



City of North Port

Request for Proposal No. 2025-09

**Warm Mineral Springs Park Historic
Renovation, Floodproofing and Site
Improvements**

CONSTRUCTION MANAGER AT RISK



2525 Bobcat Village Center Rd., Unit 105
North Port, FL 34288

Point of Contact:
Caryn Huff, Area Manager
(941) 621-4723
chuff@whartonsmith.com

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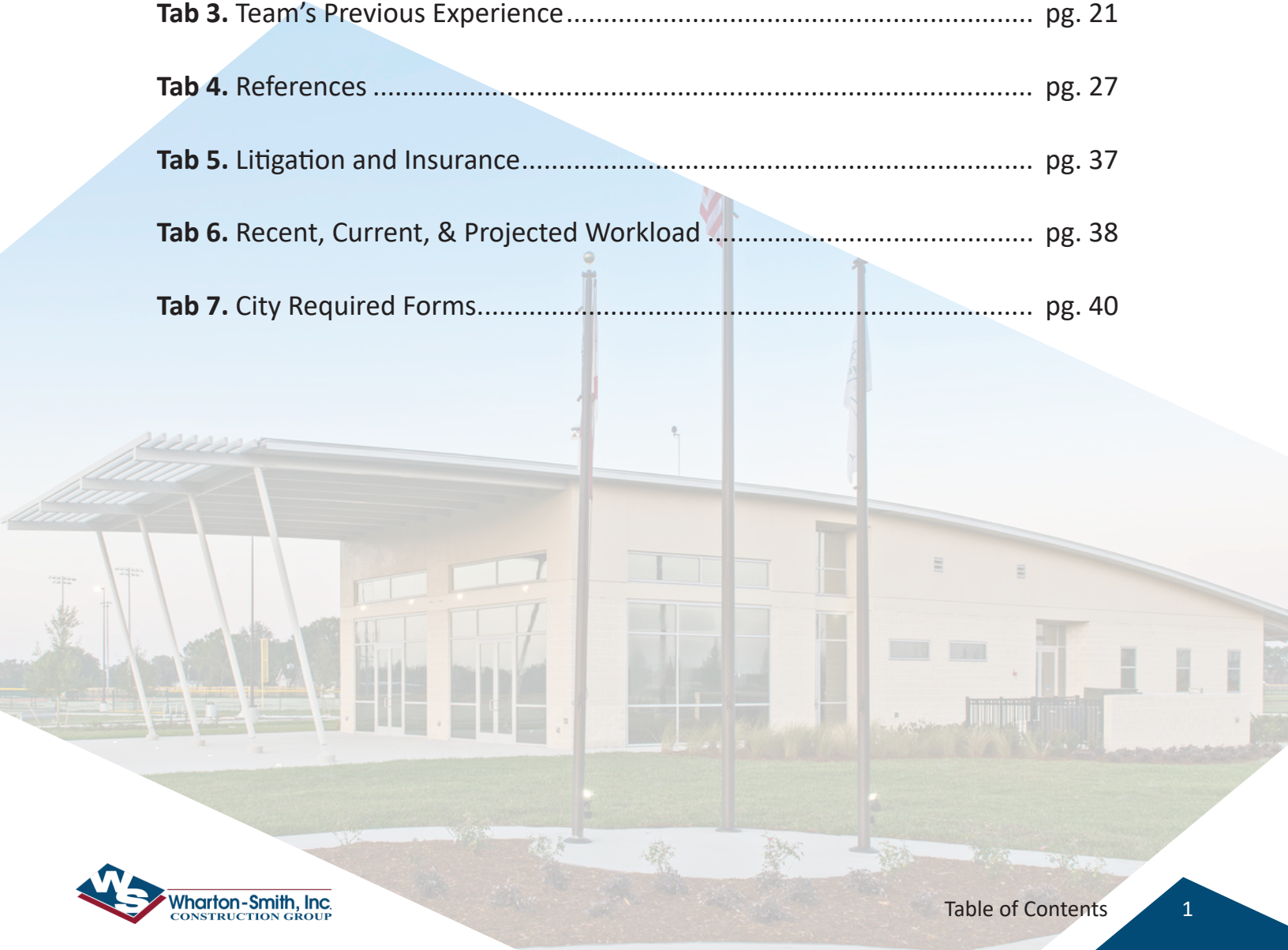
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Transmittal Letter



City of North Port | Finance Department - Purchasing Division
Geoff Thomas, Contract Administrator I
4970 City Hall Boulevard, Suite 337
North Port, Florida 34286

December 3, 2024

Re: RFP No. 2025-09, Warm Mineral Springs Historic Renovation, Floodproofing, and Site Improvements, Construction Manager at Risk

Dear Members of the Selection Committee:

Wharton-Smith is pleased to present our proposal for the Warm Mineral Springs Historic Renovation, Floodproofing, and Site Improvements project. We are proud to say that we assisted on repairs to this beloved facility shortly after Hurricane Ian and are excited about the possibility of providing CM at Risk services to further invest our time and resources to improve this valuable asset for the City of North Port. To that end, we have assembled an experienced local team with an excellent track record. Together, we bring the following key advantages:

LOCAL TEAM – Our local office is staffed with nearly 30 construction professionals that have the credentials and knowledge required to collaborate with your team throughout the building process. Our proposed team of **Caryn Huff, Chad Roeder, Chuck Hardwick, Tripp Lytle, and Jay Coker** have proudly worked together on many projects in the region. As a result, this team’s knowledge of the area and the standards and requirements of local governing authorities 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, to safeguard the schedule against unexpected delays and support an on-time delivery to generate savings back to the City. ***Through our local office, we have the staffing and resources available to service this project and respond promptly to any concerns. This will result in additional cost savings to the City!***

UTILITIES EXPERTISE – Wharton-Smith brings 40 years of experience in providing water and wastewater services to many communities throughout the state of Florida for utility departments such as Orlando Utilities Commission, City of Punta Gorda, City of Cape Coral, City of Fort Myers, and Lee and Sarasota County Utilities, just to name a few. We will leverage this experience with the expertise of our **Utilities Subject Matter Expert, Kyle Jennings** to evaluate options for providing the most economical utility services to the site. Our team will work diligently to ***get the job done in cost-efficient manner while maximizing the scope.***

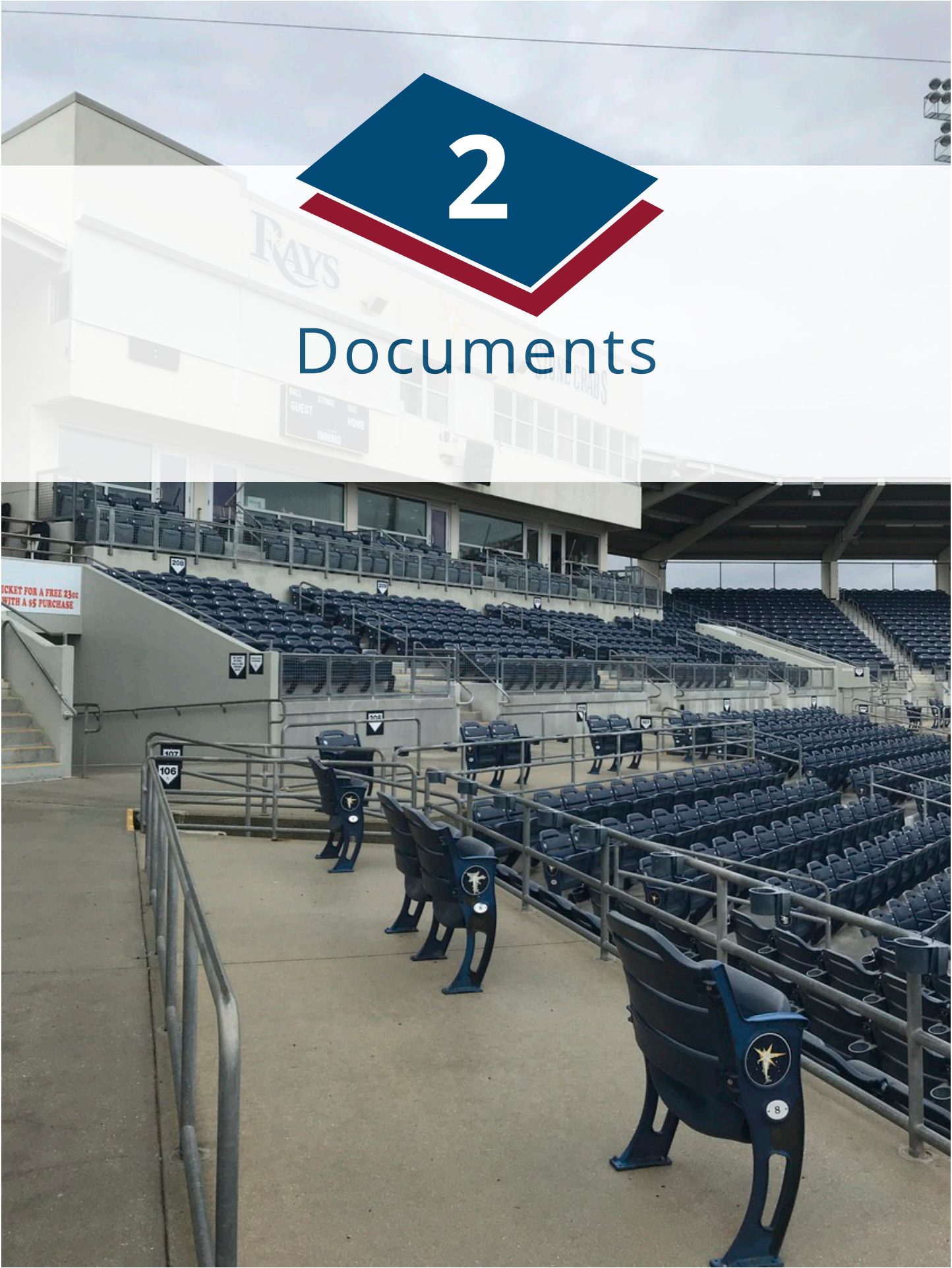
HISTORIC PRESERVATION EXPERIENCE – Included in our portfolio of 500+ CMAR projects across the state of Florida is experience working on historic sites. Our staff Architect and **Historic Preservation Subject Matter Expert, Jeffery Williams**, provides this specific expertise and will guide the project team throughout construction to ensure we are meeting all requirements. Most recently, we have been providing guidance as a consultant and local resource to the Architect, Sweet-Sparkman, by providing cost input on the latest design concepts.

We are excited about bringing this unique expertise to the City of North Port as your construction management team for this project and are fully committed to making the project a success in every way. We thank you for the opportunity to submit our proposal.

Sincerely,
Wharton-Smith, Inc.


Darin Crafton
COO - Commercial
407-321-8410
dcrafton@whartonsmith.com


Caryn E. Huff
Area Manager
941-621-4723
chuff@whartonsmith.com



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, 2024, that its most recent annual report/uniform business report was filed on January 3, 2024, 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 Third day of January, 2024*



Secretary of State

Tracking Number: 4058037720CC

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

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

CITY OF NORTH PORT BUSINESS TAX RECEIPT Valid Thru September 30, 2025

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: November 26, 2024

This Business Tax Receipt is hereby issued for the occupation of SERVICE GENERAL. The Business Tax Receipt Number is 25-00021319 and is valid with the City of North Port at 4970 City 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.

Ron DeSantis, Governor
Melanie S. Griffin, Secretary

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

CONSTRUCTION INDUSTRY LICENSING BOARD

THE GENERAL CONTRACTOR HEREIN IS CERTIFIED UNDER THE PROVISIONS OF CHAPTER 489, FLORIDA STATUTES

SMITH, TIMOTHY SCOT
WHARTON-SMITH INC
750 MONROE ROAD
SANFORD FL 32771

LICENSE NUMBER: CGC1511243
EXPIRATION DATE: AUGUST 31, 2026
Always verify licenses online at MyFloridaLicense.com

ISSUED: 06/04/2024
Do not alter this document in any form.

This is your license. It is unlawful for anyone other than the licensee to use this document.

Wharton-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 single-source 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.



CARYN HUFF, CGC, LEED AP AREA MANAGER

EDUCATION

BS, Building Construction,
Auburn University

EXPERIENCE

32 Years Industry

CERTIFICATIONS & AFFILIATIONS

General Contractor State of Florida
#CGC1530053

LEED Accredited Professional

Solar Contractor State of Florida

CPR/First Aid

Charlotte De-soto Building Industry
Association, Past President

North Port Chamber, Economic
Development Committee

The Argus Foundation

Professional Women in Building
Council

ABOUT ME

As Area Manager, 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 the project team. She assists in staffing, outlining project plans, setting project goals/deadlines, and evaluating performance.

RELATED PROJECT EXPERIENCE

City of North Port, Warm Mineral Springs (North Port, FL)—\$99K

Wharton-Smith provided electrical and plumbing connections to the temporary office and restroom facilities trailer provided by the Owner. Formed and poured approximately 400 lineal feet of ADA sidewalk from the existing parking lot to the spring. Added approximately 200 lineal feet of temporary fencing and reconfigured the existing temp fence to accommodate visitors foot traffic.

Charlotte County, Charlotte Sports Park Hurricane Insured Asset Repairs (Port Charlotte, FL)—\$17.6M

Wharton-Smith provided Construction Management services for the facility repairs due to damages sustained from Hurricane Ian. The facility had significant damage and repairs included all new roofing at the Stadium, Clubhouse, Press Tower, and building A, all new flooring, ceiling tiles, cove base, drywall repairs, and miscellaneous electrical, mechanical, and plumbing repairs, new Practice Field fencing and Batters Eyes, and new signage throughout the Sports Park. All stadium light poles were replaced with new LED models. Work was completed on time for the 2024 Spring Training Season.

Charlotte County, Community Development Center Office Expansion (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.

The team maintained the project schedule while keeping the building fully operational and open to the public during construction.

City of North Port, Fire Training Tower (North Port, FL)—\$1.5M

Wharton-Smith provided General Contracting services for the construction of a Modular Fire Training Unit consisting of a Class A training tower with an approximate size of 8,000 SF for the entire structure. The facility is located adjacent to a driving track that is used by the City for training and included associated paving and parking. The project was competitively bid resulting in a tight budget. The project team carefully managed the project to keep it within budget.

City of Punta Gorda, FL, Shell Creek WTP RO Addition-Chlorine Buildings (Punta Gorda, FL)—\$2.9M

Wharton-Smith provided Construction Management at Risk services for the City of Punta Gorda's Shell Creek WTP RO Addition project. The scope of work included construction of a new 16,225 SF reverse osmosis process plant consisting of administrative offices, process areas, workshop, chemical storage rooms, high pressure feed pump room, and plant laboratories.



**JEFFERY WILLIAMS, CGC
HISTORIC PRESERVATION
SME**

EDUCATION

BS, Architectural Studies- Florida
A&M University

EXPERIENCE

20 Years Industry

CERTIFICATIONS & AFFILIATIONS

OSHA 10-Hour
Florida Certified General Contractor
Trenching & Excavation
SWPPP

ABOUT ME

Jeffery is trained in architecture, and he will contribute invaluable experience and knowledge to the Wharton-Smith team. As our historic preservation subject matter expert, Jeffery will provide valuable input on historic preservation and the kind of constructability review necessary to ensure this project has the proper elements. He will also utilize his hands on experience to provide value engineering options.

RELATED PROJECT EXPERIENCE

City of St. Cloud, Lakefront Park Expansion (St. Cloud, FL)—\$9M

Wharton-Smith provided General Contracting services on the Lakefront Park Expansion project for the City of St. Cloud. The expansion consisted of the addition of 140 boat slips including fixed and floating docks, a new seawall with cap, two boat ramps, dredging of the marina basin, and the installation of water/electric utilities for boat use. The project also included a 10,000 SF, two-story multi-purpose building that has meeting/dance hall space with catering setup and a stage, a kitchen with food service, a bathroom facility, and seven shelter structures. The grounds were adorned with new landscaping and irrigation, as well as decorative retaining walls, colored concrete hardscapes, 135 parking spaces, new lighting, a playground, a splash pad, open recreation lawn, and two new trail heads.

Rollins College, Multiple Dorms Historic Renovation (Winter Park, FL)—\$17.M

Jeffery served as Project Manager for complete renovations of seven dorms on Rollins College's campus. The renovations while maintaining the historical elements of the Tuscan Architecture. Materials preserved included windows, doors, coquina stone, wood floors, structural teak wood, and finishes.

HISTORIC PRESERVATION | ROLLINS COLLEGE DORMS

Wharton-Smith provided Construction Management services for the renovations of 10 student dormitories totaling over 212,000 SF on the campus of the prestigious Rollins College. These projects spanned over a five-year period and included a wide variety of upgrades varying from building to building. In addition to interior and exterior architectural finishes, renovations consisted of upgrades to plumbing and electric systems, fire alarm systems, new/refurnished flooring, fan coil unit modifications, HVAC upgrades, additions such as classroom and faculty apartments, new ADA ramp installation, kitchen renovations, and site work. All work was done in an effort to keep the historical elements intact throughout the campus.



CROSS HALL



JUANMIGUEL GORUT
PRECON EXECUTIVE

EDUCATION

BS, Mechanical Engineering-
University of Florida

MBA, Global Management-
University of Phoenix

EXPERIENCE

19 Years Industry

CERTIFICATIONS & AFFILIATIONS

LEED Accredited Professional
Associated Builders & Contractors

ABOUT ME

Juanmiguel is responsible for overseeing Wharton-Smith's Commercial Division Preconstruction Services Department. His responsibilities include the review of contract documents, estimating, the preliminary pricing of projects, and preparing Guaranteed Maximum Price (GMP) packages.

RELATED PROJECT EXPERIENCE

City of North Port, Warm Mineral Springs (North Port, FL)—\$99K

Wharton-Smith provided electrical and plumbing connections to the temporary office and restroom facilities trailer provided by the Owner. Formed and poured approximately 400 lineal feet of ADA sidewalk from the existing parking lot to the spring. Added approximately 200 lineal feet of temporary fencing and reconfigured the existing temp fence to accommodate visitors foot traffic.

City of Zephyrhills, Hercules Park (Zephyrhills, FL)—\$4.2M

Wharton-Smith recently broke ground on the new Hercules Park for the City of Zephyrhills. Hercules Park will feature a playground, splash pad, nature trails, open pavilions, and restrooms, meeting the needs of the 18,000 residents of Zephyrhills. **Designed by Kimley-Horn, the park pays homage to its heritage** by brining aspects of the Hercules Powder Company, which previously owned 80 acres of land and established Camp No. 39 on the site over 70 years. This is the first community park built in Zephyrhills in 40 years.

City of Clearwater, Crest Lake Park Renovations (Clearwater, FL)—\$5.8M

Wharton-Smith provided renovations of Crest Lake Park for the City of Clearwater. This project provided improvements to the park including wider sidewalks around the lake and through the park along with boardwalks and decks in portions of the lake, new lighting, irrigation, and landscaping and grassing. The construction also features a **new restroom building**, two picnic shelters, two volleyball courts, and four new play areas including a splash pad. Finally, Wharton-Smith also provided improvements to the lake's shoreline, a lighted fountain in the lake, rain gardens to filter stormwater, and improved parking spaces.

City of North Port, Hurricane Repairs- Various Locations (North Port, FL)

Wharton-Smith has been providing construction management services to the City of North Port on a variety of hurricane damaged facilities. Some of these include parks, public works and fire stations.

City of North Port, Fire Training Tower (North Port, FL)—\$1.5M

Wharton-Smith provided General Contracting services for the construction of a Modular Fire Training Unit consisting of a Class A training tower with an approximate size of 8,000 SF for the entire structure. The facility is located adjacent to a driving track that is used by the City for training and included associated paving and parking. The project was competitively bid resulting in a tight budget. The project team carefully managed the project to keep it within budget.



CHUCK HARDWICK
SR. PROJECT MANAGER

EXPERIENCE

30 Years Industry

CERTIFICATIONS & AFFILIATIONS

Certified Healthcare Safety Professional

Certified Healthcare Engineer

Ws Safety/Competent Persons Training

North Fort Myers Junior Football Association

Vice President - 4 years

President - 10 years

Football Coach - 9 years

Cheer Coach - 2 years

Pop Warner- Peace River Conference

Vice President - 2 years

ABOUT ME

As Senior Project Manager, Chuck provides direct management oversight for the project team. He provides continuity from preconstruction through the entire construction phase and ensures the appropriate resources are available for the project. Chuck takes an active role in key milestone events in the preconstruction phase to include the partnering session, GMP development, value engineering, constructability and schedule review. He oversees construction and leverages his experience and expertise to ensure the project remains on schedule and within budget.

RELATED PROJECT EXPERIENCE

City of North Port, Warm Mineral Springs (North Port, FL)—\$99K

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Lee County, John Yarbrough Linear Park (Fort Myers, FL)—\$1.5M*

The John Yarbrough Linear Park was a \$1.5 million new park project for the Lee County end of the 10-mile trail. This three-phase project included the construction of 1.25 miles of paved path and sidewalks, two shade shelters with picnic tables, and 1.5 miles of paved trails.

City of North Port, Fire Training Tower (North Port, FL)—\$1.5M

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Charlotte County, Charlotte County Transit Facility (Port Charlotte, FL)—\$3.4M

Wharton-Smith provided Construction Management at Risk services for the construction of a new 5,880 SF administration building consisting of offices, a breakroom, a driver's lounge, two restrooms with showers and lockers, an entrance foyer with a walk-up window, and a training and conference room for 20 people. The project also consisted of outside parking on 25,000 SF for the 63 buses and vans of various sizes and admin services vehicles was also built including a charging station for up to 6 electric vehicles and personal parking spaces for employees.

Charlotte County, Public Works Maintenance Yard (Charlotte County, FL)—\$1.8M

Wharton-Smith provided Construction Management at Risk services for the **redevelopment and improvement** of approximately 7.5 acres of County property for a Public Works Maintenance Yard. The project included **site and storm water improvements**, new site lighting, chain link fencing, and a highway style privacy wall.

* Denotes individual project experience

ABOUT ME

As Assistant Project Manager, Tripp is responsible for facilitating subcontractor meetings, creating and distributing weekly owner and subcontractor meeting minutes, submittal reviews for compliance (e.g., concrete/rebar shop drawings, structural steel shop drawings, casework shop drawings, etc.), facilitating MEP coordination meetings, communicating directly with the design team, compiling operation/maintenance manuals, coordinating and tracking material deliveries, and taking weekly progress photos.

RELATED PROJECT EXPERIENCE

Charlotte County, Charlotte Sports Park Hurricane Insured Asset Repairs (Port Charlotte, FL)—\$17.6M

Wharton-Smith provided Construction Management services for the facility repairs due to damages sustained from Hurricane Ian. The facility had significant damage and repairs included all new roofing at the Stadium, Clubhouse, Press Tower, and building A, all new flooring, ceiling tiles, cove base, drywall repairs, and miscellaneous electrical, mechanical, and plumbing repairs, new Practice Field fencing and Batters Eyes, and new signage throughout the Sports Park. All stadium light poles were replaced with new LED models. Work was completed on time for the 2024 Spring Training Season.

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Charlotte County, Airport Rescue Fire Fighter Training Facility (ARFF) (Charlotte County, FL)—\$9.0M

Wharton-Smith provided Construction Management services for this unique project to help train fire fighters in the event of an aircraft emergency. Sitting **adjacent to an existing and active** fire training tower the project scope included a full size 737 airplane simulator on a concrete burn pit, an 800 SF control tower building containing the control room and **multi-stall restrooms with showers, and a covered hospitality area with fans and spray system.**

Charlotte County, Community Development Center Office Expansion (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. **The team maintained the project schedule while keeping the building fully operational and open to the public during construction.**



TRIPP LYTLE ASST. PROJECT MANAGER

EDUCATION

BS, Construction Management-
Kent State University

EXPERIENCE

6 Years Industry

CERTIFICATIONS & AFFILIATIONS

OSHA 30-Hour

Next Gen Council (Charlotte Desoto
Building Industry Association)

FAA Drone License



**CHAD ROEDER, CBC
AREA SUPERINTENDENT**

EXPERIENCE

26 Years Industry

CERTIFICATIONS & AFFILIATIONS

Certified Building Contractor, State of Florida #CBC1252218

PROCORE Certified

OSHA 10-Hour

Forklift

Rigging and Signal Person

ABOUT ME

As Area Superintendent, Chad will oversee the field teams to ensure adequate resources and assist with schedules, delivery coordination, production planning, installation requirements, quality control, project final quality, start-up testing, as well as final close-out.

RELATED PROJECT EXPERIENCE

City of North Port, Warm Mineral Springs (North Port, FL)—\$99K

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City of Cape Coral, Southwest Water Reclamation Facility Operations Building (Cape Coral, FL)—\$15.7M

Wharton-Smith provided Construction Management at Risk services for the construction of a new 25,000 SF operations and administration building on the existing Southwest WRF site. The two-story building was constructed 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 includes open areas for maintenance purposes, a mezzanine, and conference room areas. Additionally, a 500 SF pre-engineered metal building was also constructed for warehouse-type storage.



JAY COKER
SUPERINTENDENT

EXPERIENCE

43 Years Industry

CERTIFICATIONS & AFFILIATIONS

- Scaffolding
- Confined Space
- Fall Protection
- 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

Charlotte County, Charlotte Sports Park Hurricane Insured Asset Repairs (Port Charlotte, FL)—\$17.6M

Wharton-Smith provided Construction Management services for the facility repairs due to damages sustained from Hurricane Ian. The facility had significant damage and repairs included all new roofing at the Stadium, Clubhouse, Press Tower, and building A, all new flooring, ceiling tiles, cove base, drywall repairs, and miscellaneous electrical, mechanical, and plumbing repairs, new Practice Field fencing and Batters Eyes, and new signage throughout the Sports Park. All stadium light poles were replaced with new LED models. Work was completed on time for the 2024 Spring Training Season.

Tampa Bay Rays, Charlotte Sports Park- Spring Training Expansion and Renovation (Port Charlotte, FL)—\$2.3M

Wharton-Smith provided Construction Management at Risk services for the Charlotte County Sports Park- Tampa Bay Rays Spring Training Renovation project. Approximately 4,800 SF was added to an existing building along with the renovation of existing locker rooms, training room, and laundry room to create a Major League Fitness Center that totals approximately 10,000 SF. Additionally, the existing batting cages of approximately 12,000 SF were converted from an open-air structure to an enclosed air-conditioned space, creating a player development area.

Charlotte County, Community Development Center Office Expansion (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.

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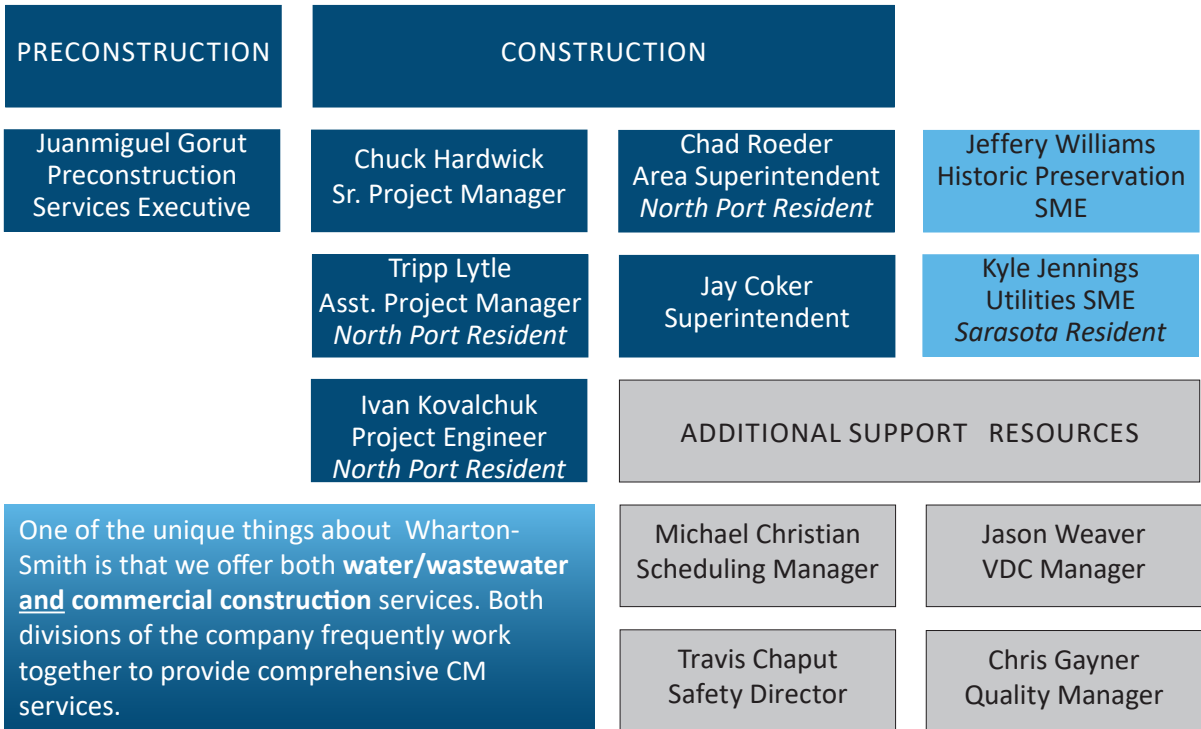
City of Punta Gorda, FL, Shell Creek WTP RO Addition-Chlorine Buildings (Punta Gorda, FL)—\$2.9M

Wharton-Smith provided Construction Management at Risk services for the City of Punta Gorda's Shell Creek WTP RO Addition project. The scope of work included construction of a new 16,225 SF reverse osmosis process plant consisting of administrative offices, process areas, workshop, chemical storage rooms, high pressure feed pump room, and plant laboratories. Wharton-Smith also constructed a new 500 SF sodium hypochlorite building consisting of an electrical room and a mechanical room. Both buildings are adjacent to the existing Punta Gorda Water Treatment Plant.

ORGANIZATIONAL CHART



Caryn Huff
 Area Manager
Single Point of Contact



KEY PERSONNEL ASSIGNED

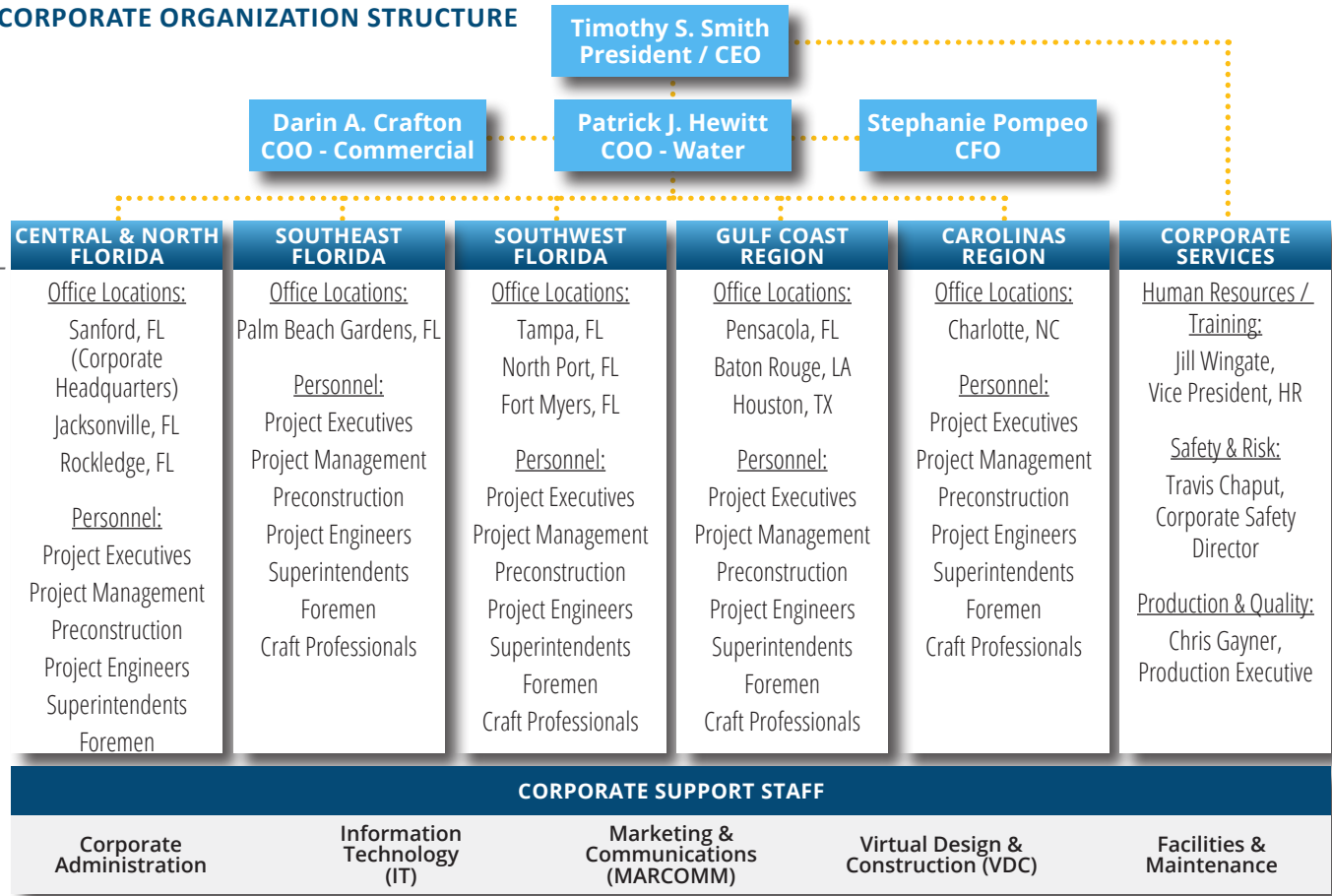
Wharton-Smith is a full-service firm in that we have an in-house preconstruction/estimating department, a corporate scheduler, a corporate safety officer, and a BIM/VDC department. Beyond our normal breadth of services, you can expect a hands on, collaborative approach between the City of North Port,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

The team we assembled for the Warm Mineral Springs 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.

Area Manager, Caryn Huff will provide executive level oversight for all construction management services. Area Superintendent and North Port resident Chad Roeder, will provide construction oversight to ensure on time completion at the highest quality. Senior Project Manager, Chuck Hardwick 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. Superintendent, Jay Coker will oversee all onsite day-to-day operations.

We are pleased to include the expertise of Jeffery Williams, Architect and Historic Preservation Subject Matter Expert (SME) and Kyle Jennings, Engineer, Utilities Subject Matter Expert with our Water/Wastewater division. Jeffery will provide guidance to our team pertaining to **historical elements of the project and mothballing process**. Kyle will provide expertise related to the required water wastewater services to the site. ***This unique, in-house expertise sets Wharton-Smith apart and allows us to provide enhanced services to the City at no additional cost!***

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. As indicated on the map below, our local office is conveniently located only 8.8 miles from Warm Mineral Springs.

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. In the event in-person meetings are not feasible, our staff has the training and ability to utilize Microsoft Teams as another means of communication with subcontractors and project stakeholders. In addition to email and other standard means of communication, it also provides a way to transfer information quickly and efficiently.



Project Approach

Wharton-Smith has a well-developed comprehensive project approach for projects utilizing the Construction Management (CM) methodology. Our proactive approach guarantees effective project leadership from the very beginning of the project and is enhanced by our emphasis on communication, pre-planning, and ability to understand your processes, constraints, and needs.

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, to guide decisions regarding design, cost, schedule, and constructability.

SERVICES TO BE PROVIDED

For the Warm Mineral Springs Park Historic Renovation, Floodproofing, and Site Improvements project, Wharton-Smith will perform four important services:

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

PROJECT UNDERSTANDING

The Wharton-Smith team provided services to the City of North Port after Hurricane Ian and was instrumental in getting this park back open to the public. This previous experience coupled with our local knowledge provides us with familiarity and a deep understanding of this facility, its components, and its value to the community.

Warm Mineral Springs has a deep geologic, archeologic, and historic significance. It is listed on the U.S. Register of Historic Places. The park contains Florida's only natural warm spring and experiences over 150,000 visitors per year. Below is our understanding of the proposed project scope elements:

- ✓ Building A: Provide conditioned space for Admissions staff, staff restrooms, and a meeting room in a wet floodproofed condition.
- ✓ Building B: Provide family-style rooms and a shaded area for public gathering.
- ✓ Building C: 'Mothball' the Cyclorama consistent with historic guidelines, replace the roof and wet floodproof the facility.
- ✓ Site improvements: Construct open-air shower towers and various other improvements, determined by zoning requirements and budget constraints.
- ✓ Extend water/wastewater utilities connecting near US 41 through Ortiz Boulevard
- ✓ Assist/prepare/present concepts to City Commission as needed

WORKING IN FLOOD PRONE AREAS

Utilizing our team's experience working in flood prone areas, we will implement the following steps to wet floodproof the buildings as outlined in the RFP and as further defined by FEMA:

- ✓ Install flood damage-resistant materials below the design flood elevation
- ✓ Raise utilities above the flood protection level
- ✓ Install electrical and mechanical systems to minimize disruptions and facilitate repairs.
- ✓ Install flood openings or other methods to equalize the hydrostatic pressure exerted by floodwaters.

More specifically, we'll adhere to the NFIP requirements for wet floodproofing, as described in 44 CFR § 60.3, NFIP Technical Bulletin 7, FEMA Policy #104-008-3 and Floodplain Management Bulletin P-2140.



WARM MINERAL SPRINGS PROPOSED LOGISTICS PLAN

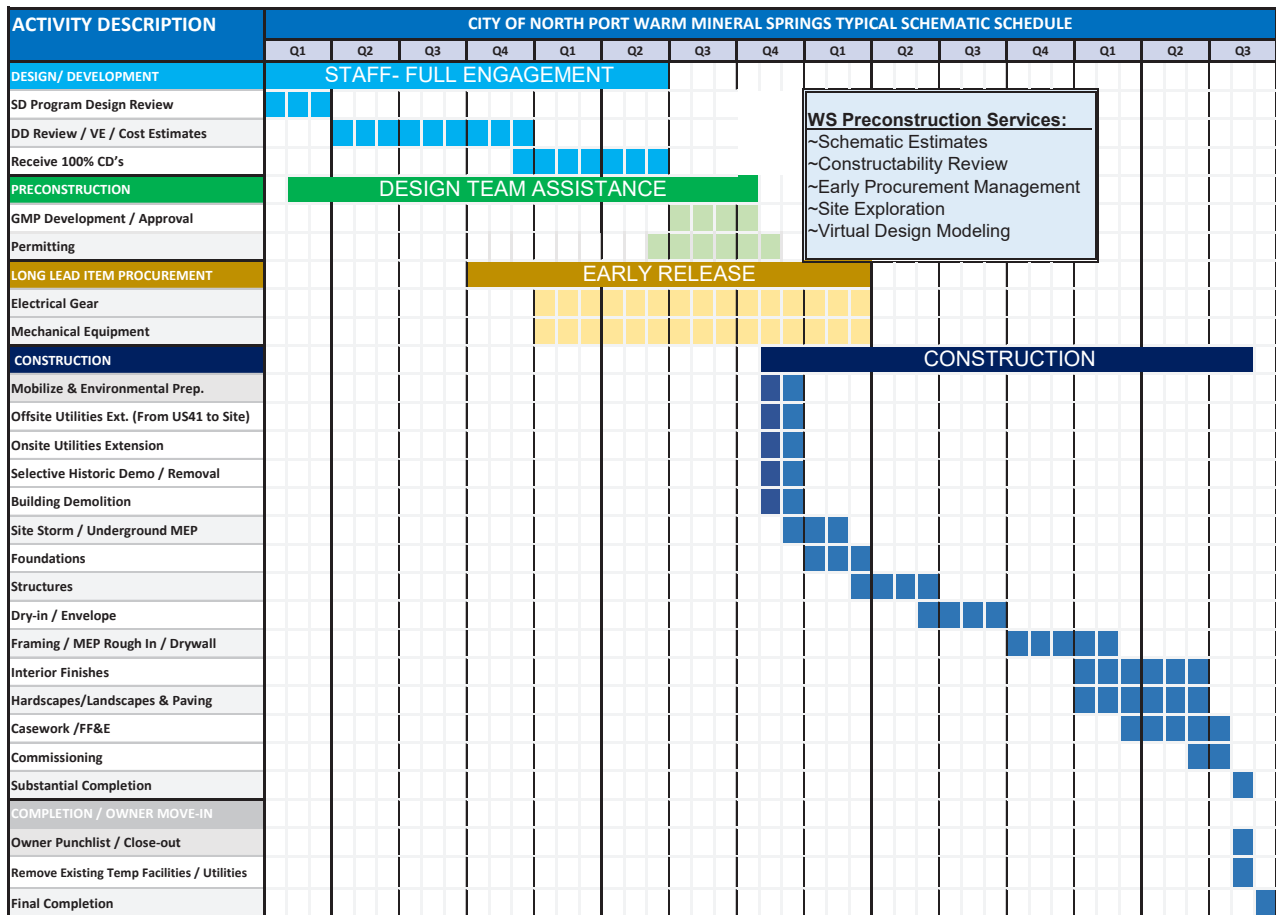
LEGEND:

- = CONSTRUCTION EGRESS ROUTES
- = PROPOSED WSI WINDSCREEN
- = TEMPORARY CONSTRUCTION FENCE
- = WSI STAGING / LAYDOWN AREA
- = BUILDINGS TO BE FLOOD PROOFED
- = 325 FT. ARCHEOLOGICAL ZONE
- = TEMP. OFFICE / ADMISSIONS
- = ACCESS GATES
- = TEMP. RSTRM. FACILITY
- = TEMP. SIDEWALK
- = MONUMENT SIGN
- = WSI JOB TRAILER
- = AREA OF PORTALET
- = GRASS PARKING

Construction Notes:

- Monument sign to be protected during construction.
- Wharton Smith is aware of the Archaeological Protected Zone and will observe all applicable rules.
- Construction entrance will be from Trionfo Ave. to avoid mixing construction traffic with the facilities patrons.





- * Note: This schedule is diagrammatic to represent typical construction activities.
- * Note: Q1 assumed to be April 1st, 2025.

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.

During the close-out phase of the project the schedule remains in continual use and is quite beneficial in scheduling many of the final project activities. These activities typically consist of the various witnessed testing phases that are required as a project comes to an end and the project is eventually handed over to the Owner. The schedule is also a great tool in scheduling such items as Owner training and Operation and Maintenance (O&M) manuals.

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. **Once the scope is finalized our team will work closely with the project team to develop the schedule. Our overall goal is to keep the facility open and operational for the public to enjoy. Phasing of work will be carefully considered to meet this goal.**



SCHEDULING SUCCESS

The Tampa Bay Rays were in need of improvements to their existing training facility by expanding their weight rooms and installing an enclosure for their outdoor batting areas. Wharton-Smith was presented with the program in late September and asked to have the scope of work completed by early February of the following year. The scope of work was forecasted with a two month duration which left only two to three months for preconstruction. Our team, under a designbuild delivery model, was able to develop a program and associated cost estimate within weeks. Upon establishment of the projected costs and continued development of the project documents, the team was able to release long-lead items like the pre-engineered metal building for the batting cages, so as to not impact the project schedule. Final design and reconciliation of costs were achieved prior to on-site mobilization. With this approach the team was able to deliver the facility to the Tampa Bay Rays on time and on budget.

CHARLOTTE SPORTS PARK - TB RAYS SPRING TRAINING RENOVATIONS

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 **Preconstruction Services Executive, Juanmiguel Gorut, LEED AP** will work directly with the city and the design team to review and document any cost savings ideas for the project, identify impacts to the schedule and construction costs, develop new schedules and updated cost estimates. This will help the city make informed decisions in a timely manner. Pending Owner expectations, we can provide budget estimates at various stages of the project depending on size and scope.

In the construction management at risk (CMAR) delivery method, the GMP must be managed with an open book- policy. This policy is one of the greatest advantages of CMAR.

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 first cost estimate and is maintained through close-out.

The cost tracking system that our team implements involves the city every step of the way, and truly maintains transparency for how a 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 process 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

The first step is to perform a cost estimate, as estimating the project is often the best way of identifying the "why" of the project cost to ensure the project stays within the established budget. Our team of commercial construction professionals both in the City of North Port and throughout Southwest Florida collaborate frequently and share experiences to build quality projects of all sizes and to respect each Owner and their budgetary restraints.

We understand that this project was previously competitively bid and came in over the anticipated budget. We will make every effort to work with the city utilizing our proven preconstruction processes to keep this project within the city's anticipated budget. **We have worked on cost analysis with the architect and have some initial cost savings ideas:**

- ✓ **Reduce length of pipe runs for utilities extension**
- ✓ **Painted block on building interior**
- ✓ **Options for roof materials**

PROJECT BUDGET ESTIMATING

Unlike many other construction managers, we are also in the hard dollar bid market and have been very successful in winning many projects as the low bidder. This gives us the advantage of knowing the true market value and understanding what items must be included in a project, even if not specifically shown on the documents. This enables our estimates to avoid gaps, overlaps, and omissions. Our Preconstruction Services Executive Juanmiguel Gorut will begin by fully understanding the project's program requirements, analyzing the overall project budget, and aligning it with our construction estimates. Juanmiguel has been involved in many education projects and is well respected by Owners for his collaborative, value-added approach to the preconstruction process. The entire project team will be engaged in the preconstruction effort. Constructability reviews will be conducted by our Senior Project Manager Chuck Hardwick. Our Area Superintendent Chad Roeder will also provide reviews, phasing options, scheduling, and bidding scope development. It will be our job to work with the design team, not only during the design phase but also during the bidding and construction phase to maximize the best value for the City of North Port.

PREPARING THE GMP ESTIMATE

- ✓ All aspects of the project are fully defined
- ✓ Any open items are reduced to specific Allowances, Alternates, or clarified
- ✓ Subcontractor outreach and prequalification will be conducted to encourage participation
- ✓ Subcontractor pricing will be compared to our estimate to identify discrepancies
- ✓ The total project will be priced and a Guaranteed Maximum Price developed
- ✓ Post-GMP review meetings will be conducted

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 beginning of the project 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, location, 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. This will result in the City receiving the maximum savings.

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.

COST CONTROL AND REPORTING DURING CONSTRUCTION

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 City'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 on-site team will provide monthly project status reports to all stakeholders. This comprehensive reporting system includes the following items:

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

CONSTRUCTION SERVICES

We provide stakeholders with access to our procedural mechanisms, so that the team can have uniformed, systematic procedures during the construction phase, keeping all management levels informed of the project status. This well- developed approach has procedures to address lines of communication, management information systems, and records management, as well as schedule and cost control procedures.

Before construction starts on site and if the project scope requires it, 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 Perimeter and Security Plan**
- ✓ **Environmental Protection Plan**

With this approach the city, 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.

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 the Warm Mineral Springs project. During preconstruction, project team meetings will be held to discuss the constructability of the design details, conformity to the strict permitting processes for an environmentally sensitive jobsite, compliance with material and product specifications, and sequencing of planned activities.

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 to establish quality**
- ✓ **Performing independent testing**

Throughout construction, Area Manager, Caryn Huff and Area Superintendent, Chad Roeder will continually walk the project site, working with the architect/engineer and City representatives to ensure expectations of quality are being exceeded.

As a local contractor, we understand the significance of this park. It is highly valued by the residents of North Port and therefore, we will provide a finished product of the highest quality that the City and citizens will be proud of for years to come.

As your Construction Manager, we will thoughtfully approach the construction process. During the mothballing process, we will take the following steps:

MOISTURE

- Is the roof watertight?
- Are drains unobstructed?
- Are windows, doors, and frames in good condition?
- Are masonry walls able to seal out moisture?
- Is site properly graded for water run-off?
- Is vegetation cleared from around the building to avoid trapping moisture?

PESTS

- Have nests/pests been removed from the building's interior and eaves?
- Are adequate screens in place to guard against pests?
- Has the building been treated for insects/rodents?
- Have toxic droppings been properly disposed of?

HOUSEKEEPING

- Have trash and any hazardous materials been removed from inside the building?
- Is the interior broom-clean?
- Have significant architectural elements that have become detached from the building been labeled and stored in a safe place?
- Is there a building file?

SCRUTINY

- Have fire and police departments been notified that the building will be mothballed?
- Are smoke and fire detectors in working order?
- Are the exterior doors and windows securely fastened?
- Are plans in place to monitor the building?
- Are the keys to the building in a secure location?

UTILITIES

- Have utility companies disconnected/shut off or fully inspected water, gas, and electric lines?
- Have water lines been drained?
- If the electricity is to be left on, is the wiring safe?

VENTILATION

- Have steps been taken to ensure proper ventilation?
- Has the building been checked for excessive humidity?

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 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.

Wharton-Smith also uses **DroneDeploy** and Drone Photography with Lidar capability to:

- ✓ **Provide collaborative 3D Project Reviews**
- ✓ **Reduce the number of site visits**
- ✓ **Document field conditions**
- ✓ **Expedite the resolution of RFIs and constructability concerns**
- ✓ **Improve construction efficiencies and cost savings**

We currently have 3 certified drone pilots in our North Port office. Our capabilities with these technologies will be critical to providing accurate documentation for 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 have been OSHA certified as competent persons. All employees are required to go through the company's basic safety orientation.

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

PROJECT CLOSE-OUT

At the beginning of a project the team will have a formal meeting to discuss the project closeout process and develop a plan. 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.

We are known in the industry for our response measures after the warranty period expires, and 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 will respond rapidly!



**CHARLOTTE COUNTY
COMMUNITY DEVELOPMENT CENTER
OFFICE EXPANSION**

OCCUPIED SITE CASE STUDY

The Charlotte County Community Development Center project was a highly sensitive renovation and addition project that took place in an occupied facility that included all the county's major jurisdictional departments for construction services including but not limited to Inspections, Plan Review, Zoning and Building. The biggest concern was keeping all personnel safeguarded during construction and completing the renovations as quickly as possible to minimize downtime for staff and the public. With this in mind, Wharton-Smith devised a schedule that broke down the work activities so they were performed in a sequence that reduced time and minimized the interruptions to the building systems by having work completed and awaiting final tie-ins which were completed during off-hours while the facility was closed to the public. Piping was measured and pre-manufactured offsite in order to complete the critical infrastructure components timely and effectively reduce the overall construction timeline.

3

Team's Previous Experience





CHARLOTTE SPORTS PARK HURRICANE INSURED ASSET REPAIRS

Port Charlotte, FL

Wharton-Smith provided Construction Management services for the facility repairs at the 56 acre Charlotte County Sports Park, due to damages sustained from Hurricane Ian in 2022. The facility had significant damage throughout the interior and exterior and required repairs / renovations at the main Stadium, Concessions Stands, Ticket Office, Tiki Hut, Practice Fields, MLB Clubhouse, Building A, and the main Stadium. Facility repairs included all new roofing at the Stadium, Clubhouse, Press Tower, and building A, all new flooring, ceiling tiles, cove base, drywall repairs, and miscellaneous electrical, mechanical, and plumbing repairs, new Practice Field fencing and Batters Eyes, and new signage throughout the Sports Park. Additionally, Wharton-Smith replaced all 6 Stadium light poles with new LED models. Wharton-Smith worked expeditiously and strategically to meet the tight timeframe to allow the Tampa Bay Rays to utilize the entire facility for the 2024 Spring Training Season.



PROJECT OWNER

Charlotte County, FL
18500 Murdock Circle
Port Charlotte, FL 33948
Joe Romanelli, Project Manager
P: (941) 623-1056
E: joseph.romanelli@charlottecountyfl.gov

SIZE AND PROJECT TYPE

75 Acres
Hurricane Restoration

COMPLETION DATE

January 2024

CONSTRUCTION COST

\$17,672,322

KEY PERSONNEL

Caryn Huff, Area Manager
Chad Roeder, Area Superintendent
Jay Coker, Superintendent
Tripp Lytle, Project Engineer
Juanmiguel Gorut, Preconstruction Executive



AUSTIN TINDALL REGIONAL PARK EXPANSION & REHABILITATION

Kissimmee, FL

Wharton-Smith Wharton-Smith provided Construction Management Services to Osceola County at the Austin Tindall Regional Park Expansion project. This expansion consisted of two additional FIFA standard championship soccer fields, a stadium, **restroom/concession facilities, and amenities to update the existing park.** **Construction work was phased to provide a fully functioning sports facility for scheduled events throughout the duration of the project.**

The scope of work includes but is not limited to: rehabilitation and **site improvements** of existing multi-purpose fields to FIFA standards, additional multi-purpose field for FIFA practice/competition, FIFA championship field and stadium with bleachers, scoreboard, and press box, **multi-purpose building for restrooms & storage**, field maintenance CMU storage bin area, golf cart charging station, additional site pavilions, entrance marquee, driveway, and parking improvements, **utility infrastructure for water and sewer service to entire park, and coordination of existing systems with new elements.**



PROJECT OWNER

Osceola County, FL
1 Courthouse Square
Suite 3100A
Kissimmee, FL 34741
Jeff Kuenzli, Sports Facilities
Manager
P: (407) 873-8104
E: jeff.kuenzli@osceola.org

SIZE AND PROJECT TYPE

115 acres
New Construction & Rehabilitation

COMPLETION DATE

August 2018

CONSTRUCTION COST

\$9,677,878

KEY PERSONNEL

Mike Christian, Scheduling
Manager
Chris Gayner, Quality Manager



SOLDIER'S CREEK SPORTS COMPLEX

Longwood, FL

Wharton-Smith provided preconstruction and construction management services for the **demolition and redevelopment** of 25.49 acres of an existing recreational park. The newly developed Soldiers Creek Park features six natural turf fields with state-of-the-art LED lighting, eight lanes of batting cages, warm-up and assembly areas, **a central indoor meeting space for group events**, playground, and **concession and hospitality space**. Also included was a pre-engineered metal maintenance building with a high-performance coating system and included an **air-conditioned staff restroom, office**, custodial storage, maintenance, and covered work area with chain-link fence enclosure and storage loft area.



PROJECT OWNER

Seminole County, FL
845 Lake Markham Road
Sanford, FL 32771
Rick Durr, Director of Leisure Services
P: (407) 665-2001
E: rdurr@seminolecountyfl.gov

SIZE AND PROJECT TYPE

6,980 SF /25.49 acres
Demolition & Park Redevelopment

COMPLETION DATE

April 2017

CONSTRUCTION COST

\$7,474,915

KEY PERSONNEL

Mike Christian, Scheduling Manager
Chris Gayner, Quality Manager



TAMPA BAY BLVD ELEMENTARY SCHOOL UPGRADES

Tampa, FL

Wharton-Smith provided Construction Management at Risk services for the multi-phased renovations, F/A upgrades, and HVAC replacement on the Tampa Bay Boulevard Elementary School Renovation project. This project consists of partial heating replacement, ventilating and air conditioning system replacement, fire alarm control system replacement, security systems (access control) replacements, electrical system upgrades, fire evacuation improvements, exterior brick repointing, repainting/waterproofing for exterior, stucco replacement, interior Building 1 ceiling tile replacement, and door hardware replacement throughout.

Improvements were also made to the fire evacuation paths and architectural features throughout the school. The project required extensive coordination with multiple stakeholders, as all work was completed on an occupied campus with while staff and students were on campus.



PROJECT OWNER

Hillsborough County Public Schools
1202 Palm Avenue
Tampa, FL 33605
Carin Hunt
P: (813) 272-4112
E: carin.hunt@hcps.net

SIZE AND PROJECT TYPE

345,000 SF

COMPLETION DATE

August 2022

CONSTRUCTION COST

\$4,604,329

KEY PERSONNEL

Mike Christian, Scheduling Manager
Chris Gayner, Quality Manager



SECRET LAKE PARK IMPROVEMENTS

Casselberry, FL

Wharton-Smith provided preconstruction and construction management services on the Secret Lake Park Improvements project for the City of Casselberry. The project included replacement of the existing baseball field with multipurpose sports fields, and construction of a new pavilion, outdoor exercise station, and a children's playground.

A pre-fabricated modular restroom building was also incorporated in addition to renovations to the existing restroom.

The scope also consisted of a new 8-foot-wide trail and boardwalk, raised wood structural walkways, an over-water wood pier, additional shade structures, and pedestrian lighting.



PROJECT OWNER

City of Casselberry
95 Triplet Lake Drive
Casselberry, FL 32707
Kelly Brock
P: 407-262-7725 ext. 1235
E: kbrock@casselberry.org

SIZE AND PROJECT TYPE

Various Park Improvements

COMPLETION DATE

September 2022

CONSTRUCTION COST

\$2,880,531

KEY PERSONNEL

Mike Christian, Scheduling Manager
Chris Gayner, Quality Manager



SPOTLIGHT: Historic Experience

CIRCA
1926



PRINCETON ELEMENTARY SCHOOL RENOVATION

Wharton-Smith provided preconstruction and construction management services for the renovation of the historic Princeton Elementary School building. The scope of work included the installation of air conditioning systems to the hallways and auditorium, the refurbishment of the interior of building 100 (by the scraping and skim coating of walls), modifications to stairwells to meet current code egress routes, a new exterior handicap access ramp to the building, new stairwells at both ends of the building, upgrades to the plumbing and electrical for bathrooms and offices, new carpet, VCT, tile, and paint.

FIRST UNITED METHODIST CHURCH WINTER PARK

This project required careful maneuvering and a temporary support structure to preserve the existing façade of the then 78-year-old building. The scope of this project included building a new three-story, 33,000 SF building, while at the same time preserving the existing three-story façade built in 1926. The City of Winter Park and the Historical Preservation Association's approval of this project was contingent upon saving the existing wall fronting Morse Boulevard in downtown Winter Park.

CIRCA
1926



CIRCA
1886-1940



ROLLINS COLLEGE STUDENT DORMITORY RENOVATIONS

Wharton-Smith provided construction management services for the renovations of 10 student dormitories totaling over 212,000 SF on the campus of the prestigious Rollins College. These projects spanned over a five-year period and included a wide variety of upgrades varying from building to building. In addition to interior and exterior architectural finishes, renovations consisted of upgrades to plumbing and electric systems, fire alarm systems, new/refurnished flooring, fan coil unit modifications, HVAC upgrades, additions such as classroom and faculty apartments, new ADA ramp installation, kitchen renovations, and site work. All work was done in an effort to keep the historical elements intact throughout the campus.

WORLD WAR II HANGAR RENOVATIONS

After a decade of sitting in ruins, a historic World War II Hangar (circa 1944) at the Gulfport-Biloxi International Airport was restored for the National Guard to use as a training facility. This restoration project came 10 years after Hurricane Katrina left the building in shambles. The hangar is a designated Mississippi landmark and on the register of Historic Places. As general contractor for the project, Wharton-Smith removed the existing roofing down to the structure and installed a new seam metal roof. Crews also provided a new metal deck, miscellaneous steel repairs, installed new plywood onto hangar doors, covered the existing windows, and removed exterior finishes.

CIRCA
1944



4

References



Tab 4: References

ATTACHMENT C
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 Board of County Commissioners

Name of Contact Person/Title: Joseph Romanelli, Projects Manager

Telephone# _____ E-mail joseph.romanelli@charlottecountyfl.gov

Address _____ Phone Number 941-623-1056

18500 Murdock Circle Port Charlotte, FL 33948

Duration of Contract or business relationship 16 mths. Project completion date: 1/19/24 Type

of Services Provided CMAR

Cost of Project: Design _____ Construction: N/A | \$17,672,322

2. Business/Customer Name: Seminole County

Name of Contact Person/Title: Rick Durr, Director of Leisure Services

Telephone# _____ E-mail rdurr@seminolecountyfl.gov

Address _____ Phone Number 407-665-2001

945 Lake Markham Road Sanord, FL 32771

Duration of Contract or business relationship 11 mths. Project completion date: 4/19/17 Type

of Services Provided CMAR

Cost of Project: Design _____ Construction: N/A | \$7,474,915

3. Business/Customer Name: Osceola County

Name of Contact Person/Title: Jeff Kuenzli

Telephone# _____ E-mail jeff.kuenzli@osceola.org

Address _____ Phone Number 407-873-8104

1 Courthouse Square, Suite 3100A Kissimmee, FL 34741

Duration of Contract or business relationship 9 mths. Project completion date: 8/17/18 Type

of Services Provided CMAR

Cost of Project: Design _____ Construction: N/A | \$9,677,878

4. Business/Customer Name: City of Casselberry

Name of Contact Person/Title: Kelly Brock

Telephone# _____ E-mail kbrock@casselberry.org

Address _____ Phone Number 407-262-7725 Ext. 1235

95 Triplet Lake Drive Casselberry, FL 32707

Duration of Contract or business relationship 10 mths Project completion date: 9/13/22 Type of Services

Provided CMAR

Cost of Project: Design ___ Construction: N/A | \$2,880,531

5. Business/Customer Name: _____

Name of Contact Person/Title: _____

Telephone# _____ E-mail _____

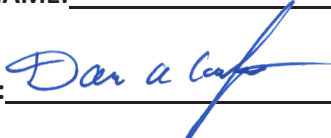
Address _____ Phone Number _____

Duration of Contract or business relationship _____ Project completion date: _____ Type of Services

Provided _____

Cost of Project: Design ___ Construction: _____

COMPANY NAME: Wharton-Smith, Inc.

SIGNATURE: 

ATTACHMENT D
REFERENCE AND PERFORMANCE QUESTIONNAIRE VERIFICATION FORM

RFP 2025-09XX WARM MINERAL SPRINGS HISTORIC RENOVATION, FLOODPROOFING, AND SITE IMPROVEMENTS – CONSTRUCTION MANAGER (CM) AT RISK”.

1. Contractor Information (Proposer information) FIRM

NAME: Wharton-Smith, Inc.
ADDRESS: 2525 Bobcat Village Center Road, Unit #105, North Port, FL 34288
Telephone 941-621-4723
number#: E-mail: chuff@whartonsmith.com
Point of Contact Caryn Huff Contact Phone Number 941-621-4723

2. Worked Performed as **Prime** **Sub Contractor** **Joint Venture** **Other (Explain)**

Percent of project work performed 100 %
If Subcontractor, who was the prime (Name/Phone #) _____

3. CONTACT INFORMATION

Contract Number: 16-035

Contract Type: Firm Fixed Price Cost Reimbursement Other (please specify): CM at Risk

Contract Title: Soldier's Creek Sports Complex

Contract Location: Longwood, FL

Award Date (mm/dd/yy) 05/24/16

Actual Completion Date: 04/19/17

Original Contract Price (Award Amount): \$7,181,652

Final Contract Price (to include all modifications, if applicable): \$7,474,915

Scope Revisions and ODP Deductions

Explain the Difference: _____

4. PROJECT DESCRIPTION: Complexity of Work **HIGH** **MED** **ROUTINE**

How is this project relevant to project

submission? This project consists of the demolition and redevelopment of 25.49 acres of an existing recreational park. The new facility included a 6 field softball complex with clay infields and natural turf out fields. Project included a combination concession, restroom, and office building, maintenance facility, playground, batting cages, shade pavilions, asphalt pavement entrance, and parking.

5. CLIENT INFORMATION

Name: Rick Durr **Title:** Director of Leisure Services

Name of Entity: Seminole County, FL

Phone Number: 407-665-2001 **E-Mail:** rdurr@seminolecountyfl.gov

PERFORMANCE EVALUATION

(CHECK)
 "YES" OR "NO"

1. Was the scope of work performed similar in nature? YES OR NO

2. Did this company have the proper resources and personnel by which to get the job done?
 If no, please describe: _____ YES OR NO

3. Were any problems encountered with the company's work performance?
 If yes, please describe: _____ YES OR NO

4. How long did the company/individual work for you? Years: _____ Months: _____
11

5. On a scale of 1 to 10, 10 being best, how would you rate the overall work performance, considering professionalism; final product; personnel; resources. Rate from 1 to 10. (10 being highest) 10!

6. If the opportunity were to present itself, would you rehire this company?
 If no, please state why: _____ YES OR NO
 YES OR NO

7. Date Questionnaire completed 11/15/24 (mm/dd/yy)

8. Please provide any additional comments pertinent to this company and the work performed for you (you may use additional pages):

I have been in the Parks profession for almost 30 years now and Wharton Smith is by far the top contractor I have ever worked with! Their staff is highly skilled, motivated and great to work with. They have followed through on every project with the highest quality and greatest customer service. And the facilities they construct are top-notch.

Signature 

Date this was completed: 11/15/24

NOTE: REQUESTS THAT THE CLIENT COMPLETES THIS FORM AND SUBMITS DIRECTLY BACK TO THE PROPOSER. THE PROPOSER WILL SUBMIT THE COMPLETED FORM WITH THEIR PROPOSAL. CLIENTS ARE HIGHLY ENCOURAGED TO SUBMIT THE FORM DIRECTLY TO THE PROPOSER. HOWEVER, MAY BE DIRECTLY SUBMITTED TO: PURCHASING@NORTHPORTFL.GOV REFERENCING THE RFP #: 2025-09.

THE CITY RESERVES THE RIGHT TO VERIFY ANY AND ALL INFORMATION ON THIS FORM.

ATTACHMENT D
REFERENCE AND PERFORMANCE QUESTIONNAIRE VERIFICATION FORM

RFP 2025-09XX WARM MINERAL SPRINGS HISTORIC RENOVATION, FLOODPROOFING, AND SITE IMPROVEMENTS – CONSTRUCTION MANAGER (CM) AT RISK”.

1. Contractor Information (Proposer information) FIRM

NAME:	Wharton-Smith, Inc.
ADDRESS:	2525 Bobcat Village Center Road, Unit #105, North Port, FL 34288
Telephone number#:	941-621-4723
E-mail:	chuff@whartonsmith.com
Point of Contact	Caryn Huff
Contact Phone Number	941-621-4723

2. Worked Performed as **Prime** **Sub Contractor** **Joint Venture** **Other (Explain)**

Percent of project work performed 100 %
If Subcontractor, who was the prime (Name/Phone #) _____

3. CONTACT INFORMATION

Contract Number: 17-152

Contract Type: Firm Fixed Price Cost Reimbursement Other (please specify): CM at Risk

Contract Title: Austin Tindall Regional Park Expansion

Contract Location: Kissimmee, FL

Award Date (mm/dd/yy) 10/24/17

Actual Completion Date: 08/17/18

Original Contract Price (Award Amount): \$9,525,445

Final Contract Price (to include all modifications, if applicable): \$9,677,878

Explain the Difference: _____

4. PROJECT DESCRIPTION: Complexity of Work **HIGH** **MED** **ROUTINE**

How is this project relevant to project submission?

This expansion consists of four new multi-use sports fields and a FIFA-standard championship soccer field, stadium, restroom/concession facilities buildings, and amenities to update the existing park. Construction work was phased to provide a fully functioning sports facility for scheduled events throughout the duration of the project.

5. CLIENT INFORMATION

Name: Jeff Kuenzli Title: Sports Facilities Manager

Name of Entity: Osceola County, FL

Phone Number: 407-873-8104 E-Mail: jeff.kuenzli@osceola.org

ATTACHMENT D
REFERENCE AND PERFORMANCE QUESTIONNAIRE VERIFICATION FORM

RFP 2025-09XX WARM MINERAL SPRINGS HISTORIC RENOVATION, FLOODPROOFING, AND SITE IMPROVEMENTS – CONSTRUCTION MANAGER (CM) AT RISK”.

1. Contractor Information (Proposer information) FIRM

NAME:	Wharton-Smith, Inc.
ADDRESS:	2525 Bobcat Village Center Road, Unit #105, North Port, FL 34288
Telephone number#:	941-621-4723
E-mail:	chuff@whartonsmith.com
Point of Contact	Caryn Huff
Contact Phone Number	941-621-4723

2. Worked Performed as **Prime** **Sub Contractor** **Joint Venture** **Other (Explain)**

Percent of project work performed 100 %
If Subcontractor, who was the prime (Name/Phone #) _____

3. CONTACT INFORMATION

Contract Number: 21-156

Contract Type: Firm Fixed Price Cost Reimbursement Other (please specify): CM at Risk

Contract Title: Secret Lake Park

Contract Location: Casselberry, FL

Award Date (mm/dd/yy) 11/30/21

Actual Completion Date: 09/13/22

Original Contract Price (Award Amount): \$3,121,530

Final Contract Price (to include all modifications, if applicable): \$2,880,531

Overall cost savings during the project (original contract included contingency funds)

Explain the Difference: _____

4. PROJECT DESCRIPTION: Complexity of Work **HIGH** **MED** **ROUTINE**

How is this project relevant to project submission? This project included a new 8 foot wide trail and boardwalk, pavilion, and new outdoor exercise station, raised wood structural walkways, and over-water wood pier, a new playground for children ages 2-5, and additional shade structure and pedestrian lighting. Two precast fabricated modular restroom buildings were also incorporated.

5. CLIENT INFORMATION

Name: Kelly Brock Title: _____

Name of Entity: City of Casselberry, FL

Phone Number: 407-262-7725 Ext. 1235 E-Mail: kbrock@casselberry.org

PERFORMANCE EVALUATION

(CHECK)
"YES" OR "NO"

- 1. Was the scope of work performed similar in nature? YES OR NO
- 2. Did this company have the proper resources and personnel by which to get the job done?
If no, please describe: _____ YES OR NO
- 3. Were any problems encountered with the company's work performance?
If yes, please describe: _____ YES OR NO
- 4. How long did the company/individual work for you? Years: 0 Months: 10
- 5. On a scale of 1 to 10, 10 being best, how would you rate the overall work performance, considering professionalism; final product; personnel; resources. Rate from 1 to 10. (10 being highest) 9
- 6. If the opportunity were to present itself, would you rehire this company?
If no, please state why: _____ YES OR NO
- 7. Date Questionnaire completed (mm/dd/yy)
11/21/2024
- 8. Please provide any additional comments pertinent to this company and the work performed for you (you may use additional pages):
Overall Wharton-Smith did a good job on this project and delivered it at reasonable cost despite a highly inflationary construction cost environment. This is one of several successful projects they have completed for the City over several years.

Kelly Ann Brock Digitally signed by Kelly Brock
Date: 2024.11.21 14:44:09 -05'00'

Signature

Date this was completed: 11/21/2024

NOTE: REQUESTS THAT THE CLIENT COMPLETES THIS FORM AND SUBMITS DIRECTLY BACK TO THE PROPOSER. THE PROPOSER WILL SUBMIT THE COMPLETED FORM WITH THEIR PROPOSAL. CLIENTS ARE HIGHLY ENCOURAGED TO SUBMIT THE FORM DIRECTLY TO THE PROPOSER. HOWEVER, MAY BE DIRECTLY SUBMITTED TO: PURCHASING@NORTHPORTFL.GOV REFERENCING THE RFP #: 2025-09.

THE CITY RESERVES THE RIGHT TO VERIFY ANY AND ALL INFORMATION ON THIS FORM.

ATTACHMENT D
REFERENCE AND PERFORMANCE QUESTIONNAIRE VERIFICATION FORM

RFP 2025-09XX WARM MINERAL SPRINGS HISTORIC RENOVATION, FLOODPROOFING, AND SITE
 IMPROVEMENTS – CONSTRUCTION MANAGER (CM) AT RISK”.

1. Contractor Information (Proposer information) FIRM

NAME:	Wharton-Smith, Inc.
ADDRESS:	2525 Bobcat Village Center Road, Unit #105, North Port, FL 34288
Telephone number#:	941-621-4723
E-mail:	chuff@whartonsmith.com
Point of Contact	Caryn Huff
Contact Phone Number	941-621-4723

2. Worked Performed as Prime Sub Contractor Joint Venture Other (Explain)

Percent of project work performed 100 %
 If Subcontractor, who was the prime (Name/Phone #) _____

3. CONTACT INFORMATION

Contract Number: 2023-000267

Contract Type: Firm Fixed Price Cost Reimbursement Other (please specify): CM at Risk

Contract Title: Charlotte Sports Park Hurricane Insured Asset Repairs

Contract Location: Port Charlotte, FL

Award Date (mm/dd/yy): 01/24/23

Actual Completion Date: 01/19/24

Original Contract Price (Award Amount): \$17,672,322

Final Contract Price (to include all modifications, if applicable): \$17,672,322

Explain the Difference: _____

4. PROJECT DESCRIPTION: Complexity of Work HIGH MED ROUTINE

How is this project relevant to project submission? Facility repairs due to damage from Hurricane Ian that included interior and exterior improvements to the existing spring training facility

5. CLIENT INFORMATION

Name: Joseph Romanelli Title: Project Manager
 Name of Entity: Charlotte County Board of County Commissioners

Phone Number: 941-623-1056 E-Mail: joseph.romanelli@charlottecountyfl.gov

PERFORMANCE EVALUATION	(CHECK) "YES" OR "NO"
1. Was the scope of work performed similar in nature? _____	YES OR NO <input checked="" type="checkbox"/> <input type="checkbox"/>
2. Did this company have the proper resources and personnel by which to get the job done? If no, please describe: _____ _____	YES OR NO <input checked="" type="checkbox"/> <input type="checkbox"/>
3. Were any problems encountered with the company's work performance? If yes, please describe: _____ _____	YES OR NO <input type="checkbox"/> <input checked="" type="checkbox"/>
4. How long did the company/individual work for you?	Years: <u>1</u> Months: <u>4</u>
5. On a scale of 1 to 10, 10 being best, how would you rate the overall work performance, considering professionalism; final product; personnel; resources. Rate from 1 to 10. (10 being highest)	<u>8</u>
6. If the opportunity were to present itself, would you rehire this company? If no, please state why: _____	YES OR NO <input checked="" type="checkbox"/> <input type="checkbox"/>
7. Date Questionnaire completed. <u>12/2/2024</u>	(mm/dd/yy)

8. Please provide any additional comments pertinent to this company and the work performed for you (you may use additional pages):
Wharton-Smith and their project management team exemplified their skills and professionalism during this project's extremely tight deadline of just 9 months from start of construction in April 2023 to completion of January 1 2024. Their team successfully made the repairs to and completed the build back of 58 assets. This project was met with multiple set backs and engineering challenges but Wharton-Smith and their dedicated team showed great perseverance to insure the Charlotte Sports Park was able to reopen for Spring Training 2024.

Signature Joseph Romanelli

Date this was completed: 12/2/2024

NOTE: REQUESTS THAT THE CLIENT COMPLETES THIS FORM AND SUBMITS DIRECTLY BACK TO THE PROPOSER. THE PROPOSER WILL SUBMIT THE COMPLETED FORM WITH THEIR PROPOSAL. CLIENTS ARE HIGHLY ENCOURAGED TO SUBMIT THE FORM DIRECTLY TO THE PROPOSER. HOWEVER, MAY BE DIRECTLY SUBMITTED TO: PURCHASING@NORTHPORTFL.GOV REFERENCING THE RFP #: 2025-09.

THE CITY RESERVES THE RIGHT TO VERIFY ANY AND ALL INFORMATION ON THIS FORM.



5

Litigation and Insurance



Litigation & Insurance

Have you been involved in litigation in the last five (5) years? If so, describe circumstances and outcome.

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 communications. The successes we have had on our projects are due in large part to our commitment to partnering and conflict prevention and resolution. Occasionally, a situation arises where a third-party mediation is needed, despite all efforts to avoid it. Our litigation record for the past five years is as follows:

OWNER/CLIENTS:

Wharton-Smith, Inc. vs. Clay Road 628 Development, L.P. and Montgomery County Mud No. 138. (Case No. 24-04-06018, District Court in the Four Hundred Fifty Seventh Judicial District Court, Montgomery County, Texas): In April 2024, Wharton-Smith filed suit against Clay Road 628 Development, L.P. and Montgomery County Mud No. 138 over nonpayment for work performed. **This case is ongoing.**

The proposer shall provide details on the scale and amount of liability insurance held.

Please see our Certificate of Liability Insurance included in Tab 7.

6

Recent, Current & Projected Workload



Recent, Current, & Projected **Workload**

With over 880 employees, Wharton-Smith has the additional resources in a wide variety of disciplines available to meet the needs of the Warm Mineral Springs project. Below, please find our recent, current and projected workload.

CHARLOTTE COUNTY PUBLIC SCHOOLS CONT. SERVICES - CURRENT			
PROJECT NAME	SCOPE	START	FINISH
CTC MDF Fire Suppression	Install clean agent fire system	Jan. 2025	Mar. 2025
Murdock Middle School Generators	Install 400KV generator	Dec. 2024	Mar. 2025

CHARLOTTE COUNTY PUBLIC SCHOOLS CONT. SERVICES - COMPLETE			
PROJECT NAME	SCOPE	START	FINISH
Liberty Elementary School Modulars	Install modular pads and utility connections	Jan. 2024	Nov. 2024
WCT Fuel Tank Replacement	Install new above ground 10,000 gallon tank and infrastructure	May 2024	Nov. 2024
Security Group 10	Enhance security systems- vehicular gates, main gate and access control	May 2024	Nov. 2024
Myakka Elementary School Fire Alarm	Upgrade fire panels and devices	May 2024	Oct. 2024
East Elementary School Fire Alarm	Upgrade fire panels and devices	May 2024	Oct. 2024
Port Charlotte High School Irrigation	Add irrigation lines for more capacity	May 2024	Oct. 2024
ROTC Course Removal	Clear/grade site for future field house.	May 2024	Oct. 2024
Video Boards	Install video boards for the three high school sports fields	Feb. 2024	May 2024
Window Shades	Install window shades in mutiple schools to improve security	July 2024	July 2024

CITY OF NORTH PORT HURRICANE IAN RECOVERY (VARIOUS LOCATIONS) - CURRENT			
PROJECT NAME	SCOPE	START	FINISH
Dallas White Park Temporary Maintenance Facility	Demolish five buildings and install pre-engineered metal building	June 2024	Feb. 2025
Fire Station No. 82, 83, 84	Repair roof, ceiling tiles, gutters, fascia, soffits, and light fixtures	Nov. 2024	Dec. 2024
Dallas White Park PITO	Replace tennis court lighting and repair the bathroom roof	Dec. 2024	Jan. 2025
Dallas White Park Kayak Launch	Replace kayak launch	Jan. 2025	Aug. 2025
Senior Center	Repair roof, ceiling tiles, drywall, soffits, gutters, and fascia	Jan. 2025	Mar. 2025
Family Center	Repair roof, ceiling tiles and exterior trim	Jan. 2025	Feb. 2025
Facility's Admin. Building	Repair roof, ceiling tiles, and trailer	Feb. 2025	May 2025
Facility's Pole Barn	Demolish existing building and install a new pre-engineered metal building	May 2025	Nov. 2025
Detective Building	Demolish existing building & cap utilities	Jan. 2025	Feb. 2025
Garden of the Five Senses	Replace sidewalks	Jan. 2025	Feb. 2025

CITY OF NORTH PORT SERVICES CONTRACT - CURRENT

PROJECT NAME	SCOPE	START	FINISH
Dallas White Park	Remove softball field and reconfigure into a multipurpose sports field	Feb. 2025	July 2025
Fire Station No. 81	Provide preconstruction services for demolition/re-build of the fire station	June 2024	May 2025

CHARLOTTE COUNTY - CURRENT

PROJECT NAME	SCOPE	START	FINISH
Sheriff's 911 Admin.	Construct new 911 HQ building and logistics center	Apr. 2024	Nov. 2025

CHARLOTTE COUNTY- PAST

PROJECT NAME	SCOPE	START	FINISH
Charlotte Sports Park	Hurricane repairs - roofing, fencing, ceiling tiles, sports lighting, flooring	Apr. 2023	Jan. 2024

NAME/TITLE	PRECONSTRUCTION	CONSTRUCTION
Caryn Huff, Project Executive	10%	25%
Juanmiguel Gorut, Preconstruction Manager	100%	As Needed
Chuck Hardwick, Sr. Project Manager	10%	50%
Tripp Lytle, Asst. Project Manager	10%	100%
Chad Roeder, Area Superintendent	As Needed	25%
Jay Coker, Superintendent	As Needed	100%
Ivan Kovalchuk, Project Engineer	As Needed	100%
Kyle Jennings, Utilities SME	As Needed	5%
Jeffery Williams, Historic Preservation SME	As Needed	5%



City Required Forms



THE REMAINDER OF THIS PAGE IS LEFT INTENTIONALLY BLANK

REQUIREMENTS AND METHOD OF SUBMITTAL

TAB 6 – CITY REQUIRED FORMS: 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 are the responsibility of each Proposer to submit 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.

REQUIRED SUBMITTAL FORMS: Provide fully executed forms.

- ATTACHMENT A:** Proposal Submittal Signature Form
- ATTACHMENT B:** Statement of Organization
- ATTACHMENT C:** Reference/Client Listing Form
- ATTACHMENT D:** Reference Form
- ATTACHMENT E:** Disclosure Form (Consultant/Engineer/Architect)
- ATTACHMENT F (ATTACHMENT 5 ON CONTRACT):** Lobbying Certification
- ATTACHMENT G (ATTACHMENT 6 ON CONTRACT):** Non-Collusive Affidavit
- ATTACHMENT H (ATTACHMENT 7 ON CONTRACT):** Conflict of Interest Form
- ATTACHMENT I (ATTACHMENT 8 ON CONTRACT):** Public Entity Crime Information
- ATTACHMENT J (ATTACHMENT 9 ON CONTRACT):** Drug-Free Workplace
- ATTACHMENT K (ATTACHMENT 11 ON CONTRACT):** Scrutinized Company Certificate
- ATTACHMENT L (ATTACHMENT 12 ON CONTRACT):** E-Verify System
- ADDITIONAL ATTACHMENT:** Human Trafficking Affidavit
- ADDITIONAL ATTACHMENT:** Foreign Entity of Concern Laws Affidavit

***Note: See City Insurance Requirements (see levels of coverage) and Indemnification in the Contract**

SAMPLE INSURANCE CERTIFICATE: Demonstrate your firm’s ability to comply with insurance requirements. Provide a previous certificate or other evidence listing the Insurance Companies names for both Professional Liability and General Liability and the dollar amounts of the coverage.

MBE/WBE/VBE: If claiming either Minority Business Enterprise/Women Business Enterprises/Veteran Business Enterprise, the Prime Firm (not sub-consultant) **shall be** certified as a Minority Business Enterprise I _____ of Florida, Department of Management Services, Office of Supplier Diversity pursuant to Section 287.0943, Florida C.S. DC (check one):

1. **YES, CLAIMING STATUS AS PRIME ONLY (MBE/WBE/VBE)**

___ YES, I'VE ATTACHED THE CERTIFICATE OF MBE/WBE STATUS FROM STATE OF FLORIDA AS OUTLINED SECTION 1.

2. ^X ___ NOT CLAIMING MBE/WBE /VBE

PLEASE INITIAL AND RETURN WITH YOUR PROPOSAL. DC
INITIALS

THIS PAGE MUST BE COMPLETED AND SUBMITTED

A. METHOD OF SUBMITTAL:

1. **NUMBER OF SUBMITTAL PACKAGES:** One (1) original hard-copy **UNBOUND** (marked "**ORIGINAL**") and signed in blue ink. **NUMBER OF COPIES:** three (3) hard copies **BOUND** (marked "**COPY**").
(1 original + 5 copies = 6 total submittals).
2. **NUMBER OF PAGES:** The proposal **shall not exceed (19) pages (one-sided)** in length. **LETTER SIZE:** 8.5"x11"
/FONT SIZE: Calibri 11, PDF FORMAT.
3. **USB FLASH DRIVE:** One (1) electronic version in Portable Document Format (PDF) **on a USB Drive** containing the entire submittal. **CDs will not be accepted.**

(The Title Page, City Required Forms, resumes and tabs do not count towards the TOTAL NUMBER OF PAGES).

- 1.1 When compiling a response, sections should be tabbed and labeled; pages should be sequentially numbered at the bottom of the page; proposals should be bound to allow flat stacking for easy storage; **do not use three ring binders of any kind;** and sections should be compiled in the sequence list above.
- 1.2 Place proposal with all the required items in a sealed envelope clearly marked for specification number, project name, name of proposer, and due date and time.

4. **SUBMIT TO:**
City of North Port
Finance Department - Purchasing Division
Geoff Thomas
4970 City Hall, 3 RD Floor, Suite 337
North Port, Florida 34286
**RFP NO. 2025-09-XX WARM MINERAL SPRINGS Historic Renovation, Floodproofing and Site Improvements (CM)
AT RISK"**

Note: Submissions received after the time and date stated on the Notice of Availability will not be accepted.

**ATTACHMENT A:
 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 Addendum No. _____ Dated Addendum No. _____
 Dated Addendum No. Dated Dated Addendum No. Dated

Company Name Wharton-Smith, Inc.

407-321-8410 dcrafton@whartonsmith.com 407-321-4368

Telephone# **E-Mail** **Fax #**
750 Monroe Road

Main Office Address
Sanford FL 32771

City **State** **Zip Code**

Address of Office Servicing City of North Port, if different than above: **SAME AS ABOVE**

2525 Bobcat Village Center Road, Unit 105

Office Address

North Port FL 4/22/2024
34288

City	State	Zip Code
941-621-4723	chuff@whartonsmith.com	407-321-4368

Telephone#	E-mail	Fax #
Darin Crafton, Chief Operating Officer - Commercial		

Name & Title of Firm Representative

	11/21/24
Signature	Date

ATTACHMENT B:

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, Partnership, etc): Corporation
Business Address: 2525 Bobcat Village Center Road, Unit 105
North Port, FL 34288 **Phone:**
941-621-4723 **Fax:** 407-321-4368
E-Mail dcrafton@whartonsmith.com
Federal Identification Number: 59-2392802

Respondent shall submit proof that it is authorized to do business in the State of Florida unless registration is not required by law.

Is 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: N/A

What kind of corporation is it: "For Profit" or "Not for Profit" No

Is it in good standing: Yes or No

Authorized to transact business in Florida: Yes or

State of Florida Department of State Certificate of Authority Document No.: G94383

Does it use a registered fictitious name: Yes or No

Specify Name: _____

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, 2024, that its most recent annual report/uniform business report was filed on January 3, 2024, 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 Third day of January, 2024*

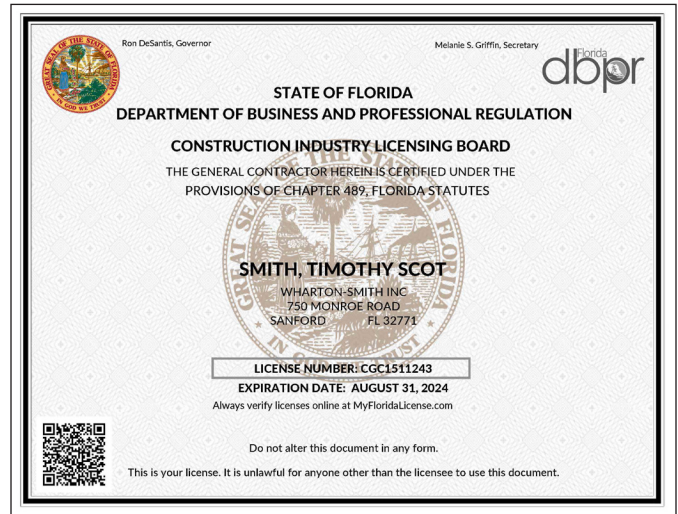



Secretary of State

Tracking Number: 4058037720CC

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

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



Names of Officers: *Please see our complete list of Officers on the following page.*
Please see our complete list of Officers on the following page.

President: _____ Secretary: _____

Vice President: _____ Treasurer: _____

Director: _____ Director: _____

Other: _____ Other: _____

Name of Corporation (As used in Florida):

Wharton-Smith, Inc.

(Spelled exactly as it is registered with the state or federal government)

Corporate Address: 750 Monroe Road Sanford, FL 32771

Post Office Box: _____
_____ Street Address: _____
State, Zip: _____

City, State Zip:
City,

Print Name and Title of person authorized to bind the company (provide list):

Darin Crafton, Chief Operating Officer - Commercial

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL



CORPORATE OFFICERS / PRINCIPALS

Names and Titles of Principal Officers	Year Position Assumed	Years with Wharton-Smith	Qualifier
Timothy S. Smith – President/CEO	2022	31	Yes
Ronald F. Davoli – Chairman of the Board (Retired as President/CEO in 2022)	2022	32	Yes
Patrick J. Hewitt – Chief Operating Officer Water	2005	25	Yes
Stephanie Pompeo – Chief Financial Officer / Secretary	2020	16	Yes
Darin A. Crafton – Chief Operating Officer Commercial	2015	9	Yes
Kenneth E. Marcell III – Vice President Gulf Coast Water	2014	18	Yes
Todd O’Donnell – Director of Business Development – Water/Wastewater	2014	22	Yes
Gregory Williams – Director of Operations	2015	9	Yes
Andre P. Boagni – Director of Operations	2019	16	Yes

ATTACHMENT E
DISCLOSURE FORM
FOR
CONSULTANT/ENGINEER/ARCHITECT

Please select (only) one of the following three options:

Our firm has no actual, potential, or reasonably perceived, **financial*** or **other interest**** in the outcome of the project.

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/may be perceived to receive or lose private income depending on the government business choices based on your firm's findings and recommendations, this must be listed as a financial interest. An example would be ownership in physical assets affected by the government business choices related to this project. The possibility of contracting for further consulting services is not included in this definition and is not prohibited.

****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/may be perceived to have political, legal or any other interests that will affect what goes into your firm's findings and recommendations, or will be/may be perceived to be affected by the government business choices related to this project, this must be listed as another interest.

COMPANY NAME: Wharton-Smith, Inc.

NAME (PERSON AUTHORIZED TO BIND THE COMPANY):  Darin Crafton, COO - Commercial

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

Attachment F


CERTIFICATION REGARDING LOBBYING

The undersigned certifies, to the best of his or her knowledge, that:

1. 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 an officer or employee of an 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.
2. 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-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
3. 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 31, U.S.C. § 1352 (as amended by the Lobbying Disclosure Act of 1995). Any person who fails 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 such failure.

The Contractor certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Contractor understands and agrees that the provisions of 31 U.S.C. § 3801 et seq., apply to this certification and disclosure, if any.



Signature of Contractor's Authorized Representative

Darin Crafton

Name

Chief Operating Officer - Commercial

Title

11/21/24

Date

Attachment G
NON-COLLUSIVE AFFIDAVIT

Before me, the undersigned authority ("Affiant"), personally appeared: Darin Crafton
_____ who, being first duly sworn, deposes and says that:

1. Affiant is the Officer _____ [insert Owner, Partner, Officer, Representative or Agent] of Wharton-Smith, Inc. _____, [insert name of Contractor] the Respondent that has submitted the attached reply;
2. Affiant 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 on 11/21, 2024 .



Signature
Darin Crafton

Printed Name
Chief Operating Officer - Commercial

Title

SWORN ACKNOWLEDGMENT

STATE OF FL COUNTY
OF Sarasota

Sworn to (or affirmed) and subscribed before me by means of physical presence or online notarization, this 21st day of Nov 2024, by Darin Crafton .



Notary Public

Personally Known OR Produced Identification

Page 47 of 111



Attachment H
CONFLICT OF INTEREST
FORM

Florida Statutes Section 112.313 places limitations on public officers (including advisory board members) and employees' ability to contract with the City of North Port, Florida ("City") either directly or indirectly.

PART I. [Select and complete all that apply]:

I am an employee, public officer, or advisory board member of the City.

Identify the position and/or board: _____

I am the spouse or child of an employee, public officer, or advisory board member of the City.

Identify the name of the spouse or child: __

I am an employee, public officer or advisory board member of the City, or my spouse or child, is an officer, partner, director, or proprietor of Respondent/Contractor or has a material interest in Contractor. "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 Florida Statutes Section 112.313, indirect ownership does not include ownership by a spouse or minor child.

Identify the name of the person and the entity _____

Bidder/Contractor employs or contracts with an employee, public officer, or advisory board member of the City.

Identify the name of the employee, public officer, or advisory board member

None of the Above

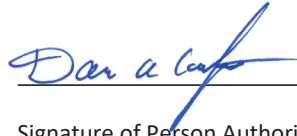
PART II: Will you request an advisory board member waiver?

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)

N/A

The City will review any relationships which may be prohibited under the Florida Ethics Code and will disqualify any Contractor whose conflicts are not waived or exempt.



Signature of Person Authorized to Bind the Contractor
Darin Crafton

Printed Name
Chief Operating Officer- Commercial

Title
11/21/24

Date

Attachment I

PUBLIC ENTITY 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.

Darin Crafton
I, _____, being an authorized representative of the Contractor, have read and understand the contents above.

I certify that the Contractor is not disqualified from replying to this solicitation/contracting because of Florida Statutes Section 287.133.

Telephone #: ___ Fax #: _ 941-621-4723 | 407-321-4368

Federal ID #: ___ Email: _ 59-2392802 | dcrafton@whartonsmith.com



Signature of Contractor's Authorized Representative

Darin Crafton, COO - Commercial

Name and Title of Contractor's Authorized Representative

11/21/24

Date

SWORN ACKNOWLEDGMENT

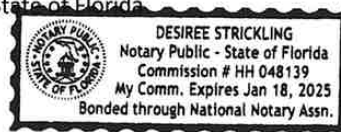
STATE OF FLORIDA
COUNTY OF Sarasota

Sworn to (or affirmed) and subscribed before me by means of physical presence or online notarization, this 21st day of Nov 2024, by Darin Crafton.



Notary Public – State of Florida

Personally Known OR Produced Identification _____
Type of Identification Produced



Attachment J
DRUG FREE WORKPLACE FORM

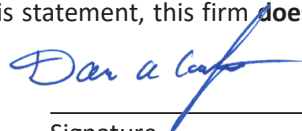
The undersigned, in accordance with Florida Statutes Section 287.087, hereby certifies that the Contractor,
_____ (Company Name): Wharton-Smith, Inc.

1. Publishes 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. Informs 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. Gives 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), notifies 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. Imposes 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. Makes 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.



Signature
Darin Crafton

Printed Name
Chief Operating Officer - Commercial

Title
11/21/24

Date

Attachment K

SCRUTINIZED COMPANY CERTIFICATION FORM

Wharton-Smith, Inc.

Contractor Name: _____ Authorized Representative Name and Title: Darin Crafton, COO - Commercial
Address: _City: _____ State: _____ ZIP: _____ Phone Number: 941-621-4723 Email Address: dcrafton@whartonsmith.com
2525 Bobcat Village Center Rd, Unit 105, North Port, FL 34288

A company is ineligible to, and may not, bid on, submit a proposal for, or enter into or renew a Contract with the City of North Port for goods or services of any amount if, at the time of bidding on, submitting a proposal for, or entering into or renewing such Contract, the company is on the Scrutinized Companies that Boycott Israel List, created pursuant to Florida Statutes, section 215.4725, or is engaged in a boycott of Israel.

A company is ineligible to, and may not, bid on, submit a proposal for, or enter into or renew a Contract with the City of North Port for goods or services of \$1 million or more if, at the time of bidding on, submitting a proposal for, or entering into or renewing such Contract, the company is on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to Florida Statutes, section 215.473, or with companies engaged in business operations in Cuba or Syria.

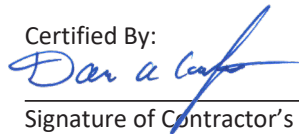
CHOOSE ONE OF THE FOLLOWING

This Contract or Contract renewal is for goods or services of less than \$1 million. As the person authorized to sign on behalf of the above-named company, and as required by Florida Statutes Section 287.135(5), I hereby certify that the above-named company is not participating in a boycott of Israel.

This bid, proposal, Contract or Contract renewal is for goods or services of \$1 million or more. As the person authorized to sign on behalf of the above-named company, and as required by Florida Statutes Section 287.135(5), I hereby certify that the above-named company is not participating in a boycott of Israel, is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, and it does not have business operations in Cuba or Syria.

I understand that pursuant to Florida Statutes, section 287.135, the submission of a false certification may result in the termination of the Contract if one is entered into, and may subject the above-named company to civil penalties, attorney's fees and costs.

Certified By:



Signature of Contractor's Authorized Representative

Darin Crafton

Name

Chief Operating Officer - Commercial

Title

11/21/24

Date

Attachment L

VENDOR'S CERTIFICATION FOR E-VERIFY SYSTEM

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 remuneration.
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; and
 - 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.
7. Vendor understands that pursuant to Florida Statutes, section 448.095, the submission of a false certification may result in the termination of the contract if one is entered into, and may subject the Vendor named in this certification to civil penalties, attorney's fees and costs.

VENDOR: _____(Vendor's Company Name) Wharton-Smith, Inc.

Certified By: __ AUTHORIZED REPRESENTATIVE SIGNATURE



Print Name and Title: _Darin Crafton, COO - Commercial

Anti-Human Trafficking Affidavit

Instructions: This form must be completed by an officer or representative of an entity registering as a vendor, entering into, renewing, or extending, a contract with the City of North Port.

The undersigned, on behalf of Wharton-Smith, Inc. (“Entity”), verifies the following:

A. I have read and understand that Florida Statutes Section 787.06(13), prohibits the City of North Port (“City”) from executing, renewing, or extending a contract to entities that use coercion for labor or services, with such terms defined in Florida Statutes Section 787.06(2) as follows:

· “Coercion” means: (1) using or threatening to use physical force against any person; (2) restraining, isolating, or confining or threatening to restrain, isolate, or confine any person without lawful authority and against her or his will; (3) using lending or other credit methods to establish a debt by any person when labor or services are pledged as a security for the debt, if the value of the labor or services as reasonably assessed is not applied toward the liquidation of the debt, the length and nature of the labor or services are not respectively limited and defined; (4) destroying, concealing, removing, confiscating, withholding, or possessing any actual or purported passport, visa, or other immigration document, or any other actual or purported government identification document, of any person; (5) causing or threatening to cause financial harm to any person; (6) enticing or luring any person by fraud or deceit; or (7) providing a controlled substance as outlined in Schedule I or Schedule II of Section 893.03, Florida Statutes, to any person for the purpose of exploitation of that person.

· “Labor” means work of economic or financial value.

· “Services” means any act committed at the behest of, under the supervision of, or for the benefit of another. The term includes, but is not limited to, forced marriage, servitude, or the removal of organs.

B. I declare, under penalties of perjury, that Entity does not use coercion for labor or services as defined in Florida Statutes Section 787.06(2).

C. I understand that this affidavit applies to any City contract executed, renewed, or extended for the duration of the contract; and the Entity must execute and submit this affidavit at least annually in the vendor registration and renewal process.

I, the undersigned, understand and affirm that the above statements are based upon personal knowledge; that I am over the age of 18 years and otherwise competent to make the above statements; and am authorized to legally bind the Entity, and make the above statements on behalf of Entity. Under penalties of perjury, I declare that I have read the forgoing document and that the facts stated in it are true.

Authorized Signature: Date: *Darin Crafton* 11/21/24

Printed Name: Title: Darin Crafton, Chief Operating Officer - Commercial

STATE OF Florida

COUNTY OF Sarasota

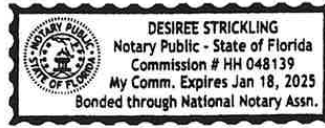
REQUEST FOR PROPOSAL NO. 2024-XX
Warm Mineral Springs Admissions, Restrooms, and Site Improvements – CONSTRUCTION MANAGER (CM) AT RISK

Sworn to (or affirmed) and subscribed before me by means of physical presence or online notarization,
this 21st day of November, 2024, by Darin Crafton, as COO
of Wharton-Smith, Inc., the Entity, and is personally known to me or produced identification.
Type of Identification produced N/A.

Desiree Strickling

Signature of Notary Public

Desiree Strickling



Name of Notary Typed, Printed or Stamped

My Commission Expires: 1/18/2025

AFFIDAVIT OF COMPLIANCE REGARDING FOREIGN ENTITY OF CONCERN LAWS

The undersigned, on behalf of the entity listed below (“Entity”), hereby attests and declares as follows:

1. Entity is not owned by the government of a foreign country of concern as defined in Florida Statutes Section 287.138.
2. The government of a foreign country of concern does not have a controlling interest in Entity.
3. Entity is not organized under the laws of, and does not have a principal place of business in, a foreign country of concern.
4. Entity is not owned or controlled by the government of a foreign country of concern, as defined in Florida Statutes Section 692.201.
5. Entity is not a partnership, association, corporation, organization, or other combination of persons organized under the laws of or having its principal place of business in a foreign country of concern, as defined in Florida Statutes Section 692.201, or a subsidiary of such entity.
6. Entity is not a foreign principal, as defined in Florida Statutes Section 692.201.
7. Entity complies, if purchasing real property, with all applicable requirements of Florida Statutes Sections 692.202, 692.203, and 692.204.
8. If purchasing real property, Entity is not a foreign principal prohibited from purchasing the subject real property. Entity is either (1) not a person or entity described in Florida Statutes Section 692.204(1)(a) or (2) authorized under Florida Statutes Section 692.204(2) to purchase the subject property. Entity complies with the requirements of Florida Statutes Section 692.204.
9. The undersigned is authorized to execute this affidavit on behalf of Entity.

Under penalties of perjury, I declare that I have read the foregoing document and that the facts stated in it are true.

ENTITY

WHARTON-SMITH, INC. _____ [insert name of legal entity, in bold ALLCAPS]

 _____ [signature]

Darin Crafton, COO - Commercial _____ [insert name and title]

11/21/24 _____ [insert date]

Wharton-Smith, Inc.

Client#: 706782

WHARTINC

ACORD™

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

4/02/2024

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).


PRODUCER Marsh & McLennan Agency Bouchard Region 1 N. Dale Mabry Hwy, Suite #450 Tampa, FL 33609	CONTACT NAME: Certificate Specialist	
	PHONE (A/C, No, Ext): 727 447-6481 FAX (A/C, No): E-MAIL ADDRESS: MMABouchard.certificates@MarshMMA.com	
INSURED Wharton-Smith, Inc. 750 Monroe Road Sanford, FL 32771	INSURER(S) AFFORDING COVERAGE	NAIC #
	INSURER A : Amerisure Insurance Company	19488
	INSURER B : Starr Indemnity & Liability Company	38318
	INSURER C : Great American Assurance Company	26344
	INSURER D : Amerisure Mutual Insurance Company	23396
	INSURER E : Berkley Assurance Company	39462
	INSURER F : Amerisure Partners Insurance Company	1105

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.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:	Y	Y	GL20361081901	04/01/2024	04/01/2025	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 MED EXP (Any one person) \$10,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000 \$
E	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY <input checked="" type="checkbox"/>	Y	Y	CA20361071905	04/01/2024	04/01/2025	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE	Y	Y	CU21171470301	04/01/2024	04/01/2025	EACH OCCURRENCE \$20,000,000
B		Y	Y	1000585014241			AGGREGATE \$20,000,000
C	<input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$0	Y	Y	EXC5608923			\$
D	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	WC20361091802	04/01/2024	04/01/2025	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
E	Pollution Liab	Y		PCADB50245320424	04/01/2024	04/01/2025	\$10,000,000
E	Professional Liab			PCADB50245320424	04/01/2024	04/01/2025	\$10,000,000
G	Rented Equipment			UM00024961MA24A	04/01/2024	04/01/2025	\$2,500,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Insurers Affording Coverage Continued:
Insurer G - XL Specialty Insurance Company
Policy #UM00024961MA24A - Rented Equipment Coverage
Blanket Loss Payee applies for Rented and Leased Equipment.
Rented and Leased Equipment deductible:
(See Attached Descriptions)

CERTIFICATE HOLDER	CANCELLATION
	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 

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ACORD 25 (2016/03) 1 of 2 #S13897017/M13895348

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RCJTF



Insurance Continued

DESCRIPTIONS (Continued from Page 1)

\$10,000 standard deductible.

2% subject to a \$10K minimum deductible applies to all rented cranes.

Certificate holder is additional insured as respects General Liability, Automobile Liability, Pollution Liability and Umbrella/Excess Liability policies 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 to the terms, conditions and exclusions of your policy.

Waiver of subrogation applies in favor of certificate holder as respects General Liability, Automobile Liability and Workers Compensation only if required by written contract, and subject to the terms, conditions and exclusions as specified in the policy.

It is agreed by endorsement to the General Liability, Automobile Liability and Workers Compensation policy that this policy shall not be cancelled by the insurance carrier without first giving thirty (30) days

prior written notice except for nonpayment of premium or if the first named insured elects to non renew.

Umbrella/Excess Liability policies follow the forms/endorsements of the underlying General Liability, Automobile Liability and Workers Compensation policies.

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: 4/1/2024 - 4/1/2025
POLICY NUMBER: UM00024960MA24A

COVERED PROPERTY AND PREMISES DESCRIPTION

New construction and remodeling of waste or water treatment plants; new construction and non-structural 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. \$25,000 on projects over \$50,000,000.
Named Storm – On Islands	12.5%, Subject to \$500,000 minimum on projects up to \$8M. 10.0%, Subject to \$500,000 minimum on projects over \$8M.
Named Storm – Water Treatment Plant Projects Only	3%, Subject to \$25,000 Minimum.
Named Storm – Frame, Joisted Masonry or Non-Combustible Construction	5%, Subject to \$25,000 Minimum.
Named Storm – Masonry Non-Combustible, Semi Fire-Resistive or Fire-Resistive Construction	3%, Subject to \$25,000 Minimum.

Insurance Continued

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
Earth Movement and Volcanic Eruption “Pacific Northwest Seismic Area” “High Hazard Seismic Zones”	1% Subject to \$50,000 Minimum
Earth Movement and Volcanic Eruption “New Madrid Seismic Area”	1% Subject to \$50,000 Minimum
Earth Movement 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 (Wastewater 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

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

Insurance Continued

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



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