



RFP NO. 2023-17
City of North Port
**Construction Management Services –
Continuing Services Contracts**

Submitted by:
Wharton-Smith, Inc.
2525 Bobcat Village Center Road
Unit #105
North Port, FL 34288

Points of Contact:
Tom Iarossi, VP Commercial
Cell: (813) 436-6521
Fax: (813) 288-0371
tiarossi@whartonsmith.com

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



COPY



Table of Contents

Tab 1	Transmittal Letter
Tab 2	Documents Licenses and Certifications Resumes Project Approach Additional Information
Tab 3	Team's Previous Experience / Proficiency in Similar Projects
Tab 4	References
Tab 5	Litigation and Insurance
Tab 6	Submission Requirements and Required Submittal Forms

1

TRANSMITTAL LETTER

City of North Port
Geoff Thomas, Contract Administrator I
4970 City Hall Boulevard, Suite 337
North Port, Florida 34286

December 16, 2022

Re: RFP NO. 2023-17 Construction Management Services- Continuing Services Contracts for City of North Port

Dear Members of the Selection Committee:

Wharton-Smith is excited about the opportunity to continue our relationship with the City of North Port in serving as your Construction Manager for the Continuing Services Contracts. We are proud to say that we have managed over 25 continuing services contracts. Additionally, our team is well versed in the CM at Risk process and is eager to deliver successful, high-quality projects to the City. To that end, we have assembled an experienced **local** team with an excellent track record to ensure it is a seamless, enjoyable process for all. Our team brings the following key advantages to the Continuing Services Contracts:

LOCAL TEAM – Our proposed team of **Caryn Huff, LEED AP, Doug Whisler, Chuck Hardwick, Mark Jackson, and Mike Schreiber** have proudly worked together on many projects and have collectively built well over 50 jobs within the region. As a result, this team’s knowledge of the area, the standards and requirements of local governing authorities, permitting agencies and building standards will be a direct benefit to the project. With this experienced **local** team, no time or money will be wasted on learning curves. This will allow for more of the budget to go back into tangible scope elements and incorporate the needs of the end user rather than squandered on contractor overhead. Furthermore, this experience ensures our team will hit the ground running on day one, which will safeguard the schedule against unexpected delays and support an early or on-time delivery to generate savings back to the City. ***Through our local office, we have the staffing and ability to service any project included in the Continuing Services Contracts allowing for additional cost savings to the City! No added costs for travel or lodging will be required.***

COMMITMENT TO THE CITY OF NORTH PORT – To demonstrate our commitment to the City of North Port, we established a regional office in the city last year. We are thrilled to be part of such a dynamic and growing community and plan to be a business partner of the city for many years to come! Our local office is staffed with nearly 20 construction professionals that have the credentials and knowledge required to collaborate with your team throughout the building process and take full advantage of cost saving opportunities as they arise. There is no better example of this than with our recent effort on the **North Port Fire Training Tower project**, in which our team was able to carefully manage the budget and implement a number of **cost saving ideas that have kept the project under budget. Even in an unprecedented construction market, our team has leveraged local relationships to build the most efficient and economical project for the city.** With our team, it is not just about crossing the finish line, but rather, fostering a collaborative environment that will inspire all stakeholders and end-users throughout the entire construction process.

CONTINUING SERVICES EXPERIENCE – The Wharton-Smith team brings extensive experience completing projects as part of a continuing service contract, and we have organized our in-house resources to provide the best service to these clients. As such, we understand what it takes to respond quickly to your needs, organizing and managing assignments easily while delivering effective and expedient services in the field. As a result, this team’s knowledge of the standards and requirements of local governing authorities, permitting agencies, and building standards will be a direct benefit to the project. This experience, combined with our expertise and ability to work with multiple user groups and stakeholders, will assure that ***we know what to do to get the job done in a timely and cost-efficient manner.***

COMMUNITY OUTREACH – Beyond our direct benefits to these projects themselves, we find that community involvement is one of the most rewarding core values for our company. We know that supporting the neighborhoods, non-profits, and other organizations in the North Port community is key to providing a sense of balance and purpose in the professional lives of our employees. Wharton-Smith supports numerous local organizations throughout the year. We are grateful for the opportunity to give back to a community that has embraced us and our work. Through our local office, our primary goal is to provide quality construction that stands the test of time and **generates a level of pride for you, the community and all project team participants.**

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

Sincerely,

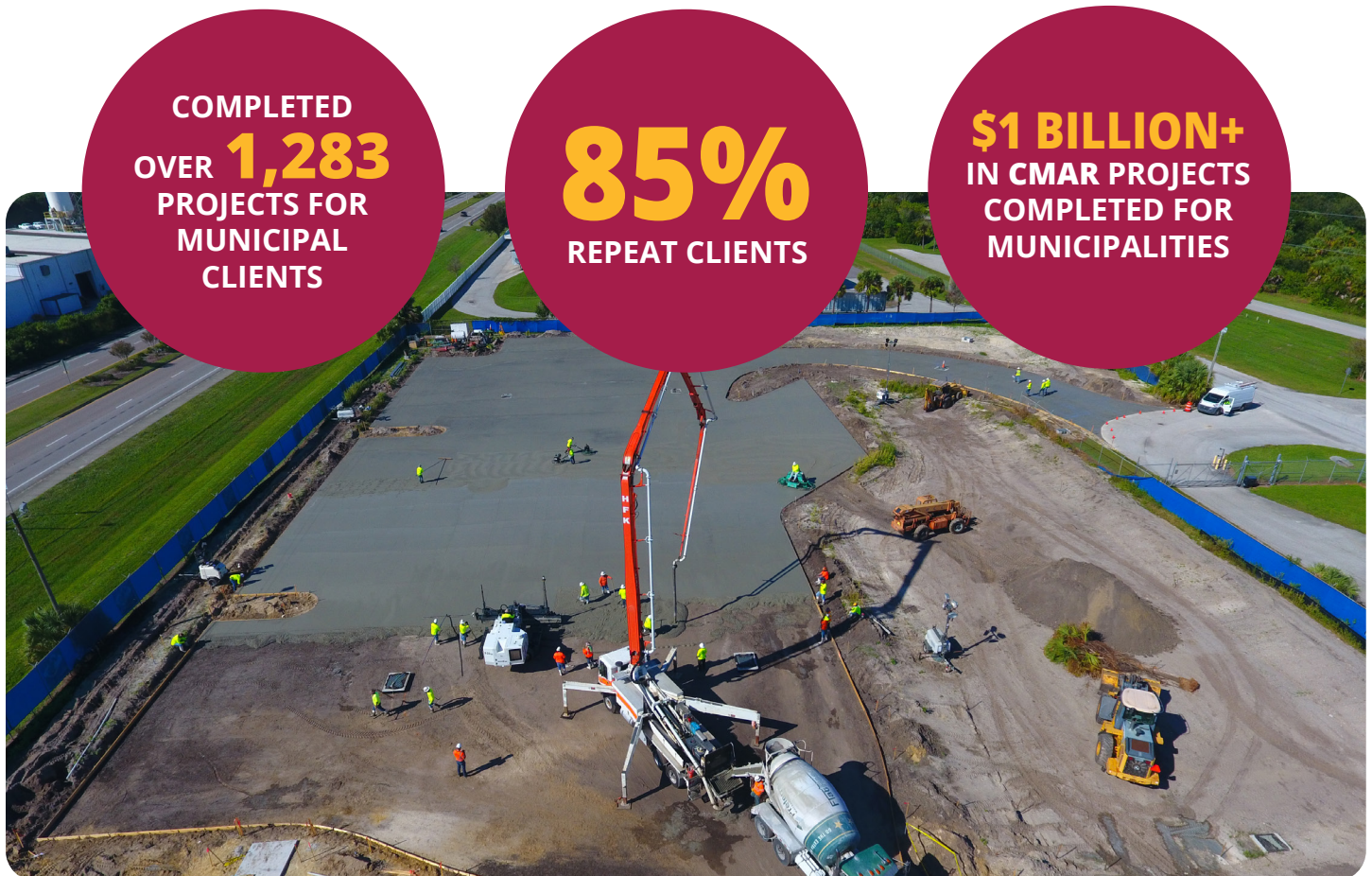
Wharton-Smith, Inc.



Tom Iarossi
Vice President, Commercial Division
813-436-6521
tiarossi@whartonsmith.com



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



2

DOCUMENTS

Licenses and Certifications

**State of Florida
Department of State**

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

The document number of this corporation is G94383.

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

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

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



Randi R. Be
Secretary of State

Tracking Number: 7328199655CC

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, 2023**

WHARTON-SMITH INC (OL)
2525 BOBCAT VILLAGE CENTER RD
NORTH PORT FL 34288

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


Issue Date: September 13, 2022

This Business Tax Receipt is hereby issued for the occupation of SERVICE GENERAL. The Business Tax Receipt Number is 23-00021319 and is valid with the City of North Port at 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, 2024

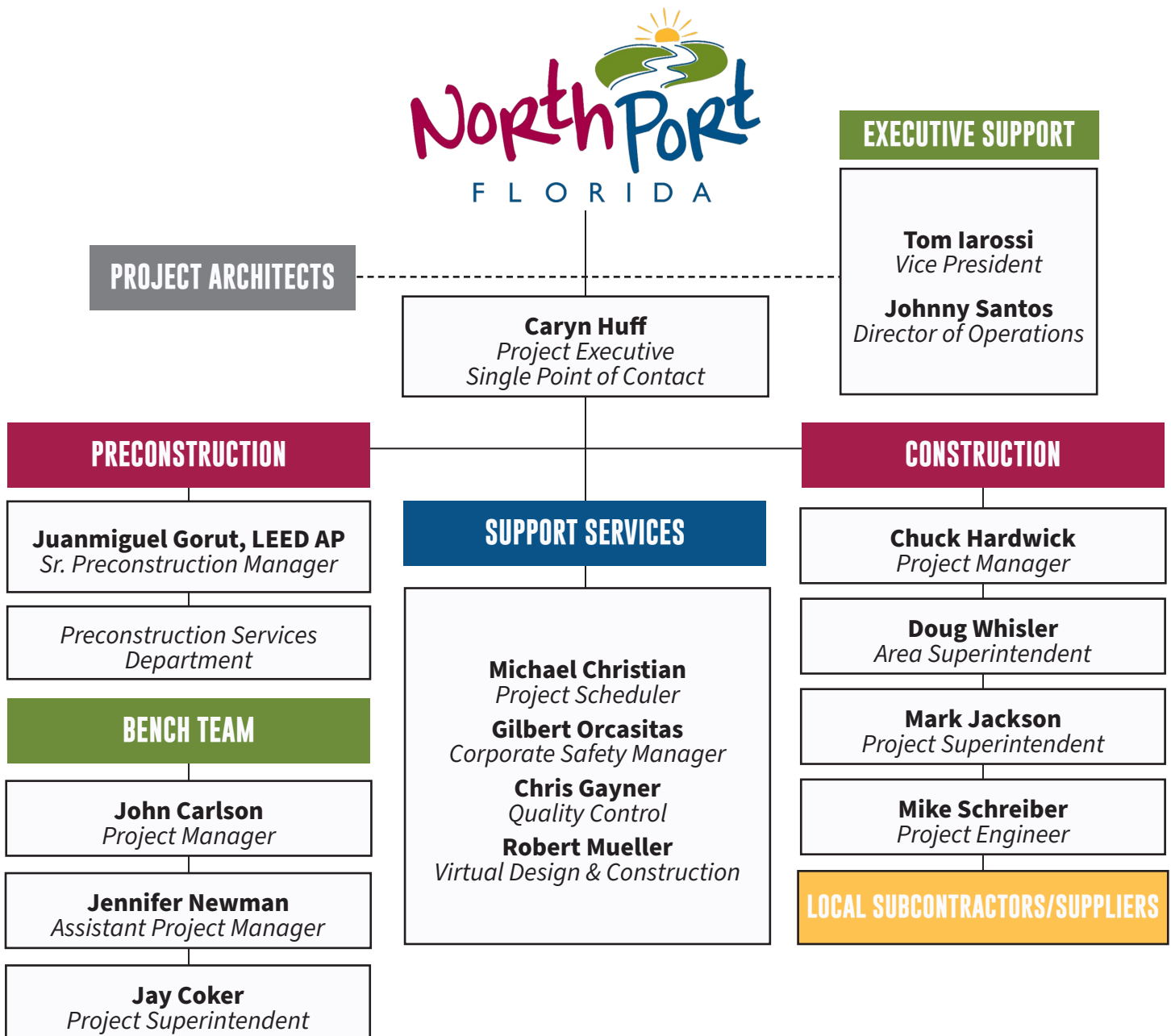
Always verify licenses online at MyFloridaLicense.com



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.

Project Team

Wharton-Smith has provided the organizational chart below, which depicts staff assigned to the City of North Port Continuing Services Contracts. Each key staff member has been selected based on their technical expertise, CMAR experience, and availability for this project. Our proposed **Sr. Preconstruction Manager Juanmiguel Gorut** and our **Project Executive Caryn Huff and Project Manager Chuck Hardwick** will serve lead roles in the preconstruction and construction phases, respectively. We have also included a highly experienced Bench Team should we need to work on multiple projects at the same time. **The team shown below has worked on numerous projects together over the last several years and will bring that cohesion to this project.**





Caryn Huff, CGC, LEED AP Project Executive



EXPERIENCE AND QUALIFICATIONS

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

RELATED PROJECT EXPERIENCE

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

Wharton-Smith provided Construction Management at Risk services for Charlotte County’s new Transit Facility. As project executive, Caryn facilitated the team’s construction of a 5,880 SF administration building consisting of offices, a breakroom, a driver’s lounge that consisted of workstations and charging outlets, 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.

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

Wharton-Smith provided Construction Management services on the Community Development Office Expansion project. Phase 1 consisted of constructing a new concrete block and stucco 5,000 SF addition onto the Community Development building. Phase 2 consisted of interior renovations to the existing 17,931 SF Community Development building. Managing the end users to maintain the project schedule while keeping the building operational during construction proved to be a challenge for the team. To solve this, Wharton-Smith’s team facilitated end user scope and scheduling meetings that allowed the team to keep the project on task as required per the contract. Local Participation (based on 1 hour driving radius) was 81%.

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

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

Charlotte County Justice Center Reroof, Charlotte County FL—\$2.6 M (Port Charlotte, FL)

Wharton-Smith was hired to perform overall design-build services to address the ongoing moisture mitigation issues associated with the existing Justice Center facility. To work around the daily event schedule, our team engaged in a non-destructive forensic study of the existing building components to identify the causes associated with the reported moisture intrusion, air infiltration and subsequent air quality, energy efficiency, and possible life safety issues presented. We evaluated, through non-destructive observations of the building’s exterior and interior, the building walls, roof, windows, ceiling plenum spaces, and mechanical rooms.

YEARS

- 30 - Industry
- 5 - Wharton-Smith

EDUCATION

BS, Building Construction,
Auburn University

CERTIFICATIONS/ AFFILIATIONS

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

28 Years LOCAL Experience!




YEARS
40 - Industry
6 - Wharton-Smith

**REGISTRATIONS/
CERTIFICATIONS**

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

Doug Whisler Area Superintendent

EXPERIENCE AND QUALIFICATIONS

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

RELATED PROJECT EXPERIENCE

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

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 that consisted of workstations and charging outlets, 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.

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

Wharton-Smith provided Construction Management services on the Community Development Office Expansion project. Phase 1 consisted of constructing a new concrete block and stucco 5,000 SF addition onto the Community Development building. Phase 2 consisted of interior renovations to the existing 17,931 SF Community Development building. Managing the end users to maintain the project schedule while keeping the building operational during construction proved to be a challenge for the team. To solve

this, Wharton-Smith’s team facilitated end user scope and scheduling meetings that allowed the team to keep the project on task as required per the contract. Local Participation (based on 1 hour driving radius) was 81%.

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

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

Charlotte County Justice Center Reroof, Charlotte County FL—\$2.6 M (Port Charlotte, FL)

Wharton-Smith was hired to perform overall design-build services to address the ongoing moisture mitigation issues associated with the existing Justice Center facility. To work around the daily event schedule, our team engaged in a non-destructive forensic study of the existing building components to identify the causes associated with the reported moisture intrusion, air infiltration and subsequent air quality, energy efficiency, and possible life safety issues presented. We evaluated, through non-destructive observations of the building’s exterior and interior, the building walls, roof, windows, ceiling plenum spaces, and mechanical rooms.

Charlotte Sports Park - Tampa Bay Rays Spring Training Renovations, Charlotte County FL—\$2.3 M (Port Charlotte, FL)

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.



Chuck Hardwick Project Manager

EXPERIENCE AND QUALIFICATIONS

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

RELATED PROJECT EXPERIENCE

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

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

Charlotte County Public Works Operations Center, Charlotte County FL—\$2.3 M (Punta Gorda, FL) *

The Charlotte County Public Works Operations Center building was constructed on an existing Public Works campus to serve as the headquarters for the Public Works Maintenance and Operations staff. The one-story 8,610 SF building contained offices, meeting space, open work rooms, break room, and a locker room. Additionally, the northwest end of the building was utilized by Charlotte County Building Department to provide permitting services for the public in south county.

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

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 that consisted of workstations and charging outlets, 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 Jail Expansion Phases 1 & 2, Charlotte County FL—\$60 M (Port Charlotte, FL) *

A Phased project consisting of several out-parcel ancillary services buildings and the addition of approximately 150,000 square feet of inmate housing pods and a 20,000 square feet Sally Port Intake and Booking area. Phase 1 of the project entailed the adding of the 7,000 square feet Work Release Center, the 2,000 square feet Maintenance Center for the Inmate Lawn Mowing program, the 2,000 square feet Armory Training Center, and the 5,000 square feet state of the art Video Visitation Center. Phase 2 was comprised of the addition of 150,000 square feet to the main jail doubling its inmate bed capacity for the future growth of Charlotte County.

* Individual experience





Juanmiguel Gorut Senior Preconstruction Manager

EXPERIENCE AND QUALIFICATIONS

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

RELATED PROJECT EXPERIENCE

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

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

Charlotte County Sheriff's District 3 Office with Evidence Building and Impound, Charlotte County FL—\$11.2 M (Port Charlotte, FL)

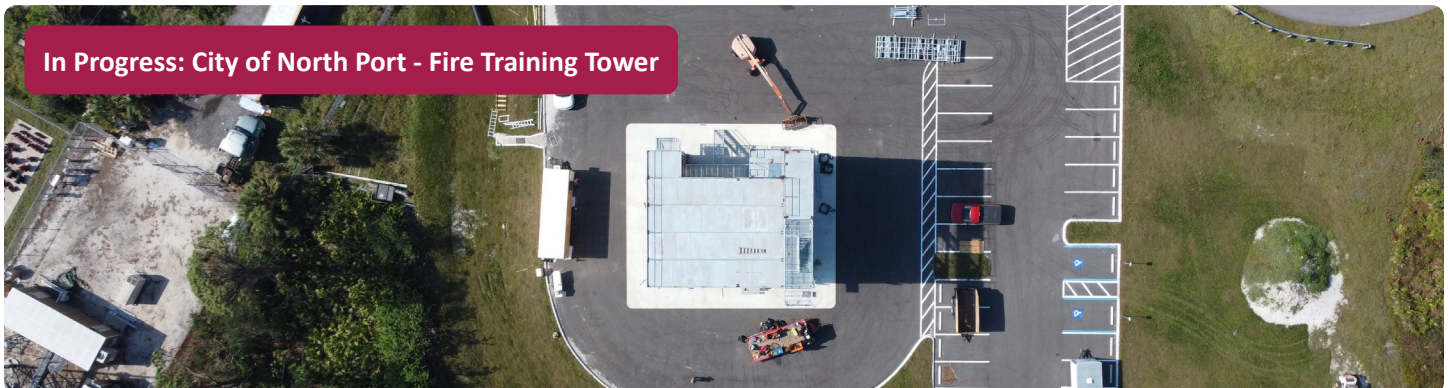
Wharton-Smith provided Construction Management at Risk services for the Sheriff's District 3 Office for Charlotte County, FL. This project included building a new 16,574 SF Sheriff's Administration Building that consisted of offices, conference and meeting rooms, and fitness areas with room for expansion. A new 24,565 SF Evidence Building was also built that included new offices, a training room, evidence vaults, evidence processing and cleaning rooms, a faraday room, new impound evidence bays with a new backup generator, and a chiller plant to service the entire 20-acre site.

Charlotte County Schools Continuing Services, Charlotte County, FL—>\$4 M (Charlotte County, FL)

Wharton-Smith is currently providing construction management services on various projects for Charlotte County Schools through a two-year term Continuing Services Contract. Current projects include locker room renovations and fire alarm replacements.

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

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





Mark Jackson

Project Superintendent

EXPERIENCE AND QUALIFICATIONS

As Superintendent, Mark 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, Mark oversees and implements safety procedures and accident protection and prevention.

RELATED PROJECT EXPERIENCE

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

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 that consisted of workstations and charging outlets, 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.

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

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

Charlotte County Justice Center Reroof, Charlotte County FL—\$2.6 M (Port Charlotte, FL)

Wharton-Smith was hired to perform overall design-build services to address the ongoing moisture mitigation issues associated with the existing Justice Center facility. To work around the daily event schedule, our team engaged in a non-destructive forensic study of the existing building components to identify the causes associated with the reported moisture intrusion, air infiltration and subsequent air quality, energy efficiency, and possible life safety issues presented. We evaluated, through non-destructive observations of the building's exterior and interior, the building walls, roof, windows, ceiling plenum spaces, and mechanical rooms.

Charlotte Sports Park - Tampa Bay Rays Spring Training Renovations, Charlotte County FL—\$2.3 M (Port Charlotte, FL)

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.

YEARS

36 - Industry
6 - Wharton-Smith

EDUCATION

BS in Construction Management, Washington State University
BS in Building Science, Auburn University
BA in Business Marketing/Management, Florida Southern College

REGISTRATIONS/CERTIFICATIONS

- Certified General Contractor- State of Florida
- LEED Accredited Professional
- Fall Protection
- Trenching & Excavation
- Scaffolding
- Confined Space
- Aerial Work Platform Operator
- Forklift Operator
- Trenching & Excavation
- Forklift Operator



Mike Schreiber Project Engineer

EXPERIENCE AND QUALIFICATIONS

As Project Engineer, Mike 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 project architect, compiling operation/maintenance manuals, coordinating and tracking material deliveries, and taking weekly progress photos.

RELATED PROJECT EXPERIENCE

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

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

Charlotte County Schools Continuing Services, Charlotte County, FL—>\$4 M (Charlotte County, FL)

Wharton-Smith is currently providing construction management services on various projects for Charlotte County Schools through a two-year term Continuing Services Contract. Current projects include locker room renovations and fire alarm replacements.

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

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

YEARS

2 - Industry

1+ - Wharton-Smith

EDUCATION

- AS, Drafting and Design Technology, Edison State College
- AS, Civil Engineering Technology, Florida Southwestern State College
- AS, Architectural Design and Construction Technology, Florida Southwestern State College
- AS, Computer Programming and Analysis, Florida Southwestern State College

REGISTRATIONS/ CERTIFICATIONS

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



In Progress: City of North Port - Fire Training Tower



Jay Coker

Project Superintendent

EXPERIENCE AND QUALIFICATIONS

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 Sports Park - Tampa Bay Rays Spring Training Renovations, Charlotte County FL—\$2.3 M (Port Charlotte, FL)

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.

YEARS

41 - Industry | 4 - WS

REGISTRATIONS/ CERTIFICATIONS

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



John Carlson

Project Manager

EXPERIENCE AND QUALIFICATIONS

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

RELATED PROJECT EXPERIENCE

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

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

Charlotte County Schools Continuing Services, Charlotte County, FL—>\$4 M (Charlotte County, FL)

Wharton-Smith is currently providing construction management services on various projects for Charlotte County Schools through a two-year term Continuing Services Contract. Current projects include locker room renovations and fire alarm replacements.

YEARS

17 - Industry | 2 - WS

EDUCATION

BS in Building
Construction, University
of Florida

AA in Building
Construction, Santa Fe
College

REGISTRATIONS/ CERTIFICATIONS

- OSHA 30-Hour
- First Aid & CPR
- Trenching & Excavation
- Confined Space
- Fall Protection
- Scaffold Safety

ABOUT WHARTON-SMITH, INC.

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

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

PROJECT APPROACH

Project Management techniques, controls, program and technologies to be employed to meet project schedule and budget requirements

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.

Cost Tracking & Cost Control During Design

During the design phase, cost control is maintained by constantly measuring cost against the original budget. Our Sr. Preconstruction Manager Juanmiguel Gorut, LEED AP will work directly with the City and the design team to document any changes or savings ideas for the project, 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

CMAR Experts

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.

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 design cost estimate and is maintained through close-out.



Charlotte County Community Development Project

The cost tracking system that our team implements involves the City every step of the way, and truly maintains the 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 strive to become your contractor of choice, with knowledgeable people who have the expertise and desire to provide you the best construction experience!



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 Sr. Preconstruction Services Manager 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, including the construction management team and design team, will be engaged in the preconstruction effort. Constructability reviews will be conducted by our Project Manager Chuck Hardwick and our Superintendent Mark Jackson will also provide reviews, phasing options, scheduling, and bidding scope development. Every project is unique and requires a specific approach to maximize the program for the budget dollars that are available. 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.

PREPARTING THE GMP ESTIMATE

- ✓ All aspects of the project are fully defined and all previous assumptions will be verified.
- ✓ Any open items are reduced to specific Allowances, Alternates, or clarified through communication with Subcontractors.
- ✓ Subcontractor outreach and prequalification will be conducted to encourage participation from the largest number of qualified subcontractors.
- ✓ Subcontractor pricing will be compared to our estimate to identify prices outside the normal range.
- ✓ The total project will be priced and a Guaranteed Maximum Price developed.
- ✓ Post-GMP review meetings will be conducted with the team.

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

SCOPES OF WORK

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

SUBCONTRACTORS AND SUPPLIERS



Our team has a database of over 3,200 pre-qualified subcontractors and based on our outreach program will develop a list of potential subcontractors and suppliers for the project.

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. We can also trend costs to predict labor productivity using our labor variance reporting. This comprehensive reporting system includes the following items:

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

CONSTRUCTION SERVICES

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.

PROJECT MANAGEMENT TECHNIQUES TO MEET THE PROJECT SCHEDULE

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

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

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 of a project is clearly defined our team will work closely with the project team to develop the schedule.***

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 any project awarded under the Continuing Services Contracts. During preconstruction, project team meetings will be held regularly 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. Our team stresses a methodical step-by-step procedure focused on reporting mechanisms, which aim to resolve problems before they become critical while keeping everyone involved with the project fully informed and fully aware of all issues at hand.

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



DEVELOP

- Include design, permitting, and procurement
- Clear identification of the critical path
- Plan for sequencing and phased turnover
- Identify long lead equipment to expedite
- Utilize key subcontractor input

MAINTAIN

- Track progress with actual start/finish dates
- Identify trends in labor efficiency
- Early identification of potential delays
- Alter sequencing to solve issues or expedite

CLOSE-OUT

- Keep the Client informed with schedule updates
- Allot for final inspections and facility clearance
- Meet or beat planned completion dates

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

and perform work.

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

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

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

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

PROJECT MANAGEMENT TECHNOLOGIES

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

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

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

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

Wharton-Smith also uses **Matterport Scanner Technology**

which allows our team to create 3D digital “twins” of any physical space through 360 degree photography and 3D scanning. The benefits of this technology are endless and our team has already experienced time and cost savings. Matterport Scanners can:

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

The Matterport scanner is essential for the as-builts and close-out of the project since it allows our team to provide accurate and permanent as-built resources. It is also a very effective tool for existing buildings that require extensive renovation.

SAFETY PROGRAMS

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

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

POST-CONSTRUCTION SERVICES

CLAIMS MANAGEMENT

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

PROJECT CLOSE-OUT

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

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

WARRANTY PERIOD SERVICES

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

Have a warranty request?
It's as simple as emailing us at:
WARRANTY@WHARTONSMITH.COM
And we take care of the rest!

We schedule warranty inspections with our team, the Owner, and the project user group at 6 months and 11 months to see how things have been working. If there are any warranty issues, this approach will get them addressed prior to expiration of the contracted warranty. In addition, our team will remain responsive long past the warranty period to assist the City with anything that may surface having to do with the design and construction of the project. 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.

CASE STUDY – CHARLOTTE COUNTY FLIGHT TRAINING FACILITY

This project consisted of an overall remodel of the existing airplane hangar, including incorporation of ADA standards, for Western Michigan University College of Aviation program within a constrained time line. With a make-or-break move-in date, there wasn't time for the County to go back to the out of town design team to correctly identify existing conditions versus their ideal design, so Wharton-Smith jumped in and offered a design-assist effort by comparing the existing conditions versus the design intent and provided the necessary coordination to commence construction efforts.

We then self-performed the demolition and rough carpentry stages in order to stay within the assigned fixed budget and also helped to engineer the layout for what would serve as the administrative office complex for the college.

Ultimately, the project was completed within a tight three-month period and on budget to the satisfaction of the new tenant.





Caryn Huff
Project Executive



Chuck Hardwick
Project Manager



Juanmiguel Gorut
Sr. Precon Manager



Doug Whisler
Area Superintendent



Mark Jackson
Superintendent



Mike Schreiber
Project Engineer

Assignment of personnel to provide the most efficient service

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 if elected for use on this project. Beyond our normal breadth of services, you can expect a hands on, collaborative approach between the City of North Port, project stakeholder's and the design team throughout the preconstruction process, and an open-book, team-oriented approach during construction and close-out as well.

The team we have assembled for the Continuing Services Contract 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.

Where elements of the work will be performed, and who in the organization chart will oversee performance of the work to provide the most efficient services

Your project will be managed by our **North Port office located at 2525 Bobcat Village Center Road**. Both Caryn and Doug will be overseeing all construction activities with Chuck as the Project Manager and Mark as the day-to-day superintendent. Our team members will be readily available to serve the City of North Port!

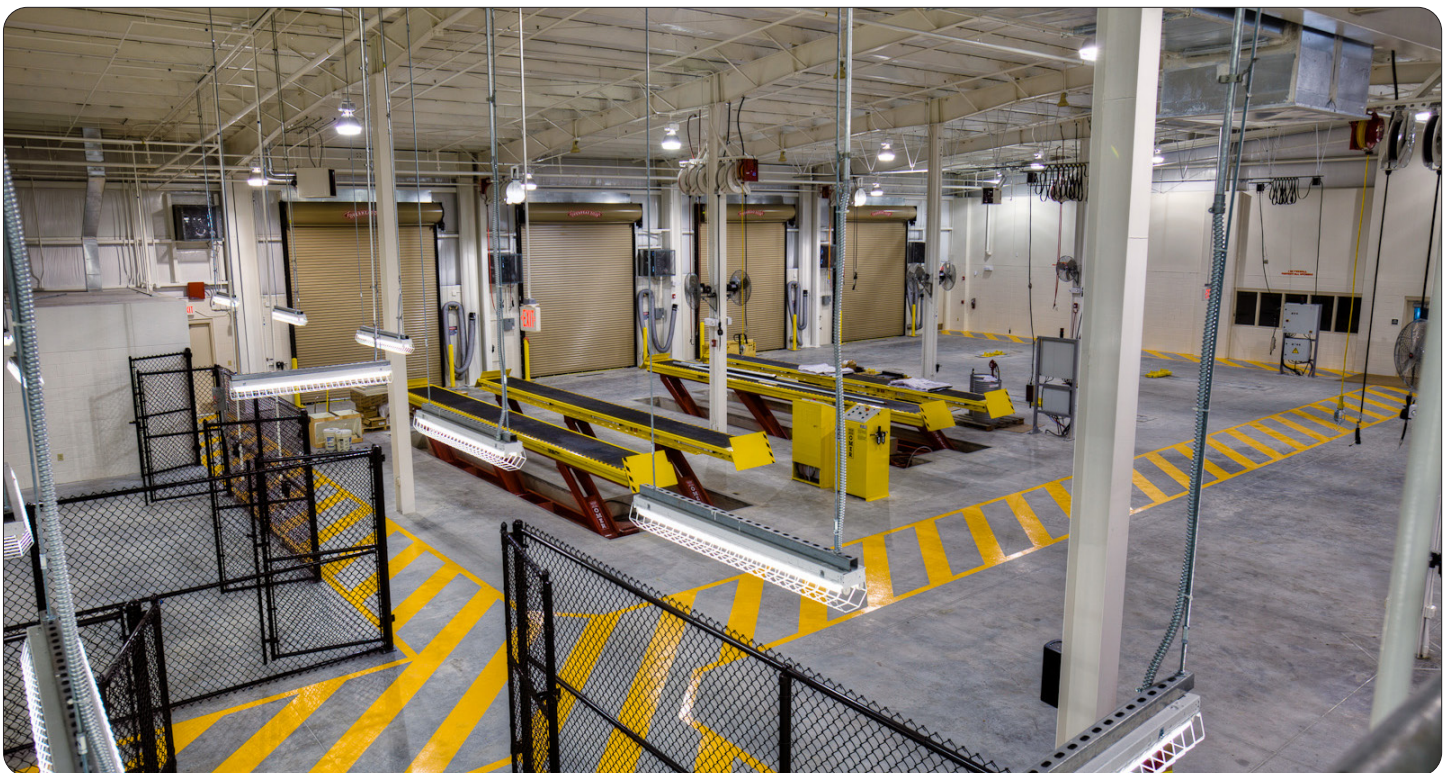
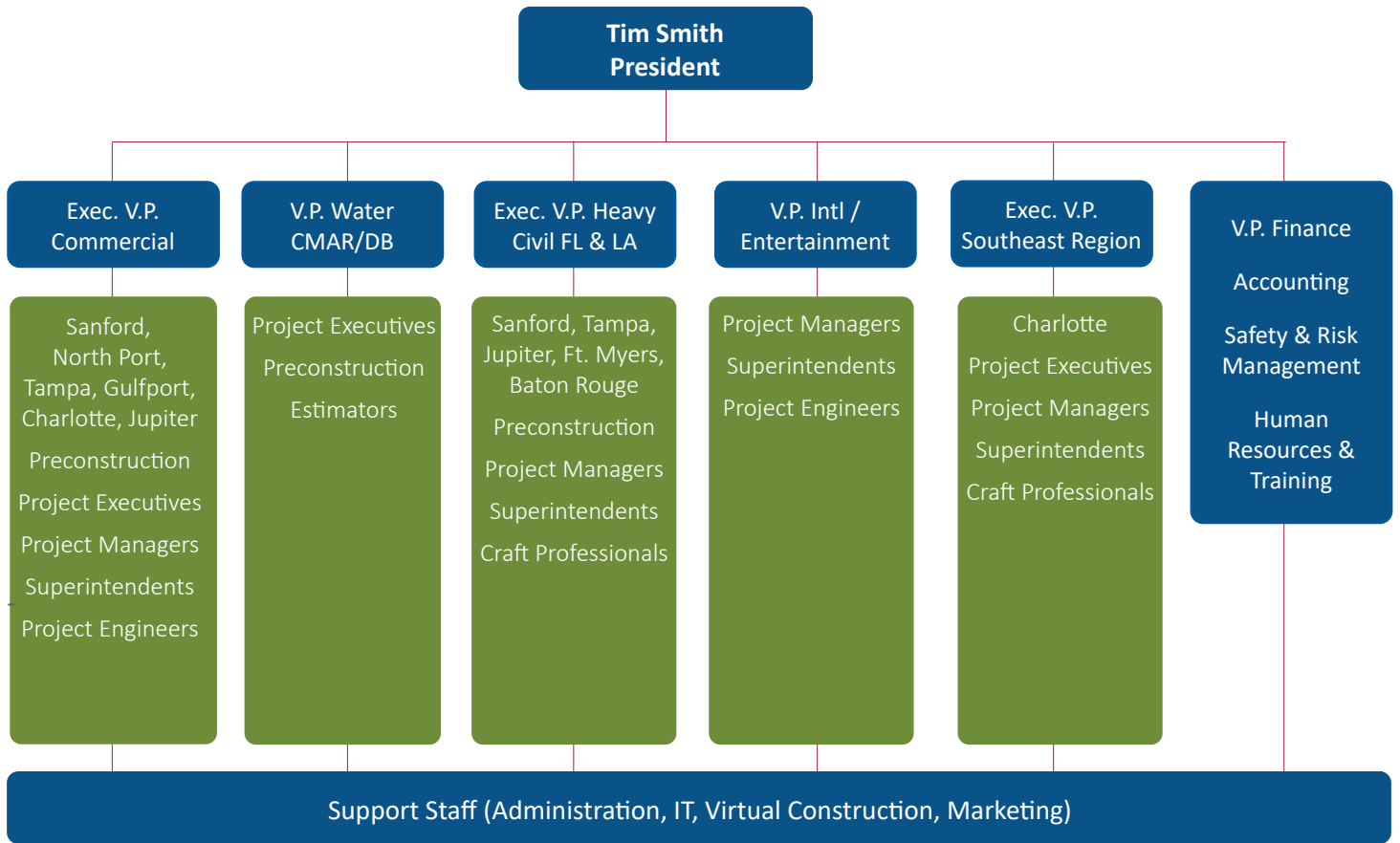
Detailed information explaining how location of the firm, key personnel and sub-contractors will affect the project, including how impact of any physical distance will be mitigated through the use of technology, processes and other means

Any projects awarded will be managed by our North Port office located in Sarasota County at 2525 Bobcat Village Center Road, North Port, FL 34288.

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. This method of communication has been implemented on our projects to ensure safety while social distancing and maintaining a healthy jobsite. In addition to email and other standard means of communication, it also provides a way to transfer information quickly and efficiently.



Organizational chart showing the corporate management structure of the proposer



Additional Information

The Wharton-Smith team brings extensive experience completing projects of the continuing service contract variety, and we have organized our in-house resources to provide the best service to these clients. We currently hold continuing services contracts with area-based agencies such as Charlotte County Public Schools, Manatee County Public Works, Manatee County Schools, City of Fort Myers, Lee County Schools, Hillsborough County, Hillsborough County Schools, Pasco County, Pasco County Schools, and Osceola County to name a few. We understand what it takes to respond quickly to your needs, organizing and managing assignments easily, while delivering effective and expedient services in the field. As a result, this team’s knowledge of the standards and requirements of local governing authorities, permitting agencies, and building standards will be a direct benefit to the City of North Port throughout the duration of the Continuing Services contract. Below please find a listing of Wharton-Smith’s current Continuing Services Contracts throughout the state of Florida.

WHARTON-SMITH CONTINUING SERVICE CONTRACTS		
CLIENT NAME	AGREEMENT TYPE	CONTRACT TERM
Martin County	CMAR	1 year term
Lee County	General Contracting	3 year term
City of Clearwater	CMAR	1 year term
Manatee County	CMAR	3 year term
Osceola County	CMAR	3 year term
City of Clearwater	CMAR/General Contracting	4 year term
Charlotte County Schools	CMAR	2 year term
Brevard County Public Schools	CMAR/ Design-Build	3 year term
Daytona State College	General Contracting	1 year term
Escambia County Schools	General Contracting	1 year term
Hillsborough County Public Schools	CMAR/Design-Build/GC	5 year term
Bay District Schools	CMAR	2 year term
Lake County Schools	General Contracting	1 year term
Martin County Schools	General Contracting	1 year term
Okeechobee County Schools	CMAR	1 year term
Orange County Public Schools	CMAR	5 year term
School District of Osceola County	CMAR	3 year term
School District of Palm Beach County	General Contracting	1 year term
Pasco County Schools	CMAR	3 year term
Pinellas County Schools	CMAR	2 year term
Seminole County Public Schools	CMAR	3 year term
Seminole State College	CMAR	3 year term
University of Central Florida	CMAR/General Contracting	1 year term
Valencia College	CMAR/Design-Build/GC	3 year term
Volusia County Schools	CMAR/General Contracting	1 year term
Pasco County Schools	General Contracting	1 year term

3

TEAM'S PREVIOUS EXPERIENCE

TEAM SYNERGY	Caryn Huff, Project Executive	Doug Whisler, Area Superintendent	Juanmiguel Gorut, Sr. Preconstruction Manager	Mark Jackson, Superintendent	Jay Coker, Superintendent	Chuck Hardwick, Project Manager	Jennifer Newman, Assistant Project Manager	Mike Schreiber, Project Engineer
1. CHARLOTTE COUNTY TRANSIT FACILITY, PORT CHARLOTTE, FL	✓	✓	✓	✓		✓		
2. COMMUNITY DEVELOPMENT CENTER, CHARLOTTE COUNTY, FL	✓	✓			✓		✓	
3. FIRE TRAINING TOWER, NORTH PORT, FL	✓	✓	✓	✓		✓		✓
4. CHARLOTTE COUNTY JUSTICE CENTER REROOF, CHARLOTTE COUNTY, FL	✓	✓	✓	✓	✓		✓	
5. CHARLOTTE SPORTS PARK - TAMPA BAY RAYS SPRING TRAINING RENOVATIONS, PORT CHARLOTTE, FL	✓	✓		✓	✓			

PROJECT SIMILARITIES	CMAR DELIVERY	OCCUPIED SITE	PROJECT UNDER \$4M	RENO. / REMODEL	EXPANSION
1. CHARLOTTE COUNTY TRANSIT FACILITY, PORT CHARLOTTE, FL	✓	✓	✓		
2. COMMUNITY DEVELOPMENT CENTER, CHARLOTTE COUNTY, FL	✓	✓	✓	✓	✓
3. FIRE TRAINING TOWER, NORTH PORT, FL			✓		
4. CHARLOTTE COUNTY JUSTICE CENTER REROOF, CHARLOTTE COUNTY, FL		✓	✓	✓	
5. CHARLOTTE SPORTS PARK - TAMPA BAY RAYS SPRING TRAINING RENOVATIONS, PORT CHARLOTTE, FL	✓	✓	✓	✓	✓



Charlotte County Transit Facility

19765 Kenilworth Boulevard, Port Charlotte, FL

Wharton-Smith provided Construction Management at Risk services for Charlotte County's new Transit Facility. The team constructed a 5,880 SF administration building consisting of offices, a breakroom, a driver's lounge that consists of workstations and charging outlets, two restrooms with showers and lockers, an entrance foyer with a walk-up window, and a training and conference room that can accommodate 20 people. 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.



Project Owner

Charlotte County, FL
18500 Murdock Circle, Bldg. D
Port Charlotte, FL 33948
Gary Burdahl
P: 941-623-1009
E: gary.burdahl@charlotte-countyfl.gov

Size and Project Type

5,880 SF New Construction

Completion Date

12/2021

Construction Cost

\$3,388,883

Key Personnel

Caryn Huff
Project Executive
Chuck Hardwick
Project Manager
Doug Whisler
Area Superintendent
Mark Jackson
Project Superintendent



Charlotte County, Community Development Center Office Expansion

Charlotte County, FL

Wharton-Smith provided Construction Management services on the Community Development Office Expansion project. Phase 1 consisted of constructing a new concrete block and stucco 5,000 SF addition onto the Community Development building. Phase 2 consisted of interior renovations to the existing 17,931 SF Community Development building. Managing the end users to maintain the project schedule while keeping the building operational during construction proved to be a challenge for the team. To solve this, Wharton-Smith’s team facilitated end user scope and scheduling meetings that allowed the team to keep the project on task as required per the contract. Local Participation (based on 1 hour driving radius) was 81%.

Project Owner

Charlotte County, FL
18500 Murdock Circle
Port Charlotte, FL 33948
Travis Perdue
P: 941-764-4130
E: travis.perdue@charlotte-countyfl.gov

Size and Project Type

5,000 SF Renovation

Contracted Completion Date

3/2019

Construction Cost

\$2,524,500

Key Personnel

Caryn Huff
Project Manager

Doug Whisler
Sr. Project Superintendent





City of North Port Fire Training Tower

North Port, FL

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

Project Owner

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

Size and Project Type

8,000 SF New Construction

Completion Date

6/2022

Construction Cost

\$1,400,000

Key Personnel

Caryn Huff
Project Executive
Chuck Hardwick
Project Manager
Mark Jackson
Project Superintendent
Doug Whisler
Area Superintendent
Mike Schreiber
Project Engineer





#4

Charlotte County Justice Center Reroof

Port Charlotte, FL

Wharton-Smith was hired to perform overall design-build services to address the ongoing moisture mitigation issues associated with the existing Justice Center facility. To work around the daily event schedule, our team engaged in a non-destructive forensic study of the existing building components to identify the causes associated with the reported moisture intrusion, air infiltration and subsequent air quality, energy efficiency, and possible life safety issues presented. We evaluated, through non-destructive observations of the building's exterior and interior, the building walls, roof, windows, ceiling plenum spaces, and mechanical rooms.

The final report included documentation of the findings, recommendations for repairs, and the cost estimates for those repairs. WS performed the repairs via a complete tear-off and re-roof of the four-story structure.

Project Owner

Charlotte County, FL
18500 Murdock Circle, Bldg. D
Port Charlotte, FL 33948
Jenny Buccieri
P: 941-743-1995
E: jenny.buccieri@charlotte
countyfl.gov

Size and Project Type

50,650 SF Design-Build

Completion Date

6/2020

Construction Cost

\$2,575,293

Key Personnel

Caryn Huff
Sr. Project Manager
Doug Whisler
Area Superintendent
Mark Jackson
Project Superintendent
Jay Coker
Project Superintendent





Project Similarities
 CMAR Delivery
 Occupied Site
 Under \$4 M
 Same Project Team
 Renovations
 Expansion Project

#5
Charlotte Sports Park - Tampa Bay Rays Spring Training Renovations

Port Charlotte, FL

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.

Project Owner
 Tampa Bay Rays
 One Tropicana Drive
 St. Petersburg, FL 33705
 Robbie Artz
 P: 727-825-3274
 E: rartz@raysbaseball.com

Size and Project Type
 4,800 SF Addition
 5,874 SF Renovation

Completion Date
 2/2020

Construction Cost
 \$2,257,780

Key Personnel
 Caryn Huff
 Sr. Project Manager
 Doug Whisler
 Sr. Project Superintendent
 Mark Jackson
 Project Superintendent
 Jay Coker
 Project Superintendent



4

REFERENCES

REFERENCES

Nick Herlihy, Deputy Chief

City of North Port
941-240-8160 | nherlihy@northport.gov

Justin Dunn, Project Manager

Charlotte County Facilities
justin.dunn@charlottecountyfl.gov

Adam Walter, Project Manager

Charlotte County Schools
Adam.walter@yourcharlotteschools.net

Evangelina Dipiazza, Business Services Supervisor

Charlotte County Community Development
Evangelina.dipiazza@charlottecountyfl.gov

Please see our completed Reference Form under Tab 6.


5

LITIGATION AND INSURANCE

Litigation and Insurance

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

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

Client#: 706782		WHARTINC		DATE (MM/DD/YYYY) 12/06/2022			
ACORD™		CERTIFICATE OF LIABILITY INSURANCE					
<p>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.</p> <p>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).</p>							
PRODUCER Marsh & McLennan Agency Bouchard Region 1 N. Dale Mabry Hwy, Suite #450 Tampa, FL 33609			CONTACT NAME: Certificate Department PHONE (A/C, No, Ext): 727 447-6481 FAX (A/C, No): EMAIL ADDRESS: certificates@bouchardinsurance.com				
INSURED Wharton-Smith, Inc. 750 Monroe Road Sanford, FL 32771			INSURER(S) AFFORDING COVERAGE INSURER A : Amerisure Insurance Company NAIC # 19488 INSURER B : Amerisure Mutual Insurance Company 23396 INSURER C : Berkley Assurance Company 39462 INSURER D : XL Specialty Insurance 37885 INSURER E : Amerisure Partners Insurance Company 11050 INSURER F :				
COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:							
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.							
INSR LTR	TYPE OF INSURANCE	ADDITIONAL INSURED	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"/> PROJECT <input checked="" type="checkbox"/> LOC OTHER:	Y	Y	GL20361081701	04/01/2022	04/01/2023	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	<input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRE AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	Y	Y	CA20361071705	04/01/2022	04/01/2023	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 type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$0	Y	Y	CU21171470101	04/01/2022	04/01/2023	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$
B	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/A	WC203610916	04/01/2022	04/01/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
D	Rented Equipment	Y	UM00024961MA22A	04/01/2022	04/01/2023	2,500,000	
C	Pollution Liab	Y	PCADB50178540422	04/01/2022	04/01/2023	5,000,000	
C	Professional Liab	Y	PCADB50178540422	04/01/2022	04/01/2023	5,000,000	
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) PROJECT: RFQ # 2023-17 Construction Management Services - Continuing Services Contracts for City of North Port COMPLETE CERTIFICATE HOLDER(S) & ADDITIONAL INSURED(S): City of North Port and any other entity as required by written contract or agreement and subject to the terms, conditions and exclusions as specified in the policies. (See Attached Descriptions)							
CERTIFICATE HOLDER			CANCELLATION				
City of North Port Geoff Thomas, Contract Administrator I 4970 City Hall Boulevard Suite 337 North Port, FL 34286			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 				
© 1988-2015 ACORD CORPORATION. All rights reserved.							
ACORD 25 (2016/03) 1 of 2		The ACORD name and logo are registered marks of ACORD		RCJTF			
#S12073318/M10619274							



6

REQUIRED SUBMITTAL FORMS

*CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT*

-
- Engineer’s Opinion of Probable Construction Cost
 - Final construction cost of the project.

TAB 5 - LITIGATION AND INSURANCE: Have you been involved in litigation in the last five (5) years? If so, describe circumstances and outcome. The proposer shall advise the amount of liability insurance you have.

TAB 6 – SUBMISSION REQUIREMENTS AND REQUIRED SUBMITTAL FORMS: This checklist is provided to assist each Proposer in the preparation of their response. Included in this checklist are important requirements, which is the responsibility of each Proposer to submit with their response in order to make their response fully compliant. This checklist is a guideline which is to be executed and submitted with the required forms. It is the responsibility of each Proposer to read and comply with the solicitation in its entirety.

A. REQUIRED SUBMITTAL FORMS: Provide fully executed forms.

ATTACHMENT 1: Proposal Submittal Signature Form

ATTACHMENT 2: Statement of Organization

ATTACHMENT 3: References – Consultant is to contact the references and advise his/her references that the City will be sending an e-mail and reference form which needs to be completed and e-mailed back to the City in a timely fashion.

ATTACHMENT 4: Drug-Free Workplace

ATTACHMENT 5: Public Entity Crime Information

ATTACHMENT 6: Non-Collusive Affidavit

ATTACHMENT 7: Lobbying Certification

ATTACHMENT 8: Conflict of Interest Form

ATTACHMENT 9: Disclosure Form (Consultant/Engineer/Architect)

ATTACHMENT 10: Scrutinized Company Certificate

ATTACHMENT 11: Vendor’s Certification For E-Verify System

ATTACHMENT 12: Certification by Bidder

ATTACHMENT 13: Certification Regarding debarments, suspension, and other responsibility matters primarily covered transactions Form

ATTACHMENT 14: Certifications and Representations Form

CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

ATTACHEMENT 15: Acknowledgment of Terms, Conditions, and Grant Clauses Form

ATTACHEMENT 16: Federal Non-Collusion/Lobbying Certification

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 by the State of Florida, Department of Management Services, Office of Supplier Diversity pursuant to Section 287.0943, Florida Statutes.

YES, CLAIMING STATUS AS PRIME ONLY

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

NOT CLAIMING MBE/WBE /VBE

PLEASE INITIAL AND RETURN WITH YOUR PROPOSAL. TI
INITIALS

THIS PAGE MUST BE COMPLETED AND SUBMITTED

THIS PAGE MUST BE COMPLETED AND SUBMITTED

A. SUBMITTAL REQUIREMENTS

1. NUMBER OF PAGES: SECTION III of the proposal **shall not exceed (22) pages (one-sided) or (11) pages (two-sided)** in length. **(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.

2. PAPER/FONT SIZE: 8.5”x11”/Font Calibri 11, PDF FORMAT.

3. NUMBER OF ORIGINAL PROPOSALS: One (1) original hard-copy **UNBOUND** (marked “ORIGINAL”) and signed in blue ink. **NUMBER OF COPIES:** four (4) hard-copies **BOUND** (marked “COPY”). **(1 original + 4 copies = 5 total submittals).**

4. USB Flash Drive: One (1) electronic version in Portable Document Format (PDF) **on a Flash Drive**

CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

containing the entire submittal. CDs are not acceptable.

B. REQUIRED SUBMITTAL FORMS

**READ/EXECUTED
& INCLUDED**

Submittal Signature Form

Statement of Organization

References

Drug-Free Workplace (If Applicable)
 YES NO

Public Entity Crime Information
 YES NO N/A

Non-Collusive Affidavit

Conflict of Interest Form

Disclosure Form for Consultant/Architect/Engineer

No Lobbying Affidavit

Scrutinized Companies

State of Florida Registration Requirements (<http://www.sunbiz.org/search.html>)
Proposer shall be registered with the State of Florida to perform the professional services required for this proposal. A copy of Registration must be included with submission.

Copy of Registration, Attached

State required license for Prime Firm Only (Not sub-consultants)

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.

YES NO Sample Insurance Certificate is included with the submittal

MBE/WBE/VBE: If claiming Minority Business Enterprise/Women Business Enterprise/Veterans Business Enterprise, the Prime Firm (not sub-consultant) **shall be** certified as a Minority Business Enterprise by the State of Florida, Department of Management Services, Office of Supplier Diversity pursuant to Section 287.0943, Florida Statutes.

YES, CLAIMING MBE/WBE/VBE STATUS AS PRIME ONLY

CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

- YES, I'VE ATTACHED THE CERTIFICATE OF MBE/WBE/VBE STATUS FROM THE STATE OF FLORIDA AS OUTLINED SECTION 12.
- NOT CLAIMING MBE/WBE/VBE

~~THIS PAGE MUST BE COMPLETED AND SUBMITTED WITH YOUR PROPOSAL~~

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 11/30/22 Addendum No. _____ Dated _____
 Addendum No. 2 Dated 12/12/22 Addendum No. _____ Dated _____
 Addendum No. _____ Dated _____ Addendum No. _____ Dated _____

Company Name Wharton-Smith, Inc.

<u>813.288.0068</u>	<u>tiarossi@whartonsmith.com</u>	<u>813.288.0371</u>
Telephone #	E-Mail	Fax #


750 Monroe Road
Main Office Address

<u>Sanford</u>	<u>FL</u>	<u>32771</u>
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

CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

North Port	FL	34288
City	State	Zip Code
941.621.4723	chuff@whartonsmith.com	N/A
Telephone #	E-mail	Fax #
Tom Iarossi, VP, West Coast FL Commercial		
Name & Title of Firm Representative		12/16/2022
		Date
Signature		

Do you accept Visa? YES NO

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

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: N/A

E-Mail chuff@whartonsmith.com

Print Name and Title of person authorized to bind: Tom Iarossi, VP, West Coast FL Commercial

Federal Identification Number: 59-2392802

Signature: 

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

(Please Check One)

Is this a Florida Corporation: Yes or No

If not a Florida Corporation,
In what state was it created: N/A

CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

Name as spelled in that State: N/A

What kind of corporation is it: "For Profit" or "Not for Profit"

Is it in good standing: Yes or No

Authorized to transact business in Florida: Yes or No

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

Does it use a registered fictitious name: Yes or No

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

Names of Officers:

President: Timothy S. Smith Secretary: Stephanie L. Pompeo

CEO: Ronald F. Davoli Treasurer: Ronald F. Davoli

COO, Water: Patrick J. Hewitt COO, Commercial: Darin A. Crafton

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:

Post Office Box: _____

City, State Zip: _____

Street Address: 750 Monroe Road

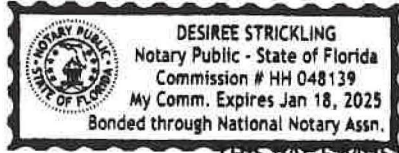
City, State, Zip: Sanford, FL 32771

STATE OF Florida
COUNTY OF Sarasota

Sworn to and subscribed before me this 16th day of December, 2023, by Tom Iarossi, who is personally known to me or has produced his/her driver's license as identification.

Desiree Stibitz
Notary Public - State of Florida

CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT



Print Name: Desiree Strickling
Commission No: HH 048139

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

REFERENCES/CLIENT LISTING

The firm shall provide a minimum of five (5) business related references for which they are currently providing or have provided within the last ten (10) years, services similar to the scope of services required by this RFP). A minimum of three (3) references must be for work performed in Florida. Attach additional sheets if necessary.

1. Business/Customer Name: City of North Port

Name of Contact Person/Title: Nick Herlihy, Deputy Chief

Telephone# 940-240-8160 Fax N/A E-mail nherlihy@northportfl.gov

Address 4980 City Center Blvd., North Port, FL 34286

Duration of Contract or business relationship (include project completion date) 1 year / In progress

Type of Services Provided General Contractor Total Cost \$1,500,000

2. Business/Customer Name: Charlotte County Facilities

Name of Contact Person/Title: Justin Dunn, Project Manager

Telephone# _____ Fax N/A E-mail justin.dunn@charlottecountyfl.gov

Address 18500 Murdock Circle, Bldg. B, Port Charlotte, FL 33948

Duration of Contract or business relationship (include project completion date) 3 ½ years (March 2019)

Type of Services Provided CM at Risk Total Cost \$2.6 M

3. Business/Customer Name: Charlotte County Schools

Name of Contact Person/Title: Adam Walter, Project Manager

Telephone# _____ Fax N/A E-mail adam.walter@yourcharlotteschools.net

Address 1029 Carmalita Street, Punta Gorda, FL 33950

Duration of Contract or business relationship (include project completion date) 1 year / In progress

Type of Services Provided CM at Risk Total Cost various

COMPANY NAME: Wharton-Smith, Inc.


SIGNATURE: _____

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

4. Business/Customer Name: Charlotte County Community Development
Name of Contact Person/Title: Evangelina Dipiazza, Business Services Supervisor
Telephone# _____ Fax N/A E-mail evangelina.dipiazza@charlottecountyfl.gov
Address 18400 Murdock Circle, Port Charlotte, FL 33948
Duration of Contract or business relationship (include project completion date) 10 years (March 2019)
Type of Services Provided CM at Risk Total Cost \$2.6 M

5. Business/Customer Name: _____
Name of Contact Person/Title: _____
Telephone# _____ Fax _____ E-mail _____
Address _____
Duration of Contract or business relationship (include project completion date) _____
Type of Services Provided _____ Total Cost _____

COMPANY NAME: Wharton-Smith, Inc.
SIGNATURE: 

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

DRUG FREE WORKPLACE FORM

The undersigned Consultant in accordance with Florida Statute 287.087 hereby certifies that
Wharton-Smith, Inc. does:
(Company Name)

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

Check one:

- As the person authorized to sign this statement, I certify that this firm complies fully with above requirements.
- As the person authorized to sign this statement, this firm **does not** comply fully with the above requirements.



Offeror's Signature

12/16/2022

Date

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

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.

I, Tom Iarossi, being an authorized representative of the Respondent, Wharton-Smith, Inc., located at 2525 Bobcat Village Center Road, Unit 105
City: North Port State: FL Zip Code: 34288, have read and understand the contents above. I further certify that Respondent is not disqualified from replying to this solicitation because of F.S. §287.133.

Signature:  Date: 12/16/2022

Telephone #: 941.621.4723 Fax #: N/A

Federal ID #: 59-2392802

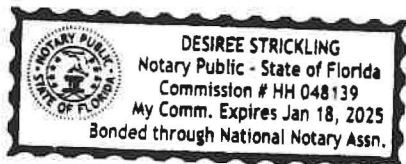
STATE OF Florida
COUNTY OF Sarasota

Sworn to and subscribed before me this 16th day of December, 2023, by Tom Iarossi who is personally known to me or has produced his/her driver's license as identification.


Notary Public - State of Florida

Print Name: Desiree Strickling

Commission No: HH 048139



THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

NON-COLLUSIVE AFFIDAVIT

State of Florida
County of Sarasota } SS.

Before me, the undersigned authority, personally appeared:
Tom Iarossi who, being first duly sworn, deposes and says that:

1. He/She is the Officer (Owner, Partner, Officer, Representative or Agent) of Wharton-Smith, Inc., the Respondent that has submitted the attached reply;
2. He/She is fully informed respecting the preparation and contents of the attached reply and of all pertinent circumstances respecting such reply;
3. Such reply is genuine and is not a collusive or sham reply;
4. Neither the said Respondent nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other respondent, firm, or person to submit a collusive or sham reply in connection with the work for which the attached reply has been submitted; or have in any manner, directly or indirectly sought by agreement or collusion, or communication or conference with any respondent, firm, or person to fix the price or prices in the attached reply or of any other respondent, or to fix any overhead, profit, or cost elements of the reply price or the reply price of any other respondent, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the reply work.

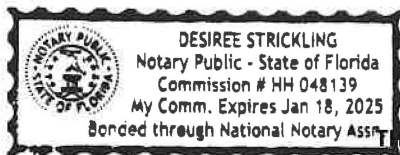
Signed, sealed and delivered this 16th day of December, 2023.

By: Tom Iarossi

Tom Iarossi
(Printed Name)
VP, West Coast FL Commercial
(Title)

STATE OF Florida
COUNTY OF Sarasota

Sworn to and subscribed before me this 16th day of December, 2023, by Tom Iarossi who is personally known to me or has produced his/her driver's license as identification.



Desiree Strickling
Notary Public - State of Florida
Print Name: Desiree Strickling
Commission No: HH 048139

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

CONFLICT OF INTEREST FORM

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

PART I.

- I am an employee, public officer or advisory board member of the City
_____ (List Position Or Board)
- I am the spouse or child of an employee, public officer or advisory board member of the City
Name: _____
- An employee, public officer or advisory board member of the City, or their spouse or child, is an officer, partner, director, or proprietor of Respondent or has a material interest in Respondent. "Material interest" means direct or indirect ownership of more than 5 percent of the total assets or capital stock of any business entity. For the purposes of [§112.313], indirect ownership does not include ownership by a spouse or minor child.
Name: _____
- Respondent employs or contracts with an employee, public officer or advisory board member of the City
Name: _____
- None Of The Above

PART II:

Are you going to request an advisory board member waiver?

- I will request an advisory board member waiver under §112.313(12)
- I will NOT request an advisory board member waiver under §112.313(12)
- N/A

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

COMPANY: Wharton-Smith, Inc. _____

SIGNATURE:  _____

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

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.

BUSINESS NAME: Wharton-Smith, Inc.

NAME (PERSON AUTHORIZED TO BIND THE COMPANY): Tom Iarossi

SIGNATURE:  DATE: 12/16/2022

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES - CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

LOBBYING CERTIFICATION

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

STATE OF FLORIDA

COUNTY OF SARASOTA

This 16th day of December of 20 23

Tom Iarossi, being first duly sworn, deposes and says that he or she is the authorized representative of Wharton-Smith, Inc. (Name of the contractor, firm or individual), and that the vendor and any of its agents agree to have no contact or communication with, or discuss any matter related in any way to any active City of North Port solicitation, with any City of North Port elected officials, officers, their appointees or their agents or any other staff or outside individuals working with the city in respect to this request other than the designated Procurement Official Contact and to abide by the restrictions outlined in the General Terms and Conditions of the Solicitation. Technical questions directed to the project manager, is prohibited. These persons shall not be lobbied, either individually or collectively, regarding any questions for bid, proposal, qualification and/or any other solicitations released by the city. To do so is grounds for immediate disqualification from the selection process. The selection process is not considered final until such a time as the Commission has made a final and conclusive determination.

(a) No City appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence either directly or indirectly an officer or employee of the City, City Commission in connection with the awarding of any City Contract.

(b) If any funds other than City appropriated funds have been paid or will be paid to any person for influencing or attempting to influence a member of City Commission or an officer or employee of the City in connection with this contract, the undersigned shall complete and submit Standard Form-L "Disclosure Form to Report Lobbying", in accordance with its instructions.

Signed, sealed and delivered this 16th day of December, 20 23.

By: [Signature]

Tom Iarossi
(Printed Name)
VP, West Coast FL Commercial
(Title)

STATE OF Florida
COUNTY OF Sarasota

Sworn to and subscribed before me this 16th day of December, 20 23, by Tom Iarossi who [X] is personally known to me or [] has produced his/her driver's license as identification.



[Signature]
Notary Public - State of Florida
Print Name: Desiree Strickling
Commission No: HH 048139

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL



CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

Scrutinized Company Certification Form

Company Name: Wharton-Smith, Inc.

Authorized Representative Name and Title: Tom Iarossi, VP, West Coast FL Commercial
2525 Bobcat Village Center

Address: Road, Unit 105 City: North Port State: FL ZIP: 34288

Phone Number: 941.621.4723 Email Address: tiarossi@whartonsmith.com

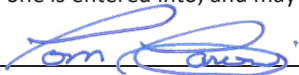
A company is ineligible to, and may not, bid on, submit a proposal for, or enter into or renew a contract with the City of North Port for goods or services of any amount if, at the time of bidding on, submitting a proposal for, or entering into or renewing such contract, the company is on the Scrutinized 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 bid, proposal, 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: 
AUTHORIZED REPRESENTATIVE SIGNATURE

Print Name and Title: Tom Iarossi, VP, West Coast FL Commercial

Date Certified: 12/16/2022

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

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

CERTIFICATION BY BIDDER

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

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

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

NAME AND ADDRESS OF BIDDER (include ZIP Code): Wharton-Smith, Inc.
2525 Bobcat Village Center Road, Unit 105, North Port, FL 34288

1. Bidder has participated in a previous contract or subcontract subject to the Equal Opportunity Clause. Yes No
2. Compliance reports were required to be filed in connection with such contract or subcontract. Yes No
3. bidder has filed all compliance reports due under applicable instructions. Yes No
4. Have you ever been or are you being considered for sanction due to violation of Executive Order 112246, as amended? Yes No

Signed, sealed and delivered this 16th day of December, 2023.

By: [Signature]

Tom Iarossi
(Printed Name)
VP, West Coast FL Commercial
(Title)
STATE OF Florida
COUNTY OF Sarasota

Sworn to and subscribed before me this 16th day of December, 2023, by Tom Iarossi who is personally known to me or has produced his/her driver's license as identification.

[Signature]
Notary Public - State of Florida
Print Name: Desiree Strickling
Commission No: HH 048139

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL



CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

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

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

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

(a) is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions, as defined in 49 CFR s29.110(a), by any federal department or agency;

(b) has within a three-year period preceding this certification been convicted of or had a civil judgment rendered against it for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state, or local government transaction or public contract; violation of federal or state antitrust statutes; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

(c) is presently indicted for or otherwise criminally or civilly charged by a federal, state, or local governmental entity with commission of any of the offenses enumerated in paragraph (b) of this certification; and

(d) has within a three-year period preceding this certification had one or more federal, state, or local government public transactions terminated for cause or default.

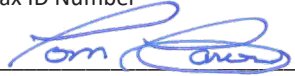
The Bidder certifies that it shall not knowingly enter into any transaction with any subcontractor, material supplier, or vendor who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this project by any federal agency unless authorized by the City of North Port.

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

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

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

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

<u>Wharton-Smith, Inc.</u>	<u>59-2392802</u>	<u>11-512639</u>
Company (Bidder) Name	Tax ID Number	DUNS Number
<u>Tom Iarossi</u>		
Authorized Representative Name	Authorized Representative Signature	

<u>59-2392802</u>	<u>11-512639</u>	<u>0P3Y5</u>
Federal Issued Tax Identification Number (If Social Security number DO NOT enter)	DUNS Number	CAGE Code issued through www.sam.gov
		DATE: <u>12/16/2022</u>

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL



CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

CERTIFICATIONS AND REPRESENTATIONS
(GRANTFUNDS)

1. BYRD ANTI-LOBBYING AMENDMENT COMPLIANCE AND CERTIFICATION

For all orders above the limit prescribed in 2 CFR 215, Appendix A, Section 7 (currently \$100,000), the Offeror must complete and sign the following:

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

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

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

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

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

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

SIGNATURE:  _____

COMPANY NAME: Wharton-Smith, Inc.

DATE: 12/16/2022

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

*CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT*

ACKNOWLEDGEMENT OF TERMS, CONDITIONS, AND GRANT CLAUSES


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

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

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

Grant Conditions and Federal Provisions

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

SIGNATURE:  _____
COMPANY NAME: Wharton-Smith, Inc. _____
DATE: 12/16/2022 _____

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT

FEDERAL NON-COLLUSION / LOBBYING CERTIFICATION

Tom Iarossi, being the authorized Agent, certifies that: He/she is the Officer (Owner, Partner, Officer, Representative or Agent) of Wharton-Smith, Inc., the Bidder that has submitted the attached Proposal.

NON-COLLUSION PROVISION CERTIFICATION

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

LOBBYING CERTIFICATION

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

(a) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence either directly or indirectly an officer or employee of any state or federal agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal Contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(b) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with this Federal contract, grant loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-L “Disclosure Form to Report Lobbying”, in accordance with its instructions.

(c) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into.

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

Desiree Strickling

By: Tom Iarossi
Tom Iarossi



*CITY OF NORTH PORT
REQUEST FOR PROPOSAL NO. 2023-17
Construction Management SERVICES – CONTINUING SERVICES CONTRACTS FOR CITY OF NORTH PORT*

Witness

(Printed Name)
VP, West Coast FL Commercial

(Title)

THIS PAGE MUST BE SUBMITTED WITH PROPOSAL

END OF PART IV

Client#: 706782

WHARTINC

ACORD

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
12/06/2022

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

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


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

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

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

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	Y	Y	GL20361081701	04/01/2022	04/01/2023	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	Y	Y	CA20361071705	04/01/2022	04/01/2023	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 EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$0	Y	Y	CU21171470101	04/01/2022	04/01/2023	EACH OCCURRENCE \$5,000,000 AGGREGATE \$5,000,000 \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y <input checked="" type="checkbox"/> N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y	N/A	WC203610916	04/01/2022	04/01/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
D	Rented Equipment			UM00024961MA22A	04/01/2022	04/01/2023	2,500,000
C	Pollution Liab	Y		PCADB50178540422	04/01/2022	04/01/2023	5,000,000
C	Professional Liab			PCADB50178540422	04/01/2022	04/01/2023	5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
PROJECT: RFQ # 2023-17 Construction Management Services - Continuing Services Contracts for City of North Port
COMPLETE CERTIFICATE HOLDER(S) & ADDITIONAL INSURED(S): City of North Port and any other entity as required by written contract or agreement and subject to the terms, conditions and exclusions as specified in the policies.
(See Attached Descriptions)

CERTIFICATE HOLDER	CANCELLATION
City of North Port Geoff Thomas, Contract Administrator I 4970 City Hall Boulevard Suite 337 North Port, FL 34286	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 

© 1988-2015 ACORD CORPORATION. All rights reserved.



DESCRIPTIONS (Continued from Page 1)

Certificate holder is additional insured as respects General Liability, Automobile Liability, Pollution Liability and Umbrella only if required by written contract, and subject to the terms, conditions and exclusions as specified in the policies.

Coverage is primary as respects to General Liability & Automobile Liability and non-contributory as subject 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 policy follows the forms/endorsements of the underlying General Liability, Automobile Liability and Workers Compensation policies.

Blanket Loss Payee applies for Rented and Leased Equipment.

Rented and Leased Equipment deductible:

\$2,500 standard deductible.

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



Wharton-Smith, Inc.
CONSTRUCTION GROUP



2525 BOBCAT VILLAGE CENTER ROAD, UNIT 105
NORTH PORT, FL 34288



TEL: 941-621-4723



WWW.WHARTONSMITH.COM