

City of Venice

**RFQ #3056-17**

# Construction Management Services for the City of Venice Water Treatment Plant Building Improvements

March 8, 2017



**Wharton-Smith, Inc.**  
CONSTRUCTION GROUP

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Skyline of Venice, Italy

City of Venice, Florida  
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Venice, Florida 34285



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www.whartonsmith.com

March 8, 2017

**Re: Request for Qualifications #3056-17 Construction Management Services for City of Venice Water Treatment Plant Building Improvements**

Dear Members of the Selection Committee:

Wharton-Smith, Inc. is pleased to submit our qualifications for Construction Management Services to the City of Venice for its Water Treatment Plant Building Improvements project. Wharton-Smith has assembled an exceptionally experienced team best suited to achieve the goals and expectations of the City of Venice for this project. Our proposed key personnel have specific experience with not only Water Treatment Plants, but also with municipalities of similar size and with projects that incorporated similar architectural aesthetic elements that are crucial to conforming with the City's standards.

Wharton-Smith is a privately held corporation founded in 1984 and has been providing quality construction for more than 30 years. We have a proven track record for performance and leadership within the communities that we work. Our proposed team fully understands the scope and goals related to upgrading your existing facility and contributing to your beautiful city's aesthetic appeal. **Below is a summary of the key benefits our team brings to the City of Venice:**

**Experience with this building type**

Water Treatment Plant (WTP) Facilities involve many specialized systems, equipment, access protocols, and safety challenges. Our team has the specific experience you need with this type of facility. Our proposed Preconstruction Team, Nathan Hillard and John Lyons, have worked on multiple WTP projects and can guard the City against unforeseen costs or other issues that may arise relative to shutdowns and tie-ins while the building renovations take place.

**Qualified Team Leadership with highly relevant experience**

Our Client Manager, Johnny Santos was carefully chosen to lead the project due to his experience with renovation efforts on occupied campuses and his years of experience with the southwest Florida market. Johnny and the rest of the team have spent years managing phased projects, renovations and projects with very specific design guidelines. Our team understands the importance of your facility conforming with the City of Venice's architectural standards and many of them have built projects in almost the exact same aesthetic that the City of Venice strives for.

**Local presence and knowledge of the southwest Florida area**

Our Punta Gorda office is only minutes from your jobsite. Our team is highly available to the City of Venice and understands the community very well. We also have established a great working relationship with the local subcontracting and equipment supplier community. Several of our team members live in the area full-time and have a vested interest in the continuation of your City's architectural aesthetic and in the overall improvement of its most important public facilities.

Our entire team is excited about the opportunity to demonstrate our exceptional construction management talents to you and your colleagues. We look forward to being considered your 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 the project in greater detail in the near future.

Sincerely,

Tom Iarossi  
Area Manager, Wharton-Smith, Inc.



## 2. Project Team Qualifications and Key Personnel Experience

This section requires that the project team organizational chart, resumes and key personnel experience make the lines of communication and responsibility very clear as well as who the Client Manager is. Maximum points will be given to key personnel experience that is relevant to projects with governments of similar size to the City of Venice.

In addition, higher value will be given to a team that includes key personnel experience demonstrating the capability to perform all or most aspects of the project, and recent experience in Public Facility projects comparable to the proposed task. The quality of projects previously undertaken, and capability to complete projects on budget will also be considered.

### Our team is ready to serve the City of Venice...

On the following pages, we've included a project Organizational Chart, which identifies the Client Manager and all other key team members for the City of Venice's project.

We've also included detailed resumes, which demonstrate the highly relevant experience of our team members. We deliberately selected this proposed team based on their ability to perform the various aspects of the project, their recent experience working with Public Facility projects comparable to yours, and their past success working together as a collaborative team. We're confident this group of professionals can hit the ground running and deliver your project on time, on budget and with no surprises. **We guarantee that we'll exceed your expectations.**



St. Leo University Student Community Center  
St. Leo, FL

# Qualifications of our team

We've carefully selected the proposed team members based on their specific expertise with Public Facility projects, their history of collaboration and their availability to serve your needs. Below we've included an Organizational Chart to illustrate the connections between our team, your assigned Client Manager and to summarize the list of other key individuals that will be assigned to the City of Venice Water Treatment Plant (WTP) Building Improvements project.

## Staffing for your specific project needs...

We recognize that your Water Treatment Plant is occupied by staff and other personnel. We therefore anticipate that some aspects of the project may need to be completed on a phased basis, to accommodate schedules, safety or other issues. With that in mind, we have included Greg Shuryan as an additional Superintendent resource, to provide additional flexibility and supervision should the need arise.

Furthermore, Nathan Hillard, John Lyons, and Steve Green have years of experience specifically with Water Treatment Plants and understand your type of facility very well. They will use their expertise to plan for unforeseen issues that may occur and guard against any additional costs and/or delays. Our team, with its highly relevant experience, is the best possible solution for the City of Venice.



## Collaborative experience. The team you need.

Our collaborative team approach has many benefits to clients - including the inherent synergy of a group of professionals that work efficiently together to produce the highest quality results. We know that one of the keys to a project's success depends in part on the relationships between team members and stakeholders.

Our proposed personnel have years of highly relevant construction experience that's very similar to your project and have built relationships founded on efficient, clear communications. Our team has recent experience working collaboratively together on these (and other) projects:

Project Name	Gene Willett Precon Mgr, Tampa	Nathan Hillard Precon. Mgr. WWF	John Lyons S.E. VP, Precon.	Johnny Santos Sr. PM & Client Mgr.	Doug Whisler Sr. Superintendent	Tom Iarossi Area Manager	Mark Jackson Assist. Proj. Mgr.	Jennifer Newman Project Assistant	Steve Green Chief Safety Officer	Greg Shuryan Superintendent	David Pagan BIM Manager	Mike Christian Scheduler
E. Water Treatment Plant Improvements Phase I		✓										✓
Southside Water Treatment Plant Expansion		✓							✓			
Orange County Southern Reg. Water Supply Facility		✓							✓			
Charlotte County Jail Infirmary	✓		✓	✓	✓	✓	✓	✓	✓		✓	✓
Charlotte County Flight Training Facility	✓		✓	✓	✓	✓	✓	✓	✓		✓	✓
City of Sanford Public Safety Complex									✓			
Pinellas County Public Safety Facility	✓			✓	✓				✓			
Charlotte County Jail Expansion, Phase I & II	✓			✓	✓							
City of Maitland Fire Station #45			✓						✓			
Charlotte Harbor Event & Conference Center					✓		✓			✓		
Boyette Elementary School Renovation						✓						
Windy Ridge K-8 School Addition & Renovation			✓						✓			
St. Leo University, Student Community Center						✓						



# Gene Willett

Preconstruction Manager, Commercial Division

## Key Qualifications

More than thirty years of experience with a wide variety of projects, including multiple County and City projects

## Education

Master of Business Administration, Florida Atlantic University

Bachelor of Arts, Florida Atlantic University

## Years of Experience

30+ yrs - total industry experience

Gene has more than thirty years of experience and works closely with owners, design teams and other stakeholders to ensure all necessary resources are supplied for the project, beginning with the preconstruction phase through project completion. Gene is responsible for the overall project leadership, the cost estimate, GMP development, and he'll work with the CM team to develop bid packages and determine best value recommendations. He will also lead the effort with constructability reviews, site utilization plans and scheduling reviews. Gene has the specific knowledge and know-how to support all aspects of the City of Venice's Water Treatment Plant Building Improvements project and will leverage his experience to benefit the project.

## Project Experience

- Charlotte County Jail Expansion Phase I & II, Punta Gorda, FL, \$37 million (both phases combined)
- Charlotte County Jail Infirmary, Port Charlotte, FL, 24,000-SF, \$7.8 million
- Charlotte County Jail Security Fencing, Port Charlotte, FL (\$1.2 million)
- Charlotte County Flight Training Facility, Punta Gorda, FL (\$1.5 million)
- Pinellas County Public Safety Facilities & Centralized Communications Center, Largo, FL, \$81 million
- Pasco County - multiple municipal projects delivered to the County
- Pinellas County Schools - Thurgood Marshall Middle School, \$21 million
- Pinellas County Schools - Oak Grove Middle School, \$23 million
- San Antonio Station – \$1.2 million
- Seven Springs – \$1.7 million
- Hillsborough County - \$1.2 million
- Raymond James Corporate HQ, Interior Renovations
- The Terraces at Bonita Springs

## Additional Qualifications -

**Gene is experienced in all of the following categories:**

- a. Water Treatment Plant Projects
- b. Budget Estimating and Cost Control
- c. Public Facilities and Commercial Renovation Projects
- d. Scheduling for phased projects
- e. Quality Control – design and construction
- f. Project Management from Preconstruction to Close-out
- g. Southwest Florida experience and local area knowledge



# Tom Iarossi

## Area Manager & Executive Review

Tom Iarossi brings 22 years of Construction Management experience to the City of Venice Water Treatment Plant Building Improvements project and will provide Executive Leadership to the CM team, championing Wharton-Smith's commitment to the City of Venice. Tom has completed multiple projects in the southwest florida region and knows the local market, communities and subcontractors very well.

As the Area Manager, Tom will ensure that the job is completed on time and to the City's satisfaction. During preconstruction, he will work with our Preconstruction team to provide input on bid packages, schedule, constructability reviews, value engineering and site logistics. Tom brings direct experience with the Italian Renaissance Architectural Style, through his past project at St. Leo University, that the City is desiring. Finally, Tom will ensure that Johnny Santos and his project team has the resources and personnel needed at all times to guarantee the project's success.

## Project Experience

- Charlotte County Jail Infirmary, Port Charlotte, FL, 24,000-SF (\$7.8 million)
- Charlotte County Flight Training Facility, Punta Gorda, FL (\$5 million)
- Charlotte County Jail Security Fencing, Port Charlotte, FL (\$1.2 million)
- St. Leo University, Student Community Center (\$16.2 million)
- Boyette Springs Elem. School Renovation, Riverview, FL (\$5.1 million)
- Federal Correctional Complex Coleman, FL (\$112 million) Design-Build
- Raymond James Corporate HQ, Interior Renovations
- Checked Baggage System Upgrades and Optimization, Hillsborough County Aviation Authority, Tampa, FL (\$60 million)
- MetWest International, ten-story, 265,000-SF, Tampa, FL (\$63 million)
- BayCare Health Systems Corporate Headquarters, 160,000-SF, three-story Clearwater, FL (\$27 million)
- Freedom Elem. School, Manatee Cty. School Dist., Bradenton, FL (\$12 million)
- McNeal Elementary School, Manatee County School District, Bradenton, FL (\$12 million)
- Southeast High School Additions and Renovations, Manatee County School District, Bradenton, FL (\$14 million)

## Additional Qualifications -

### Tom is experienced in all of the following categories:

- a. Project Executive - leadership of multiple teams/firms
- b. Budget Estimating and Cost Control
- c. Experience with Italian Renaissance Architectural Style
- d. Public Facilities and Commercial Renovation Projects
- e. Southwest Florida experience and local area knowledge
- f. Quality Control – design and construction
- g. Project Management from Preconstruction to Close-out

## Key Qualifications

Twenty-two years of experience, including multiple public facilities.

## Education

Masters of Building Construction, University of Florida, 2002

B.S. Business Marketing, Florida State University, 2000

## Years of Experience

22 yrs - total industry experience

## Certifications

Certified Building Contractor, St. of Florida, License No: CBC1252091

## Professional Affiliations

Board Director - Associated Builders & Contractors (ABC)

Board Treasurer / Co-Founder, ONBIKES, Inc.

Alumni - Leadership Tampa Bay, Tampa





# Nathan Hillard

Preconstruction Manager, Water / Wastewater Division

## Key Qualifications

Fourteen years of experience, including multiple water treatment plants and other public facilities.

## Education

B.S. Civil Engineering,  
University of Central  
Florida, 2006

## Years of Experience

14 yrs - total industry  
experience

## Certifications

40-Hour OSHA

Standard First Aid & CPR  
Certified

Nathan directs and manages the preconstruction process. He works closely with the owners and design teams to ensure all necessary resources are supplied for the preconstruction effort, beginning with the programming documents and schematic design phase. Nathan is responsible for the cost estimate, GMP development, value engineering, and works closely with the project team to develop the bid packages and determine best value recommendations. Nathan has the specific knowledge and know-how to support all estimating aspects of the City of Venice's Water Treatment Plant (WTP) Building Improvement project as required. He has worked on several WTP projects and understands the facility type very well. Due to his specific knowledge, he can provide valuable input during the budgeting process and guard against unforeseen costs. He also has direct contacts with local southwest Florida subcontractors and suppliers and has developed good relationships with the local community. Finally, Nathan has worked on numerous commercial renovation projects and has a keen eye for quality, aesthetics and attention to detail.

## Project Experience

- City of Miramar, East Water Treatment Plant Improvements, Miramar, FL (\$2.9 million)
- Orange County Southern Regional Water Supply, Orlando, FL (\$31.9 million)
- Marion Oaks Water Treatment Plant and Timberwalk Well Upgrades, Marion County Utilities, FL (\$4.5 million)
- On Top of the World Water Treatment Plant #3, Ocala, FL (\$11 million)
- St. Cloud Water Treatment Plant #4, St. Cloud, FL (\$26.7 million)
- Northeast Water Treatment Plant, Davenport, FL (\$34.9 million)
- Camelot Water Reclamation Facility Rehabilitation Phase 1A, Toho Water Authority, FL (\$6.7 million)
- S. Bermuda AOA Water Reclam. Facility, Toho Water Auth. FL (\$9.1 million)
- South Bermuda Water Reclamation Facility—Filters/Reuse Systems, Toho Water Authority, FL (\$4.4 million)
- Southwest Water Treatment Plant Ozone Facility, Toho Water Authority, FL (\$16.5 million, 10.6 MGD with 400 lbs/day generators)
- S. Bermuda Water Reclam. Facility, Actiflo, Toho Water Auth., FL (\$5 million)
- Country Club Water Treatment Plant, Seminole County, FL (\$23.2 million)
- South Bermuda Water Reclamation Facility Phase 2A, CMAR, Toho Water Authority, FL (\$4.3 million)
- Southern Regional Water Supply Facility, Orange County, FL (\$30.1 million)
- Greenwood Reclaim Plant Rerate Exp., Seminole County, FL (\$12.5 million)

## Additional Qualifications -

**Nathan is experienced in all of the following categories:**

- a. Budget Estimating and Cost Control
- b. Experience with multiple Water Treatment Plant & Public Facilities Projects
- c. Southwest Florida experience and local area knowledge
- d. Preconstruction Expertise



# John Lyons, LEED AP

Southeast Vice President of Preconstruction Services

## Key Qualifications

More than 40 years of experience with a wide variety of projects, including County and City projects. John has completed multiple water treatment, commercial renovation, and other public facilities projects.

## Education

Bachelor of Science, Civil Engineering, University of Central Florida

## Years of Experience

40 yrs - total industry experience

## Certifications

LEED Accredited Professional

John will be our Pre-Construction Services Manager for the City of Venice Water Treatment Plant Building Improvements project and will provide overall leadership. John will assist Nathan's team and present different options analysis, assist with design reviews, as well as lead value engineering and constructability analysis. John has more than 30 years of experience in all facets of the construction industry. He has worked on a wide variety of building types including water treatment plants, public facilities, and commercial renovations. John has the practical experience and knowledge to ensure accurate, realistic estimates and to value engineer projects to achieve the owner's budget objectives. John is well respected by Owners for collaborative, value-added approach to preconstruction.

## Project Experience

- Boyette Elementary School Renovation, Riverview, FL (\$5.1 million)
- Windy Ridge K-8 School Addition and Renovation, Orlando, FL (\$23 million)
- Charlotte County Event and Conf. Center, Punta Gorda, FL (\$19.6 million)
- Charlotte County Jail Infirmery, Port Charlotte, FL, 24,000-SF, (\$7.8 million)
- Charlotte County Flight Training Facility, Punta Gorda, FL (\$.5 million)
- Sanford Public Safety Complex (Police & Fire HQ), City of Sanford (\$16 million)
- Kissimmee Fire Station #11, City of Kissimmee (\$4.4 million)
- Casselberry Office Renovations, Casselberry, FL (\$771,000)
- John E. Polk Correctional Facility, Seminole County (\$33 million)
- Edward J. Doyle Police Building, City of Maitland (\$4.1 million)
- Fire Station #1 Headquarters Facility, City of Ocoee (\$2.4 million)
- Center for Public Safety, Seminole Community College (\$12 million)
- Uptown Altamonte Redevelopment, City of Altamonte Springs (\$25 million)
- Sheriff's Office & Public Safety Bldg., Seminole County (\$4 million)
- City of Sanford Riverwalk Phase I (\$10 million)
- Bethune Neighborhood Center, City of Haines City (\$4.7 million)

## Additional Qualifications -

### John is experienced in all of the following categories:

- a. Preconstruction Expertise – review and analysis
- b. Budget Estimating and Cost Control
- c. Experience with Water Treatment Plants and other Public Facilities
- d. Experience with Commercial Renovation Projects
- e. Quality Control – design and construction
- f. Scheduling phased projects
- g. Project Management throughout all Preconstruction phases





# Johnny Santos

Sr. Project Manager and Client Manager, City of Venice

## Key Qualifications

More than thirty years of experience with a wide variety of projects and expertise in public safety projects.

## Education

Electrical Workers  
Association, Camtech  
School of Construction

Specialized Commercial  
Electrical Training, Erwin  
Technical College

## Years of Experience

30 yrs - total industry  
experience

## Certifications

Class "A" General  
Contractor, St. of Florida,  
CGC1517519

Florida Qualified  
Class "B" Bldg. Contractor

Prolog – Construction  
Management Program

Electrical Workers Assoc.  
Certified Instructor

Electrical Journeyman

Low Voltage Cert. Installer

First Aid & CPR Certified

OSHA 30 Hour

Johnny has more than 30 years of professional experience in the construction industry. Johnny will provide direct management oversight for the Design-Build team. He provides continuity from preconstruction through the entire construction phase and ensures the appropriate resources are available for the project. He takes an active role in key milestone events in the preconstruction phase to include the partnering session, GMP development, value engineering, constructability and schedule review. Johnny oversees construction and leverages his experience and expertise to ensure the project remains on schedule and within budget. Finally, Johnny's experience with commercial renovations, phased projects and public facilities will greatly benefit the City of Venice's Water Treatment Building Improvements project.

## Project Experience

- Pinellas County Public Safety Facilities & Centralized Communications Center, Largo, FL, (\$81 million)
- Charlotte County Jail Expansion Phase I & II, Punta Gorda, FL, (\$37 million - both phases combined)
- Charlotte County Jail Infirmary, Port Charlotte, FL, 24,000-SF, (\$7.8 million)
- Charlotte County Flight Training Facility, Punta Gorda, FL (\$5 million)
- Charlotte County Jail Security Fencing, Port Charlotte, FL (\$1.2 million)
- Department of Corrections-Washington Correctional Institution Annex, Chipley, FL, (\$43 million)
- Dept. of Corrections-Lowell Correctional Inst. Phase II, Ocala, FL, (\$9 million)
- Raymond James Corporate HQ, Interior Renovations
- Highlands County School - Lake Placid Elem. School, Lake Placid, FL (\$3 million)
- Lake County Schools - Beverley Shores Elem. School, Leesburg, FL, (\$13 million)
- Fla. Atlantic University - Student Apartment Renovation, Boca Raton, FL, (\$4 million)
- The Glenview at Pelican Bay, Naples, FL, (\$8.3 million)
- The Terraces at Bonita Springs, Bonita Springs, FL
- Aqualea Condominium/Hotel Resort, Clearwater, FL
- Signature Place Residential Condominiums

## Additional Qualifications -

### Johnny is experienced in all of the following categories:

- a. Design Expertise – review and analysis
- b. Budget Estimating and Cost Control
- c. Experience with commercial renovations and public facilities
- d. Scheduling, phased projects
- e. Quality Control – design and construction
- f. Project involvement from Preconstruction to project Close-out





# Doug Whisler

## Senior Superintendent

Doug is located on-site full-time during the construction phase and is responsible for on-site activities. He supervises, sequences, coordinates and monitors all work to ensure that it is completed to the highest quality standards. Doug manages the day-to-day efforts of the subcontractor field staff to include all subcontractor meetings and pre-task planning. Also, he assumes a role in the pre-construction phase providing input and direction in the constructability reviews, logistics and safety planning. Doug ensures the jobsite is safe, clean and secure.

### Key Qualifications

Forty years of experience with a wide variety of projects, including commercial renovations, phased projects and multiple public facilities.

### Years of Experience

40 yrs - total industry experience

### Certifications

Certified General Contractor – Florida

OSHA 30 Hour Certified

CPR/First Aid Certified

Confined Space

Training: Fall Protection, Scaffolding, Trenching, Excavation.

Qualified Rigger & Flagger

HAZCOM & MOT

Forklift Operator

### Project Experience

- Charlotte County Jail Expansion Phase I & II, Punta Gorda, FL, (\$37 million - both phases combined)
- Charlotte County Event and Conf. Center, Punta Gorda, FL (\$19.6 million)
- Charlotte County Jail Infirmary, Port Charlotte, FL, 24,000-SF, (\$7.8 million)
- Charlotte County Flight Training Facility, Punta Gorda, FL (\$.5 million)
- Pinellas County Public Safety Facilities & Centralized Communications Center, Largo, FL, (\$81 million)
- Charlotte County Public Safety Building / Fire / EMS Vehicle Maintenance Facility, \$16 million, 50,000-SF, New facility housing Fire/EMS/Admin and Training, 911/211 and selected Sheriff's administrative personnel.
- Charlotte County Fire Station #8, 6,400-SF, Design-Build "Prototype" Fire Station
- Charlotte County Jail Security Fencing, Port Charlotte, FL (\$1.2 million)
- Charlotte County Fire Stations #13 & #14, two new fire stations
- Charlotte County Hurricane Relief - repair or rebuilding of more than 200 County-owned buildings and/or facilities after Hurricane Charley, working closely with FEMA and the County.
- Charlotte County Vehicle Maint. Facility
- Charlotte County Human Services/Walk-In Facility Clinic
- Raymond James Corporate HQ, Interior Renovations, Tampa, FL
- The Terraces at Bonita Springs, Bonita Springs, FL

### Additional Qualifications -

**Doug is experienced in all of the following categories:**

- a. Field and Subcontractor Management
- b. Schedule creation, monitoring and compliance
- c. Experience working with the proposed team members
- d. Design/Constructability Reviews
- e. Site Logistics Management
- f. Quality Assurance / Quality Control
- g. Project Safety Monitoring



# Mark Jackson, LEED

Assistant Project Manager

## Key Qualifications

Thirty years of experience with a wide variety of projects, including commercial renovations, phased projects and multiple public facilities.

## Education

B.S., Construction Management, Washington State University, 1998

B.S., Building Science, Auburn University, 1986

B.A., Business/Marketing & Management, Florida Southern College, 1981

## Years of Experience

30 yrs - total industry experience

## Certifications

Certified General Contractor

Mark is a licenced general contractor with over 30 years of experience in construction. As an Assistant Project Manager, Mark assists with bid packages, schedules, constructability reviews, value engineering, and site logistics during preconstruction. He is responsible for managing all construction activities, including interfacing with subcontractors and field superintendents, and scheduling. From working on multiple projects in the southwest Florida marketing, Mark has developed a close relationship with many businesses and suppliers in the local subcontracting community. Mark is highly experienced with commercial renovation projects and phased delivery, and through his direct participation with the construction of the Charlotte County Event Center, Mark gained valuable experience with the architectural style that the City of Venice is desiring for its Water Treatment Plant Building Improvements project.

## Project Experience

- Charlotte County Event and Conference Center, Punta Gorda, FL (\$19.6 million)
- Charlotte County Jail Infirmary, Port Charlotte, FL, 24,000-SF, (\$7.8 million)
- Charlotte County Flight Training Facility, Punta Gorda, FL (\$.5 million)
- Charlotte County Security Fencing, Port Charlotte, FL (\$1.2 million)
- Charlotte County Fire Station, Punta Gorda, FL
- Charlotte County Sheriff's Office, Punta Gorda, FL
- Charlotte County Human Services, Punta Gorda, FL
- Charlotte County EMS, Punta Gorda, FL
- Four Points Hotel by Sheraton, Punta Gorda, FL
- Bayshore Live Oak Park, Port Charlotte, FL
- South County Park, Punta Gorda, FL
- Carmalita Park, Punta Gorda, FL
- Oyster Creek Regional Park, Englewood, FL (\$17 million), 175 of 250 acre park, pool house with Olympic size pool, dog park, tennis courts, basketball court, football field, skate park, pavilions, hiking trails, bridge
- Rays Spring Training Facility, Tampa, FL

## Additional Qualifications -

**Mark is experienced in all of the following categories:**

- a. Field and Subcontractor Management
- b. Schedule creation, monitoring and compliance
- c. Experience working with the proposed team members
- d. Experience with commercial renovation and architectural style
- e. Site Logistics Management
- f. Quality Assurance / Quality Control
- g. Project Safety Monitoring



# Jennifer Newman

Project Assistant

As Project Assistant, Jennifer supports the Project Manager and all field personnel on the jobsite performing administrative duties including daily reports, owner and subcontractor meeting minutes, scheduling inspections, preparing AIA contracts and change orders, maintaining current Certificates of Insurance, preparing lien releases, maintaining calendar appointments, and coordinating meetings.

## Key Qualifications

More than twenty years of experience with a wide variety of projects, including commercial renovations, phased projects and multiple public facilities.

## Education

B.S., Electrical  
Engineering, Florida  
Atlantic University, 1988

## Years of Experience

21 yrs - total industry  
experience

## Project Experience

- Charlotte County Jail Infirmary, Port Charlotte, FL, 24,000-SF, (\$7.8 million)
- Charlotte County Flight Training Facility, Punta Gorda, FL (\$1.5 million)
- Dixon Mechanical, North Port, FL (\$3 million)
- Safety Harbour Elementary School, Pinellas County Schools, (\$361,456)
- Raymond James Phase II, Tampa, FL (\$1.5 million)

## Additional Qualifications -

### Jennifer is experienced in all of the following categories:

- a. Field and Subcontractor Management
- b. Schedule creation, monitoring and compliance
- c. Experience working with the proposed team members
- d. Experience with commercial renovation
- e. Site Logistics Management
- f. Quality Assurance / Quality Control
- f. Strong relationship with the local subcontracting community



# Steve Green

Chief Safety Officer

## Key Qualifications

Forty years of experience with a wide variety of projects, including commercial renovations, phased projects and multiple public facilities.

## Years of Experience

40 yrs - total industry experience

## Certifications

CSP - Board of Certification Safety Professionals, BCSP#14404

OSHA 500 Certification

CRIS - International Risk Management Institute

MSHA Instructor Certification Training

MOT Intermediate

Steve Green is Wharton-Smith's Chief Safety Officer and will serve as such on the City of Venice Water Treatment Plant Building Improvements project. Steve is responsible for all aspects of safety for Wharton-Smith including employee training, education and on-site inspections. He also monitors and updates Corporate Safety records monthly, and keeps current with all OSHA regulations. On the WTP Building Improvements project, Steve will lead the development and implementation of the site-specific safety and environmental plans and will ensure compliance with all Federal, State and Local regulations. Steve has worked with all members of the proposed team and has a great relationship with the southwest Florida construction community. He will leverage his relationships to ensure that the City of Venice's project is delivered safely and with the highest possible quality.

## Project Experience

- Orange County Southern Reg. Water Supply, Orlando, FL (\$31.9 million)
- St. Cloud Water Treatment Plant #4, St. Cloud, FL (\$26.7 million)
- Northeast Water Treatment Plant, Davenport, FL (\$34.9 million)
- City of Maitland Fire Station #45, City of Maitland (\$2.9 million)
- Charlotte County Jail Infirmary, Port Charlotte, FL, 24,000-SF, (\$7.8 million)
- Sanford Public Safety Complex (Police & Fire HQ), Sanford, FL (\$16 million)
- Windy Ridge K-8 School Addition and Renovation, Orlando, FL (\$23 million)
- Charlotte County Flight Training Facility, Punta Gorda, FL (\$.5 million)
- Charlotte County Security Fencing, Port Charlotte, FL (\$1.2 million)
- Casselberry Office Renovations, Casselberry, FL (\$771,000)
- Marion Oaks Water Treatment Plant and Timberwalk Well Upgrades, Marion County Utilities, FL (\$4.5 million)
- On Top of the World Water Treatment Plant #3, Ocala, FL (\$11 million)

## Additional Qualifications -

**Steve is experienced in all of the following categories:**

- a. Field and Subcontractor Safety Supervision
- b. OSHA compliance monitoring
- c. Experience working with the proposed team members
- d. Experience with commercial renovation and architectural style
- e. Experience with the southwest Florida area and subcontractors



# Greg Shuryan

## Superintendent

As Superintendent, Greg is located on-site full-time during the construction phase and is responsible for on-site activities. He is highly skilled in supervising, sequencing, coordinating and monitoring all work to ensure that it is completed to the highest quality standards. Greg manages the day-to-day efforts of the subcontractor field staff to include all subcontractor meetings and pre-task planning. Also, he assumes a role in the pre-construction phase providing input and direction in the constructability reviews, logistics and safety planning. Finally, Greg ensures the jobsite is safe, clean and secure. For the City of Venice's Water Treatment Plant Building Improvements project, Greg will provide assistance to Doug Whisler, if needed, with phasing various aspects of the project. Greg is available during the project to assist whenever needed.

### Key Qualifications

Twenty-eight years of experience with a wide variety of projects, including commercial renovations, phased projects and multiple public facilities.

### Years of Experience

28 yrs - total industry experience

### Certifications

OSHA 30-hour

CPR and First Aid Certified

### Project Experience

- Charlotte County Event and Conference Center, Punta Gorda, FL (\$19.6 million)
- Fire Stations #5 and #11, Charlotte County (\$2.4 million)
- Harbor Inn Resort & Marine Yacht Club, Punta Gorda, FL (\$8.9 million)
- Bayonet Point Middle School, Pasco County Schools (\$13 million)
- Eastside Elementary School, Hernando County Schools (\$577,000)
- Woodland Elementary School, Pasco County Schools (\$8 million)

### Additional Qualifications -

#### Greg is experienced in all of the following categories:

- a. Field and Subcontractor Management
- b. Schedule creation, monitoring and compliance
- c. Experience working with the proposed team members
- d. Design/Constructability Reviews
- e. Site Logistics Management
- f. Quality Assurance / Quality Control
- g. Project Safety Monitoring



# David Pagan

BIM Coordinator

## Key Qualifications

More than twenty-seven years of experience with a wide variety of projects, and has proven leadership with Wharton-Smith.

## Education

Technical Degree in CADD and Mechanical Design, The Plaza School of Design Paramus, NJ

## Years of Experience

27 yrs - total industry experience

## Certifications

Certificate of Management, Building Information Modeling (CM-BIM),

Associated General Contractors of America

## Software

Autodesk trained for: AutoCAD 2014, Fabrica- tion

CADmep, Navisworks Manage, Revit 2015

As BIM Coordinator, David works with the design team to develop 3D drawings and modeling, helps to coordinate work between the trades and identify potential problems early on in the job. He also creates submittal drawings, reviews specifications, provides design assistance, creates field installation shop drawings, tracks changes to field drawings, and provides as-built drawings at the end of the project. David is also involved in the creation of computer generated animations and renderings used in Wharton-Smith presentations.

As Virtual Construction Manager, David has a leadership role with Wharton-Smith's Drone Fleet program. In this role he is responsible for evaluating and specifying drones, drone data acquisition and processing software, and creating drone procedures.

## Project Experience

- Charlotte County Jail Infirmary, Port Charlotte, FL, 24,000-SF, (\$7.8 million)
- Charlotte County Flight Training Facility, Punta Gorda, FL (\$5 million)
- Millennium Middle School, Seminole County Public Schools (\$43 million)
- Universal Studios Project 727, Orlando, FL (\$26 million)
- Altamonte Springs RWRf Headworks, Altamonte Springs, FL
- Crisler Arena, University of Michigan, Ann Arbor, MI\* (\$38 million)
- Hawaii Pacific University, Aloha Tower, Honolulu, HI\* (\$50 million)
- Methodists Olive Branch Hospital, Olive Branch, TN \* (\$90 million)
- Dr. Georges Dumont Provincial Hospital, Moncton, New Brunswick, CA\* (\$104 million)
- Market Square Tower, Houston, TX\* (\$147 million)
- Caterpillar Axle Plant, Winston Salem, NC (\$426 million)
- Hancher Auditorium, University of Iowa, Iowa City, IA (\$132 million)
- Amegy Bank Headquarters, Houston, TX (\$136 million)

## Additional Qualifications -

### David is experienced in all of the following categories:

- a. Expertise with the most current BIM software and reporting options
- b. Wide variety of project sizes from less than \$1M, to more than \$426M
- c. Experience working with the proposed team members
- d. Design/Constructability Reviews
- e. Quality Assurance / Quality Control



# Michael Christian

Project Scheduler

Michael Christian has 28 years of experience in the industry, 12 of those being dedicated to scheduling theories and processes. As Project Scheduler, Michael will combine his technical expertise in Primavera P6 software with his in-depth knowledge of construction processes to develop, plan, setup, and maintain all aspects of the schedule throughout preconstruction and construction. He will interface directly with the project manager and superintendent to prepare and formulate the baseline schedule through all weekly updates. He will also assist with any scheduling issues including analysis of progress and fast tracking of projects.

## Key Qualifications

Twenty-eight years of experience with a wide variety of projects, including commercial renovations, phased projects and multiple public facilities.

## Education

B.S., Applied Science of Architectural Technology (Civil Engineering), New York Institute of Technology, 1987

## Years of Experience

28 yrs - total industry experience

## Registrations

Planning & Scheduling Professional Certifications,

Member, American Association of Cost Engineers (AACE)

## Project Experience

- City of Miramar, East Water Treatment Plant Improvements, Miramar, FL (\$2.9 million)
- Charlotte County Jail Infirmary, Port Charlotte, FL, 24,000-SF, (\$7.8 million)
- Charlotte County Flight Training Facility, Punta Gorda, FL (\$.5 million)
- Millennium Middle School, Seminole County Public Schools (\$43 million)
- Windermere High School, Orange County Public Schools (\$71 million)
- Lake Nona Middle School, Orange County Public Schools (\$28 million)
- Miami County Day School, Miami, FL\* (\$25 million)
- Universal Studios Project 727, Orlando, FL (\$26 million)
- SOF Brigade Headquarters, Fort Benning, GA\* (\$16 million)
- The Bond at Brickell, Miami, FL\* (\$160 million)
- Surf Club at Miami Beach, FL\* (\$230 million)

## Additional Qualifications -

### Michael is experienced in all of the following categories:

- a. Expertise with the most current Scheduling software & reporting options
- b. Wide variety of project sizes from less than \$1M, to more than \$230M
- c. Experience working with the proposed team members
- d. Project Phasing and Task Sequencing expertise
- e. Expertise with manpower-loaded schedules and crew monitoring
- f. Quality Assurance / Quality Control

### 3. Team Experience & References

This section of the RFQ deals with relevant and related experience and qualifications. Maximum points will be given to projects where the related experience and qualifications of the firm correlates directly with the project team members per the organizational chart and their resumes. In addition, higher value will be given to work performed for governments of a similar size to the City of Venice. Recent work experience will be weighted more heavily than historical experience. The team's reputation for professional integrity and competence will also be considered.

Provide a specific reference for contact by the City that can attest to the work performed by the consulting team member. One should anticipate that these references will be called and that the responses to these references will affect the awarding of points in this category.

#### Our similar & highly relevant project examples

On the following pages in this section, we provided examples of our past projects that demonstrate our abilities to manage your project. Our team is highly competent and ready to deliver the City of Venice's WTC Building Improvements project.



**City of Miramar, E. Water Treatment Plant Improvement**  
Miramar, FL



**City of St. Cloud Water Treatment Plant Expansion**  
St. Cloud, FL



**Orange County Southern Reg. Water Supply**  
Orlando, FL



**Charlotte County Jail Infirmary**  
Punta Gorda, FL



**Charlotte County Flight Training Facility**  
Punta Gorda, FL



**City of Sanford, Public Safety Complex**  
Sanford, FL



**Pinellas County Public Safety Facility**  
Largo, FL



**Charlotte County Jail Expansion Phase I & II**  
Punta Gorda, FL



**City of Maitland Fire Station #45**  
Maitland, FL



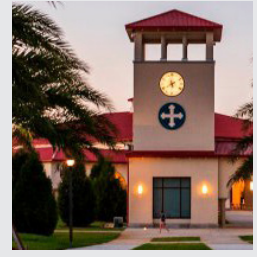
**Charlotte County Conference & Events Center**  
Punta Gorda, FL



**Boyette Elementary School Renovation**  
Riverview, FL



**Windy Ridge K-8 School Renovation & Addition**  
Orlando, FL



**St. Leo University Student Community Center**  
St. Leo, FL

## Water Treatment Plant Experience



### OWNER'S REPRESENTATIVE

City of Miramar  
Ronald Eyma P.E., Project Engineer  
13900 Pembroke Road, Bldg L  
Miramar, FL 33025  
PH: (954) 538-6806

### CONSTRUCTION COST

\$2,982,000

### SIZE

4,100 s.f.

## East Water Treatment Plant Improvements Phase IA City of Miramar, FL

### Key Relevancies

- Proposed project team member experience
- Architectural elements similar to City's Venetian Theme
- Similar Size municipality
- Water Treatment Plant
- Public facility
- Active/Occupied Campus

The centerpiece of the Phase IA Improvements project was construction of the 4,100 ft<sup>2</sup> "Mediterranean" style chemical treatment building. Arched doorways, Spanish tile roof, and other exterior architectural effects were required due to the location of the East Water treatment plant (nestled in a residential neighborhood). A second building with similar design enhancements was also part of the project. Process equipment improvements, substantial demolition, relocation of a pump station, and all associated electrical, controls, and site work made up the remainder of the contract work. The City was extremely pleased with our execution of the work and Wharton-Smith was recently selected as the design-builder for the \$25 Million expansion to this same facility to be completed in 2017-2018!



## Water Treatment Plant Experience



### OWNER'S REPRESENTATIVE

City of St. Cloud  
Chris Fasnacht, Deputy Dir. of Operations  
1300 Ninth Street  
St. Cloud, Florida 34769  
Ph: (407) 957-7104

### CONSTRUCTION COST

\$26,721,000

### SIZE

5,200 s.f. (Administration)  
6.0 MGD

### Our Clients Say it best...

*"As evidenced in the high quality of workmanship, Wharton-Smith is a company that takes pride in their work. We thank you for working with us and the City of St. Cloud on this project and providing the leadership to bring it to completion."*

— Thomas Friedrich, Vice President, Jones Edmonds, Project Architect

## Southside Wastewater Treatment Facility Expansion

City of St. Cloud, FL

### Key Relevancies

- Proposed project team member experience
- Similar Size municipality
- Water Treatment Plant
- Public facility
- Construction Management Project Delivery
- Active/Occupied Campus

Wharton-Smith acted as the Construction Manager at Risk on the Southside Wastewater Treatment Facility (WWTF) Expansion, which was a 6 MGD MLE treatment process WWTF. It included state-of-the-art grit removal, anoxic, fine bubble diffused aeration, clarification, cloth disc filtration and a 2-story administrative/office/lab building. The existing package plant structures were converted to digesters. The scope included the following underground pipe installation: approximately (2,200 LF) of 6-inch; (2,345 LF) of 8-inch; (100 LF) of 10- inch; (3,493 LF) of 16-inch to 24-inch; (697 LF) of 30-inch; (325 LF) of 36-inch; and (220 LF) of C900.



## Water Treatment Plant Experience



### OWNER'S REPRESENTATIVE

Orange County  
Board of County Commissioners  
Fernando Villanueva PMA Consultants  
9150 Curry Ford Road  
Orlando, Florida 32825  
Ph: (407) 509-7351

### CONSTRUCTION COST

\$31,946,000

### SIZE

30.0 MGD Capacity

## Southern Regional Water Supply Facility

Orlando, FL

### Key Relevancies

- Proposed project team member experience
- Water Treatment Plant
- Public facility

### Our Clients Say it best...

*"Wharton-Smith demonstrated an overall commitment to a successful project throughout the construction period. Their team approach to solving construction challenges encountered established a spirit of cooperation that extended through the life of the project."*

— Brad W. Vanlandingham, P.E., Senior Engineering Manager, Black & Veatch

Wharton-Smith provided General Contracting Services on the Southern Regional Water Supply Facility for Orange County Utilities. This project consisted of an ozone treatment system, ozone injection system, liquid oxygen system, canopy, and operations building, as well as other various building structures. Work also included six (6) well pumps, high service pump station, two (2) CAT 1750 KW diesel generators, medium voltage power system, pre-storage chemical feed system, post-storage chemical feed system, two (2) - 5 million gallon water storage tanks, more than 10,000 Linear feet of perimeter fencing, onsite lift station, 13,740 LF of 16"-48" ductile iron & stainless steel process piping, and site improvements (grade changes, storm ponds, landscaping, paved road system).



## Commercial & Public Facilities Experience



### OWNER'S REPRESENTATIVE

Charlotte County Government  
Roger Warner, Facilities Project  
Manager  
18500 Murdock Circle  
Charlotte, FL 33948  
Ph: (941) 743-1906

### CONSTRUCTION COST

\$7,800,000

### SIZE

24,000 s.f.

## Charlotte County Jail Infirmary Facility Port Charlotte, FL

### Key Relevancies

- Proposed project team member experience
- Local Experience
- Public facility
- Construction Management Project Delivery
- Active/Occupied Campus

### Our Clients Say it best...

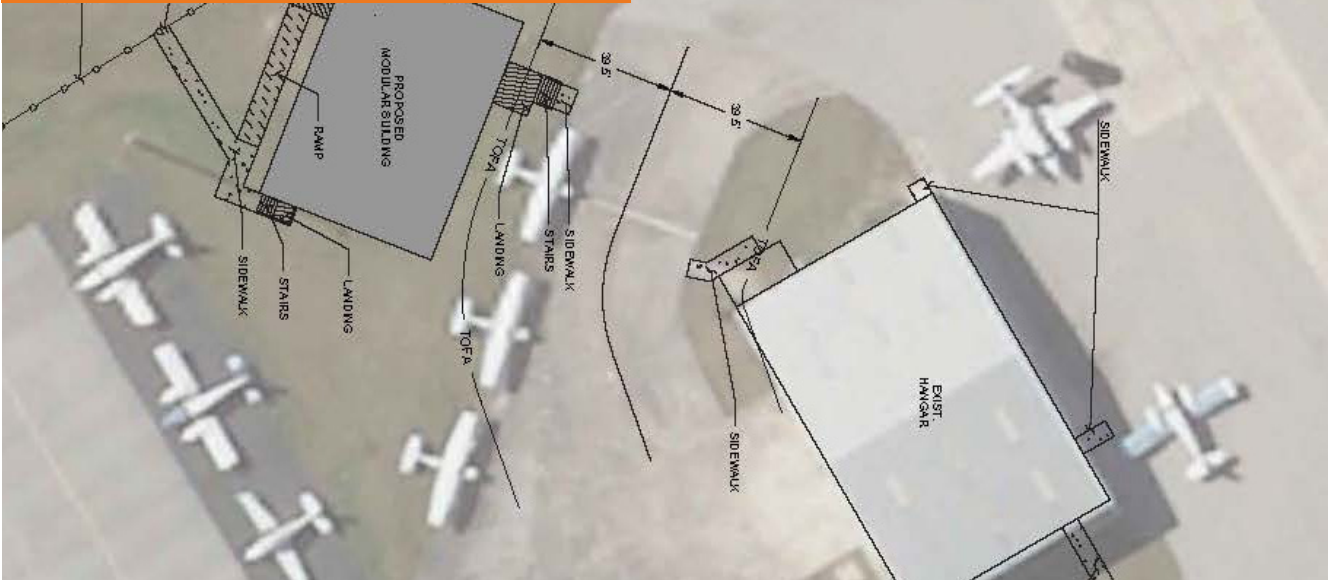
*"Johnny was a key player throughout the construction process. He possesses the ultimate "can-do" attitude while taking on all tasks with a positive energy."*

— Roger Warner, PMP, Project Manager,  
Charlotte County Government

Wharton-Smith is currently serving as the Construction Manager to provide preconstruction and construction services for a 128-bed infirmary to the Charlotte County Jail. The multi-floor concept consists of an inmate clinic with exam rooms, pharmacy, laboratory, EKG area, negative pressure isolation rooms, direct observation cells, mental health area, a dental area with exam stations, offices, records area, and storage. The project also includes an expansion to the central energy plant to accommodate the new wing and all related site work.



## Commercial & Public Facilities Experience



### OWNER'S REPRESENTATIVE

Charlotte County Government  
 Roger Warner, Facilities Project  
 Manager  
 18500 Murdock Circle  
 Charlotte, FL 33948  
 Ph: (941) 743-1906

### CONSTRUCTION COST

\$492,000

### SIZE

5,000 s.f.

## Charlotte County Flight Training Facility

Punta Gorda, FL

### Key Relevancies

- Proposed project team member experience
- Local Experience
- Renovation/Commercial Interiors project
- Construction Management Project Delivery
- Active/Occupied Campus

Interior and exterior renovation of existing Hangar 115 to provide approximately 1,500 s.f. new office space and general refurbishment. New modular operations building of approximately 3,500 s.f. 1.4 acre site development to support project needs.



City of Venice, RFQ#: 3056-17, Construction Management Services for  
 City of Venice Water Treatment Plant Building Improvements  
 3 Project Team Experience and References  
 Page 23

## Commercial & Public Facilities Experience



### OWNER'S REPRESENTATIVE

City of Sanford  
Nicholas McRay  
(currently with Lake County)  
300 North Park Avenue  
Sanford, FL 32771  
Phone: (352) 483-9080

### CONSTRUCTION COST

\$16,589,199

### SIZE

74,648 s.f.

### COMPLETION DATE

October 2011

## Public Safety Complex

### City of Sanford, FL

#### Key Relevancies

- Proposed Team Member Experience
- Public Facility
- Similar size municipality
- Construction Management project delivery

Wharton-Smith provided Preconstruction and Construction Management services for the new Public Safety Complex for the City of Sanford. This new facility is a joint-use, two-story concrete building and consists of both the Police and Fire Department Headquarters. Situated on over 6.5 acres, the Police Department includes over 40,000 s.f. of office space, training facilities and laboratory/processing areas. The Fire Department includes 18 beds, a rappel area, a five lane drive-thru Apparatus Bay, and the City's Emergency Operations Center. The project included clearing and preparation, excavation, grading, underground utilities, concrete and asphalt paving, secondary structures, a fueling island for the trucks, security chain link fencing, controlled sliding metal gates, landscaping and irrigation, and site lighting. The project incorporated several sustainable elements and utilizes recycled content, including low VOC paint, quartz kitchen counter tops, fabric covered acoustical wall panels, poured epoxy flooring in the Apparatus Bay, and more.

### Our Clients Say it best...

*"Wharton-Smith provided top notch preconstruction phase services, critical to assisting design development within the City's project budget. Wharton-Smith's construction phase services were likewise top quality."*

– Nick Mcray, Sr. PM, City of Sanford



## Commercial & Public Facilities Experience



### OWNER'S REPRESENTATIVE

Pinellas County  
Real Estate Management  
Steve Daniels  
Construction Administrator  
509 East Avenue  
Clearwater, FL 33756  
PH: (727) 415-9020

### CONSTRUCTION COST

\$81 million

### SIZE

269,032 s.f.

### COMPLETION DATE

June 2014

## Pinellas County Public Safety Facility Largo, FL

### Key Relevancies

- Team Member Experience
- Public Safety Facility
- County Client
- Similar Project Scope
- Active/Occupied Campus

Johnny Santos served as Senior Project Manager, Doug Whisler as Project Superintendent, and Gene Willett provided Preconstruction services on the new Public Safety and Centralized Communications Center for Pinellas County. Work included four new buildings and one renovated building on the 40-acre site to house the county's new emergency operation center, emergency communications and 911 call center, emergency medical services, sheriff's administrative / operations headquarters and dispatch center, and communications building. Also included is a 1,248-space parking garage, radio tower, an energy plant, a helipad, a fueling facility and the Sheriff's vehicle maintenance - all constructed on a secure site. The facility is constructed with the capability to withstand winds of up to 219 miles per hour and the forces of a 10,000 year storm event. During a natural disaster or other crisis, the facility will remain fully operational to lead recovery efforts and provide for continuous emergency communications. The project included sustainable features in order to meet LEED® certification standards.

### Our Clients Say it best...

*"Mr. Santos has a genuine concern for his client's needs, wants and wishes and is highly entrenched in the Government budgeting and permitting process being able to discern our future needs with his expertise in the CM process."*

— Steve Daniels  
Construction Administrator, Pinellas County



## Commercial & Public Facilities Experience



### OWNER'S REPRESENTATIVE

Charlotte County BOCC  
Roger Warner, Facilities Project  
Manager  
18500 Murdock Circle, Building D  
Port Charlotte, Florida 33948  
Phone: (941) 456-0733

### CONSTRUCTION COST

\$11 million (Phase I)  
\$26 million (Phase II)

### SIZE

26,292 s.f. (Phase I)  
136,982 (Phase II)

### COMPLETION DATE

April 2008 (Phase I)  
March 2010 (Phase II)

## Charlotte County Jail Expansion Phase I & II

Punta Gorda, FL

### Key Relevancies

- Proposed Team Member Experience
- Local, southwest Florida are project
- Renovation scope
- Phased schedule
- Active/Occupied Campus

Johnny Santos, Gene Willett and Doug Whisler all worked together on the Phase I Expansion to the Charlotte County Jail. The Scope of work included a new 13,525-SF Work Release Building for admitting inmates, a 4,889-SF Video Visitation Building which allowed the public to visit inmates without having to enter the jail, a 3,750-SF training/armory building, and a 4,128-SF maintenance building. This project represents the individual experience of those team members while working with another firm.

### Clients Say it best...

*"I have seen first hand Johnny's abilities to manage resources, personnel and time in order to reach the most optimal results. He has always demonstrated leadership, dedication, and commitment revered in a person we all endeavor to employ."*

— Thomas S. Rogers, Bureau of  
Corrections Commander



## Commercial & Public Facilities Experience



### OWNER'S REPRESENTATIVE

City of Maitland  
Dick Wells, Development Director  
dwells@itsmymaitland.com  
1776 Independence Lane  
Maitland, FL 32751  
PH: (407) 539-6258

### CONSTRUCTION COST

\$2,330,783.67

### SIZE

15,500 s.f., three-story

### COMPLETION DATE

January 2012

### Our Clients Say it best...

*"You can certainly be proud of all members of the Wharton-Smith team because they give their all, and it is clearly reflected in the final product. I would gladly welcome the opportunity to work with your firm again on future projects."*

— Ken Neubard, Fire Chief (retired),  
City of Maitland, FL

## Maitland Fire Station #45

City of Maitland, FL

### Key Relevancies

- Proposed project team member experience
- Custom Architectural features
- Similar Size municipality
- Highly efficient LEED facility
- Public facility

Wharton-Smith provided design-build services on the new, three story 15,500 s.f. Fire Station #45 for the City of Maitland. Fire Station #45 is headquarters to the Maitland Fire Department's administration and #45 firefighters. The new facility was constructed on a very tight site in the heart of Maitland and features a three-bay apparatus bay, air tank and fill room, mezzanine level for storage, sleeping quarters, a gourmet kitchen and dining room, administrative offices, and training room. Work included the demolition of the existing Fire Station and Police Station, site clearing, underground utilities, excavation and grading of a new retention pond, protection and preservation of a Centennial Oak Tree, reusing brick pavers for walkways and driveways, concrete parking lot, hardscape landscape, and irrigation. Fire Station #45 achieved LEED Certification with the US Green Building Council.



Experience with similar design elements



**OWNER'S REPRESENTATIVE**

Charlotte County Government  
18500 Murdock Circle, Building D  
Port Charlotte, Florida 33948  
Phone: (941) 743-1906

**CONSTRUCTION COST**

\$19.6 million

**SIZE**

45,230 s.f.

**COMPLETION DATE**

August 2008

## Charlotte County Conference & Events Center

Punta Gorda, FL

### Key Relevancies

- Proposed Team Member Experience
- Architectural elements similar to City's Venetian Theme
- New Construction, High End Finishes
- Local, southwest Florida area project



Doug Whisler, Mark Jackson and Greg Shuryan worked together on the construction of the Charlotte Harbor Event and Conference Center for Charlotte County, Florida. The Center is a 45,230 s.f. facility built for the purpose of providing the citizens of Charlotte County a state of the art convention and event center to replace the structure that was destroyed by Hurricane Charley in 2004. The building includes a 19,857 s.f. multipurpose hall, meeting and dressing rooms, and office areas for the staff. A food service area capable of serving 400 guests with a kitchen is also included. The building is hurricane rated and is built to withstand 130 mph wind speeds. This project represents the individual experience of Doug, Greg and Mark while working with another firm.



Experience with similar design elements



#### OWNER'S REPRESENTATIVE

School Dist. of Hillsborough County  
Mr. Hung Pham, Project Coordinator  
901 E. Kennedy Blvd.  
Tampa, Florida 33602  
Phone: (813) 272-4139

## Boyette Springs Elementary School Renovation

Riverview, FL

#### CONSTRUCTION COST

\$5.1 million

#### SIZE

98,000 s.f.

#### COMPLETION DATE

August 2014

#### Key Relevancies

- Proposed Team Member Experience
- Renovation Scope
- Phased Schedule
- Architectural elements similar to City's Venetian Theme

#### Our Clients Say it best...

*"Overall, I was very pleased with the professionalism and timeliness in which Mr. Iarossi and his team operated on our campus during the extensive building renovations in 2014. If given the opportunity, I would gladly work with Mr. Iarossi another project."*

— Kelly McMillan, Principal, Boyette Elementary School

This project included the construction of a new heating/AC/ventilation systems, remove and upgrade 8 existing classroom bathrooms to meet ADA compliance standards, Renovation of play courts, remove clay barrel tile roof and replace it with a new standing seam metal roof. The renovation included Interior finishes such as new cabinets, carpet, tile, VCT, vinyl base, new acoustical ceiling system and fire suppression sprinkler system.



Experience with similar design elements



#### OWNER'S REPRESENTATIVE

Orange County Public Schools  
Mr. Mark Lockard, Sr. Facilities Mgr.  
6501 Magic Way, Bldg. 200  
Orlando, FL 32809  
Phone: (407) 317-3700 x.2025266

#### CONSTRUCTION COST

\$23 million

#### SIZE

147,000 s.f.

#### COMPLETION DATE

November 2006

### Our Clients Say it best...

*"I wanted to let you know what a great job your team has done. We appreciate the long hours and hard effort in making this project a success."*

— Ron Maston, Sr. Project Manager,  
Orange County Public Schools

## Windy Ridge K-8 School Addition & Renovation

Orlando, FL

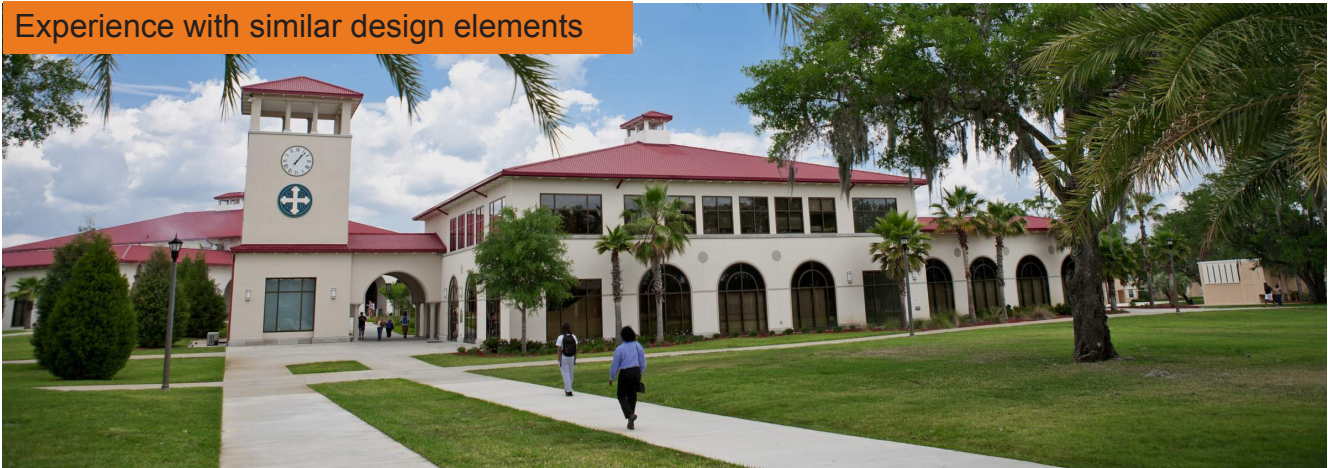
### Key Relevancies

- Proposed Team Member Experience
- Architectural elements similar to City's Venetian Theme
- Renovation & Phased Work

The project included construction of a new two story classroom building, with music and art rooms, new administrative space, and a new cafeteria. The remodeling/renovation work included converting all existing administrative buildings into classroom space. The existing 29 acre site was completely restored and provided new parking drives, utilities, etc.



Experience with similar design elements



#### OWNER'S REPRESENTATIVE

St. Leo University  
Frank Mezzanini  
33701 State Road 52  
St. Leo, FL 33574  
Ph: (352) 588-8200

#### CONSTRUCTION COST

\$16.2 million

#### SIZE

57,700 s.f.

#### COMPLETION DATE

September 2007

## St. Leo University, Student Community Center

St. Leo, FL

#### Key Relevancies

- Proposed Team Member Experience
- Architectural elements similar to City's Venetian Theme
- Construction Management Project Delivery

This new, 51,718-SF student community center acts as a hub for students, faculty and staff. The new center also plays a major campus role in the recruitment of future Saint Leo students. The community complex is situated around a new "town square." The existing facility was renovated and now houses the following program elements: dining hall, kitchen, meeting rooms, campus mail center, bookstore, convenience store and lounge.

A new student activities building on the opposite side of the "town square", this stand-alone building consists of student activities, student affairs, career services and a student lounge. Finally, a tower element housing a chapel was built and is situated between the two facilities. This project represents the individual experience of Tom Iarossi.



City of Miramar  
Water Treatment Plant



## 4. Ability to Perform Services:

Ability to perform the services expeditiously at the request of the City. Location and availability of technical support people and assigned project manager to the City

Our team is available and ready to provide Construction Management services to the City of Venice. We have carefully reviewed the current workload for each of our proposed team members and have selected them based on their availability and their expertise with your project's needs. Our team is 100% ready to get to work on the Water Treatment Plant Building Improvements projects - and there will be no issue with manpower, or your schedule milestone requirements. Furthermore, our Organizational Chart lists key support personnel that are available to assist if needed, adding additional security to the City that it's project will be delivered successfully and on time.

A big part of Wharton-Smith's success is attributed to our ability to self perform various trade work. Our self performance capabilities give our clients the added benefit and security of knowing that we have a workforce available that can perform everything from utility/ mechanical / plumbing to concrete, form-work, and general carpentry at a moments notice. This is especially important for jobs that have fast tracked project schedules or the need for accelerated completion dates. We are able to mobilize our own tradesmen quickly and have work performed 24 hours a day as well as night and weekend schedules as necessary.

This kind of availability will provide a tremendous advantage to the City of Venice - Water Treatment Plant Bldg Improvement projects. The jobs under this umbrella will vary greatly from building to building and the City will need a contractor that is flexible to adapt to many variations of scope included in the renovation efforts during that time. It is no secret, that the industry as a whole is currently experiencing a significant labor shortage. Contractors, Subcontractors, and vendors alike that do not have the available personnel required to live up to the contracted needs of the project put the County / client at great risk of not meeting completion dates and/or exceeding project budgets by not maintaining efficiencies. Furthermore, the value of the subcontracts that fall under the building improvements project, although important, will likely not all have individual trade packages of high dollar amounts to provide the ideal leverage for interest or even participation in the subcontractor market. This is where our self-perform ability gives us a great advantage. With a highly skilled and trained in-house labor force of over 175 craftsmen, we can call upon our workforce to cover any gaps in the buyout process or supplement subcontractor workforces that are not meeting the demands of the project.

When self-performing, we manage resources on the company's payroll to optimize efficiencies on the jobsite, thus helping to drive the schedule and best value for the owner. This approach enables maximum control of critical-path and fast track construction while also providing cost and performance benefits along the way.

**Please note:** Doug Whisler, the Senior Superintendent assigned to lead the construction team for your project lives full-time in Englewood, Florida - only a short 20 minute drive from Venice. Furthermore, Doug will be supported in the field by Mark Jackson and Jennifer Newman who both live in nearby Port Charlotte. **With our team, you can be assured that your jobsite will be monitored closely by professionals who live in the area year-round and call your community home.**

City of Sanford  
Public Safety Complex



## 5. Additional Considerations

The City will allow an Additional Consideration Section for the applicants to present any other relevant information that they believe should be considered during the qualifications shortlisting process. This information can include a preliminary project approach, recommendation letters, color photos, or any other type of information that they feel should be taken into account during our selection process.

### Other factors that will benefit the City of Venice...

We appreciate the opportunity in this section, to provide the City with additional information that we believe, will demonstrate the other factors regarding our team that guarantee your success.

#### **Our project approach - the proper plan is key**

As the project transitions to construction, Pre-task planning is a critical step for all field activities. This is accomplished by holding pre-task meetings with our subcontractors. In these meetings our goal is to reach a common understanding with our subcontractors and suppliers regarding project requirements for Wharton-Smith's expectations:

- Aesthetic quality
- Conformance with the City of Venice's quality standards

By outlaying our expectations before the work begins, it provides the subcontractor a baseline of quality to follow as the work is completed. This same baseline provides the project team a tool to monitor all work activities daily on-site in order to maintain the established level of quality.

## Preconstruction Planning

While we have an in-house department that will be involved with the project, quality control begins on ground zero of the project. Quality is everyone's job! During

construction we have found that work of poor quality more often than not is a result of poor planning. We employ a **Preconstruction Production Planning** system to ensure high quality execution. Preconstruction Production Planning is a process of identifying critical activities and major "chunks" of work very early in the life of the project. These work activities (for both Wharton-Smith and subcontractors) are planned six weeks in advance. All activities are tracked in the planning room.

Each activity is reviewed to confirm that all materials are on site, required personnel are available and scheduled, and prerequisite work is complete. Using this process has netted significant schedule gains since the inception of the program and has brought rework to an absolute minimum. By keeping an eye on the critical work path, bottlenecks, and other constraints the quality control program is

able to keep the pace of the project moving. As we move forward to construction and begin executing our work plans, we will maintain a target on quality and productivity.

## Recommendation Letters - Nobody can say it better than our clients

On the following pages, we've included reference letters from past clients referring to projects we've delivered that are similar to yours. For example, letter from clients representing agencies that are similar in size to the City of Venice, projects which are of a Public nature, and letters that speak specifically to our personnel's performance on projects.

## Past Project Success, as a Team

We've also provided additional information on projects which are larger than that proposed by the City of Venice, however demonstrate our team's history of collaboration, working together and successful project delivery under complex situations.

Production Planning Meeting



## Our unmatched expertise in similar Construction Management at Risk projects and our experience with building in the local area, make Wharton-Smith your best choice for this contract.

Under the Construction Management at Risk delivery method, Wharton-Smith will serve as an extension of the City of Venice's management team and will hold all subcontracts, giving the City single source responsibility. Wharton-Smith will also act as an extension of the City's facilities, and Water Treatment Plant department and will take the lead in guiding the management of the preconstruction process from initial design, through to the GMP delivery. We will provide real time responses to all of the City's needs. We can provide a budget verification based on an initial meeting with the Team within one week. Our 30% estimate can be delivered within two weeks of meeting with the team to review the documents and agreement upon assumptions in the program documents. Wharton-Smith will benchmark the project cost with this 30% estimate and regularly check the design progress against this to ensure the City receives the maximum program for your budget. Once the documents are nearing the 100% mark, Wharton-Smith will initiate the bidding process. This process will take approximately 30 days including advertising, soliciting bidders, holding pre-bid meetings, bid opening with the City, bid scope reviews, and compilation of the GMP.

It has been our consistent experience that the most successful projects are a product of a close client and construction team relationship. We will therefore work to build a strong partnership with the City of Venice by keeping our obligation to coordinate all efforts with your approval.

Our team approach is highly inclusive. During initial project meetings, we will identify those individuals, groups and project stakeholders which need to be communicated with on a regular and consistent basis. Clear, timely communication to all parties involved is vital and Wharton-Smith will take the lead during preconstruction for communication. Wharton-Smith has extensive experience meeting strict completion dates. The majority of projects we construct are publicly funded and require strict adherence to the project schedule to ensure timely occupancy. We always complete projects on time!

Additionally, the majority of Wharton-Smith's project experience has been with remodel, renovation and expansion projects on existing, occupied campuses. Many of these projects have included modifications to major building systems to meet current occupancy and life safety codes; replacing doors, windows, and roofs; as well as site and civil work to parking areas, stormwater retention ponds, and underground infrastructure. Many times these types of projects require phasing plans be developed to complete the work and avoid having to move large groups out of buildings. We are experienced in working with area building officials, Environmental Health and Safety, and the State Fire Marshal to develop plans that not only accomplish the goals of the project, but do so in a manner that meets life safety needs, as well as egress needs, during all phases of construction. We understand the importance of performing work in a manner that does not disrupt ongoing operations and will thereby be sensitive to your daily event schedule by scheduling noisy work in the off-hours.

Dust is also a factor in occupied renovations. Indoor air quality plans are implemented during each phase of the renovation to ensure that existing mechanical equipment and ductwork are protected during the process of completing the work. In many instances, we provided exhaust fans in the renovation area in order to maintain a negative pressure within the area. We have also utilized air scrubbers in isolated areas to control dust from the renovation operations.

Security and safety is of utmost importance when performing a phased renovation of an occupied facility. When developing the phasing for the project we always look to provide separation between the City workers and guests, and the construction operations.



## Case Study Example - Scheduling Success

### City of Sanford Public Safety Complex

Wharton-Smith was challenged with completing the Public Safety Complex facility within a 14-month schedule, all while accommodating many significant unforeseen design changes regarding both the building and site. Our management team was faced with the first unforeseen issue regarding the condition of the existing soil while excavating the foundations. Proper compaction was not achievable due to an organic layer of soil throughout the entire site that was not indicated within the soils report. As a result, 15 work days were lost due to soil remediation tasks that had to occur. Another design change occurred during the preparation of the 40,000+ s.f. of lightweight insulating



concrete and bituminous roof installation. Upon review of the wind load calculations by the structural engineer, it was determined that the gauge of the corrugated metal had to be modified in various areas of the roof to accommodate the 150 mph building envelope wind load rating. In addition to the items noted, many finishes and interior layout items were adjusted and/or changed during the entire construction process, including the redesigned \$32,000 Sequence of Operations packages, regarding the Emergency Response System that was added with two months left in the project schedule and the change in egress plan. Despite the challenges listed above, our team was able to complete the project on schedule.

## Case Study Example - Estimating/Budgeting Success

### City of Maitland City Hall



The key to a successful construction project is to understand the Owner's program, as well as any forces that affect that program, as early in the project as possible. Our preconstruction team and methodology will gather the information required to look at the project in depth and recommend ways to save the County money, without sacrificing quality or program. An example of minimizing cost can be illustrated on our City of Maitland – City Hall project. This job had a very limited budget, so our team worked with the City to reduce the project costs, while maintaining the functionality, performance, durability and aesthetic intent of the initial design. Solutions that were ultimately offered and implemented into the design included: changing the porch arched openings from CMU to light gauge framing & sheathing, using wood trusses in lieu of metal, decreasing the roof overhang length, filling the council chambers CMU wall with concrete in lieu of installing Kevlar walls, changing the fire sprinkler piping from steel to CPVC, changing the window frames from a custom finish to clear anodized aluminum,

and changing the secondary electrical feeders from copper to aluminum. The devil was in the details for these items, but ultimately these cost management design solutions saved the City of Maitland a total of \$304,325 in project costs.



May 8, 2009

Ron Davoli  
President  
Wharton-Smith, Inc.  
750 Monroe Road  
Sanford, FL 32771

Re: St. Cloud Southside Wastewater Treatment Facility Expansion

Dear Mr. Davoli:

As the engineering firm responsible for the design, construction administration and startup of the City of St. Cloud's Southside Wastewater Treatment Facility we would like to commend your firm for outstanding performance as construction manager at risk, and the value engineering suggestions provided.

Your Construction Group as a whole performed an exemplary job as did the management team of Robert Hahn, Project Manager, Kenneth Marcell, Assistant Project Manager and Forest Anderson, Project Superintendent. A professional image was maintained and responsibilities were taken seriously, as well as keeping in excellent communications with the City and us throughout the project.

As evidenced in the high quality of workmanship, Wharton-Smith is a company that takes pride in their work. We thank you for working with us and the City of St. Cloud on this project and providing the leadership to bring it to completion.

Sincerely,

A handwritten signature in black ink, appearing to read "Thomas W. Friedrich".

Thomas W. Friedrich  
Vice President

TWF:clw

324 South Hyde Park Avenue  
Suite 250  
Tampa, FL 33606

813.258.0703 Phone  
813.254.6860 Fax  
[www.jonesedmunds.com](http://www.jonesedmunds.com)



BRADLEY W. VANLANDINGHAM, P.E.  
Senior Engineering Manager, Water Americas  
201 SOUTH ORANGE AVENUE, STE 500, ORLANDO, FL 32801-3420 USA  
+1 407-419-3553 | VANLANDINGHAM@BV.COM

May 4, 2012

To Whom It May Concern:

Black & Veatch Corporation was the Engineer for the recently completed water treatment facility for Orange County Utilities, which was constructed by Wharton-Smith, Inc (Wharton-Smith). While we are still within the one-year correction period, to date we have been very satisfied with Wharton-Smith's services on this project.

Wharton-Smith demonstrated an overall commitment to a successful project throughout the construction period. Wharton-Smith suggested several value added changes that were implemented improving the overall quality of the project. Wharton-Smith's team approach to solving construction challenges encountered established a spirit of cooperation that extended through the life of the project.

Therefore, we highly recommend consideration of Wharton-Smith for the construction award for the Orange County Southern Regional Water Supply Facility project. Please contact me should you have any questions regarding the project.

Very truly yours,  
BLACK & VEATCH

Brad W. Vanlandingham, P.E.  
Senior Engineering Manager

[www.bv.com](http://www.bv.com)



To whom it may concern:

July 27, 2015

**RE: Letter of Reference**

It is with great pleasure to be able to send this letter of endorsement for Mr. Johnny Santos. As the Construction Administrator and Owner representative for Pinellas County Government I had the pleasure of working with Johnny for nearly 3 years on the Pinellas County Public Safety Facilities & Centralized Communications Center project. I find him to be an exceptional Senior Project Manager with an impeccable work ethic.

Mr. Santos has a genuine concern for his client's needs, wants and wishes and is highly entrenched the Government budgeting and permitting process being able to discern our future needs with his expertise in the Construction Management process.

Respectfully,

Steven F. Daniel  
[sdaniel@pinellascounty.org](mailto:sdaniel@pinellascounty.org)  
727-415-9020  
Construction Administrator  
Pinellas County Real Estate Management  
Building Design and Construction Division

PLEASE ADDRESS REPLY TO:  
509 East Avenue South  
Clearwater, Florida 33756  
PHONE: (727) 464-4765  
FAX: (727) 464-5596  
Website: [www.pinellascounty.org](http://www.pinellascounty.org)





**MAILING ADDRESS**  
CITY OF SANFORD  
POST OFFICE BOX 1788  
SANFORD, FL 32772-1788

**PHYSICAL ADDRESS**  
CITY HALL  
300 NORTH PARK AVENUE  
SANFORD, FL 32771-1244

**TELEPHONE**  
407.688.5001

**FACSIMILE**  
407.688.5002

**CITY COMMISSION**

JEFF TRIPLETT  
MAYOR

MARK McCARTY  
DISTRICT 1

VELMA H. WILLIAMS  
DISTRICT 2

RANDY JONES  
DISTRICT 3

PATTY MAHANY  
DISTRICT 4

TOM GEORGE  
CITY MANAGER

March 7, 2011

To Whom It May Concern:

Re- Wharton Smith, Inc- Construction of Sanford Police and Fire  
Headquarters

The City of Sanford contracted with Wharton Smith as Construction Manager at Risk for the City's Police and Fire Headquarters. Wharton Smith provided top notch pre-construction phase services critical to assisting design development within the City's project budget. Wharton Smith also assisted the City with identifying additional Value Engineering Savings as the construction was being done.

Wharton Smith's construction phase services were likewise top quality. Wharton Smith was very responsive to owner requested changes and less than ideal field conditions which included poor soils, freezing weather and utility conflicts. Wharton Smith did not compromise on quality and was able to deliver the project on time and on budget. They provided outstanding service under difficult circumstances.

Sincerely,

Nicholas Mcray  
Sr. Project Manager

*The Friendly City*

**WILDERARCHITECTURE, INC.**

1517 Seventh Avenue  
Suite Number C  
Tampa, Florida 33605

T 813.242.6677  
F 813.242.6683

wilderarchitecture.com

November 30, 2015

**John W. Thompson, AIA**  
President  
Wilder Architecture, Inc.  
1517 Seventh Ave., Suite C  
Tampa, FL 33605

**Re: Tom Iarossi**

To Whom it May Concern:

Please consider Tom Iarossi highly in your selection process for a Construction Management partner.

As an Architect, I had the opportunity to work with Tom on the Boyette Springs Elementary School Renovation Project. The Wilder Architecture team has experienced firsthand through the design and construction phases of this project that Tom placed the needs of the Owner and the Project at the forefront, working to complete the project within the allotted budget and time, while remaining responsive to the Owner's needs. An Owner benefits from having Tom Iarossi as part of the Construction Manager team because he understands educational buildings.

Tom's finished work is professional and well performed with minimal punch list items at the time of Substantial Completion. Our practice utilizes electronic submittals to expedite the construction process. Tom participated hand-in-hand with this forward-looking approach toward the delivery of Construction services, better serving the interests of the Owner and the project.

I recommend Tom Iarossi for your upcoming projects. If you would like to discuss his qualifications further, please do not hesitate to call. My office number is 813-242-6677.

Sincerely,

**WILDERARCHITECTURE, INC.**

**AIA Florida 2015 Firm of the Year**



John Thompson, AIA LEED AP

AA26000655

### County School Board

April Griffin, Chair  
Cindy Stuart, Vice Chair  
Doretha W. Edgecomb  
Carol W. Kurdell  
Melissa Snively  
Sally A. Harris  
Susan L. Valdes



Superintendent of Schools  
Jeff Eakins

Chief of Schools  
Larry Sykes, Ed.D.

Area Superintendent, Area 8  
Marcos Murillo

Principal  
Kelly McMillan

November 30, 2015

To Whom It May Concern,

I want to take a moment to express my complete satisfaction in working with Tom Iarossi and his team during the spring and summer of 2014 while renovations were done at Boyette Springs Elementary. As the principal, I had the opportunity to be actively involved in the building renovations that took place over the course of a year. It was my responsibility to manage the daily operations of our campus facility while concurrently working with Mr. Iarossi and his staff as they completed the renovation project. From the first meeting with Mr. Iarossi, I felt comfortable with his management style, work ethic, and his ability to work with me as a customer. After being involved with other construction type projects as a school administrator, I truly appreciated Mr. Iarossi's willingness to work with me to make the renovation go as smoothly as possible for my staff and students. His dedication to completing the project to our satisfaction is to be commended.

Tom Iarossi, his staff, and sub-contractors accommodated the needs of our school throughout the project. This was no easy feat with the scope of work that needed to be completed in a short amount of time. He began by making sure that his team understood our campus, how it operated, what our needs were, as well as areas of concern. Each time we met during preconstruction, the construction phase, and during the completion, our administration was kept abreast of the progress being made while Mr. Iarossi and his team continued to revisit our concerns until our needs were fully addressed.

Overall, I was very pleased with the professionalism and timeliness in which Mr. Iarossi and his team operated on our campus during the extensive building renovations in 2014. If given the opportunity, I would gladly work with Mr. Iarossi another project.

I would be happy to further discuss my experiences with Mr. Iarossi. You may contact me at (813) 671-5175.

Sincerely,

Kelly McMillan  
Principal

Apollo Beach Elementary • 501 Apollo Beach Blvd. • Apollo Beach, FL 33572 • Phone: 813.671.5172  
Fax: 813.672.5075 • School Website: <http://apollobeach.mysdhc.org/>  
School District Website: <http://www.sdhc.k12.fl.us> • School District Main Office: 813-272-4000



**City Manager**

James S. Williams, P.E.  
407 539-6222  
Fax 407 539-6282

**Assistant  
City Manager**

Wm. Brian Jones  
407 539-6221  
Fax 407 539-6282

**City Clerk**

Maria Waldrop  
407 539-6219  
Fax 407 539-6282

**Community  
Development  
Director**

Richard W. Wells, AICP  
407 539-6212  
Fax 407 539-6275

**CRA Director**

Verl Emrick  
407 539-1255  
Fax 407 539-6282

**Management Services  
Director**

Sharon Anselmo, CPA  
407 539-6201  
Fax 407 539-6282

**Fire Chief**

Kenneth J. Neuhard  
407 539-6229  
Fax 407 599-0858

**Parks And Recreation  
Leisure Services  
Director**

Chuck Jordan  
407 539-6264  
Fax 407-539-6282

**Police Chief**

Douglas M. Ball  
407 539-6242  
Fax 407 539-9712

**Public Works  
Director**

Rick Lemke, P.E., P.T.O.E.  
407 539-6252  
Fax 407 660-1677

July 18, 2012

Mr. Erik Palmer  
Senior Vice president  
Wharton Smith, Inc.  
750 Monroe Road  
Sanford, FL 32771

Dear Erik

I would like to commend you and your staff for the excellence in construction of the City of Maitland Fire Rescue Station #45. The on-site management team headed by Jeremy Dawkins and including Ted Homer, Mike Morton and Michael Coplin was indeed a pleasure to work with throughout the entire process. They were attentive to our needs, insisted on obtaining quality workmanship from the various trades and excelled at written and verbal communications. Their experience and knowledge played a key role in producing a fire station/headquarters building where we can proudly serve the public for many years to come.

You can certainly be proud of all members of the Wharton Smith team because they give their all and it is clearly reflected in the final product. Given the opportunity, I would gladly welcome the opportunity to work with your firm again on future projects.

Sincerely,

Kenneth J. Neuhard, Fire Chief  
City of Maitland  
1776 Independence Lane  
Maitland, FL 32751

City of MAITLAND • 1776 Independence Lane • Maitland, Florida 32751 • [www.itsmymaitland.com](http://www.itsmymaitland.com)



## Charlotte County Government

"To exceed expectations in the delivery of public services."

[www.CharlotteCountyFL.com](http://www.CharlotteCountyFL.com)

January 14, 2011

To Whom It May Concern

It is my pleasure to recommend Johnny Santos for your project. As the county's project manager, I have worked very closely with Johnny for over three years on the construction of the Charlotte County Jail Expansion Project. He has excellent written and verbal communications skills, is extremely organized, can work independently, and is able to effectively multi-task ensuring all projects are completed in a timely manner.

As the senior project manager, Johnny was a key player throughout the construction process. He possesses the ultimate "can do" attitude while taking on all tasks with a positive energy. He led the project team in the course of design development estimating phase. He worked diligently with the design team providing the best facility for jail operations. His vast knowledge of construction made him essential in the value engineering process ensuring the project met a \$41.8 million county budget. He provided unending support and guidance during the construction of the two phase project. He also has the analytical skills to diagnose problems and devise viable solutions. He produces a high volume of work while maintaining high standards for quality and accuracy. The project was a true team effort and Johnny epitomized a team member. His interpersonal and communication skills have allowed him to develop productive working relationships with the stakeholders. Johnny did an excellent job in this position and was a vital asset to his organization during his tenure on the project. The project would not have been as successful without his participation.

In closing, Johnny would be an asset to project and I would highly recommend him for employment without reservation any endeavor he chooses to pursue. Please let me know if you need future information at 941-623-1002 or [Roger.Warner@charlottefl.com](mailto:Roger.Warner@charlottefl.com).

Roger A. Warner, PMP

FACILITIES CONSTRUCTION & MAINTENANCE  
18500 Murdock Circle | Port Charlotte, FL 33948-1068  
Phone: 941.743.1392 | Fax: 941.743.1568



Sheriff of Charlotte County

7474 Utilities Road  
Punta Gorda, Florida 33982  
(941) 639-2101

December 28, 2011

To Whom it may Concern:

I had the privilege of working with Johnny Santos for over three years on the Jail Expansion Project for the Charlotte County Sheriff's Office. During this time frame, I have seen first-hand his abilities to manage resources, personnel and time in order to reach the most optimal results.

As the Bureau of Corrections Commander, the \$41.8 million project weighed heavily on my shoulders due to the lack of construction experience and the overall knowledge of the process. Johnny Santos provided detailed explanations of the process as well as any part of the construction directly related to the responsibilities/security of the jail expansion operations. Issues and concerns were addressed in open forum with a team approach. Any deviations or changes to the plans were always for the betterment of the project. His unwavering leadership and style of management made the project a success and more important, enjoyable.

Throughout our working relationship, he has always demonstrated the leadership, dedication, and commitment revered in a person we all endeavor to employ. These qualities and traits provide the foundation for him to be successful in all his career endeavors and be a true asset to any entity employing his expertise.

Sincerely,

Thomas S. Rodgers  
Bureau of Corrections Commander

## 6. Required Forms, Certificate of Insurance, Certifications

On the following pages, we provide our completed required forms as included in the City of Venice's RFQ:

- Qualifications Statement
- Local Preference Worksheet
- Public Entity Crimes Form
- Drug Free Workplace Form
- Indemnification/Hold Harmless Statement
- Certification Regarding Debarments, Suspension, Ineligibility and Voluntary Exclusion,
- Conflict of Interest, and Litigation Statement
- Non-Collusion Affidavit

In addition, we've provided our project-specific Certificate of Insurance, our State of Florida Corporate Charter, and our Certified General Contractor (CGC) license.



**SEALED REQUEST FOR QUALIFICATIONS  
CITY OF VENICE, FLORIDA**

**QUALIFICATIONS STATEMENT**

The undersigned certifies under oath the truth and correctness of all statements and all answers to questions made hereinafter:

**SUBMITTED TO:**

CITY OF VENICE  
Procurement- Finance Department  
401 W. Venice Avenue Room # 204  
Venice, Florida 34285

**CHECK ONE:**

- ☐ Corporation  
☐ Partnership  
☐ Individual  
☐ Joint Venture  
☐ Other

**SUBMITTED BY:**

NAME: Wharton-Smith, Inc.  
ADDRESS: 252 W. Marion Ave., Punta Gorda, FL 33950  
PRINCIPLE OFFICE: 4912 W. LaSalle St., Tampa, FL 33607

1. State the true, exact, correct and complete legal name of the partnership, corporation, trade or fictitious name under which you do business and the address of the place of business.

The correct name of the Proposer is:

Wharton-Smith, Inc.

The address of the principal place of business is:

4912 W. LaSalle St., Tampa, FL 33607

2. If the Proposer is a corporation, answer the following:

- a. Date of Incorporation: April 2, 1984
- b. State of Incorporation: Florida
- c. President's Name: Ronald F. Davoli
- d. Vice President's Name: Clyde Burgess, David Hayes, John Lyons, Patrick Hewitt, Timothy Smith, Devon Lewis and Darin Crafft
- e. Secretary's Name: Devon Lewis
- f. Treasurer's Name: Ronald F. Davoli
- g. Name and address of Resident Agent: Todd O'Donnell, Div. Mgr., 252 W. Marion Ave., Punta Gorda, FL 33950

3. If Proposer is an individual or partnership, answer the following:

- a. Date of Organization: Not Applicable

- b. Name, address and ownership units of all partners:

Not Applicable

- c. State whether general or limited partnership: Not Applicable

4. If Proposer is other than an individual, corporation, partnership, describe the organization and give the name and address of principals:

**THIS PAGE MUST BE COMPLETED & SUBMITTED WITH OFFER**



5. If Proposer is operating under fictitious name, submit evidence of compliance with the Florida Fictitious Name Statute.

Not Applicable

6. How many years has your organization been in business under its present business name?

33 years

- a. Under what other former names has your organization operated?

Not Applicable

#### ACKNOWLEDGEMENT

State of Florida }  
County of Hillsborough } SS.

On this the 8th day of March, 2017, before me, the undersigned Notary Public of the State of Florida, personally appeared Todd O'Donnell and (Names of individual(s) who appeared before Notary) whose name(s) in/are Subscribed to within instrument, and he/she/they acknowledge that he/she/they executed it.

NOTARY PUBLIC  
SEAL OF OFFICE:



JUSTIN E. BARTOS  
MY COMMISSION # FF 958841  
EXPIRES: May 14, 2020  
Bonded Thru Budget Notary Services

Justin E. Bartos  
NOTARY PUBLIC, STATE OF FLORIDA

Justin E. Bartos  
(Name of Notary Public: Print, stamp, or type as commissioned)

☒ Personally known to me, or ☐ Produced Identification: \_\_\_\_\_ ☐ DID take an oath, or ☒ DID NOT take an oath

**THIS PAGE MUST BE COMPLETED & SUBMITTED WITH OFFER**



## **HOW DO I DETERMINE “LOCAL PREFERENCE”**

The following questions will help you determine local preference for your company. Please answer questions 1 through 4 **FIRST**. If you answer **NO** to any questions 1 through 4, local preference does **NOT** apply.  
**ONLY** if you answer **YES** to questions 1 through 4, may you proceed to question 5.  
If you answer **YES** to any questions 5 through 7, local preference applies.  
If you are unsure of how to answer any questions, please contact the City of Venice’s Purchasing Department at 941-486-2626.

### **Questions 1 – 4**

1. Have you paid a local business tax either to Sarasota, DeSoto or Charlotte County (Manatee County does not have a local business tax) authorizing your company to provide goods or services described in this solicitation ?

YES X If “yes”, proceed to question 2.

NO        If “no”, **STOP, local preference does not apply.**

\* If the name on the local business tax receipt is not the same as the name on the bid/solicitation submittal, local preference does not apply.

2. Does your company maintain a permanent physical business address located within the limits of Sarasota, Manatee, DeSoto or Charlotte County ?

YES X If “yes”, proceed to question 3.

NO        If “no”, **STOP, local preference does not apply.**

3. Does your local business office (identified in question 2) have a least one full time employee ?

YES X If “yes”, proceed to question 4.

NO        If “no”, **STOP, local preference does not apply.**

4. Do at least fifty percent (50%) of your company employees who are based in the local business location (identified in question 2) reside within Sarasota, Manatee, DeSoto or Charlotte County ?

YES X If “yes”, proceed to question 5.

NO        If no, **STOP, local preference does not apply.**

### **Questions 5 – 7**

5. Is your local business office (identified in question 2) the primary location (headquarters) of your company ?

YES        If “yes”, **STOP, local preference applies.**

NO X If “no”, proceed to question 6.

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**THIS PAGE MUST BE COMPLETED & SUBMITTED WITH OFFER**



6. If the local business office (identified in question 2) is not the primary location of your company, are at least ten percent (10%) of your company's entire full-time employees based at the local office location ?

YES ☒ If "yes", STOP, local preference applies

NO ☐ If "no", proceed to question 7

7. If your local business office is not the primary location of your company, does at least one corporate officer, managing partner or principal owner of the company reside in Sarasota, Manatee, DeSoto or Charlotte County ?

YES ☐ If "yes", STOP, local preference applies

NO ☐ If "no", local preference does not apply.

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**THIS PAGE MUST BE COMPLETED & SUBMITTED WITH OFFER**



### PUBLIC ENTITY CRIME INFORMATION

A person or affiliate who has been placed on the State of Florida's convicted vendor list following a conviction for a public entity crime may not submit an RFQ proposal on a contract to provide any goods or services to a public entity, may not submit a response on a contract with a public entity for services in 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, Sub-Contractor, or Contractor 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 2876.017, for CATEGORY TWO** for a period of 36 months from the date of being placed on the convicted vendor list.

I, Todd O'Donnell, being an authorized representative of the firm of  
Wharton-Smith, Inc., located at City: Punta Gorda  
State: Florida Zip: 33950, have read and understand the contents of the  
Public Entity Crime Information and of this formal RFQ package, hereby submit our proposal  
accordingly.

Signature: 

Date: March 8, 2017

Phone: 813-288-0068

Fax: 813-288-0371

Federal ID#: 59-2392802

**THIS PAGE MUST BE COMPLETED & SUBMITTED WITH OFFER**

### DRUG FREE WORKPLACE

Preference shall be given to business with drug-free workplace programs. Whenever two or more RFQs, which are equal with qualifications and service, are received by the City for the procurement of commodities or contractual services, an RFQ received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. In order to have a drug-free workplace program, your firm shall:

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 action 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 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 an RFQ, 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 RFQ, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea 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 an employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

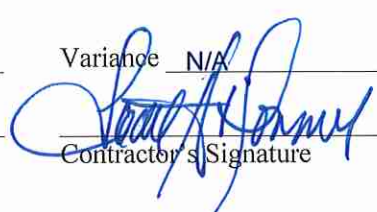
As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

Concur Yes

Variance N/A

March 8, 2017

Date

  
Contractor's Signature

**THIS PAGE MUST BE COMPLETED & SUBMITTED WITH OFFER**

**INDEMNIFICATION/HOLD HARMLESS**

The elected firm shall indemnify and hold harmless the City and its officers and employees from liabilities, damages, losses, and costs, including, but not limited to, reasonable attorneys' fees, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the elected firm and other persons employed or utilized by the elected firm in the performance of the contract.

I, Todd O'Donnell, being an authorized representative of the firm of  
Wharton-Smith, Inc. located at City Punta Gorda, State  
Florida, Zip Code 33950 Phone: 813-288-0068 Fax: 813-288-0371  
\_\_\_\_\_. Having read and understood the contents above, hereby submit  
accordingly as of this Date, March 8, 2017.

Todd O'Donnell

Please Print Name

  
\_\_\_\_\_  
Signature

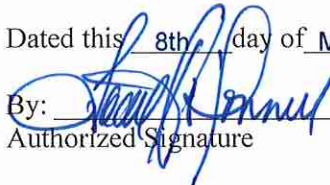
This signed document shall remain in effect for a period of one (1) year from the date of signature or for the contract period, whichever is longer.

**THIS PAGE MUST BE COMPLETED & SUBMITTED WITH OFFER**

**CERTIFICATION REGARDING DEBARMENTS, SUSPENSION, INELIGIBILITY AND  
VOLUNTARY EXCLUSION-LOWER TIER FEDERALLY FUNDED TRANSACTIONS  
STATE OF FLORIDA GRANT ASSISTANCE PURSUANT TO  
AMERICAN RECOVERY AND REINVESTMENT ACT UNITED STATES  
DEPARTMENT OF ENERGY AWARDS**

1. The undersigned hereby certifies that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
2. The undersigned also certifies that it and its principals:
  - a. Have not within a three-year period preceding this certification been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State anti-trust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property.
  - b. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph 2.(a) of this Certification; and (b) Have not within a three-year period preceding this certification had one or more public transactions (Federal, State or Local) terminated for cause or default.
3. Where the undersigned is unable to certify to any of the statements in this certification, an explanation shall be attached to this certification.

Dated this 8th day of March, 2017.

By:   
Authorized Signature

Todd O'Donnell, Division Manager  
Typed Name of Title

Wharton-Smith, Inc.  
Recipient's Firm Name

252 W. Marion Ave.  
Street Address

Punta Gorda, FL 33950  
City/State/Zip Code

**THIS PAGE MUST BE COMPLETED & SUBMITTED WITH OFFER**



## **CONFLICT/NON CONFLICT OF INTEREST AND LITIGATION STATEMENT**

### **CHECK ONE**

☒

To the best of our knowledge, the undersigned firm has no potential conflicts of interest due to any other clients, contracts, or property interest for this project.

**OR**

☐

The undersigned firm, by attachment to this form, submits information which may be a potential conflict of interest due to other clients, contracts, or property interest for this project.

### **LITIGATION STATEMENT**

IN FLORIDA ONLY, JUDGMENTS AGAINST THE FIRM, AND SUITS AGAINST CITY OF VENICE. INCLUDE ACTIONS AGAINST THE FIRM BY OR AGAINST ANY LOCAL, STATE, OR FEDERAL REGULATORY AGENCY.

### **CHECK ONE**

☐

The undersigned firm has had no litigation adjudicated against the firm on any projects in the last five (5) years and has filed no litigation against City of Venice in the last five (5) years.

**OR**

☒

The undersigned firm, BY ATTACHMENT TO THIS FORM, submits a summary and disposition of individual cases of litigation in Florida adjudicated against the firm during the past five (5) years; all legal actions against City of Venice during the past five (5) years; and actions by or against any Federal, State and local agency during the past five (5) years.

Company Name: Wharton-Smith, Inc.

Authorized Signature: 

Name (print or type): Todd O'Donnell

Title: Division Manager

Failure to check the appropriate blocks above may result in disqualification of your proposal. Failure to provide documentation of a possible conflict of interest, or a summary of past litigation, may result in disqualification of your proposal. Should additional information regarding the above items come to the attention of City of Venice after award, the awarded contract shall be subject to immediate termination.

**THIS PAGE MUST BE COMPLETED & SUBMITTED WITH OFFER**



## We Believe in Building Relationships...

We know that potential conflicts can easily be avoided by developing trustworthy relationships with all parties. The successes we have had 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 reports that there are no open litigation claims. In the interest of full disclosure, the cases below reflect three within that time period where we were initially named as part of the co-defense. Note, all have been resolved.

## Our Litigation History - Past (5) Years...

### **Emerald Utilities & Site Development, Inc vs. Wharton-Smith, Inc (Case No. 2012-CA-015654-0 The Circuit Court, Ninth Judicial Circuit, Orange County, Florida):**

In September 2012, Emerald Utilities filed suit against Wharton-Smith over alleged breach of contract regarding a claim on the Orange County Southern Regional Water Supply Facility. Wharton-Smith maintains that the claim, if valid, is a pass through claim to the owner, Orange County Public Utilities, which has denied the claim. **This case settled during mediation in March 2014.**

### **Suwannee Valley Grassing, Inc. vs. Wester Surety Co., Wharton-Smith, Inc. and Barco-Duval Engineering, Inc. (Case No. 2015-CA-4388 In the Circuit Court of the Eighth Judicial Circuit in Alachua County, Florida):**

In December 2015, Suwannee filed suit for breach of Contract regarding a subcontract they had with Barco-Duval. Barco-Duval was a subcontractor to Wharton-Smith on the Paynes Prairie Sheetflow Restoration project and has a dispute with Suwannee over non-performance and work not completed. **Wharton-Smith has been dismissed from the suit.**

### **J.D. Fields & Company, Inc vs. Nottingham Construction Co., LLC, Wharton-Smith, Inc, & Professional Construction Services, Inc. (Case No. 2012-0002517 21st Judicial District Court for the Parish of Tangipahoa, State of Louisiana):**

In August of 2012, J.D. Fields filed suit against Wharton-Smith over a dispute they had with Nottingham and Professional Construction Services in 2006. Wharton-Smith had purchased selected assets only from Nottingham in August 2010 and did not purchase this project or assume any liability in this dispute. **Wharton-Smith was dismissed from this suit in September 2014.**

**NON-COLLUSION AFFIDAVIT**

State of Florida

County of Charlotte

SS.

Todd O'Donnell being first duly sworn, deposes and says that:

1. He/she is the Division Manager (Owner, Partner, Officer, Representative or Agent) of Wharton-Smith, Inc. the Proposer that has submitted the attached Proposal;
2. He/she is fully informed respecting the preparation and contents of the attached Proposal and of all pertinent circumstances respecting such Proposal;
3. Such Proposal is genuine and is not a collusive or sham Proposal;
4. Neither the said Proposer 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 Proposer, firm, or person to submit a collusive or sham Proposal in connection with the Work for which the attached Proposal has been submitted; or have in any manner, directly or indirectly sought by agreement or collusion, or have in any manner, directly or indirectly, sought by agreement or collusion, or communication or conference with any Proposer, firm, or person to fix the price or prices in the attached Proposal or of any other Proposer, or to fix any overhead, profit, or cost elements of the Proposal price or the Proposal price of any other Proposer, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the proposal Work.

Signed, sealed and delivered  
in the presence of:

[Signature]

TOM JAROSST - AREA  
MANAGER

By: [Signature]

TODD H. O'DONNELL  
(Printed Name)

DIVISION MANAGER  
(Title)

**ACKNOWLEDGEMENT**

State of Florida

County of Hillsborough

On this the 8th day of March, 2017, before me, the undersigned Notary Public of the State of Florida, personally appeared Todd O'Donnell and (Names of individual(s) who appeared before Notary) whose name(s) in/are subscribed to within instrument, and he/she/they acknowledge that he/she/they executed it.

NOTARY PUBLIC  
SEAL OF OFFICE:



JUSTIN E. BARTOS  
MY COMMISSION # FF 958841  
EXPIRES: May 14, 2020  
Bonded Thru Budget Notary Services

Justin E. Bartos

NOTARY PUBLIC, STATE OF FLORIDA

Justin E. Bartos

(Name of Notary Public: Print, stamp, or type as commissioned)

☒ Personally known to me, or ☐ Produced Identification: \_\_\_\_\_ ☐ DID take an oath, or ☒ DID NOT take an oath

**THIS PAGE MUST BE COMPLETED & SUBMITTED WITH OFFER**



ACORD™

Client#: 26140

WHARTONS

## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

3/06/2017

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 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 rights to the certificate holder in lieu of such endorsement(s).

PRODUCER <b>Bouchard Insurance Inc.</b> <b>101 N Starcrest Dr.</b> <b>Clearwater, FL 33765</b> <b>727 447-6481</b>	CONTACT NAME:	
	PHONE (A/C, No, Ext): <b>727 447-6481</b>	FAX (A/C, No): <b>727 449-1267</b>
INSURED <b>Wharton-Smith, Inc.</b> <b>PO Box 471028</b> <b>Lake Monroe, FL 32747</b>	E-MAIL ADDRESS: <b>certificates@bouchardinsurance.com</b>	
	INSURER(S) AFFORDING COVERAGE	
	INSURER A: <b>Amerisure Insurance Company</b>	NAIC #: <b>19488</b>
	INSURER B: <b>Starr Indemnity &amp; Liability Co</b>	<b>38318</b>
	INSURER C: <b>Liberty Insurance Underwriters</b>	<b>19917</b>
	INSURER D: <b>XL Specialty Insurance Co</b>	<b>37885</b>
	INSURER E: <b>Berkley Assurance Company</b>	<b>39462</b>
	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  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:	Y	Y	GL20361081101	04/01/2016	04/01/2017	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$100,000 MED EXP (Any one person) \$5,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000 \$
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS	Y	Y	CA20361071001	04/01/2016	04/01/2017	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
B	<input type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR	Y	Y	1000022675	04/01/2016	04/01/2017	EACH OCCURRENCE \$20,000,000
C	<input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$	Y	Y	100008433603	04/01/2016	04/01/2017	AGGREGATE \$20,000,000 \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input checked="" type="checkbox"/> Y/N <input checked="" type="checkbox"/> N/A (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		Y	WC203610910	04/01/2016	04/01/2017	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
D	Rented Equipment			UM00024961MA16A	04/01/2016	04/01/2017	1,500,000
E	Pollution Liab			PCADB50004750416	04/01/2016	04/01/2017	5,000,000
E	Professional Liab			PCADB50004750416	04/01/2016	04/01/2017	5,000,000


DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

PROJECT: City of Venice Water Treatment Plant Building Renovation

The City of Venice is an additional insured as respects General Liability and Automobile Liability only if required by written contract, and subject to the terms, conditions and limits as specified in the policy. Blanket Loss Payee Applies for Rented and Leased Equipment  
(See Attached Descriptions)

## CERTIFICATE HOLDER

## CANCELLATION

<b>The City of Venice</b> <b>401 W. Venice Avenue</b> <b>Venice, FL 34285</b>	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 

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ACORD 25 (2014/01) 1 of 2 The ACORD name and logo are registered marks of ACORD  
#S633633/M591848

JANFI



City of Venice, RFQ#: 3056-17, Construction Management Services for  
City of Venice Water Treatment Plant Building Improvements  
6. Required Forms, Certificate of Insurance, Certifications  
Page 59

## DESCRIPTIONS (Continued from Page 1)

**Rented and Leased Equipment Deductible:**

\$2,500 standard deductible

\$25,000 deductible applies to all cranes, directional boring equipment and items valued over \$750,000.

Explosion, Collapse and Underground exposures are included coverages under the general liability policy.

Coverage is primary as respects to General Liability and 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 to General Liability, Automobile Liability and Workers Compensation only if required by written contract, and subject to the terms, conditions and limits as specified in the policy.

It is agreed by endorsement to the General Liability, Automobile Liability and Workers Compensation policies that these policies shall not be canceled 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.

**NOTICE:**

Bouchard Insurance is required to comply with the licensing agreement we hold with ACORD.

ACORD, in conjunction with the Department of Insurance, creates and enforces the rules and regulations pertaining to proper use of the Certificate of Liability Insurance form.

We are required to mark a Y next to the line of business in which the Additional Insured or Waiver of Subrogation coverage applies. According to ACORD, the Description of Operations section must be limited to describing information necessary to identify the operations, locations and vehicles for which the certificate was issued. Please note the Description of Operations section of the Certificate cannot be used to add additional information except as just described. Marking a Y next to the line of business adequately documents coverage. Equally important, it satisfies the rules and regulations governing the proper use of the Certificate of Liability Insurance form.

Certificate is a reflection of the current coverages provided for the insured. Limits and coverages are afforded to the certificate holder only if required by written contract.

# Firm Licenses

## 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, 2017, that its most recent annual report/uniform business report was filed on January 3, 2017, and that its status is active.

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

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the Third day of January, 2017*



*Ken Detmer*  
**Secretary of State**

Tracking Number: CC8892326279

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

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

## State of Florida Corporate Charter

Certificate No: G94383

Expires: December 31, 2017

## State of Florida Business License

Certificate No: 1813



Expires: 02/26/2019

 	
DBPR ONLINE SERVICES	
Home	
10:34:00 AM 3/3/2017	
<b>Licensee Details</b>	
<b>Licensee Information</b>	
Name:	WHARTON-SMITH, INC. (Primary Name)
Main Address:	PO BOX 471028 LAKE MONROE Florida 32747-1028
County:	SEMINOLE
License Mailing:	
License Location:	
<b>License Information</b>	
License Type:	Certificate of Authorization
Rank:	Cert of Auth
License Number:	1813
Status:	Current
Licensure Date:	05/10/1977
Expires:	02/28/2019



## Firm Licenses (continued)

STATE OF FLORIDA DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION CONSTRUCTION INDUSTRY LICENSING BOARD	
<b>LICENSE NUMBER</b>	
CGC1511243	
<p>The GENERAL CONTRACTOR Named below IS CERTIFIED Under the provisions of Chapter 489 FS. Expiration date: AUG 31, 2018</p>	
<p>SMITH, TIMOTHY SCOT WHARTON-SMITH INC PO BOX 471028 LAKE MONROE FL 32747</p>	



### State of Florida, Business Qualifier License

**Timothy Scot Smith**

Certificate No: CGC1511243

Expires: 08/31/2018

STATE OF FLORIDA DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION CONSTRUCTION INDUSTRY LICENSING BOARD	
<b>LICENSE NUMBER</b>	
CFC1427566	
<p>The PLUMBING CONTRACTOR Named below IS CERTIFIED Under the provisions of Chapter 489 FS. Expiration date: AUG 31, 2018</p>	
<p>SMITH, TIMOTHY SCOT WHARTON-SMITH INC 750 MONROE ROAD SANFORD FL 32771</p>	

### State of Florida, Plumbing Contractor



**Timothy Scot Smith**

Certificate No: CFC1427566

Expires: 08/31/2018

## Firm Licenses (continued)


STATE OF FLORIDA DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION CONSTRUCTION INDUSTRY LICENSING BOARD	
<b>LICENSE NUMBER</b>	
CUC056506	
The UNDERGROUND UTILITY & EXCAVATION CO Named below IS CERTIFIED Under the provisions of Chapter 489 FS. Expiration date: AUG 31, 2018	
DAVOLI, RONALD FRANK WHARTON-SMITH INC 750 COUNTY RD 15 PO BOX 471028 LAKE MONROE FL 32747-1028	



**State of Florida, Underground Utility & Excavation**  
**Ronald Frank Davoli**  
Certificate No: CUC056506  
Expires: 08/31/2018

We are local...

**CITY OF PUNTA GORDA**



**BUSINESS TAX RECEIPT**  
**10/16-09/17**

WHARTON-SMITH INC  
252 W MARION AVE  
PUNTA GORDA FL 33950

WHARTON-SMITH INC  
PO BOX 471028  
LAKE MONROE FL 32747

Is hereby issued a City of Punta Gorda Business Tax Receipt, valid through September 30 of license year for the occupation of LICENSED PROFESSIONALS. \$105.00 was paid on September 21, 2016 for receipt number 17-00016693 at the City Clerk's Office, 326 W. Marion Avenue, Punta Gorda, Florida 33950. (0013615)

City of Punta Gorda, Business Tax Receipt

**2016 / 2017 CHARLOTTE COUNTY  
LOCAL BUSINESS TAX RECEIPT**

MUST BE DISPLAYED IN A CONSPICUOUS PLACE

ACCOUNT 30227  
EXPIRES SEPTEMBER 30, 2017  
RENEWAL

TYPE OF BUSINESS 1883 CONTRACTOR STATE CERTIFIED GENERAL (QUALIFIER-TIMOTHY SCOT SMITH)

BUSINESS ADDRESS 252 W MARION AVE UN 1123  
PUNTA GORDA, FL 33950

BUSINESS NAME WHARTON-SMITH INC

OWNER RONALD F DAVOLI

MAILING ADDRESS PO BOX 471028  
LAKE MONROE, FL 32747

AMOUNT 35.00  
PENALTY 0.00  
**TOTAL 35.00**

**Vicki L. Potts**  
**Charlotte County Tax Collector**

THIS FORM BECOMES A RECEIPT ONLY WHEN VALIDATED

Paid 07/12/2016 Receipt # INT-00031212 35.00

This receipt does not constitute a franchise, an agreement, or permission or authority to perform the services or operate the business described hereon when a franchise, agreement, or other county commission, state or federal permission or authority is required by county, state or federal law.

Charlotte County Local Business Tax Receipt





**Wharton-Smith, Inc.**  
CONSTRUCTION GROUP

252 West Marion Ave.  
Unit 1123  
Punta Gorda, FL 33950  
941.505.6176  
[www.whartonsmith.com](http://www.whartonsmith.com)