



CONSTRUCTION MANAGEMENT AT RISK SERVICES FOR CITY OF VENICE PUBLIC SAFETY FACILITY

RFQ No. 3079-18

March 2nd, 2018



Wharton-Smith, Inc.
CONSTRUCTION GROUP



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Tab 1

Letter of Interest





Letter of Interest

City of Venice- RFQ 3079-18

Construction Management at Risk Services for Venice Public Safety Facility

City of Venice, Florida
City Hall, Purchasing Dept., Room 204
401 W. Venice Ave.,
Venice, Florida 34285

March 2, 2018

RE: Construction Management at Risk Services for City of Venice Public Safety Facility

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 your new public safety facility. 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 Public Safety Facilities, but also with municipalities of similar size and with projects that have incorporated similar complexity 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 33 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 the new Public Safety 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:**

- **Public sector experience-** Wharton-Smith brings a strong depth of experience with government facility projects through-out the state of Florida. Over 95% of Wharton-Smith's work is performed for clients in the public sector, including work for over 80 counties, towns and cities statewide. Many of these have been community-based projects requiring a significant amount of input from multiple stakeholder's as will certainly be the case on the Public Safety Facility project. With strong reliance on past projects of very similar nature, you can rest assured that we will deliver a project that meets the needs of the community and exceeds the goals of the City of Venice.
- **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 therefore have a vested interest in the overall improvement of the City's key public facilities such as this one.
- **Qualified team leadership with highly relevant experience-** Our **Project/Client Manager, Caryn Huff**, was carefully chosen to lead the project due to her experience with municipal projects and her years of experience with the southwest Florida market. Caryn and the rest of the team have spent years managing projects with similar complexity and high levels of security. The entire team is also well-versed in construction management at risk projects so there will be no learning curve on this Public Safety Facility project.

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 future.

Sincerely,

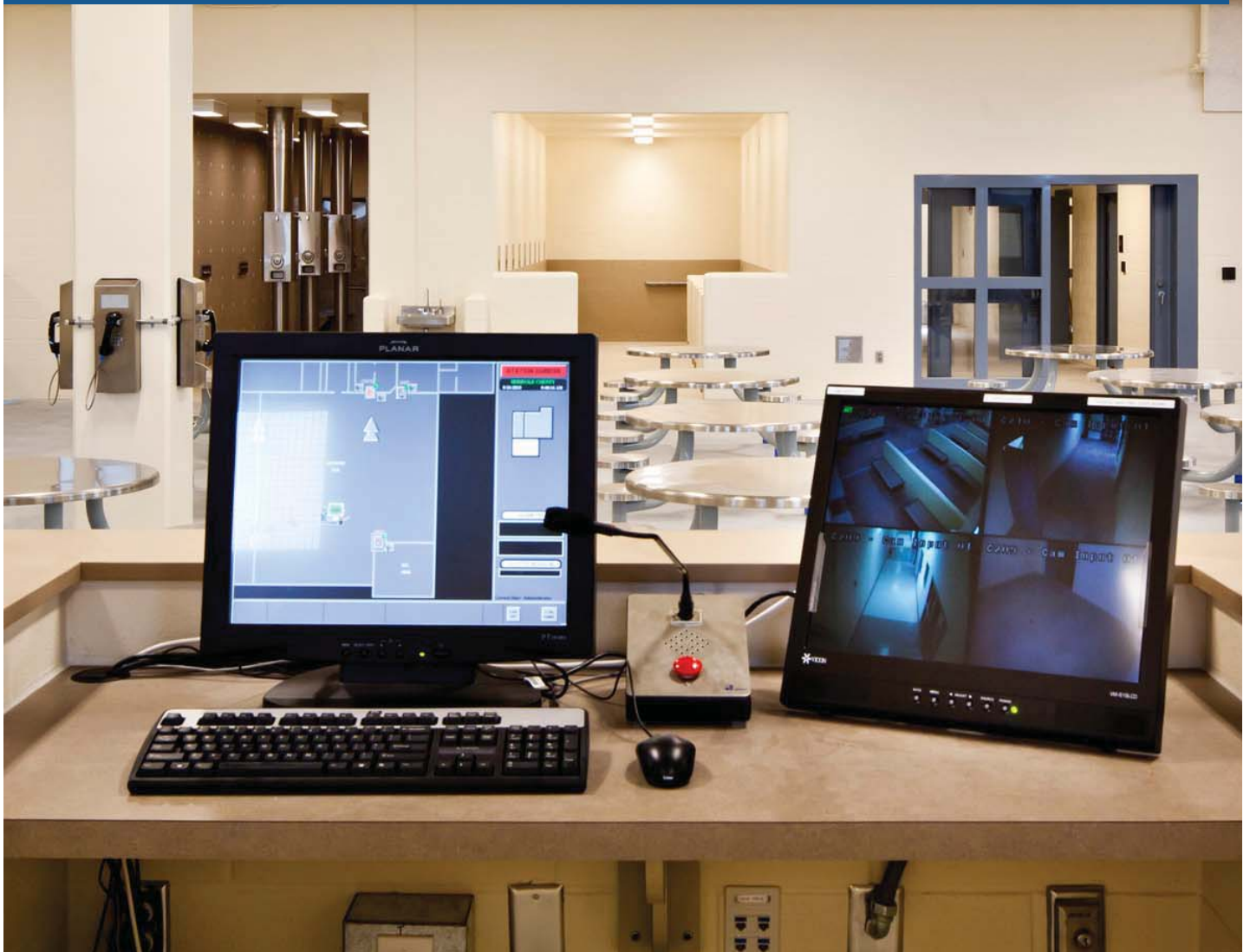
Johnny Santos
Project Executive, Wharton-Smith

Tom Iarossi
Area Manager, Wharton-Smith, Inc.



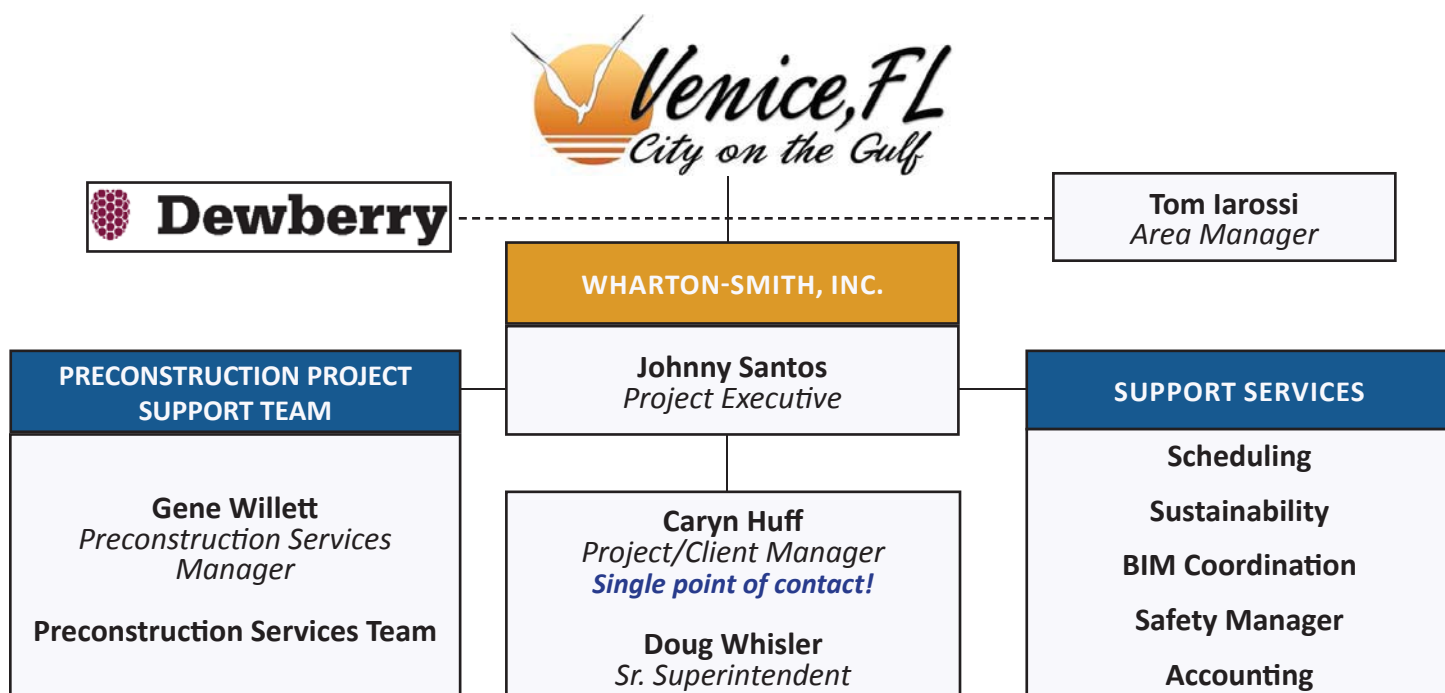
Tab 2

Teams Qualifications/ Key Personnel Experience



Proposed Team Organizational Chart

Below please find the organizational chart as it relates to this project. Each key staff member has been chosen for the Public Safety Facility project based on their experience and expertise. This proposed team has proven experience on governmental and public sector facilities and are all well versed on construction management at risk services, including those with an accelerated schedule, multiple stakeholders and secured sites. Resumes containing the detailed information on each individual's experience and expertise can be found on the pages that follow.



Tom Iarossi

Area Manager- Tampa



Personal Stats

22 years of experience in the construction industry
Certified Building Contractor
Masters of Construction Management - University of Florida
BS in Business Marketing - Florida State University

Role and Expertise

Tom brings over 22 years of expertise and leadership to this construction management services contract and will oversee all preconstruction and construction services that are provided to ensure the delivery of a successful project. He will work closely with all stakeholders including the City's staff, user groups, and design team members to develop a detailed construction plan and ultimately execute it.

"As a construction professional, any time I see facility improvements taking place in the community, whether it's a simple landscape site improvement or new construction such as the new Public Safety Facility, I take the opportunity to give my kids a life lesson on the importance of community projects. I cannot imagine a more valuable work experience than developing a public-use project that will serve the needs of the community in multiple facets. I look forward to working on a project which will continue to revitalize the existing neighborhood facilities that are such an important part of the overall history of Venice and Sarasota County alike."

Additional Project Experience

- District 3 Sheriff's Office and Evidence Building, Punta Gorda, FL (\$10.5M)
- Charlotte County Flight Training Facility, Punta Gorda, FL (\$492,000)
- Design-Build of Admin Bldg., NW Regional Water Reclamation Facility, Hillsborough County, FL (\$3.7M)
- Community Development Building, Punta Gorda, FL (\$3M)
- Charlotte County Security Fencing Renovation, Punta Gorda, FL
- Saint Leo University Student Community Center, Saint Leo, FL*
- BayCare Headquarters, Tampa, FL (\$27M)*

*Individual Project Experience

Highlighted Projects



U.S. Penitentiary Coleman Federal Correctional Complex*

Coleman, FL

Tom provided estimating and office engineering services for the \$112 million maximum security facility. Located adjacent to the existing Coleman Federal Detention Facility, U.S. Penitentiary Coleman I houses over 1,000 inmates.



Charlotte County Jail Infirmary

Punta Gorda, FL

\$9 million, 24,000 s.f., new addition of a 128-bed infirmary. The multi-floor concept consists of an inmate clinic with exam rooms, pharmacy, laboratory, EKG area and direct observation cells, just to name a few

Johnny Santos

Project Executive



PERSONAL STATS

30 years in the construction industry
Certified General Contractor - FL
Class "B" Building Contractor
Prolog Construction Management Program
Electrical Journeyman
Low Voltage Certified Installer
First Aid/CPR; OSHA 30 hour

Role and Expertise

Johnny will provide direct management oversight for the project team. He provides continuity from preconstruction through the entire construction phase and ensures the appropriate resources are available for the project. 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.

"After spending years gaining knowledge as a tradesman, Public Facility construction was the birthplace of my Construction Management career nearly 15 years ago. I have enjoyed many successful and rewarding projects throughout the region since that time, but I am most proud of my work performed in recent years as my team and I managed similar projects with multiple Owners and End Users. These projects proved to be much more than just work assignments, they were bridges to providing a tangible resource to the community and forming lifelong friendships along the way."

Additional Project Experience

- District 3 Sheriff's Office and Evidence Building, Punta Gorda, FL (\$10.5M)
- District Office Building 2- Professional Development Center, Pasco County Schools, Tampa, FL (\$1.4 M)
- Charlotte County Jail Infirmiry, Punta Gorda, FL (\$9M)
- Charlotte County Jail Expansion Phase I, Punta Gorda, FL (\$11 M)*
- Charlotte County Jail Expansion Phase II, Punta Gorda, FL (\$26 M)*
- Department of Corrections Lowell Correctional Institution, Ocala, FL (\$9 M)*
- Department of Corrections Washington Correctional Institution Annex, Chipley, FL (\$43 M)*

*Individual Project Experience

Highlighted Projects



Charlotte County Jail Infirmiry

Punta Gorda, FL

\$9 million, 24,000 s.f., new addition of a 128-bed infirmiry. The multi-floor concept consists of an inmate clinic with exam rooms, pharmacy, laboratory, EKG area and direct observation cells, just to name a few.



Pinellas County Public Safety Facilities and Centralized Communications Center*

Largo, FL

\$81 million, 40-acre Pinellas County campus includes an emergency operations center, a call center, EMS, Sheriffs dispatch center, and the Sheriff's administrative and operational headquarters. Also included a 1,248-space parking garage, an energy plant, and the Sheriff's vehicle maintenance.



Caryn Huff, LEED® AP

Project Manager & Client Manager, City of Venice



PERSONAL STATS

25 years of experience, including direct experience with The City of Venice's processes and procedures. B.S., Building Construction- Auburn University
LEED® Accredited Professional
Board Member, Charlotte Desoto Building Industry Association (CDBIA)

Role and Expertise

Caryn has lived in the Englewood area since 1994 and is very familiar with working on projects within Sarasota & Charlotte Counties. She will reside in Venice beginning in June of 2018, making her just a short drive away from the project site at all times. Caryn is responsible for providing daily leadership to the project team and for the successful completion of all preconstruction and construction phases of the project. She will develop schedules, perform constructability reviews, value engineering and site logistics. During construction, she assists with all construction activities, including quality control, cost control, change orders, and close-out. As a LEED® AP, Caryn will also ensure that sustainable construction practices are applied throughout the project to help achieve a facility with optimal efficiency and durability. **She will serve as the single point-of-contact for the Public Safety Facility project.**

"I had the privilege of starting my career in the construction industry within this area 25 years ago. In that time, I have been involved in numerous projects across the region spanning from Sarasota to Punta Gorda. I take pride in the projects I have successfully completed, many of which were high profile County projects that have made a significant positive impact on the community. One of my measures of success is the long standing relationships I have developed with local agencies and professionals in the area. I look forward to continue contributing to the community in a positive way for years to come."

Additional Project Experience

- District 3 Sheriff's Office and Evidence Building, Punta Gorda, FL (\$10.5M)
- Charlotte County Fire Station 10, Punta Gorda FL*
- Charlotte County Fire Station Efficiency Retrofits - 2, 3, 6, 7, 8 & 12, Charlotte County, FL*
- Charlotte County Justice Center, Punta Gorda, FL (\$36 M)*
- Charlotte County Public Works Operations Center, Punta Gorda, FL*

*Individual Project Experience

Highlighted Projects



Venice Community Center Remodel*

Venice, FL

Caryn served as Project Manager during the design and construction phases of the \$3 million, 45,000 s.f. interior renovations to the City of Venice's Community Center.



Charlotte County Jail Infirmiry

Punta Gorda, FL

\$9 million, 24,000 s.f., new addition of a 128-bed infirmiry. The multi-floor concept consists of an inmate clinic with exam rooms, pharmacy, laboratory, EKG area and direct observation cells, just to name a few.



Doug Whisler

Senior Project Superintendent



Personal Stats

39 years in the construction industry
Certified General Contractor – FL
OSHA 30 Hour; CPR/First Aid;
Confined Space; Fall Protection; Scaffold;
Trenching/Excavation; Qualified Rigger;
Flagger;
HAZCOM; MOT;
Forklift Operator

Role and Expertise

Doug is located on-site full time during the construction phase and is responsible for all on-site activities. He has lived in Englewood since 1994 and has extensive local municipal construction experience. He supervises, sequences, coordinates and monitors all work to ensure 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. He will provide input and direction in the constructability reviews, logistics and safety planning. Finally, Doug ensures the jobsite is safe, clean, and secure on a daily basis.

"I have enjoyed a great career in construction, spanning more than 39 years. During that time, I've successfully built many amazing projects throughout the state, but the truly special projects nearest and dearest to my heart are the ones I get to build near my hometown of Englewood – Sarasota & Charlotte Counties! As the Superintendent for the Charlotte County Human Services & Walk-In Clinic, the Public Safety Building, and the Charlotte Harbor Event and Conference Center projects, it was exciting to see the transformation of the various areas throughout the local area with the completion of each project! The expertise I bring to the Public Safety Facility project is second only to the dedication and commitment I will personally deliver to the project and the residents of the surrounding area."

Additional Project Experience

- District 3 Sheriff's Office and Evidence Building, Punta Gorda, FL (\$10.5M)
- Charlotte County Jail Infirmary, Punta Gorda, FL
- Multiple Fire Stations for Charlotte County, FL*
- City of Punta Gorda Fire Station No. 2*
- Charlotte County Human Services Building, Punta Gorda, FL (\$560,000)*

*Individual Project Experience

Highlighted Projects



Pinellas County Public Safety Facilities and Centralized Communications Center*

Largo, FL

\$81 million, 40-acre Pinellas County campus includes an emergency operations center, a call center, EMS, Sheriff's dispatch center, and the Sheriff's administrative and operational headquarters. Also included a 1,248-space parking garage, an energy plant, and the Sheriff's vehicle maintenance.



Charlotte County Public Safety Building Fire/EMS Vehicle Maintenance Facility*

Port Charlotte, FL

\$16 million, 50,000 s.f., new public safety building, seven acres, designed to house Fire/EMS administration and training, County EOC/Emergency Management, 911/211 office, and selected sheriff's personnel.



Gene Willett

Preconstruction Services Manager



Personal Stats

30 years of experience with estimating in the construction industry
B.A. - Florida Atlantic University
MBA - Florida Atlantic University
Graduate Concentration in Accounting - University of Phoenix

Role and Expertise

Gene 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. Gene is responsible for the cost estimate, GMP development, value engineering, and works closely with the construction team to develop the bid packages and determine best value recommendations. Gene has the knowledge and know-how to support all estimating aspects of the Public Safety Facility efforts as required. Gene works closely with members of the project team during preconstruction for constructability, site utilization and scheduling reviews.

"Public facilities are always fun because of the end-users and community involvement aspects. Having worked on numerous community driven projects, I find the greatest challenge lies around the extensive amount of infrastructure components involved with the project to properly outfit them for unknown future use, etc. Aspects such as these often go unseen by the public eye but ultimately serve as the true measure of success for the job from an end-user standpoint. I will work closely with the design team to develop detailed cost models so the City can make sound business decisions regarding cost."

Additional Project Experience

- District 3 Sheriff's Office and Evidence Building, Punta Gorda, FL (\$10.5M)
- Charlotte County Flight Training Facility, Punta Gorda, FL (\$492,000)
- Charlotte County Jail Expansion Phase I, Punta Gorda, FL (\$11 M)*
- Charlotte County Jail Expansion Phase 2, Punta Gorda, FL (\$26 M)*
- Pasco County Three Separate Fire Stations, Pasco County, FL (\$3 M)*
- Pasco County Library, Pasco County, FL (\$2.5 M)*
- Southwest Florida Water Management District Main Office, Brooksville, FL (\$8M)*
- Charlotte County Security Fencing, Punta Gorda, FL

*Individual Project Experience

Highlighted Projects



Charlotte County Jail Infirmary

Punta Gorda, FL

\$9 million, 24,000 s.f., new addition of a 128-bed infirmary. The multi-floor concept consists of an inmate clinic with exam rooms, pharmacy, laboratory, EKG area and direct observation cells, just to name a few.



Pinellas County Public Safety Facilities and Centralized Communications Center*

Largo, FL

\$81 million, 40-acre Pinellas County campus includes an emergency operations center, a call center, EMS, Sheriff's dispatch center, and the Sheriff's administrative and operational headquarters. Also included a 1,248-space parking garage, an energy plant, and the Sheriff's vehicle maintenance.



Tab 3

Project Team Experience/ References



Wharton-Smith has over 33 years of experience providing quality construction services for public and municipal clients. Approximately 90% of our public work, including municipal development projects, have been delivered through the construction management at risk methodology. We understand how to work with owners, design teams, and developers, to help manage development projects and bring added value to the project. The key to a successful construction management process is communication and we believe in forming strong partnerships with all team members at the beginning of every project. As Construction Manager, we coordinate all project functions- including estimating, value analysis, constructability reviews, project operations and management, scheduling, cost control, quality control, and safety. We operate under an open-book principle with the budget and GMP process delivering accurate updates on cost, value analysis, and project scheduling throughout the project. Our open-book policy and communication ensures that there are “no surprises” and guarantees a successful project.

PROJECT RELEVANCIES	SIMILAR PROJECT													
	Charlotte County Public Safety Building Fire/EMS (Charlotte County, FL)	Federal Correctional Complex (Coleman, FL)	Pinellas County Public Safety Complex (Pinellas County, FL)	Charlotte County Justice Center- Multiple Projects (Charlotte County, FL)	Charlotte County Jail Expansion - Phase I & II (Charlotte County, FL)	Charlotte County Jail Infirmary (Punta Gorda, FL)	City of Tavares Public Safety Facility (Tavares, FL)	District 3 Evidence Building + Sheriff's Office (Punta Gorda, FL)	Sanford Public Safety Complex (Sanford, FL)	Edward J. Doyle Police Headquarters (Maitland, FL)	John E. Polk Correctional Facility (Sanford, FL)	City of Orlando Fire Station 1 (Orlando, FL)	District 9 Medical Examiners Office (Orlando, FL)	Seminole County Sheriff's Office + Public Safety Building Remediation (Sanford, FL)
	50k s.f	830k s.f.	269k s.f.	N/A	177k s.f.	77k s.f.	38k s.f.	38k s.f.	74k s.f.	17k s.f.	77k s.f.	60k s.f.	40k s.f.	20k s.f.
	\$16 M	\$112 M	\$81 M	\$36 M	\$37 M	\$9 M	\$12.7 M	\$10.5 M	\$16.5 M	\$4.1 M	\$33.6 M	\$17.9 M	\$11 M	\$3.9 M
Law enforcement + Public Safety	✓		✓	✓			✓	✓	✓	✓		✓		✓
Municipal Project	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
CMAR Delivery			✓		✓	✓		✓	✓	✓	✓		✓	✓
Hurricane Hardened	✓	✓	✓		✓	✓	✓	✓	✓		✓			
30,000 s.f.+	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	
Evidence Storage or Data Center		✓	✓		✓	✓	✓	✓	✓	✓	✓		✓	



Charlotte County Jail Infirmary
Punta Gorda, Florida

KEY RELEVANCIES

- ✓ Same Project Team
- ✓ Similar Complexity
- ✓ CMAR Services
- ✓ Similar Budget
- ✓ Secured Site



As construction manager, Wharton-Smith recently completed construction of the 128-bed infirmary to the Charlotte County Jail. The multi-floor concept consisted 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 included an expansion to the central energy plant to accommodate the new wing and all related site work.

Owner's Representative: Charlotte County Government ▪ Roger Warner ▪ 18500 Murdock Cir. ▪ Port Charlotte, FL 33948
▪ P 941.743.1906 ▪ roger.warner@charlottecountyfl.gov

Completion Date: February 2018 (est.)

Cost / Size of Project: \$9 million (est.) ▪ 24,000 s.f.; 128 beds

Firm's Responsibility: Construction Management at Risk Services





KEY RELEVANCIES

- ✓ Public Safety Complex
- ✓ Over 30,000 s.f.
- ✓ Multipurpose Rooms
- ✓ Training Facilities
- ✓ CMAR Services
- ✓ Police & Fire Accommodations
- ✓ Hurricane Hardened



Wharton-Smith provided preconstruction and construction management services for the City of Sanford's Public Safety Complex. This 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 through 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, irrigation and site lighting.

Other unique elements incorporated into the Sanford Public Safety Complex included bullet proof glass doors, an antique fire truck and police car museum, impact resistant exterior glass walls, and a stainless steel monumental staircase in the main lobby.

Owner's Representative: City of Sanford ▪ Nicholas McRay (Currently with Lake County) ▪
300 North Park Ave ▪ Sanford, FL 32771 ▪ P (352) 483-9080 ▪ nmcray@lakecountyfl.gov

Completion Date: October 2010

Cost / Size of Project: \$16.5 M ▪ 74,648 s.f.

Firm's Responsibility: Construction Management at Risk Services



City of Tavares Public Safety Complex

Tavares, Florida



KEY RELEVANCIES

- ✓ Public Safety Complex
- ✓ Similar Size (Over 30,000 s.f.)
- ✓ Multipurpose Rooms
- ✓ Training Area
- ✓ Police & Fire Accommodations
- ✓ Administration/Office space
- ✓ Evidence/Records Storage

Wharton-Smith is currently providing General Contracting Services on the new 38,527 s.f. Public Safety Complex for the City of Tavares which includes a fire station, police station and emergency operation center. The Fire Station features four drive through apparatus bays, a day room with kitchen and dining along with second floor bunk and shower rooms. The police station includes a sally-port, fitness center and locker rooms shared with the fire department, administration offices, patrol room, detective unit, interrogation rooms, criminal investigation lab, indoor shooting range, evidence and records storage. The emergency operations center has a community meeting room and a command center with overnight accommodations.

Owner's Representative: City of Tavares ▪ John Rumble ▪ 201 East Main Street ▪ Tavares, FL 32778 ▪ P (352) 742-6131

Completion Date: December 2018 (est.)

Cost / Size of Project: \$12.7 M ▪ 38,527 s.f.

Firm's Responsibility: General Contracting Services





KEY RELEVANCIES

- ✓ Training Room
- ✓ Multipurpose Room
- ✓ Over 30,000 s.f.
- ✓ Multi-use Facility
- ✓ Administration/Office Space
- ✓ Houses Special Operations Units
- ✓ State-of-the-Art Technology



Located in the heart of downtown, Orlando's Fire Station (OFD) No. 1 (a.k.a "The Big House") is a 60,000 s.f., 11-bay station that serves as the city's headquarters and is home to more than 70 firefighters. Delivered design-build, the new firehouse incorporates state-of-the-art technologies and high-end finishes throughout and includes administration offices, sleeping quarters, workout space, modern kitchen and dining room, training areas, and meeting space. The facility also houses OFD's special operations units, consisting of Arson and Bomb, Dive Rescue, and Hazardous Materials. Fire Station 1 was designed and built to be energy efficient, incorporating various sustainable design and construction elements, and achieved LEED Gold certification with the U.S. Green Building Council.

Owner's Representative: City of Orlando Fire Station #1 ▪ Bill Burns - Project Manager
400 S. Orange Ave. ▪ Orlando, FL 32802 ▪ P (407) 246-2266 ▪ bill.burns@cityoforlando.net

Completion Date: October 2009

Cost / Size of Project: \$17.9 M ▪ 60,000 s.f.

Firm's Responsibility: Design-Build Services





KEY RELEVANCIES

- ✓ CMAR Services
- ✓ Multipurpose Room
- ✓ Administration/Office Space
- ✓ Evidence/Records Storage
- ✓ Municipal Project



Wharton-Smith provided preconstruction and construction management services on the Edward J. Doyle Police Building for the City of Maitland. This police facility is a two-story, 17,289 s.f. building and boasts the latest technology and security innovations. The ground floor consists of reception, records, quartermaster, evidence processing, storage, and three high-security prisoner holding cells off of a secured sally-port and secure entrance. The second floor consists of all the police department administration offices, including offices for the Chief of Police and other commanders. Additional features include larger office areas for the detectives and the community policing officers and a large, multi-purpose conference and training room.

The Maitland Police Station originally targeted LEED Silver Certification, however after all the sustainable measures were completed this project ultimately achieved a LEED Gold Certification.

Owner's Representative: City of Maitland ■ 1776 Independence Lane ■ Maitland, FL 32751 ■ P (407) 539-6200

Completion Date: November 2009

Cost / Size of Project: \$4.1 M ■ 17,289 s.f.

Firm's Responsibility: Construction Management at Risk Services





John. F. Polk Correctional Facility
Sanford, Florida

KEY RELEVANCIES

- ✓ Secured Facility
- ✓ CMAR Services
- ✓ Multipurpose & Training Room
- ✓ Administrative Offices
- ✓ Over 30,000 s.f.

"Working in a Correctional Facility has many unique challenges and [Wharton-Smith] eagerly worked to overcome those challenges, exceeding our expectations."

-Preston Allyn, Sergeant
Seminole County Sheriff's Office

Wharton-Smith provided preconstruction and construction management services for a new addition to the existing John F. Polk Correctional Facility. This facility expansion project consisted of a 60,000 s.f. addition of inmate beds and administration, 17,000 s.f. addition of intake/release with ally-port facilities, public video visitation, central energy plant, misc. support services, and 4.25 acres of associated site work. This project was constructed in and around an existing operational facility over an 18 month period.

Owner's Representative: Seminole County Government ▪ Sgt. Preston Allyn ▪ 100 Bush Blvd. ▪ Sanford, FL 32773
▪ P (407) 665-2431 ▪ pallyn@seminolesheriff.org

Completion Date: September 2010

Cost / Size of Project: \$33.6 M ▪ 77,000 s.f. addition + 13,000 s.f. renovation

Firm's Responsibility: Construction Management at Risk Services





Pinellas County Public Safety Facility
Largo, Florida

KEY RELEVANCIES

- ✓ Secured Facility
- ✓ CMAR Services
- ✓ Multipurpose & Training Room
- ✓ Administrative Offices
- ✓ Over 30,000 s.f.
- ✓ Data Center
- ✓ Hurricane Hardened



Johnny Santos served as Sr. Project Manager, **Doug Whisler** as Sr. 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 forty acre site to house the County's new emergency operations center, emergency communications and 911 call center, emergency medical services, sheriff's administrative / operations headquarters and dispatch center, and communications building. The project also included a 1,248-space parking garage, radio tower, and energy plant, a helipad, a fueling facility and the Sheriff's vehicle maintenance area- all constructed on a secure site. The facility is constructed with the capability to withstand winds of up to 219 mph 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.

Owner's Representative: Pinellas County Real Estate Management ▪ Steve Daniel- Construction Administrator ▪ 509 East Ave. ▪ Clearwater, FL 33756 ▪ P (727) 415-9020 ▪ sdaniel@pinellascounty.org

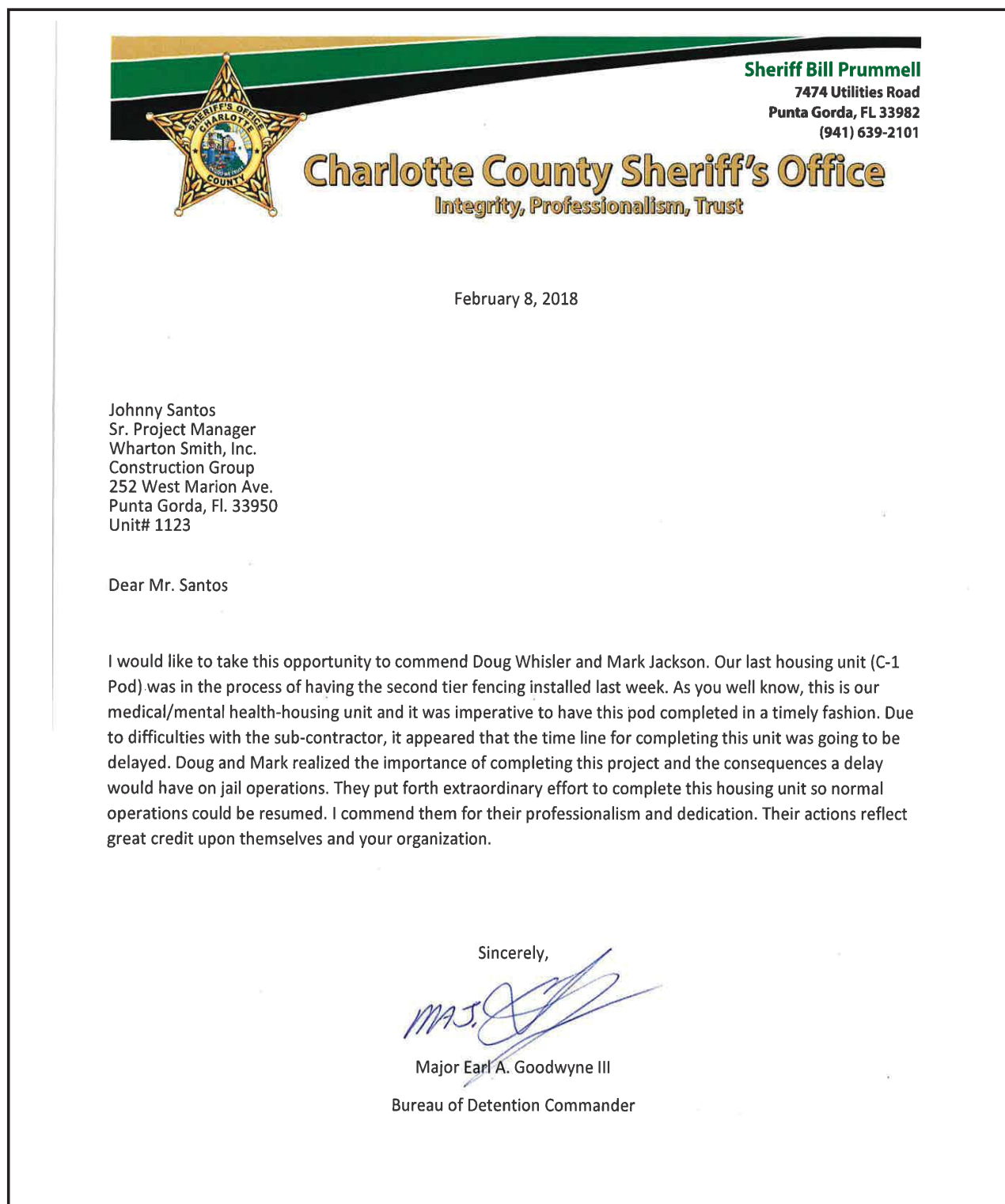
Completion Date: June 2014

Cost / Size of Project: \$81 M ▪ 269,032 s.f.

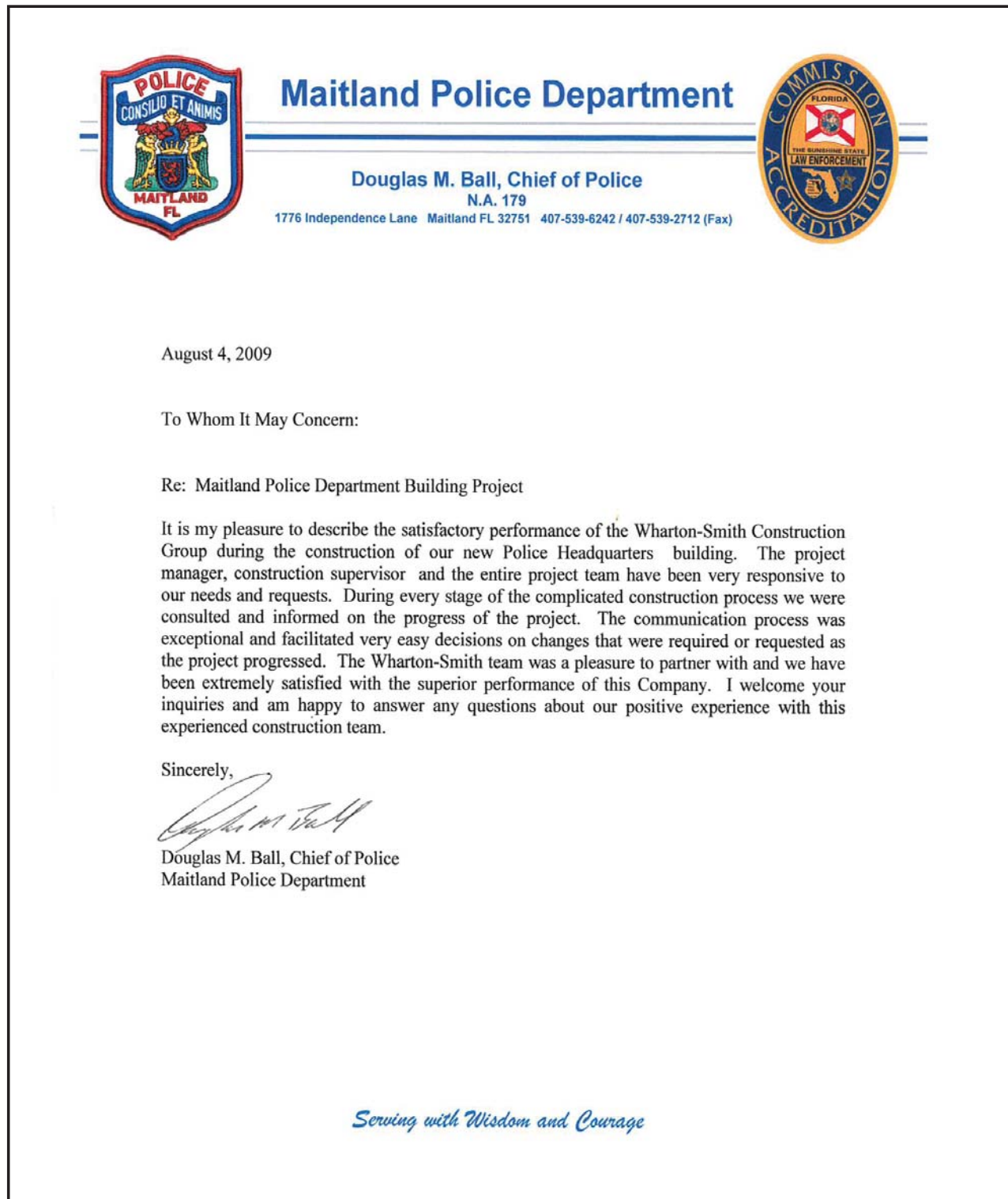
Firm's Responsibility: Individual experience of Johnny Santos, Doug Whisler, and Gene Willett




References



References



References



BRIAN F. TOOLEY
CHIEF OF POLICE

•

SANFORD POLICE DEPARTMENT
815 S. FRENCH AVENUE
SANFORD, FLORIDA 32771

•

TELEPHONE
407.688.5070

FACSIMILE
407.688.5071

WEBSITE
WWW.SANFORDPOLICE.ORG

•

CITY COMMISSION

LINDA KUHN
MAYOR

ART WOODRUFF
DISTRICT 1


DR. VELMA H. WILLIAMS
DISTRICT 2, VICE MAYOR

RANDY JONES
DISTRICT 3

JACK T. BRIDGES
DISTRICT 4

•

CITY MANAGER
ROBERT (SHERMAN) YEHL



POLICE DEPARTMENT

August 17, 2009

To Whom It May Concern:

The City of Sanford Public Safety Complex is under construction. This project has been discussed for approximately fifteen years. Once the decision was made to finally move forward on this project, it was critical that an outstanding architectural firm and construction firm be selected. I believe we have both; I will address the construction firm in this letter.


Wharton-Smith, Inc. is the construction company that we selected. During the early stages of this project, I found their staff to be highly professional, easily accessible, and always willing to help in any way. They continually sought input from the City of Sanford staff, and always seemed very eager to do what it took to please the customer.

During a number of community meetings, the staff of Wharton-Smith, Inc. was responsive and informative to the public. In these tough economic times, many citizens might question the need for a project like this. Wharton-Smith, Inc., as part of the project team, excelled at answering questions that arose in these public meetings.

We are just a few weeks past our groundbreaking, and still have thirteen months of construction ahead of us. To date, the folks at Wharton-Smith, Inc. have been a pleasure to work with. I am confident that their highly professional staff will make the remainder of our project a success.

If I can be of further assistance, please feel free to call me a 407.688.5075.

Sincerely,

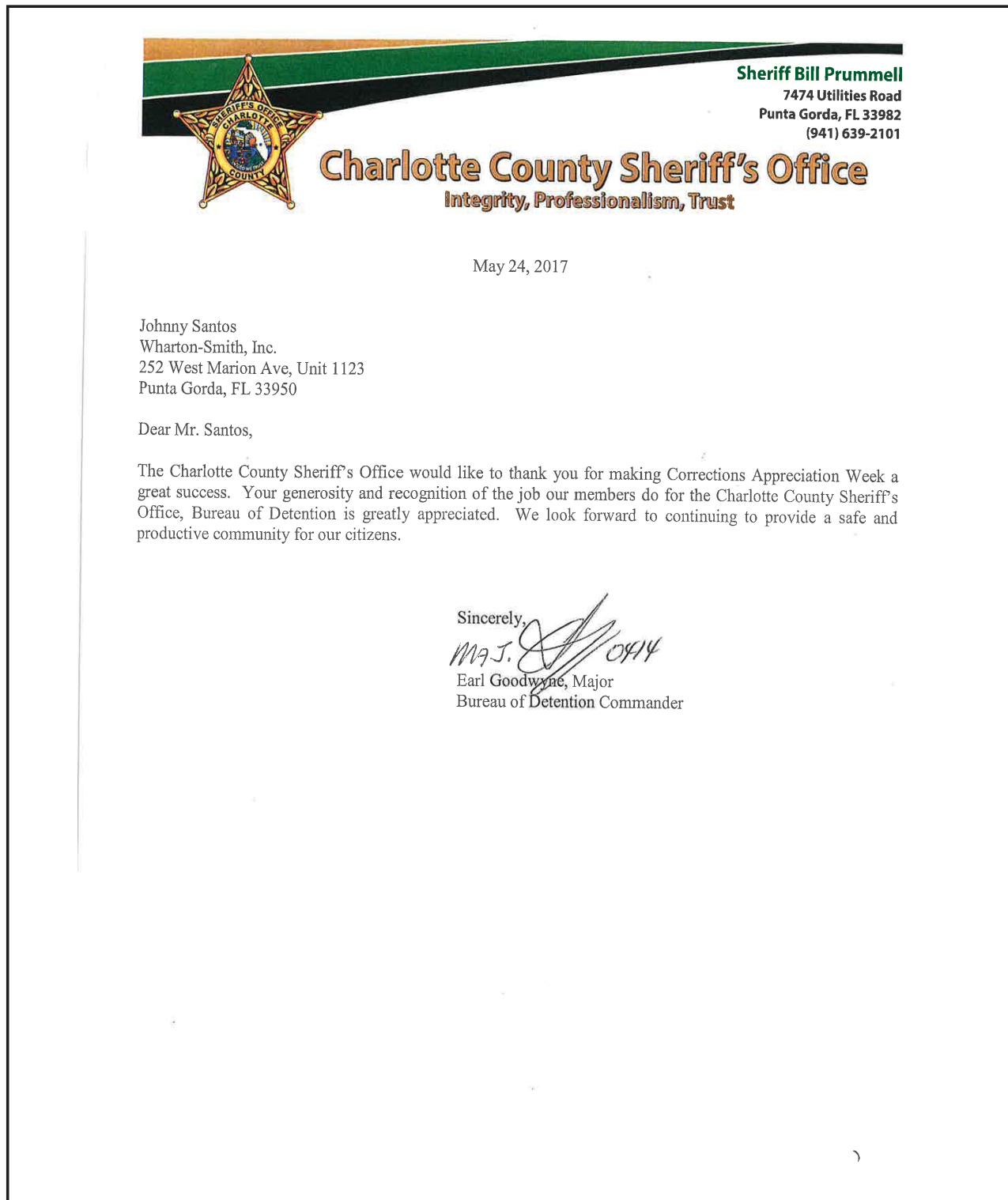


BRIAN F. TOOLEY
CHIEF OF POLICE

In Partnership With The Community



References



References



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
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



References



CITY OF ORLANDO

FIRE DEPARTMENT



September 25, 2012

Re: Letter of Recommendation — Wharton-Smith, Inc. — Construction of Orlando Fire Station 1 and Fire Headquarters.

To Whom It May Concern:

The City of Orlando contracted with Wharton-Smith [W-S] for *design-build* delivery services for Fire Station 1 and Fire Headquarters. Wharton-Smith, from the beginning, provided outstanding pre-construction phase services critical to site preparation challenges in the downtown area. These challenges consisted of restricted space and adjacent to active RR tracks. The architectural design is excellent in use of space, natural light, and offers a superb flow of personnel while staying within the project budget.

During the construction phase, Wharton-Smith was always responsive and committed to owner requested changes and to identifying additional, value added engineering services. Wharton-Smith was a pro-active partner, tenacious in resolving issues and communication was always outstanding and responsive to customer needs.

This fast-track project, less than a year in construction, consisting of over 60,000 SF of air conditioned space, 3-1/3 stories, and 12 apparatus bays; was delivered on time and within budget. As a final comment, this state-of-the art facility recently was certified as LEED Gold by the U.S. Green Building Council.

Sincerely,

John Miller, Fire Chief

c: file



Tab 4

Ability to Perform Services/Location



Wharton-Smith, Inc. is a privately held corporation that has provided quality construction for more than 32 years throughout the state.

Specializing in municipal, educational, public, and hospitality, our services include preconstruction, construction management, general contracting, green building, and design-build delivery for both private and public sector clients. Wharton-Smith was founded by George Smith and Bill Wharton, who envisioned growing a company that would encompass strong work ethics and have a positive impact within the communities that we serve. A Top 400 ENR Contractor, with a strong financial backing, Wharton-Smith continues to uphold those founding ideals under the leadership of Ron Davoli, President / CEO.

Wharton-Smith is headquartered in Sanford, Florida and currently operates six branch offices throughout Florida and the southeastern United States as noted below. Wharton-Smith proudly services The City of Venice via our Punta Gorda office, which was established in 2016.



**George E. Smith (left) - Chairman of the Board;
Ronald F. Davoli (right) - President / CEO**

The Punta Gorda office will provide direct oversight and management for the Public Safety Facility project.

Wharton-Smith Local Office:

Punta Gorda, Florida
252 West Marion Ave., Unit 1123
Punta Gorda, FL 33950
Ph: 941.621.4723

Charlotte, North Carolina
77th Center Drive, Suite 120, Charlotte, NC 28217
Tel: 704.525.5695 • Fax: 704.525.5697

Wharton-Smith additional offices:

Tampa, Florida
4912 W. LaSalle Street, Tampa, FL 33607
Tel: 813.288.0068 • Fax: 813.288.0371

Gulfport, Mississippi
1087 East Pass Road, Gulfport, MS 39501
Tel: 228.284.2068 • Fax: 228.284.2117

Sanford (Orlando), Florida
750 Monroe Road, Sanford, FL 32771
Tel: 407.321.8410 • Fax: 407.829.4453

Jupiter, Florida
125 W. Indiantown Road, Jupiter, FL 33458
Tel: 561.748.5956 • Fax: 561.748.5958

Baton Rouge, Louisiana
17474 Opportunity Avenue, Baton Rouge, LA 70817
Tel: 225.754.0550 • Fax: 225.754.0578



Wharton-Smith has read all issued information regarding the City of Venice's new Public Safety Facility. We understand that this facility has a construction cost of approximately \$9 million that shall include the building and site development. This facility will be an approximately 30,000 s.f hurricane-hardened command center located on a secured 10 acre property. The building will include items such as a multipurpose room, a community room, house forensic technology, evidence storage area, housing data center for IT services, ect. We also understand that this project will be delivered as construction management at risk services. We are highly experienced in the construction of municipal and public safety facilities, including projects such as the Charlotte County Jail Infirmary, Seminole County Jail and Sheriff's Office, City of Maitland Police Headquarters, and the City of Sanford's Public Safety Complex, Our team is committed to providing construction services that are of the highest quality standards, while keeping within the project budget produced by the City of Venice. While we are very proactive in providing different options for your review, we will never sacrifice quality for cost. We are excited to be a part of the team that provides this type of top-notch facility to the community.

SERVICES TO BE PROVIDED

On the Public Safety Facility project, Wharton-Smith will perform four important services:

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

PRECONSTRUCTION SERVICES

KICK-OFF MEETING

The project will begin with a "kick-off" meeting involving The City of Venice staff, Dewberry Architects and the Wharton-Smith project team. During our initial project meeting, we will identify with The City of Venice those individuals, groups and project stakeholders, which need to be communicated with on a regular and consistent basis. Specific lines of communication will be established and all pertinent information will be discussed. Points of concern such as quality standards, programming requirements, aesthetics, budgets, constructability, scheduling, permitting, and site logistics will be reviewed. It is vital that all parties are on the same page from the outset.

To ensure we are maintaining high quality design and enforcing high quality construction which complies with specifications, we recommend that our preconstruction team participates in every upcoming programming and design meeting. **Our Project Manager, Caryn Huff** will also attend to ensure both preconstruction and operations are dialed into the project status at all times. Prior to each meeting, we will review the most current design and program documents. Based on past experience, we will keep a sharp lookout for items we know will be required although not yet drawn. During the meeting, we listen to what is being said in order to understand how the written design may be influenced by the discussion, noting all items that may be for inclusion in the project.



"NEEDS" VERSUS "WANTS"

If the initial estimate confirms the project is over budget, a path must be established to return to an affordable cost, while maintaining the function and purpose of the facility. Early in the design, user groups are invited to a design session that begins with "if there were no constraints, what would you want in this facility?" This question is intended to help define what an ideal facility would include. What is missing is an understanding of how these "wants" fit into the financial constraints of the project. Rarely is there enough funding to incorporate everything that everyone wants – so how to decide?



We would revisit the list of wants, providing cost estimate information based on simple sketches, narrative information, and a site visit to review existing conditions. This will allow the project team to understand and prioritize – because not every “want” is a “need.” We will construct a cost model to demonstrate alignment with budget and schedule constraints. The model will be subdivided to define each element, building, feature, and option, so that the entire menu of wants is clearly visible. The team can then walk through the cost and design effect of each want, prioritizing by its effect on the function, look, and cost to the project. This process is critical in identifying and prioritizing. Items that are low priority “needs,” as well as high priority “wants” may be added to the project as alternates or donor opportunities and included as contingencies allow.

Once the items have been prioritized and costs assigned, the project team will understand how much of the list can be constructed within the budget - these are the “needs.” Items falling below the line become “wants.” This becomes the basis for the cost estimate model and design work can resume.

PROJECT BUDGET ESTIMATING

Unlike many other construction managers, we are also in the hard dollar bid market and have been very successful in winning many projects as the low bidder. This gives us the advantage of knowing the true market value and understanding what items must be included in a project, even if not specifically shown on the documents. This enables our estimates to avoid gaps, overlaps and omissions. We employ an organized system of controls to ensure that costs are managed and controlled during all project phases, from earliest design planning to construction completion. Our cost control begins with defining the City’s program requirements, analyzing the project budget, and aligning both. These numbers are highlighted and made available to the project team. During each meeting, we provide input as to schedule, constructability, alternatives, and cost in order to allow timely decisions to be made.



Our Preconstruction Services Department, headed by Gene Willett, will begin by fully understanding the project’s program requirements, analyzing the overall project budget, and aligning it with our construction estimates. The entire project team, including the construction management team and design team, will be engaged in the preconstruction effort. Constructability reviews will be conducted by our **Project Manager, Caryn Huff,** and our **Senior Project Superintendent, Doug Whisler** along with oversight by **Johnny Santos, Project Executive,** who will also provide reviews, phasing options, scheduling, and bidding scope development.

Every project is unique and requires a specific approach in order to maximize the program for the budget dollars that are available. It will be our job to work with the design and construction management team members, not only during the design phase, but also during the bidding and construction phase in order to maximize the best value for the City of Venice.

DESIGN REVIEWS

The preconstruction phase determines the design of the project and therefore, the cost of the project. During this phase, we will be very active with the entire project team supplying accurate cost information, as well as advice from our experience of completing hundreds of government municipality projects. During the preconstruction phase of this project we will provide a number of formal reviews. Our reviews are based on:

- Thorough understanding of the project (program) requirements
- Previous cost data from our extensive public safety and municipal building project database
- Current cost data from hard bid projects
- Experience in the Sarasota County market
- Input from select major trades



Within our preconstruction department we have staff experienced in architecture, civil, structural, electrical, and mechanical disciplines. Each, within their own area of expertise, performs quantity take-offs and cost estimates for each division. The project is analyzed for practicality, access, phasing, schedule, seasonal issues, and other items affecting constructability. Utilizing input from our construction staff and our in-house cost library of municipal projects, costs are developed for each work activity. Items that were not in the previous version of the documents are identified and flagged. At the appropriate point in the design, costs are verified with the local subcontractors. Our estimates are constantly updated to accurately reflect the project in its current design stage. Items of potential confusion are flagged so that sufficient detail can be included in the design documents, thereby avoiding subcontractor contingency.

We offer estimates at any stage of the preconstruction with typical milestones at conceptual estimate, schematic estimate, design development estimate, and Guaranteed Maximum Price (GMP).

COMPETITIVE SUBCONTRACTING BID STRATEGY / GMP DEVELOPMENT

Once the project moves from the design phase, it is our team's responsibility to develop the best competitive subcontracting and bid strategy for this project. We will prepare a list of best potential vendors and subcontractors suited for this pricing and construction delivery method. By providing accurate, complete, and detailed bid instructions to the subcontractors we ensure there are no misunderstandings or unknown circumstances that would otherwise creep into the bids.

All the subcontractors bidding the project will be qualified to perform the work. Some of the factors we look at include:

- Successful past experience
- The design consultant's recommendation
- Manpower availability
- Location
- Bonding
- Safety
- Past relevant experience
- Project staff
- Financial strength

When subcontractors are pre-qualified correctly, the award process is simply the lowest responsive and complete bid.

Our team has a database of over 3,200 prequalified subcontractors, which includes many southwest Florida firms. We will develop a list of potential subcontractors and suppliers for the project and provide it to The City of Venice for review and approval, prior to distribution of the bid documents. After the subcontractor and vendor list has been finalized, we will schedule pre-bid meetings and site visits, so that bidders can become familiar with the existing conditions. In order to maximize local participation on the project, we will evaluate which trade packages can be broken up into smaller packages in order to provide increased opportunities for smaller subcontractors that would otherwise not be able to handle a larger trade package. Multiple competitive bids will be solicited for each work trade on the project and a GMP will be developed and submitted to The City of Venice for approval.

After the GMP is approved, we will go through a process of scope verification and negotiations with the low bidders. A formal recommendation for the award of each subcontract will be submitted to The City of Venice for final approval. We will be looking for a lump sum price from the bidder in order to lock in a fixed price for the work. Our team will also identify and manage owner direct purchase opportunities to save The City of Venice sales tax dollars that could potentially be used for the project.



CONSTRUCTION PHASE

Construction is the most complex phase as it relates to coordination, communication, scheduling, and cost control. Our team provides The City of Venice with the benefit of having highly experienced individuals working towards the same common goal, which is to efficiently and economically deliver a building that meets the needs and vision of the City. We provide stakeholders with access to our procedural mechanisms, so that the team can have uniformed, systematic procedures during the construction phase, keeping all management levels informed of the project status. This well-developed approach has procedures to address lines of communication, management information systems and records management, as well as schedule and cost control procedures.

Our team will conduct a thorough study of the building site, adjacent properties and access roads and will consult with The City of Venice regarding access, staging, deliveries, and construction trade parking. Before construction operations start on-site, our team will submit a site logistics, construction staging and management plan addressing the following:

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

With this approach the City of Venice, as well as other team members, will have a clear understanding of the project and can monitor the entire process as needed.

PERMITTING PROCESS

We have developed a highly efficient method for meeting regulatory requirements. By determining all permitting/approval requirements early in the process, we can customize a plan to track and obtain permitting/approvals in the most expeditious manner. In the beginning stages of the project, we quickly identify and address any issues that may require special attention. We work with local regulatory agencies to identify project requirements and permit schedule durations. When possible, informal pre-submittal review meetings are held with permitting officials to obtain valuable input. Early and open dialogue with all required agencies aids in expediting the permitting process and is a good defense against surprises during permitting and construction.

OVERALL PROJECT MANAGEMENT

SAFETY

Wharton-Smith understands that safety management on any project is of the utmost importance, and particularly when working on an secured public safety site such as this Public Safety Facility. We are very proud of our strong safety record. We have been honored with more than 12 safety awards over the past nine years, including a national award for Safety Excellence in Construction and Best Overall Safety Program. We continually review our accident history to determine progress in current programs and improvements that need to be implemented. Wharton-Smith has had no safety-related litigation claims. Thorough job site safety inspections are conducted continuously throughout the project by our on-site safety personnel. A pre-job safety planning meeting allows potentially hazardous tasks to be flagged in advance so the project staff can prepare. Each project is also inspected by



our Safety Department staff on a monthly basis. The inspections cover every aspect of on-site safety and include an electronic report that both addresses hazardous conditions observed and assigns responsibility for corrective actions. Each inspection report is reviewed by our management team, including the President of the company.

Our highly trained safety staff holds multiple certifications including those issued by the U.S. Department of Labor —OSHA (1926 Construction Standards and 1910 General Industry), Board of Certified Safety Professionals (CSP) and National Safety Council.

SCHEDULING



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

Our project schedules are created in-house with input from our entire project team and not by an outside consultant. Wharton-Smith uses Primavera® P6 scheduling software which creates a computer generated schedule utilizing the Critical Path Method of construction scheduling.

The development of the baseline schedule is the crucial first step. The scope of the work for the project is broken down in phases which creates a Work Breakdown Structure (WBS). The WBS outlines all the project phases including pre-construction (constructability reviews and value engineering), permitting, bidding and procurement, construction, project close-out, and ultimately turnover. Our **Project Manager Caryn Huff**, and **Senior Project Superintendent Doug Whisler** will begin the planning process by preparing a WBS that will break the project down into the phases mentioned above. Activities are then added to each phase of the WBS and these activities will cover the entire scope of work for the project. This baseline schedule is developed during preconstruction and used throughout the entire life of the project.

The project team will meet weekly to accurately update the overall project schedule. The daily reports, subcontractor input, and field reviews are used to update the schedule and record what work has been put in place. Actual start dates, finish dates, and remaining durations are confirmed during the update. After each update is complete it is reviewed by the entire project team and adjusted if necessary so that the plan going forward allows us to finish the project on time. We then distribute copies of the project schedule to all subcontractors, design team members and the owner so they can incorporate these updates into their work plans. The durations and logic of the critical path and near critical path activities of the project schedule are reviewed due to their level of importance moving forward.

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

The schedule that we develop will be a pragmatic tool used by all parties, with all data entry and maintenance performed by Wharton-Smith. The schedule is the mechanism that will initiate the discussion, review, agreement, and planning of the project sequence by the entire project team. This approach allows us to utilize the schedule, not only as a tool to

"I found their [Wharton-Smith] staff to be highly professional, easily accessible, and always willing to help in any way. They continually sought input from the City of Sanford staff, and always seemed very eager to do what it took to please the customer."

- Brian Tooley, Chief of Police
Sanford Police Department



update and forecast timelines, but also to resolve potential delays and conflicts. This joint approach benefits all parties with the common goal of providing a successful project.

COST TRACKING AND COST CONTROL DURING DESIGN

During the design phase, cost control is maintained by constantly measuring cost against the original budget. Our preconstruction manager will work directly with The City of Venice and the design team to document any changes or savings ideas in program needs, identify impacts to the schedule and construction costs, and develop new schedules and updated cost estimates. This will help The City of Venice make informed decisions in a timely manner. We will provide budget estimates to The City of Venice at the following stages of the project: Conceptual, Schematic, Design/Development, and GMP.

In the CM at Risk delivery method, the GMP must be managed with an open book policy. This policy is one of the greatest advantages of CM at Risk. Open and honest communication allows financial decisions to be made jointly. Equally important, it allows financial records to be kept with complete transparency. This policy starts from the very first design cost estimate and is maintained through close-out.

The Cost Tracking system that our team implements involves The City of Venice every step of the way, and truly maintains the transparency for how the GMP is created, how it was administered and maintained, and how it is closed out. We are proud to say that we have never exceeded a GMP on any CM at Risk project. This result directly stems from the experienced personnel we have, the management systems we employ, and the relationships we build. The benefits of our Preconstruction Plan include:

- Open Book Policy—No hidden or internal cost
- Accurate Cost Estimates—Historically within 2% of construction cost—this means maximum project scope!
- Comprehensive Logistics Planning—Increase safety, increased efficiencies, reduced costs
- Comprehensive Scheduling—Includes design, owner equipment, construction and commissioning
- Comprehensive Design Reviews for Constructability—Increased quality control, reduced costs

COST CONTROL AND REPORTING DURING CONSTRUCTION

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



For cost accounting, Wharton-Smith uses **Timberline** software to provide real-time cost analysis and reporting. Our on-site team will provide monthly Project Status Reports to all stakeholders. We can also trend costs to predict labor productivity using our labor variance reporting. This comprehensive reporting system includes the below items:

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

VALUE ENGINEERING

Our team will incorporate value engineering during design to provide the most efficient, affordable and constructible facility possible. Value engineering employs life cycle analysis to ensure that all materials and operating systems will be long-life and low-maintenance. We will continue value engineering throughout construction, maintaining the highest quality standards to ensure budget compliance, without jeopardizing the quality of the project.



POST CONSTRUCTION / WARRANTY MANAGEMENT

When the project is approximately 50% complete, the team will have a formal meeting to discuss the project closeout process. Through this meeting, a detailed plan will be developed identifying the steps required to close-out the project. This plan will be written and communicated to the entire staff and is devised to ensure a minimal punch list and quick occupancy for The City of Venice's new Public Safety Facility.

The closeout plan will include the following:

Close-Out Letter—When the project is four to six months from completion, a close-out letter will be mailed to each subcontractor (for those subcontractors who typically finish early in the project, i.e. steel and concrete, this letter can go out earlier). The purpose of this letter is to communicate the requirements needed for the subcontractor to be paid in full. The letter clearly states what is expected of the subcontractor and the time frame when the items are due.

Subcontractor Close-Out Meeting—This meeting is held after the close-out letter has been issued. All subcontractors are invited, especially those subcontractors that we believe may prolong the closeout process. In this meeting, team members review the requirements identified in the close-out letter and address any questions the subcontractors may have. Again, the more the subcontractors can be educated on the requirements, the better the chance of closing out the project early.

Project Close-Out Summary—This is an Excel spreadsheet which identifies all the requirements to close-out all subcontractors and vendors. This sheet is started at 50% completion and is a tool in keeping every member informed of the status of the project's close-out. **Project Manager, Caryn Huff**, will be responsible for updating this sheet.

As-Built Drawings—The as-built drawings are kept current on the jobsite throughout the work effort. We have internal monthly reviews with our subcontractors on as-builts to ensure that they are up to date for The City of Venice's review at monthly progress meetings. Near the end of the project, we finalize the as-builts and forward them to The City of Venice to review for completeness prior to a complete clean set being formally submitted.

Operation and Maintenance (O&M) Manuals/Executed

Project Warranties—This process is started after each submittal is approved. We prefer to submit O&M data by submittal item to allow for a more thorough review by all parties. This helps to confirm that project specific models and options provided on the project are included in the manuals. After a complete review of each submittal item is done, the preliminary manual is assembled and submitted for approval. It is at this time that we also begin the process of collecting all warranty certificates. Training will also be scheduled, and any maintenance procedure that is required to be performed by your staff during occupancy will be videotaped for reference.



City of Sanford - Public Safety Complex

WARRANTY

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

We schedule warranty inspections with our team, The City of Venice and the project User Group at six months and 11 months to see how things have been working. If there are any warranty issues, this approach will get them addressed prior to expiration of the contracted warranty. In addition, our team will remain responsive long past the warranty period to assist The City of Venice with anything to do with the construction of the project. We are known in the industry for our response measures after the warranty period expires, and our services don't just end when the warranty runs out. We want to be a life-long partner to The City of Venice and are committed to providing you with a building that will stand the test of time.



QUALITY ASSURANCE AND CONTROL PLAN

Wharton-Smith embodies a culture of responsibility that embeds quality awareness in all of our organizational processes. We are committed to quality control and quality assurance (QC/QA), customer satisfaction and continuous improvement. Our formal Quality Management system includes the development of clear, quantifiable and measurable requirements. As indicated earlier in the design phase, the QC/QA team committed to this project will continue into the construction phase by developing a plan tailored specifically for the The City of Venice Public Safety Facility project. Project team meetings will be held regularly to discuss the constructability of design details, compliance with material and product specifications, and sequencing of planned activities. Our team stresses a methodical step-by-step procedure focused on reporting mechanisms, which aim to resolve problems before they become critical—while keeping everyone involved with the project fully informed and fully aware of all issues at hand.

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. Additional ways we ensure quality during construction include:



MOCK-UPS

Mock-ups allow us to make sure we get the details right prior to the actual work being completed which brings rework to an absolute minimum. Mock-ups are identified and scheduled during preconstruction and some of the items we would identify for this project include the hardscape, cast-in place concrete, roofing, windows, drywall, stucco and paint.



INDEPENDENT TESTING

Independent testing is important to ensure all systems are working as they were designed to work. To reduce the chance for leaks, we regularly perform tests on the exterior envelope of the building (roof, windows, joint caulking). Other independent testing we perform is for MEP/FP systems.



PEER REVIEW INSPECTIONS

Peer Review inspections are performed by WS PMs and Superintendents who are not working on the project. The purpose is to have the project reviewed by a separate set of eyes. These inspections are beneficial for identifying items that may have been overlooked by staff working closely on the project.



PRE-INSPECTION

We know that your time is valuable. In order to keep things running smoothly, we perform pre-inspection checks to ensure that all systems are working as planned before we call for any inspections.

SELF-PERFORMANCE

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 Public Safety Facility as this project will need a contractor that is flexible to adapt to many variations of scope required to successfully complete the project. 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. This is where our self-perform ability gives us a great advantage. With a highly skilled and trained in-house labor force of over 200 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.

LOCAL RESOURCES

Wharton-Smith has additional resources in a wide variety of disciplines available to meet the needs of the City for the Public Safety Facility project. Specifically, the team members proposed for this project are all based in the Southwest Florida region. **Project Manager, Caryn Huff**, proudly calls the City of Venice home and she is the City's **single point of contact** through the duration of the project. **Sr. Superintendent, Doug Whisler** lives in nearby Englewood and is quickly available to the City whenever needed. This project team works out of our Punta Gorda office, **just 35 miles from Venice City Hall**. This team is available for any need that should arise from preconstruction through the warranty phase of the Public Safety Facility project.

The matrix below depicts the forecasted percentage of time/availability for each member to the Public Safety Facility project during the preconstruction and construction phases.





Tab 5

Additional Information

PROJECTS SIMILAR IN NATURE

Our expertise in public safety facilities stems from the success achieved on the award-winning City of Sanford Public Safety Complex, as well as the numerous projects we have completed for government municipalities. Our vast portfolio goes well beyond a single safety facility. Our company has completed dozens of fire stations, police headquarter buildings, high security correctional facilities, public safety complexes. Wharton-Smith understands what it takes to complete this Public Safety Facility project.

District 3 Sheriff's Office

Punta Gorda, Florida

Wharton-Smith is currently providing preconstruction and construction management services to Charlotte County for their new District 3 Sheriff's Office building. The new district facility will be an estimated 18,000 s.f. building which will include space for a Road Patrol Staff area with Roll Call Room and supervisor offices, a training room, records room, armory area and an exercise area with locker rooms. The 20,000 s.f. evidence facility is being designed to include warehouse storage, an office area with forensic lab, processing areas, and exterior storage.

District 9 Medical Examiner's Office

Orlando, Florida

Wharton-Smith provided preconstruction and construction management services on the 40,200 s.f. Medical Examiner's Office for Orange County Government. This \$11 million facility serves both Orange and Osceola counties and is the site for the Dr. G: Medical Examiner television show. This Medical Examiner's Office includes morgue space, along with administrative office space, classroom and training areas. This project was originally slated for LEED Silver Certification, but actually achieved LEED Gold Certification.

Seminole County Sheriff's Office and Public Safety Building Remediation

Sanford, Florida

Wharton-Smith provided preconstruction and construction management services for the \$3.9 million remediation of the existing Sheriff's Office and Public Safety Building. The 200,000 s.f. renovation included training areas, an emergency operations and 911 call center, evidence holding areas, meeting rooms and office space.



Charlotte County Public Safety Facility

Punta Gorda, Florida

Sr. Superintendent Doug Whisler completed the \$16 million Charlotte County Public Safety Facility Building which included the FIRE/EMS Vehicle Maintenance Facility. This project consisted of seven acres and tilt-up construction of a new Public Safety Building to house Fire/EMS administration and training, County EOC/Emergency Management, 911/211, and selected Sheriff's administration personnel. Six full length equipment bays with overhead automatic doors at each end and two full length air conditioned bays for staff, work shop, tools/parts and storage in the middle bays.



U.S. Penitentiary Coleman Federal Correctional Complex

Coleman, Florida

Area Manager, Tom Iarossi, provided estimating and office engineering services for the U.S. Penitentiary Coleman I project that involved construction of a 544,000 s.f. maximum security facility. Located on approximately 90 acres adjacent to the existing Coleman Federal Detention Facility, U.S. Penitentiary Coleman I houses over 1,000 inmates. Included in this project was the construction of six 60-foot guard towers, a food service building, a light manufacturing building, a medical unit, educational and recreational buildings, and a loading dock, as well as the installation of state-of-the-art security systems. The prison features a concrete facade with punch windows.



Charlotte County Jail Expansion- Phases I & II

Punta Gorda, Florida

Johnny Santos, Doug Whisler, and Gene Willett all provided preconstruction and construction management services on phases I & II of the Charlotte County Jail. Phase I work included a new 13,525 s.f. work release building for admitting inmates, a 4,889 s.f. video visitation building which allowed the public to visit inmates without entering the jail, a 3,750 s.f. training/armory building, and a 4,128 s.f. maintenance building. Phase II of this project included the addition of 548 beds, expansion to the intake/booking area, additional housing pods, emergency generator expansion, new emergency utility water and sewer system, and replacement of the Electronic Security Control System while the existing jail was operational.



Pinellas County Public Safety Facility

Largo, FL

Johnny Santos, Doug Whisler, and Gene Willett provided preconstruction and construction management services on the \$81 million, 40-acre Pinellas County Public Safety Facility campus. The scope of work included an emergency operations center, call center, EMS, Sheriff's dispatch center, and the Sheriff's administrative and operational headquarters. This project also included a 1,248-space parking garage, an energy plant, and the Sheriff's vehicle maintenance department.



Tab 6

Required Forms, Certificate of Insurance & Certifications



Qualifications Statement

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: 750 Monroe Road, Sanford FL 32771

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:

750 Monroe Road, Sanford, FL 32771

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: Executive Vice Presidents: Darin Crafton, Timothy Smith and Patrick Hewitt
- e. Secretary's Name: Devon Lewis
- f. Treasurer's Name: Ronald F. Davoli
- g. Name and address of Resident Agent: Tom Iarossi, Area Manager- 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:

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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

Signed, sealed and delivered
in the presence of:

Ari Moro
Rebena Tihua

By: Darin Crafton

Darin Crafton
(Printed Name)

Executive Vice President- Commercial
(Title)

State of Florida }
County of Seminole } SS.

On this the 26th day of February, 2018, before me, the undersigned Notary Public of the
State of Florida, personally appeared Darin Crafton 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:

Pamila Evans
NOTARY PUBLIC, STATE OF FLORIDA

Pamila Evans
(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



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Local Preference Worksheet

“LOCAL PREFERENCE” DETERMINATION

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 and 6, 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. Has your company paid a local business tax either to Sarasota, DeSoto or Charlotte County (Manatee County does not currently 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 from which your company operates or performs business?

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

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

3. Does your company’s 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’s 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.**

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Questions 5 – 6

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

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

NO ☒ If "no", proceed to question 6.

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 AND does at least one corporate officer, managing partner or principal owner of your 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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Project Team Form

PROJECT TEAMTEAM NAME: Wharton-Smith, Inc.FEDERAL ID No.: 59-2392802

Prime Role	Name & City of Residence of Individual Assigned to the Project	No. of Years Experience	Education, Degree(s)	Florida Active Registration Nos.
Principle-in-Charge/Project Executive	Johnny Santos Land O' Lakes, FL	30 Years	Prolog Construction Management Program	Class "A" General Contractor - Florida License # CGC1517519
Project Manager	Caryn Huff Englewood, FL *Moving to Venice in June 2018	25 Years	B.S., Building Construction Auburn University	
Project Engineer				
Superintendent	Doug Whisler Englewood, FL	39 Years		
Scheduler				
Other Key Member Preconstruction Services Manager	Gene Willett Riverview, FL	30 Years	MBA, Florida Atlantic University	

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Public Entity Crimes Form

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, Darin Crafton / Executive Vice President, being an authorized representative of the firm of Wharton-Smith, Inc., located at City: Sanford State: Florida Zip: 32771, 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: February 26th 2018Phone: (407) 321-8410Fax: (407) 829-4453Federal ID#: 59-2392802

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Drug Free Workplace Form

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

February 26th, 2018
Date


Contractor's Signature

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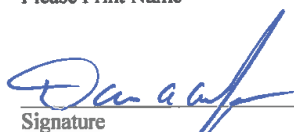
Indemnification/Hold Harmless Statement

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, Darin Crafton, being an authorized representative of the firm of
Wharton-Smith, Inc. located at City Sanford, State
Florida, Zip Code 32771 Phone: (407) 321-8410 Fax:
(407) 829-4453. Having read and understood the contents above, hereby submit
accordingly as of this Date, February 21st, 2018.

Darin Crafton- Executive Vice President
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.

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Certification Regarding Debarments, Suspension Ineligibility and Voluntary Exclusion

**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 26th day of February, 2018.

By: [Signature]
Authorized Signature

Darin Crafton- Executive Vice President- Commercial
Typed Name of Title

Wharton-Smith, Inc.
Recipient's Firm Name

750 Monroe Road
Street Address

Sanford, FL 32771
City/State/Zip Code

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Conflict of Interest and Litigation Statement

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): Darin Crafton



Title: Executive Vice President

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.

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Non-Collusion Affidavit

<u>NON-COLLUSION AFFIDAVIT</u>	
State of <u>Florida</u>	}
County of <u>Seminole</u>	
SS.	
<u>Darin Crafton</u> being first duly sworn, deposes and says that:	
1. He/she is the <u>Executive Vice President</u> , (Owner, Partner, Officer, Representative or Agent) of <u>Wharton-Smith, Inc.</u> 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:	
<u>Ari Moro</u> <u>Rebena Titus</u>	By: <u>Darin Crafton</u> <u>Darin Crafton</u> (Printed Name) <u>Executive Vice President</u> (Title)
ACKNOWLEDGEMENT	
State of <u>Florida</u> County of <u>Seminole</u>	
On this the <u>26th</u> day of <u>February</u> , 2018, before me, the undersigned Notary Public of the State of <u>Florida</u> , personally appeared <u>Darin Crafton</u> 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:	<div style="border: 1px solid black; padding: 5px; display: inline-block;">  PAMILA RENEE EVANS MY COMMISSION # GG014442 EXPIRES July 21, 2020 </div> <div style="margin-top: 10px;"> <u>Pamela Evans</u> NOTARY PUBLIC, STATE OF FLORIDA <u>Pamela Evans</u> <small>(Name of Notary Public: Print, stamp, or type as commissioned)</small> </div>
<input checked="" type="checkbox"/> Personally known to me, or <input type="checkbox"/> Produced Identification: _____ <input type="checkbox"/> DID take an oath, or <input type="checkbox"/> DID NOT take an oath	
	
THIS PAGE MUST BE COMPLETED & SUBMITTED WITH OFFER	



CITY OF VENICE PROCUREMENT- FINANCE DEPARTMENT**401 W. VENICE AVE. - ROOM # 204****VENICE, FL. 34285****(941) 486-2626****FAX (941) 486-2790****ADDENDUM NO. 1****Date: February 21, 2018****To: All Prospective Proposers****Re: RFQ #3079-18 Construction Management at Risk Services for City of Venice Public Safety Facility**

This addendum sets forth changes and/or information as referenced and is hereby made part of and should be attached to the subject Contract Documents. Receipt of this Addendum shall be acknowledged below and in the submitted proposal. It shall be the responsibility of each proposer, prior to submitting a proposal, to contact the City of Venice- Procurement-Finance Department to determine if addenda were issued and to make such addenda a part of their proposal.

QUESTION:

In reviewing this section it appears that the criteria shown in this RFQ, may need to be revised to reflect the scope of work for the CM requested on pages 10 – 12 of the RFQ.

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 20%

The points will be awarded based on factors such as the physical location of the Firm's office and its **Design Professionals and sub-consultants**, as well as on the degree of interest shown in undertaking the project. All key personnel shall have their primary work location identified in the submittal. Firms that have the ability to complete all the services in-house may be awarded more points than firms that require sub-consultants unless a compelling rationale is given as to why the diversified team approach is better for this particular project. Firms that do not adequately anticipate nor cover in-house all of the services required (**such as ecological, hydrogeological, structural engineering services, etc.**) will receive less points than firms whose response properly identifies all the **design professionals** required to provide the scope of services.

- 1) We would anticipate providing an overview in the Ability to Perform Services section that would cover the items outlined on pages 10 thru 12 of the RFQ, but do not want to do anything that may appear that we are not properly addressing the question being asked in this section, can you confirm that we should be addressing the Scope of Services requested by the City as part of our Ability to Provide Service as outlined



2) The Project Team form has a list of staff members that a CM would not normally have on Staff. Is it okay to modify the form to reflect our Org Chart of Staffing we would provide to the Project? I have shown below the positions we would generally include in our Org Chart for your review.

- ☐ Principle in Charge
- ☐ Project Executive
- ☐ Project Manager
- ☐ Project Engineer
- ☐ General Superintendent
- ☐ Chief Estimator
- ☐ Purchasing Agent
- ☐ Chief Scheduler

Please advise if this list is acceptable and if it is acceptable to modify the Form to reflect this staffing.

RESPONSE:

Section 4 is amended as follows:

Scoring Method

The scoring method for the RFQ will be based on the Required Response Format of the qualifications response. There will be no points given to the letter of interest.

SELECTION CRITERIA	WEIGHT %
Project team's professional qualifications and key personnel experience.	30%
Project team experience with governments of similar size to the City.	30%
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.	20%
Local Preference	10%
Completeness of RFQ submittal	10%



Project team's ~~professional~~ qualifications and key personnel experience 30%

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 Safety Facility projects comparable to the proposed task. The quality of projects previously undertaken, and capability to complete projects on budget will also be considered.

Project team experience/references 30%

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.

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 20%

The points will be awarded based on factors such as the physical location of the Firm's office and its ~~Design Professionals and sub-consultants~~, as well as on the degree of interest shown in undertaking the project. All key personnel shall have their primary work location identified in the submittal. Firms that have the ability to complete all the services in-house may be awarded more points than firms that require sub-consultants unless a compelling rationale is given as to why the diversified team approach is better for this particular project. Firms that do not adequately anticipate nor cover in-house all of the services required ~~(such as ecological, hydrogeological, structural engineering services, etc.)~~ will receive less points than firms whose response properly identifies all the ~~design professionals~~ personnel required to provide the scope of services.

Local Preference 10%

Criteria defined in Section 1, Article 16 of the RFQ.



Completeness of RFQ submittal 10%

RFQ packages must include adequate proof of insurance coverage for all team member firms and proof of professional licenses and registrations required to perform ~~design and permitting~~ activities required by the project and include all other required forms (such as the Drug Free Workplace Form, etc.).

Other 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.

Shortlisting and Notification

Subsequent to selection and approval by the City, all respondents to this solicitation will be notified in writing regarding the selection of the top ranked Firms.

~~Reuse of Design Ideas~~

~~Upon submittal of proposals and oral presentations, all information becomes public information and the concepts or design ideas advanced by any Firm may be reused directly or indirectly by the City without any limitation or payment to the Firm. Granting the City the right to refuse documents contained in the presentation and proposal is a condition of presenting the proposals.~~

Challenge of Notice of Intent to Award

Any person adversely affected by the City's decision, or intended decision, on the award is entitled to challenge the award by filing a written notice of protest within 72 hours after the posting of the intent to award. A copy of the City's protest procedures may be obtained through the Purchasing Department upon request.

Rejection of Proposals

The City of Venice reserves the right to waive minor proposal irregularities, and to reject any and all Proposals or parts thereof, or to accept the Proposal(s) or parts thereof, when considered by it to be in the best interest of the City.



REVISION:

A revised PROJECT TEAM form is attached to this addendum and must be included with your submittal.

Peter A. Boers
Procurement Department

Acknowledgment is requested even if you have elected not to respond to this bid. A designated management representative of your firm can sign the receipt for this addendum. Please acknowledge receipt of this addendum immediately by fax to (941) 486- 2790 or mail to the above noted address, if a fax is not possible.

Receipt Acknowledged:



Signature

Wharton-Smith, Inc.







Company

2/26/18

Date

A copy of this addendum (excluding attachments) is to be included with the proposal response.



Client#: 26140		WHARTONS																																																																																											
ACORD™		CERTIFICATE OF LIABILITY INSURANCE																																																																																											
		DATE (MM/DD/YYYY) 2/15/2018																																																																																											
<p>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</p> <p>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must 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).</p>																																																																																													
PRODUCER Bouchard Insurance, Inc. 101 N Starcrest Dr. Clearwater, FL 33765 727 447-6481		CONTACT NAME: PHONE (A/C, No, Ext): 727 447-6481 FAX (A/C, No): 727 449-1267 E-MAIL ADDRESS: certificates@bouchardinsurance.com																																																																																											
INSURED Wharton-Smith, Inc. PO Box 471028 Lake Monroe, FL 32747		INSURER(S) AFFORDING COVERAGE																																																																																											
		INSURER A : Amerisure Insurance Company																																																																																											
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State of Florida Corporate Charter

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, 2018, that its most recent annual report/uniform business report was filed on January 2, 2018, 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 Second day of January, 2018*



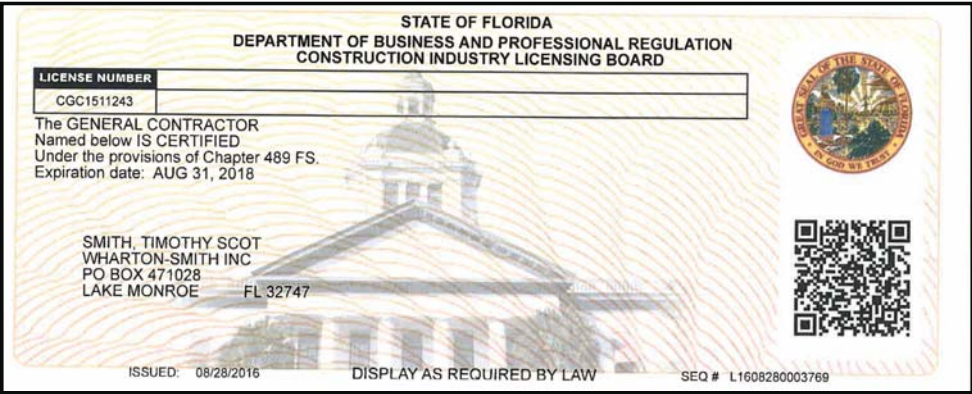
Ken Detjen
Secretary of State

Tracking Number: CC2671502072

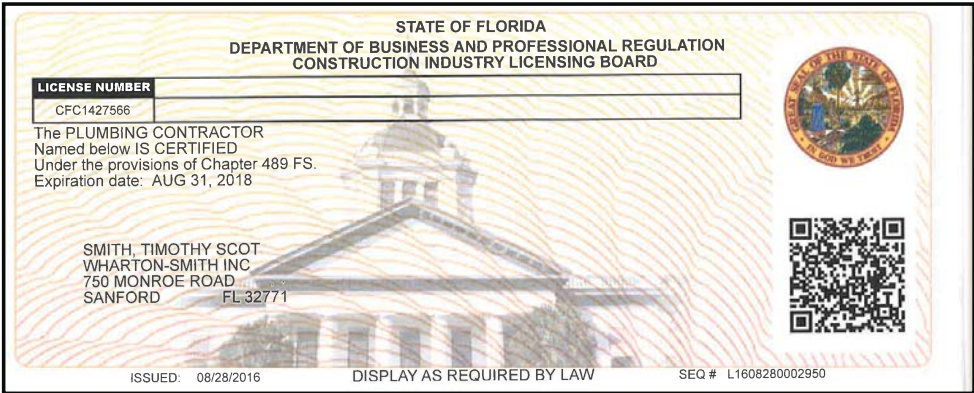
To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

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

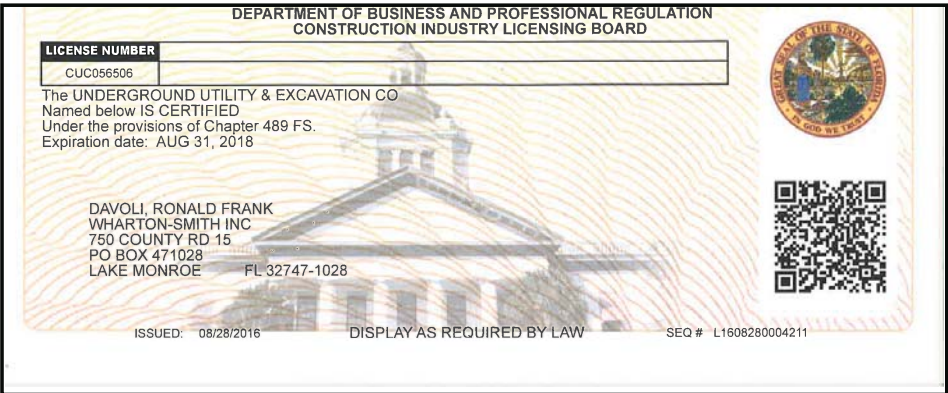
State of Florida, General Contractor License #CGC1511243



State of Florida, Plumbing Contractor License #CFC1427566




State of Florida, Underground Utility & Excavation License #CUC056506



City of Punta Gorda Business Tax Receipt

CITY OF PUNTA GORDA



BUSINESS TAX RECEIPT
10/17-09/18

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 19, 2017 for receipt number 18-00016693 at the City Clerk's Office, 326 W. Marion Avenue, Punta Gorda, Florida 33950. (0013615)

The issuance of this receipt or acceptance by the business owner in no way confers any right to violate any law, ordinance or regulation of this State, County or Municipality.

License Comment: ALL SIGNS REQUIRE PERMITTING
License Restrictions:

License must be exhibited conspicuously at your place of business.

Charlotte County Local Business Tax Receipt

THIS FORM BECOMES A RECEIPT ONLY WHEN VALIDATED

Paid 07/07/2017 Receipt # 772-00002931 35.00

**2017 / 2018 CHARLOTTE COUNTY
LOCAL BUSINESS TAX RECEIPT**
MUST BE DISPLAYED IN A CONSPICUOUS PLACE

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

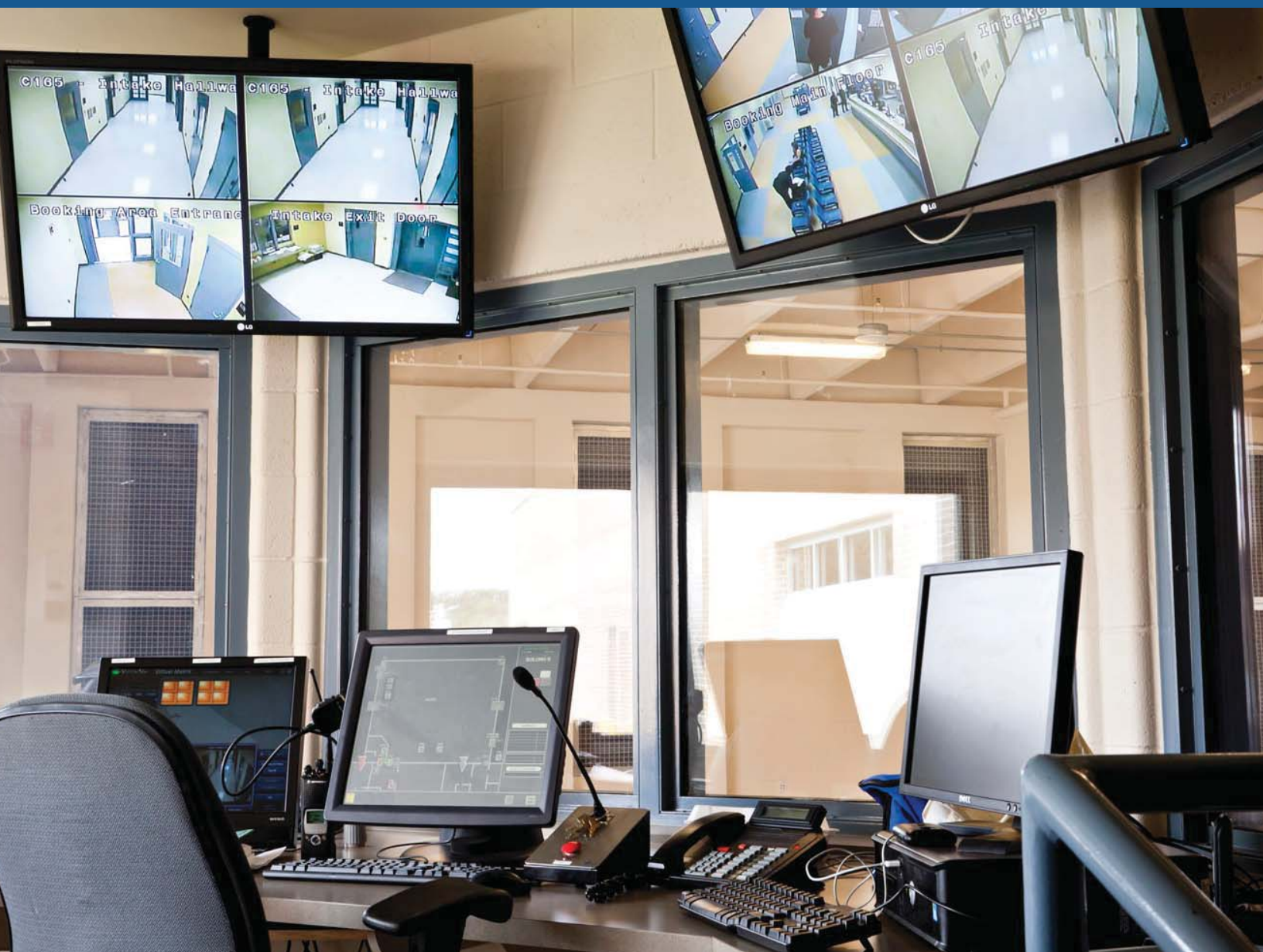
ACCOUNT 30227
EXPIRES SEPTEMBER 30, 2018
RENEWAL

AMOUNT	35.00
PENALTY	0.00
TOTAL	35.00

THIS FORM BECOMES A RECEIPT ONLY WHEN VALIDATED

Paid 07/07/2017 Receipt # 772-00002931 35.00





Wharton-Smith, Inc.
CONSTRUCTION GROUP

252 West Marion Ave., Unit 1123
Punta Gorda, FL 33955
Tel: 941.621.4723
www.whartonsmith.com