



Charlotte County

Construction Manager at Risk Emergency Operations Center Expansion

RFP No. 20250233

Table of **Contents**

Letter of Interest	pg. 3
Tab I. Proposed Team.....	pg. 6
Tab II. Proposed Management Plan.....	pg. 12
Tab III. Previous Experience of Team	pg. 24
Tab IV. Project Control.....	pg. 28
Tab V. Proposed Approach	pg. 39
Tab VI. Recently Accomplished Similar Projects.....	pg. 45
Tab VII. Experience and Capabilities.....	pg. 57
Tab VIII. Volume of Work	pg. 60
Tab IX. Location	pg. 62
Tab X. Litigation	pg. 65
Tab XI. Minority Business.....	pg. 67

Letter of Interest

March 4, 2025

Charlotte County Purchasing Division
Kim Chamberlain, Senior Contract Specialist
18500 Murdock Circle, Suite 344
Port Charlotte, FL 33948

Re: Construction Manager at Risk - Emergency Operations Center Expansion | RFP No. 20250233

Dear Members of the Selection Committee,

Wharton-Smith, Inc. is excited about the opportunity to continue our relationship with Charlotte County by serving as your Construction Manager for the Emergency Operations Center Expansion project. Our team is committed to delivering a successful high-quality project to the County and have assembled a highly experienced team. Our team brings the following key advantages:

CHARLOTTE COUNTY EXPERIENCE—Our proposed team of **Director of Operations Johnny Santos, Area Manager Caryn Huff, Project Executive John Carlson, Project Manager Mike Nunez, Project Engineer Tripp Lytle, Area Superintendent Chad Roeder, Superintendent Junior Etienne, and Preconstruction Executive Juanmiguel Gorut** have proudly worked together on multiple projects for Charlotte County. This includes several critical Public Safety projects such as the Sheriff's District 3 Office with Evidence Building, Sheriff 911 Admin, Fire Stations 2 & 5 and the Airport Rescue Firefighter Training Facility (ARFF) to name a few.

In addition to our team members working together on multiple projects, we have very recent experience working with Harvard Jolly on 7 projects in Charlotte County within the last 2 years. Likewise, we worked with TLC and Banks Engineering on the Charlotte County Sheriff District 3 office. With our team there is simply no learning curve. This experience ensures our team will hit the ground running on day one, which will safeguard the schedule against unexpected delays and support an early or on time delivery. It will also ensure a smooth, worry-free project!

PUBLIC SECTOR EXPERIENCE—Within our portfolio of **500+ CMAR** projects across the state of Florida, over 95 percent of our work is performed for clients in the public sector, including over 80 counties, towns, and cities. With these projects comes experience working on **State and Federally funded projects**. We demonstrated our management skills in this area on the

**WHY
WHARTON-SMITH?**

**Public
Safety
Experts**

**Proven
Partners**

Local Office

**1,300+
GOVERNMENT
PROJECTS**

**400+
OCCUPIED
CAMPUSES**

**\$4B+
IN FLORIDA CMAR
PROJECTS**

Charlotte County Transit facility, which was a grant funded project. With strong reliance on past successes of projects similar in nature, you can rest assured that we will deliver a project that meets the needs of the community and exceeds the goals of Charlotte County.

EXPERTISE IN RENOVATION—The vast majority of our project experience stems from renovation and expansion projects in existing and occupied facilities. This is our specialty! A great example of our ability to plan and manage construction safely on an open campus is our recent success on the Charlotte County ARFF. This facility was constructed on the Public Safety campus while open for EOC operations and Fire Department training exercises. We will apply this experience along with our skill in site coordination and logistics to the EOC Expansion project.

We are pleased to include our in-house **Communications, Security & Low-Voltage Systems Expert, Eve Hinds** who will provide guidance regarding the 911 communications system and its expansion. Our team's knowledge of the Public Safety campus, training operations and existing infrastructure will provide for a seamless experience for Charlotte County.

UTILITIES EXPERTISE—Our team brings experience working on utility infrastructure projects within Charlotte County such as the Shell Creek RO plant for the City of Punta Gorda. With over 40 years of experience in the state of Florida, Wharton-Smith is one of the leaders in water/wastewater facility construction. We will leverage this experience along with our team's knowledge of the existing utilities on site, with the expertise of our in-house **Utilities Subject Matter Expert, Kyle Jennings**.

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

Sincerely,

Wharton-Smith, Inc

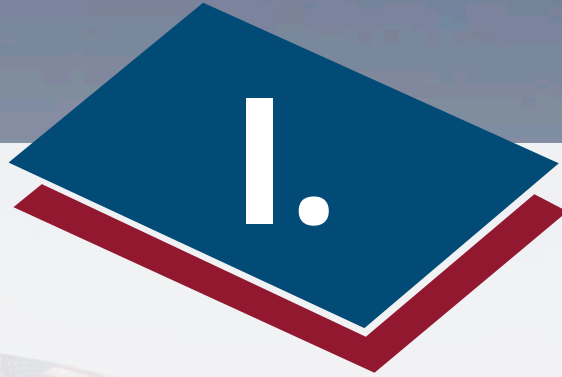


Darin A. Crafton
COO, Commercial
407-321-8410
dcrafton@whartonsmith.com



Caryn Huff
Area Manager
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Proposed Team



Tab I. Proposed Team



Left to right: Ronald F. Davoli - Chairman of the Board; George E. Smith - Founder; Timothy S. Smith - President & Chief Executive Officer

What began in 1984 as a leap of faith for two friends from Ohio has grown into one of Central Florida's largest general contractor and construction management firms. George Smith and Bill Wharton met in 1966 during their tenure at a construction company in Ohio. The company opened a Florida office in 1975, bringing George and Bill to Central Florida. When the company announced they were moving back to Ohio, George and Bill made an offer to take over the firm's unfinished Florida work. So, with just a handful of employees, **Wharton-Smith, Inc. was incorporated on April 2, 1984.**

George will tell you that Wharton-Smith owes its success to "the employees that we had then and have now...Neither Bill nor I ever dreamed that the company would be what it is today."

Our Vision

To be the construction group of choice for our employees, our clients, and the communities we serve.

Our Mission

To exceed our clients' expectations by performing with the highest quality professionalism and fairness and by communicating with honesty and integrity at all times.

More than 40 years since its incorporation, Wharton-Smith strives to maintain the culture fashioned by its founders. A culture that believes core values like trust and integrity is just as important as business acumen and operations skills. A culture that rewards accountability and hard work. A culture built on meticulous planning, continuous training, standards, protocols, and research. An ENR Top 400 Contractor, with a strong financial backing, Wharton-Smith continues to uphold these founding ideals under the leadership of Tim Smith, President and CEO.

With a focus on building communities, we specialize in building schools (K-12 and higher education), community centers, public safety, parks and recreation, corrections, sports, water and wastewater, entertainment, mixed-use, and hospitality projects—all the things a community needs to thrive.

Our people are our greatest asset and we have the depth and diversity to deliver your project successfully. Wharton-Smith also owns our own Florida-based fleet of heavy equipment to provide fast response times and eliminate the risks associated with the current market conditions.

Wharton-Smith is headquartered in Sanford, Florida, with regional offices across the Southeast. We are proud to offer clients local construction services and market expertise with the bench strength to build projects of all types and sizes. We are active within the communities where we live and work and have developed strong relationships with local subcontractors and suppliers, giving us access to the best talent and resources for our clients.



Our local team is ready to serve you!

A. BACKGROUND OF THE PERSONNEL

The team we have assembled for the Emergency Operations Center Expansion project brings extensive experience in the **Construction Management at Risk** process, in addition to **multi-use government, public safety, and municipal facilities** constructed in the County and throughout the state of Florida. We offer the skills, experience, and knowledge necessary to successfully construct this project within the County's schedule, budget, and expectation of quality. This team's knowledge of Charlotte County procedures, experience with County Project Manager Pedro Agosto, and synergy working together with Harvard Jolly and their design team will prove invaluable to the project.

1. Project Manager



Mike Nunez, Project Manager

Mike will serve as Project Manager for the EOC project. He is responsible for providing daily leadership to the project team and for the successful completion of all preconstruction and construction phases of the project. He will develop schedules, perform constructability reviews, value engineering and site logistics. During construction, he assists with all construction activities, including quality control, cost control, change orders, and close-out. **Mike has recent experience working on the Public Safety Campus as the on-site Project Manager of the ARFF project, that will be invaluable during planning and construction.**

2. Other Key Personnel



John Carlson, Project Executive

John will serve as Project Executive for the EOC project and will be the main point of contact. He works to ensure the entire team is on the same page regarding the project and fosters a one-team atmosphere. He provides guidance and problem solving advice, assists with staffing, outlining project plans, setting project goals/deadlines, and evaluates performance. He also works closely with our Preconstruction Services Department for the timely delivery of bid packages, schedule, constructability reviews, value engineering ideas, and site logistics plans. **John was raised in Charlotte County and has a lifetime of experience working on County projects.**



Chad Roeder, Area Superintendent

As Area Superintendent, Chad is responsible for maintaining a well-trained and qualified work force and for maximizing allocation of manpower, tools, and equipment between jobsites. As he regularly visits the jobsites, Chad assists with monitoring safety inspections, daily reports, two-week look ahead schedules, delivery coordination, production planning, weekly subcontractor coordination meetings, storage and installation requirements, quality control, labor and equipment resources, project final quality, start-up testing, as well as final close-out. **Chad has experience working on several public safety projects for Charlotte County that includes ARFF and Sheriff District 4 on Airport Road.**



Junior Etienne, Superintendent

As Superintendent, Junior will assist with all supervision of all field activities, including the coordination of all subcontractors and field construction activities and supervisory review of all on-site construction. In this role, he will assist with the overall responsibility for field construction operations, job site safety, and quality control. Junior will ensure that all work is in compliance with the contract documents and will serve as the primary contact with local building officials. **Junior has experience working on public safety projects for Charlotte County.**



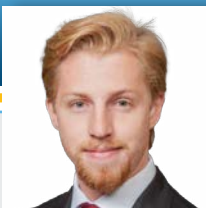
Tripp Lytle, Project Engineer

As Project Engineer, Tripp is responsible for facilitating subcontractor meetings, creating and distributing weekly owner and subcontractor meeting minutes, completing submittal reviews for compliance, facilitating MEP coordination meetings, communicating directly with the project architect, compiling operations/maintenance manuals, coordinating and tracking material deliveries, and taking weekly progress photos. **Tripp has experience working on complex public safety projects for Charlotte County. He a valuable member of the on-site team at the Sheriff 911 Admin project.**



Juanmiguel Gorut, Preconstruction Services Executive

Juanmiguel will serve as the Preconstruction Services Executive for the EOC project. He has worked alongside our proposed project team on several projects for Charlotte County. His primary focus will be overseeing the review of contract documents, management of subcontractor solicitations, development of estimates, and the preparation of the Guaranteed Maximum Price (GMP) packages. **He recently demonstrated his strength in Preconstruction bidding and GMPs through his successful cost negotiations on Charlotte County Fire Station #2 and #5, Sheriff District 4 and Sheriff 911 Admin proejcts.**



Colton McVety, BIM/VDC Engineer

Colton will provide expertise with construction technology as a Certified Drone Pilot to assist with BIM and 3D Modeling during preconstruction and construction. **Colton was raised in Charlotte County and is also an active board member of the CDBIA and NextGen council.**



Eve Hinds, Comms, Security & Low-Voltage Systems Expert

Eve will utilize her extensive knowledge and experience to provide Low Voltage and Systems Reviews. She will provide a thorough review during preconstruction to ensure all scope is captured in the plans and specifications prior to bidding. During construction, Eve will be available for reviews to ensure quality work-in-place the first time. **Her role is critical to ensuring all systems are maintained throughout construction.**



Kyle Jennings, Utilities Subject Matter Expert

Kyle will utilize his extensive knowledge and experience in local and regional water/wastewater projects to guide the team as needed related to required capacities and tie-in of existing systems. Our team's experience working on the Public Safety campus along with Kyle's expertise will ensure there are no obstacles pertaining to utility permitting or system requirements.



Caryn Huff, Area Manager

As Area Manager, Caryn provides daily leadership to project teams overseeing all phases of the projects. She is responsible for ensuring projects are completed on time and to the client's satisfaction and for providing executive guidance and problem-solving advice to project managers and superintendents. She also assists in staffing, outlining project plans, setting project goals/deadlines, and evaluating performance. **Caryn has an extensive portfolio of successfully completing several public safety projects for Charlotte County with members of our proposed team as outlined on her resume.**



Johnny Santos, Director of Operations

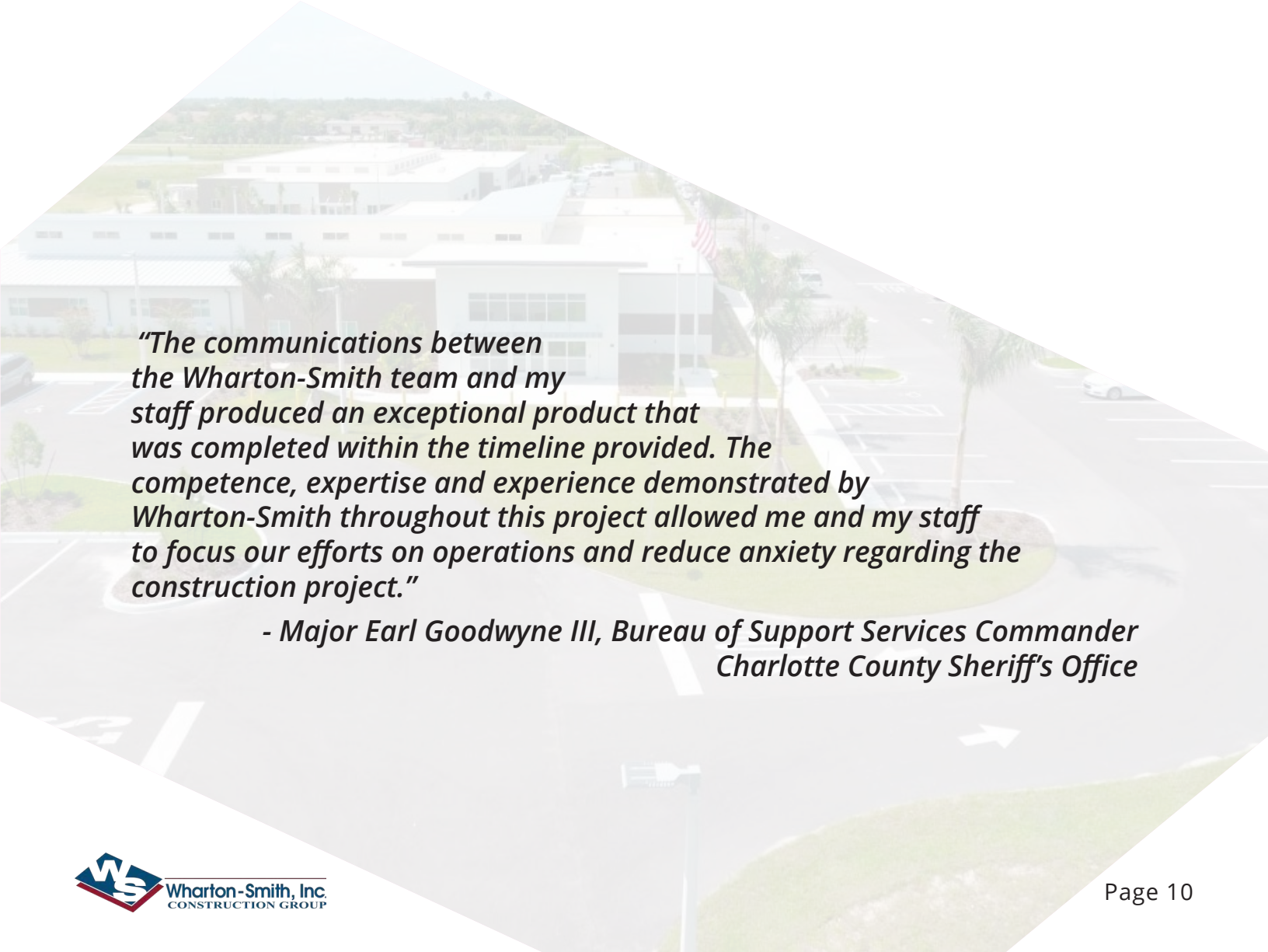
As Director of Operations Johnny brings years of experience, expertise and leadership to our commercial division. Johnny began his relationships with Charlotte County in April of 2007, when he successfully completed the original Charlotte County Jail Expansion. He continues to foster that relation by working with our highly qualified team in successfully completing multiple projects for Charlotte County. Johnny is responsible for operations oversight, business development, community relations, and quality of services. **Some of the most recent projects Johnny led this team to a successful completion are the Charlotte County Jail Infirmary, Sheriff's District 3 Office and Evidence Building, Fire Station #2 and #5, and the Airport Rescue Fire Fighter Training Facility.**

3. Consultants

Our submission does not include any consultants for the Emergency Operations Center Expansion project.

4. Staffing Levels and Positions Proposed

This proposed team has proven experience on fire stations, governmental, and public sector facilities and are well versed on successfully completing projects through the Construction Management at Risk (CMAR) method. Our similar experience includes completing projects with Charlotte County. In fact, our team members have worked on at least a dozen Charlotte County Public Safety facilities. ***The Project Manager identified will not be substituted without the express permission of Charlotte County Facilities.***



"The communications between the Wharton-Smith team and my staff produced an exceptional product that was completed within the timeline provided. The competence, expertise and experience demonstrated by Wharton-Smith throughout this project allowed me and my staff to focus our efforts on operations and reduce anxiety regarding the construction project."

***- Major Earl Goodwyne III, Bureau of Support Services Commander
Charlotte County Sheriff's Office***



Proposed Management Plan

Tab II. Proposed Management Plan

A. Team Organization



Please refer to the chart below for the outline of our team during the pre-construction and construction phase.

NAME & ROLE	PRE-CONSTRUCTION PHASE	CONSTRUCTION PHASE
John Carlson Project Executive	✓	✓
Caryn Huff Area Manager	As Needed	As Needed
Juanmiguel Gorut Preconstruction Services Executive	✓	As Needed
Mike Nunez Project Manager	✓	✓
Chad Roeder Area Superintendent	As Needed	✓
Junior Etienne Superintendent	As Needed	✓
Tripp Lytle Project Engineer	As Needed	✓
Eve Hinds Comms, Security & Low-Voltage Systems Expert	As Needed	As Needed
Kyle Jennings Utilities Subject Matter Expert	As Needed	As Needed
Colton McVety BIM/VDC Engineer	✓	✓
Guillermo Bobea Corporate Safety Manager	As Needed	✓
Michael Christian Corporate Scheduler	✓	✓
Johnny Santos Director of Operations	As Needed	As Needed



CARYN HUFF, CGC, LEED AP AREA MANAGER

Years of Experience

08 | WS

34 | Industry

BS, Building Construction, Auburn University
Certified General Contractor, Certified Solar Contractor
LEED Accredited Professional
Charlotte De-soto Building Industry Association, Past President
United Way Women United, Board Member
Charlotte County Economic Development Partnership

Caryn has lived in the area for over 30 years and is very familiar with Charlotte County building practices. As Area Manager, Caryn provides daily leadership to project teams overseeing all phases of the projects. She is responsible for ensuring projects are completed on time and to the client's satisfaction and for providing executive guidance and problem-solving advice to project managers and superintendents. Caryn also assists in staffing, outlining project plans, setting project goals/deadlines, and evaluating performance.

PUBLIC SAFETY EXPERT

Caryn's many years of providing project management expertise on Charlotte County public safety projects will serve as a tremendous resource in navigating any unforeseen challenges!

RELATED PROJECT EXPERIENCE

Sheriff District 3 Admin/911 and Logistics Center, Charlotte County—\$37.5M

Wharton-Smith is currently providing Construction Management services for the new Sheriff's Administration Hardened 911 Facility. The 8-acre site is part of the District 3 campus masterplan. This new **hardened facility** is a 63,500 SF administration office with support services for Senior and Executive Commands, Finance, Intelligence, Community Affairs, Human Resources, MIS, and Operational Support. Key features for the project include communications/Dispatch, RTIC, Records, Investigations and a fleet vehicle maintenance center. **This tilt-wall building** will implement sustainable building practices paralleling LEED or similar rating system.

Sheriff District 4 Headquarters/Training Facility/K9, Charlotte County—\$13.2M

Wharton-Smith is currently providing Construction Management services for the replacement District 4 office for the Charlotte County Sheriff's Administration. The new complex consists of a 20,000 SF sheriff's office space, separate training offices, and a large training room outfitted to host 80 people. This building sits on the training complex that includes a firing range, obstacle course and K9 training. Amenities will include a fitness center, locker room, storage, breakroom, reception area, and a K9 kennel inclusive of outdoor runs. **The building is being constructed as an essential facility and will be hardened beyond the hurricane-rated impacts required by applicable building codes.**

ADDITIONAL EXPERIENCE	COST
Sheriff's District 3 Office with Evidence Building and Impound, Charlotte County	\$11.3M
Airport Rescue Fire Fighter Training Facility (ARFF), Charlotte County	\$9.2M
Jail Infirmary Expansion, Charlotte County	\$9.8M
Fire Station #2, Charlotte County	\$5.5M
Fire Station #5, Charlotte County	\$4.5M
Shell Creek Water Treatment Plant Reverse Osmosis Plant, City of Punta Gorda	\$23.6M
Fire Training Tower, City of North Port	\$1.5M
Fire Stations #91 and #92, Town of Longboat Key	\$6M



JOHNNY SANTOS, CGC, CBC

DIRECTOR OF OPERATIONS

Years of Experience

10 | WS

35 | Industry

Contractor Course Training, Camtech School of Construction
 Certified General Contractor, Certified Building Contractor
 Electrical Journeyman License
 Low Voltage and Fire Alarm Certified Installer
 Electrical Workers Association Certified Instructor

Johnny brings years of expertise and leadership to Wharton-Smith's commercial operations. As Director of Operations, Johnny is responsible for operations oversight, business development, community relations, and quality of services. He will provide direct support to Caryn and the project team to ensure compliance with policies and procedures.

RELATED PROJECT EXPERIENCE

Public Safety Facilities & Centralized Communications Center, Pinellas County—\$81M* *Harvard Jolly Project*

Provided Preconstruction and Construction Management services for the 40-acre Pinellas County campus which includes an **emergency operations center**, a call center, EMS, Sheriff's dispatch center, and the Sheriff's administrative and operational headquarters. Also included are a 1,248-space parking garage, an energy plant, and the Sheriff's vehicle maintenance. **The campus is storm hardened and able to withstand up to 219-mph winds.**

Sheriff District 4 Headquarters/Training Facility/K9, Charlotte County—\$13.2M

Wharton-Smith is currently providing Construction Management services for the replacement District 4 office for the Charlotte County Sheriff's Administration. The new complex consists of a 20,000 SF sheriff's office space, separate training offices, and a large training room outfitted to host 80 people. This building sits on the training complex that includes a firing range, obstacle course and K9 training. Amenities will include a fitness center, locker room, storage, breakroom, reception area, and a K9 kennel inclusive of outdoor runs. **The building is being constructed as an essential facility and will be hardened beyond the hurricane-rated impacts required by applicable building codes.**

Johnny has been providing expertise to Charlotte County since 2007! His experience delivering Public Safety projects within budget will help guide the team through any cost challenges.

ADDITIONAL EXPERIENCE	COST
Sheriff's District 3 Office with Evidence Building and Impound, Charlotte County	\$11.3M
Airport Rescue Fire Fighter Training Facility (ARFF), Charlotte County	\$9.2M
Jail Infirmary Expansion Phases I & II, Charlotte County*	\$53M
Jail Infirmary Expansion, Charlotte County	\$9.8M
Transit Facility, Charlotte County	\$3.3M
Fire Station #2, Charlotte County	\$5.5M
Fire Station #5, Charlotte County	\$4.5M
Fire Station #81, City of North Port	\$8M
Fire Training Tower, City of North Port	\$1.5M
Fire Stations #91 and #92, Town of Longboat Key	\$6M

**Individual Experience*



JOHN CARLSON, CGC

PROJECT EXECUTIVE

Years of Experience

05 | WS

20 | Industry

BS, Building Construction, University of Florida
 Certified General Contractor
 FHBA, 2023 Vice President
 Suncoast Builders Assoc, 2024 President Building Industry
 Advisory Board, Charlotte County

John was raised in Charlotte County, and as a resident of Port Charlotte, he is deeply invested in the local community. As Project Executive, John works to ensure the entire team is on the same page regarding this project and fosters a one-team atmosphere. He provides guidance and problem solving advice, assists with staffing, outlining project plans, setting project goals/deadlines, and evaluates performance. He also works closely with our Preconstruction Services Manager on bid packages, schedule, constructability reviews, value engineering, and site logistics.

RELATED PROJECT EXPERIENCE

Sheriff District 3 Admin/911 and Logistics Center, Charlotte County—\$37.5M

Wharton-Smith is currently providing Construction Management services for the new Sheriff's Administration Hardened 911 Facility. The 8-acre site is part of the District 3 campus masterplan. This new **hardened facility** is a 63,500 SF **tilt-wall** administration office with support services for Senior and Executive Commands, Finance, Intelligence, Community Affairs, Human Resources, MIS, and Operational Support. Key features for the project include **communications/Dispatch**, RTIC, Records, Investigations and a fleet vehicle maintenance center. The building will implement sustainable building practices paralleling LEED or similar rating system.

Fire Station #2, Charlotte County—\$5.5M

Wharton-Smith provided Construction Management at Risk services for Charlotte County on the new Fire Station #2. This new 12,727 SF fire station consists of 12 bunk rooms and 3 apparatus bays equipped with office space, a kitchen, living, fitness, and decontamination areas. This project contains fuel pumps and associated parking for Fire/EMS vehicles. **The building is considered a hardened building, complete with Level E missile rated impact glass and doors and a full standby generator fueled by two 1,000-gallon underground LP tanks.**

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

Wharton-Smith provided Construction Management at Risk services for Charlotte County on the new Fire Station #5. This new 9,621 SF fire station consists of 8 bunk rooms and 2 apparatus bays. The station is equipped with office space, a kitchen, living, fitness, and decontamination areas. **The building is considered a hardened building, complete with Level E missile rated impact glass and doors and a full standby generator fueled by two 1,000-gallon underground LP tanks.**

CHARLOTTE COUNTY RESIDENT

John is a member of the CDBIA and past President of the Suncoast Builders Association. His extensive local relationships and familiarity with the area, coupled with his recent public safety experience, will prove to be an invaluable asset on this project!

ADDITIONAL EXPERIENCE

ADDITIONAL EXPERIENCE	COST
Hurricane Ian Recovery - Mid County, Charlotte County	Varies
Fire Station #81, City of North Port	\$8M
Various Continuing Services Projects, Charlotte County Schools <i>Harvard Jolly Projects</i>	Varies
Transit Facility, Charlotte County <i>Grant Funded</i>	\$3.3M



MIKE NUNEZ

PROJECT MANAGER

Years of Experience

07 | WS

07 | Industry

BS, Professional Aeronautics, Embry-Riddle Aeronautical University
FAA Certified Drone Operator
Confined Space, Scaffolding, Trenching & Excavation, Fall Protection, OSHA Hazard Communications

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

Mike has experience working on the Public Safety Campus that will be invaluable during planning and construction.

RELATED PROJECT EXPERIENCE

[Airport Rescue Fire Fighter Training Facility \(ARFF\), Charlotte County—\\$9.2M](#)

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

[Community Development Center Office Expansion, Charlotte County—\\$2.5M](#)

Wharton-Smith provided Construction Management at Risk services on the Community Development Office Expansion project. Phase 1 consisted of constructing a new concrete block and stucco 5,000 SF addition onto the Community Development building. Phase 2 consisted of interior renovations to the existing 17,931 SF Community Development building.

[Shell Creek Water Treatment Plant Reverse Osmosis Plant, City of Punta Gorda—\\$23.6M](#)

Wharton-Smith provided Construction Management at Risk services for the City of Punta Gorda's Shell Creek WTP Reverse Osmosis Addition project. This project consisted of two buildings: the reverse osmosis processing plant and the sodium hypochlorite building. The project is located adjacent to the existing Punta Gorda Water Treatment Plant and was completed by both Wharton-Smith's water and commercial departments. Our commercial department managed the vertical construction while our water department constructed the overall plant and horizontal construction components. The 16,225 SF reverse osmosis processing plant consists of administration offices, plant laboratories, a control room, communications room, high pressure feed pump room, chemical storage rooms, a workshop, electrical broom, breakroom/conference room, and restrooms.

ADDITIONAL EXPERIENCE	COST
Supervisor of Elections Warehouse, Charlotte County	\$7.1M
Transit Facility, Charlotte County <i>Grant Funded</i>	\$3.3M
Sheriff's District 3 Office with Evidence Building and Impound, Charlotte County	\$11.3M
Fire Station #9 Temporary Facility, Charlotte County	\$200K
Charlotte Sports Park Hurricane Insured Asset Repairs, Charlotte County	\$17.7M



CHAD ROEDER, CBC

AREA SUPERINTENDENT

Years of Experience

03 | WS

27 | Industry

Certified Building Contractor
OSHA 10-Hour
Forklift
Rigging and Signal Person

As Area Superintendent, Chad is responsible for maintaining a well-trained and qualified work force and for maximizing allocation of manpower, tools, and equipment between jobsites. As he regularly visits the jobsites, Chad assists with monitoring safety inspections, daily reports, two-week look ahead schedules, delivery coordination, production planning, weekly subcontractor coordination meetings, storage and installation requirements, quality control, labor and equipment resources, project final quality, start-up testing, as well as final close-out.

Chad has experience working on several public safety projects for Charlotte County.

RELATED PROJECT EXPERIENCE

[Sheriff District 3 Admin/911 and Logistics Center, Charlotte County—\\$37.5M](#)

Wharton-Smith is currently providing Construction Management services for the new Sheriff's Administration Hardened 911 Facility. The 8-acre site is part of the District 3 campus masterplan. This new **hardened facility** is a 63,500 SF **tilt-wall** administration office with support services for Senior and Executive Commands, Finance, Intelligence, Community Affairs, Human Resources, MIS, and Operational Support. Key features for the project include **communications/Dispatch**, RTIC, Records, Investigations and a fleet vehicle maintenance center. The building will implement sustainable building practices paralleling LEED or similar rating system.

[Sheriff District 4 Headquarters/Training Facility/K9, Charlotte County—\\$13.2M](#)

Wharton-Smith is currently providing Construction Management services for the replacement District 4 office for the Charlotte County Sheriff's Administration. The new complex consists of a 20,000 SF sheriff's office space, separate training offices, and a large training room outfitted to host 80 people. This building sits on the training complex that includes a firing range, obstacle course and K9 training. Amenities will include a fitness center, locker room, storage, breakroom, reception area, and a K9 kennel inclusive of outdoor runs. **The building is being constructed as an essential facility and will be hardened beyond the hurricane-rated impacts required by applicable building codes.**

ADDITIONAL EXPERIENCE	COST
Airport Rescue Fire Fighter Training Facility (ARFF), Charlotte County	\$9.2M
Supervisor of Elections Warehouse, Charlotte County	\$7.1M
Fire Station #2, Charlotte County	\$5.5M
Hurricane Ian Recovery - Mid County, Charlotte County	Varies
Public Works Maintenance Yard, Charlotte County	\$1.9M
Fire Training Tower, City of North Port	\$1.5M
Southwest WRF Operations Building, City of Cape Coral	\$15.6M
Various Continuing Services Projects, Charlotte County Schools Harvard Jolly Projects	Varies



JUNIOR ETIENNE

SUPERINTENDENT

Years of Experience

04 | WS

04 | Industry

Civil Engineering Graduate, Florida Gulf Coast University
 OSHA 30-Hour, CPR/First Aid Certification, Confined Space
 American Society of Civil Engineers
 Received Navy Marines Corps Achievement Medal and US Navy
 Sailor of the year 2009

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

RELATED PROJECT EXPERIENCE

[Airport Rescue Fire Fighter Training Facility \(ARFF\), Charlotte County—\\$9.2M](#)

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

[Sheriff District 4 Headquarters/Training Facility/K9, Charlotte County—\\$13.2M](#)

Wharton-Smith is currently providing Construction Management services for the replacement District 4 office for the Charlotte County Sheriff's Administration. The new complex consists of a 20,000 SF sheriff's office space, separate training offices, and a large training room outfitted to host 80 people. This building sits on the training complex that includes a firing range, obstacle course and K9 training. Amenities will include a fitness center, locker room, storage, breakroom, reception area, and a K9 kennel inclusive of outdoor runs. **The building is being constructed as an essential facility and will be hardened beyond the hurricane-rated impacts required by applicable building codes.**

[Tampa Bay Rays, Charlotte Sports Park Hurricane Insured Asset Repairs, Charlotte County—\\$17.7M](#)

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

[Southwest WRF Operations Building, City of Cape Coral—\\$15.6M](#)

Wharton-Smith provided Construction Management at Risk services for the construction of a new 25,000 SF **tilt-wall** Operations and Administration Building on the existing Southwest WRF site. The two-story building was constructed utilizing tilt wall construction. This building is designed to create state-of-the-art office spaces for staff and a permanent structure for the plant's computer systems, in lieu of a temporary modular trailer. The facility includes open areas for maintenance purposes, a mezzanine, and conference room areas.

Junior has recent experience working on multiple public safety projects for Charlotte County.



TRIPP LYTLE

PROJECT ENGINEER

Years of Experience

03 | WS

07 | Industry

BS, Construction Management, Kent State University
FAA Drone License
OSHA 30-Hour
Next Gen Council (Charlotte Desoto Building Industry Association)

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

Tripp has experience working on several complex public safety projects for Charlotte County.

RELATED PROJECT EXPERIENCE

Sheriff District 3 Admin/911 and Logistics Center, Charlotte County—\$37.5M

Wharton-Smith is currently providing Construction Management services for the new Sheriff's Administration Hardened 911 Facility. The 8-acre site is part of the District 3 campus masterplan. This new **hardened facility** is a 63,500 SF **tilt-wall** administration office with support services for Senior and Executive Commands, Finance, Intelligence, Community Affairs, Human Resources, MIS, and Operational Support. Key features for the project include **communications/Dispatch**, RTIC, Records, Investigations and a fleet vehicle maintenance center. The building will implement sustainable building practices paralleling LEED or similar rating system.

Airport Rescue Fire Fighter Training Facility (ARFF), Charlotte County—\$9.2M

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

Sheriff's District 3 Office with Evidence Building and Impound, Charlotte County—\$11.3M

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

ADDITIONAL EXPERIENCE	COST
Supervisor of Elections Warehouse, Charlotte County	\$7.1M
Hurricane Ian Recovery - Mid County, Charlotte County	Varies
Public Works Maintenance Yard, Charlotte County	\$1.9M
Fire Training Tower, City of North Port	\$1.5M
Tampa Bay Rays, Charlotte Sports Park Hurricane Insured Asset Repairs, Charlotte County	\$17.7M
Various Continuing Services Projects, Charlotte County Schools <i>Harvard Jolly Projects</i>	Varies



JUANMIGUEL GORUT, LEED AP PRECONSTRUCTION EXECUTIVE

Years of Experience

08 | WS

20 | Industry

BS, Mechanical Engineering, University of Florida
MBA, Global Management, University of Phoenix
LEED Accredited Professional
Associated Builders & Contractors

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

RELATED PROJECT EXPERIENCE

Public Safety Complex, City of Tavares—\$13.7M

Wharton-Smith provided General Contracting services on this two-story, 38,527 SF Public Safety Complex for the City of Tavares. Designed to replace the undersized, outdated, and ill-converted Train Supply Station Depot previously utilized by the City for years as a temporary fire station and the crowded, poorly ventilated accommodations that the police department had been enduring at City Hall. The new facility now houses a fire station, police station, and **emergency operations center**.

Sheriff District 3 Admin/911 and Logistics Center, Charlotte County—\$37.5M

Wharton-Smith is currently providing Construction Management services for the new Sheriff's Administration Hardened 911 Facility. The 8-acre site is part of the District 3 campus masterplan. This new **hardened facility** is a 63,500 SF **tilt-wall** administration office with support services for Senior and Executive Commands, Finance, Intelligence, Community Affairs, Human Resources, MIS, and Operational Support. Key features for the project include **communications/Dispatch**, RTIC, Records, Investigations and a fleet vehicle maintenance center. The building will implement sustainable building practices paralleling LEED or similar rating system.

Sheriff District 4 Headquarters/Training Facility/K9, Charlotte County—\$13.2M

Wharton-Smith is currently providing Construction Management services for the replacement District 4 office for the Charlotte County Sheriff's Administration. The new complex consists of a 20,000 SF sheriff's office space, separate training offices, and a large training room outfitted to host 80 people. This building sits on the training complex that includes a firing range, obstacle course and K9 training. Amenities will include a fitness center, locker room, storage, breakroom, reception area, and a K9 kennel inclusive of outdoor runs. **The building is being constructed as an essential facility and will be hardened beyond the hurricane-rated impacts required by applicable building codes.**

Having worked on numerous public safety projects, Juanmiguel will also assist with incorporating sustainability measures and value engineering ideas for these projects.

ADDITIONAL EXPERIENCE	COST
Sheriff's District 3 Office with Evidence Building and Impound, Charlotte County	\$11.3M
Airport Rescue Fire Fighter Training Facility (ARFF), Charlotte County	\$9.2M
Transit Facility, Charlotte County <i>Grant Funded</i>	\$3.3M
Fire Station #2, Charlotte County	\$5.5M
Fire Station #5, Charlotte County	\$4.5M
Supervisor of Elections Warehouse, Charlotte County	\$7.1M

C. Roles and Responsibilities of Participants

This team will provide all of the Construction Manager at Risk services necessary for a successful project. Wharton-Smith is a full-service firm in that we have an in-house preconstruction/estimating department, a corporate scheduler, a corporate safety officer, and BIM/VDC capabilities that we will offer if elected for use on this project. With these capabilities, you can expect an internal estimate and fully detailed takeoff to use as a measuring stick for the future bidding phase. In this manner, you can rest assured that we will be in control of the GMP process, rather than just receiving subcontractor quotes and passing on the results to the Owner for reimbursement. By first estimating the job ourselves, we will then work to ensure bid packages contain all of the scope of work dictated by the documents eliminating holes and scope gap, while also questioning costs that seem exorbitant to the current industry norms. Beyond the normal breadth of services, with our team you can expect a hands-on collaborative approach with the owner and design team throughout the preconstruction process, and an open-book, team-oriented approach during construction and close-out as well.



"The construction team has displayed the utmost level of professionalism and experience to help us achieve our goals while keeping our needs and/or vision in top priority. If a new project were to arise I would 100% attempt to work with Wharton-Smith again."

- Matthew Astorino, Chief Operator Southwest Water Reclamation, City of Cape Coral



Previous Experience of Team




Tab III. Previous Experience of Team

A. Describe Previous Projects the Team Worked on Together

Our proposed project team has extensive experience working on projects together, which several have been public safety projects in the region, and many of which have been completed for Charlotte County. As shown in the table below, this team provides the continuity, knowledge, synergy, and experience to ensure Charlotte County receives the highest quality facilities for the best value!

The projects listed below are all Wharton-Smith projects:

	Caryn Huff, Area Manager	John Carlson, Project Executive	Mike Nunez, Project Manager	Chad Roeder, Area Superintendent	Junior Etienne Superintendent	Tripp Lytle, Project Engineer	Juanmiguel Gorut, Preconstruction Services Executive	Michael Christian, Corporate Scheduler	Guillermo Bobea, Area Safety Manager	Johnny Santos, Director of Operations
	Sheriff's Administration/Hardened 911 Facility	✓	✓		✓		✓	✓	✓	
	Jail Infirmary Expansion	✓								✓
	Community Development Expansion & Renovation	✓		✓			✓			✓
	Sheriff's District 3 Office with Evidence Building and Impound	✓		✓		✓	✓	✓		✓
	Transit Facility	✓	✓	✓			✓	✓		✓
	Airport Rescue Fire Fighter Training Facility (ARFF)	✓		✓	✓	✓	✓	✓		✓
	Fire Station #2	✓	✓		✓		✓			✓
	Fire Station #5	✓	✓				✓			✓
	Temporary Fire Station #9	✓		✓		✓	✓	✓		✓
	Supervisor of Elections Warehouse	✓	✓	✓		✓	✓	✓	✓	✓
	Sheriff's District 4 HQ / Training Facility / K9	✓			✓	✓	✓	✓	✓	✓
	Hurricane Ian Recovery - Mid County	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Charlotte Sports Park Hurricane Insured Asset Repairs	✓	✓	✓		✓	✓	✓	✓	✓

B. Relevant Work History with Government Facilities in Florida

Our proposed team delivers a vast portfolio of local government facility projects. When selecting a Construction Manager for your project, it is imperative to choose a team with recent CMAR experience.

More than 120 Florida Public Agency Clients throughout the state have trusted Wharton-Smith to provide similar projects. Additionally, Wharton-Smith has been delivering high-quality multi-use and public safety projects to Charlotte County for over nine years.

C. Construction of Multi-use Facilities, Government Facilities, Public Safety Facilities, Hardened Structures, and Command Centers, with Proposed Team

Wharton-Smith has completed numerous projects that were government, public safety and hardened projects throughout Florida. In addition to the Charlotte County projects listed on the previous page, here is a sample of other similar projects that Wharton-Smith has completed.

PROJECT NAME, CLIENT

Public Safety Complex, City of Tavares
Public Safety Complex, City of Sanford
Center for Public Safety, Seminole State College
Emergency Operations Center, Mobile County
Emergency Operations Center Renovations, UCF
Sheriff's Office Administrative Service Complex, Indian River County
Sheriff's Office and Public Safety Building Remediation, Seminole County
Edward Doyle Police Station, City of Maitland
Fire Station/Administration Building, City of Daytona Beach
Fire Station #1 Headquarters, City of Orlando
Communications Center Renovation, Seminole County Sheriff's Office
Utilities Administration Building, City of DeLand
Justice Center Annex, Seminole County
Municipal Operations Center, City of Statesville
Utilities Administration Facility, City of Lakeland
City Hall, City of Ocoee
Supervisor of Elections Office Renovations, Osceola County
District 7 Medical Examiner's Office, Volusia County
District 9 Medical Examiner's Office, Orange County
Public Works Complex, City of Casselberry
District 1 Regional Medical Examiners Office, DOMES
Southwest WRF Operations Building, City of Cape Coral
Shell Creek WTP Administration Building City of Punta Gorda
Holopaw Community Center, Osceola County
City Hall, City of Maitland
Court-Central Services Warehouse, Volusia County

PUBLIC SAFETY EXPERTS

We understand the functions and special purpose units needed for safety, security, practicality, and longevity. We understand what materials and building techniques to use. We understand the importance of the logistics and functionality as it pertains to operations. We understand because we listen; because we put the needs of your team first and do everything in our power to accommodate those needs without compromising the budget.



D. Working with Designers Keeping Project within a Fixed Budget

At Wharton-Smith, we understand that one of the most critical phases of construction management takes place early in the development of the projects. While the program is being developed and the design is only a concept, this is the best opportunity to obtain the maximum value for each budget dollar. As the program is

finalized and the design becomes developed, more effort is required by the project team to implement measures to ensure the budget is maintained.

The first step is to perform a cost estimate, as estimating the project is often the best way of identifying the “why” of the project cost to ensure the project stays within the established budget. Our team of commercial construction professionals both in Charlotte County and throughout the Southwest collaborate frequently and share experiences to build quality projects of all sizes and to respect each Owner and their budgetary restraints. **We strive to be your contractor of choice** with knowledgeable people who have the experience and desire to provide the best construction experience to our Owners.

Wharton-Smith is committed to finding innovative solutions to save Charlotte County both time and money throughout all phases of the projects. As outlined below, we will follow a well-defined and detailed approach during preconstruction in order to provide the highest quality product at the lowest cost.

BUDGETING PROCESS

Phase I: Participation in Design Meetings

- Review design documents.
- Suggest ideas to enhance overall design.
- Identify existing conditions that could hinder/improve the project.

Phase II: Real Time Estimating

- Provide accurate estimating.
- Develop value-engineering alternatives to lower costs.
- Ensure the project stays within the proposed budget.

Phase III: Constructability Review

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

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

COST REDUCTION SCENARIO CHARLOTTE COUNTY SHERIFF ADMIN/911 BUILDING

We developed a GMP for the Charlotte County Sheriff's Office in December 2023. To align with the County's budget and combat cost escalations, we worked hand in hand with our design team, to develop VE items that would reduce the overall project cost. Through creativity and collaboration, this effort resulted in drastic savings to the project.

- ✓ Review structural engineering to eliminate the shear walls **\$858,585 SAVINGS**
- ✓ Modify stair foundations **\$453,598 SAVINGS**
- ✓ Evaluate site conditions to reduce fill material **\$120,000 SAVINGS**
- ✓ Reduce glazing throughout building **\$83,600 SAVINGS**





IV.

Project Control

Tab IV. Project Control

A. What techniques are planned to assure that the schedule will be met?

The project schedule is a living document that serves as a valuable tool to the project team. Fast paced projects with diverse construction can only be successful with an accurate and useful schedule. Identification of the critical path and other important time limitations are impossible without an effective and current schedule. Our scheduling is performed inhouse by our experienced staff of project schedulers and project staff. Wharton-Smith uses Primavera P6 for computer generated project Critical Path Method scheduling.

INITIAL SCHEDULE CREATION

1

The development of the baseline schedule is the crucial first step. The schedule is inclusive of all project phases including pre-construction (constructability reviews and value engineering), permitting, bidding and procurement, close-out, and ultimately, turnover. Project Executive John Carlson and Superintendents, will begin the planning process by preparing an overall master schedule to effectively sequence the areas of work. Each area will be further broken down into activities to define the work logic and duration. Milestones include completion of design, Notice to Proceed (NTP), permanent power available to the facilities, substantial completion, final completion, and Owner/user move-in. This schedule is developed during preconstruction and used in the GMP.

WEEKLY SCHEDULE UPDATES TO ENSURE ACCURACY

2

The project team will meet weekly during construction to accurately update the overall project schedule. The schedule is updated utilizing superintendent daily reports, subcontractor input, field reviews, and record of what work has been put in place. Actual start dates, finish dates, and remaining durations are confirmed, and updated as needed, during these meetings. After each schedule update is complete, the durations and logic of the critical path and near critical path activities are reviewed, due to their level of importance, so the plan going forward allows for an on-time or early finish. We then distribute copies of the updated project schedule to all subcontractors, project team members, the design team, and Charlotte County so they can incorporate these updates into their work plans and to keep all stakeholders informed of project status.

LOOK-AHEAD SCHEDULES WITH SUBCONTRACTOR INPUT

3

Our project superintendents will create and manage a three-week look-ahead schedule that is updated each week as well as daily activities and goals for all trades. This schedule includes more detailed breakdown and confirms materials are on site or due on site in order to accomplish the work goals. This schedule is developed with the subcontractors input during the weekly subcontractor coordination meeting. We will support this effort by using production planning boards at each job site.

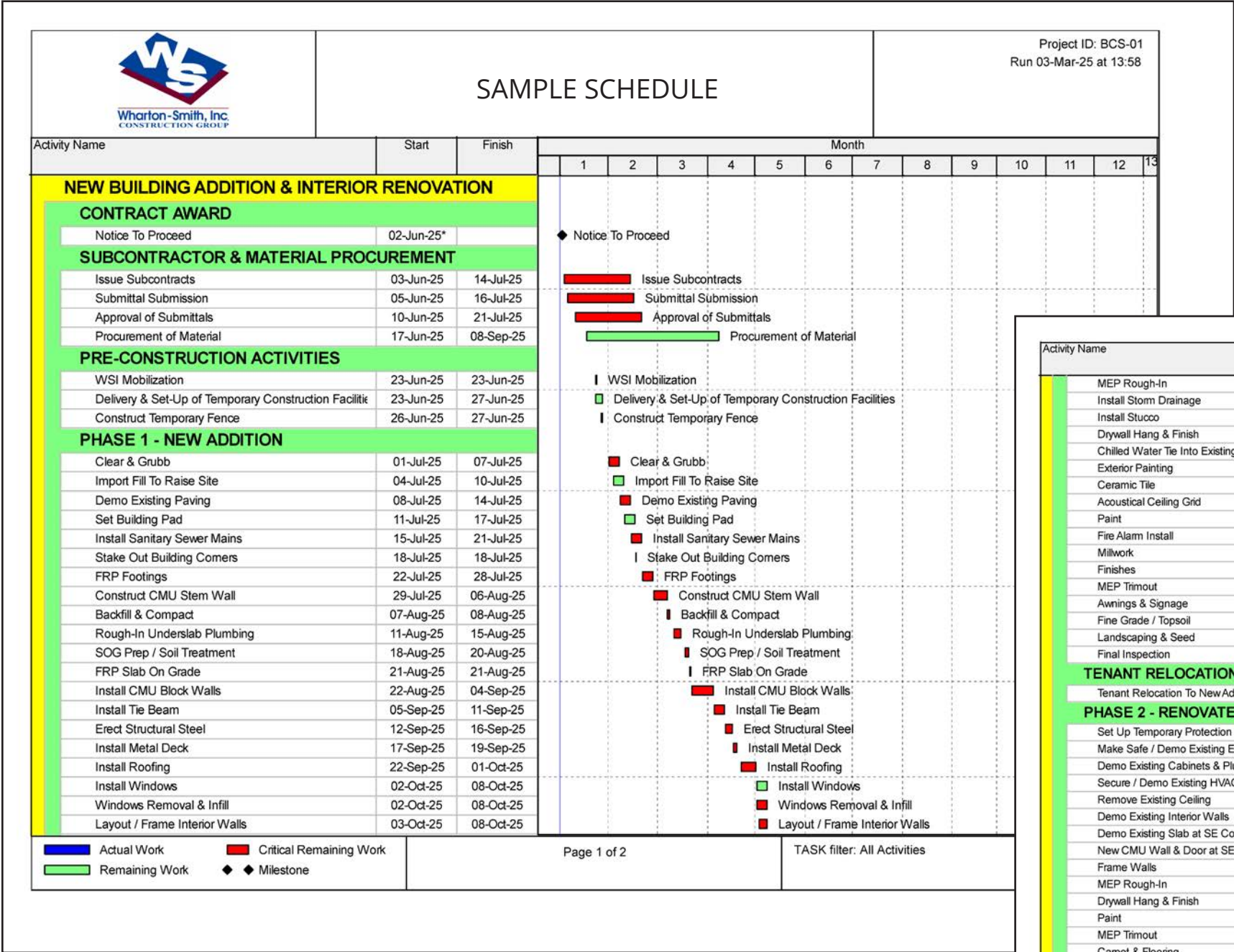
UTILIZING THE SCHEDULE THROUGH CLOSE-OUT AND TURNOVER

4

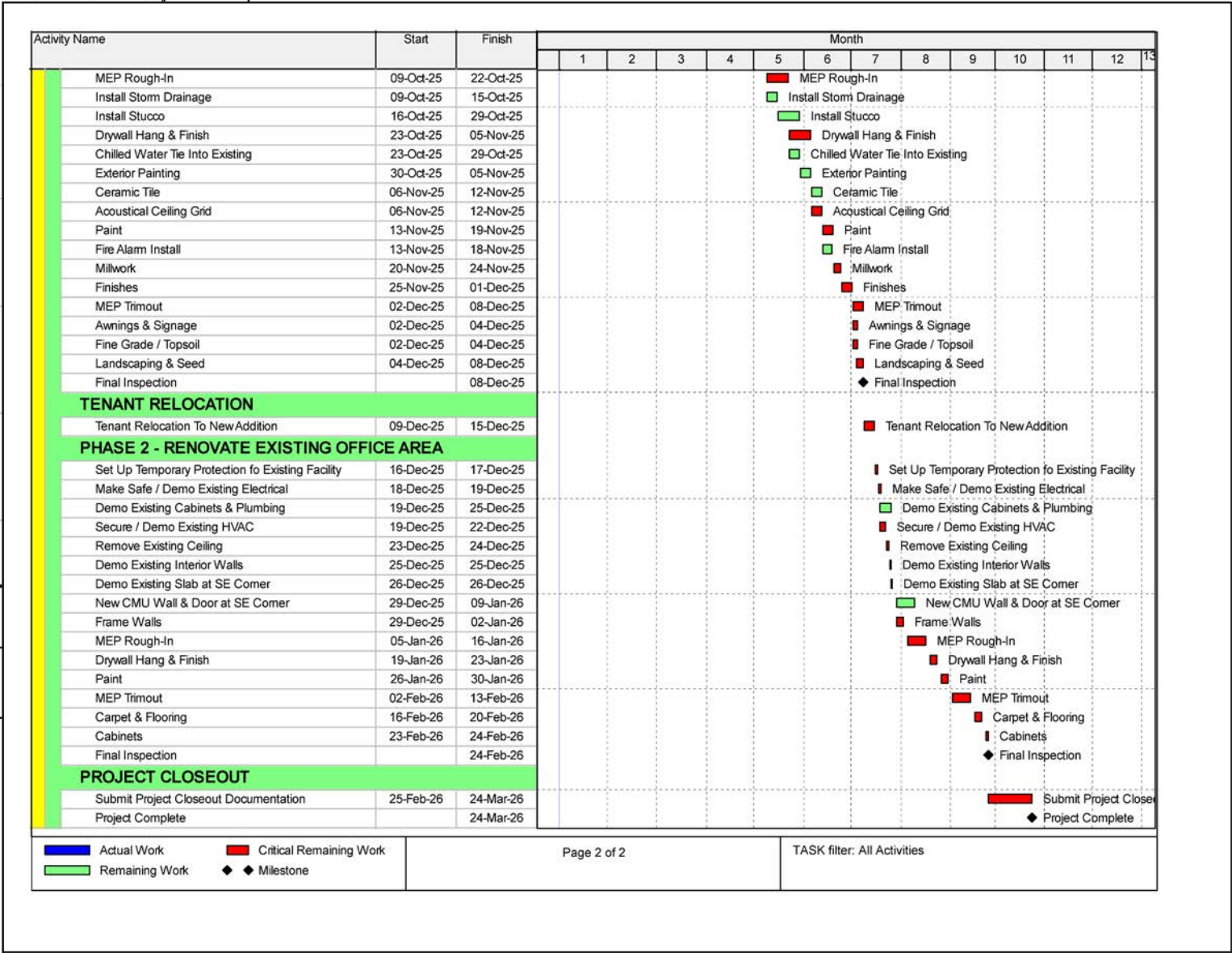
During the close-out phase of the project the schedule remains in continual use and is quite useful in scheduling many of the final project activities. These activities typically consist of the various witnessed testing phases that are required as a project comes to an end and the project is eventually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

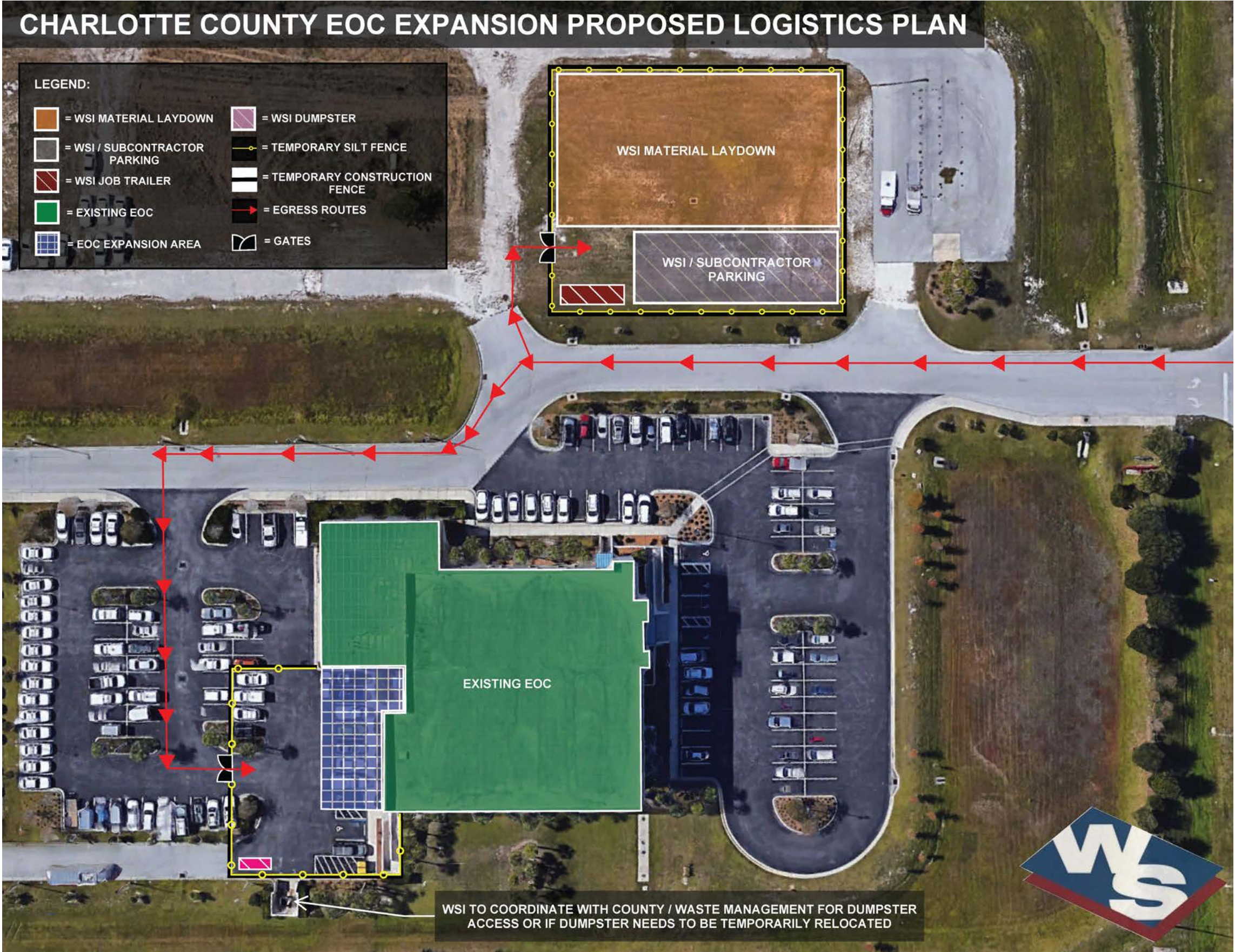
The schedule is the mechanism that will initiate the discussion, review, agreement, and planning of the project sequence by the entire project team. This approach allows us to utilize the schedule, not only as a tool to update and forecast timelines, but also to resolve potential delays and conflicts. This joint approach benefits all parties with the common goal of providing successful projects and it has served our team well on all our projects. **We have an excellent track record of completing projects on time and under budget for Charlotte County!**

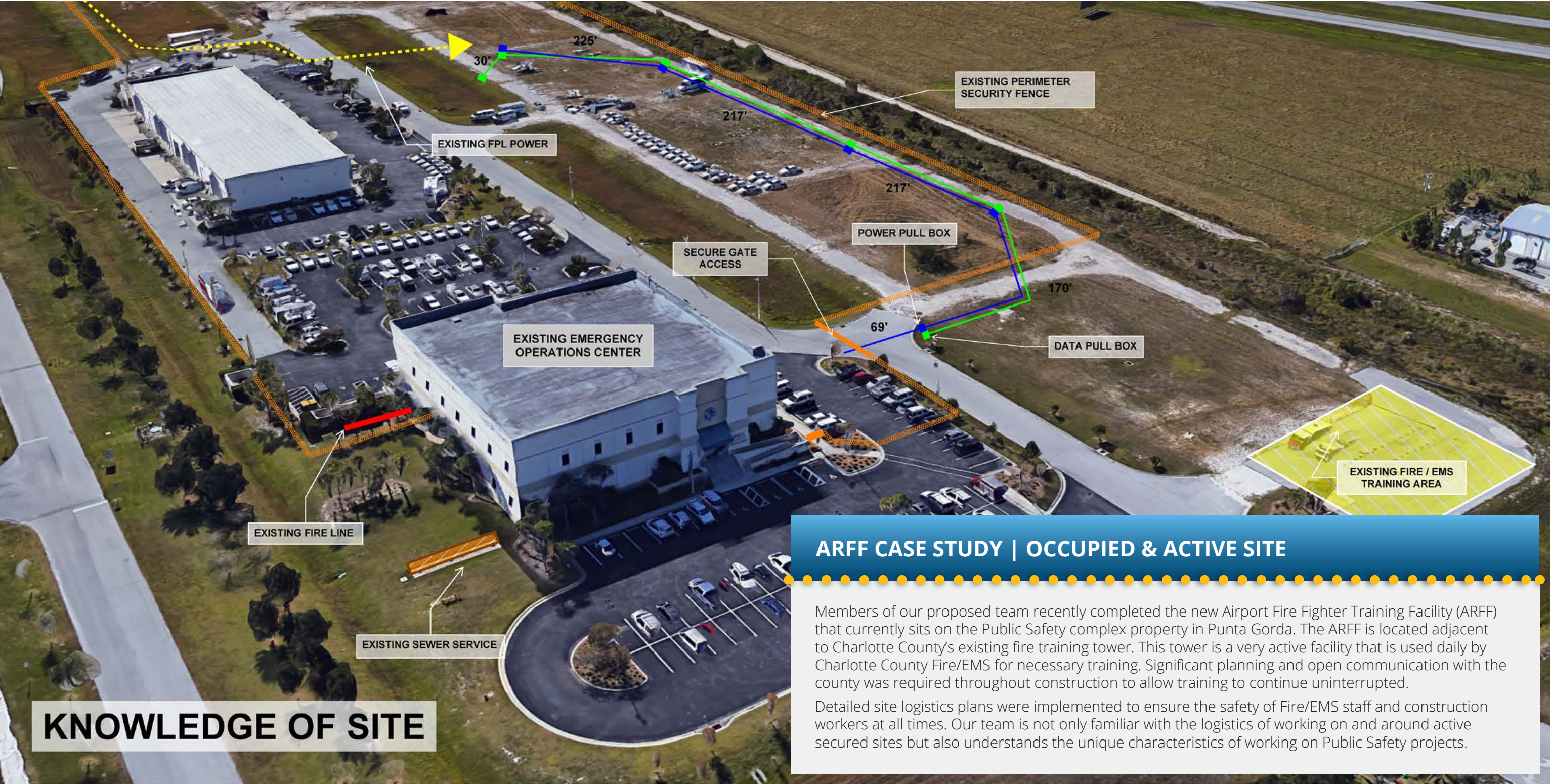
SAMPLE PHASED PROJECT SCHEDULE



- Our team will work closely with the County and Design team to develop the final construction schedule. The following items will be taken into consideration when creating the schedule:
1. Long lead items such as switch gear and specialty communications gear if applicable
 2. Project phasing - phase 1 addition, phase 2 interior renovation
 3. Relocation of staff i.e. continuity of operations
 4. Commissioning of building systems and project turnover







1. This property sits in Charlotte County's ECAP overlay District
2. Fire training activities occur at the Fire Tower, ARFF and front of the property.
3. Charlotte County Vehicle Maintenance uses the rear parking lot for vehicle overflow parking along with the grass areas to the west.

LEGEND:

- Data line & pull boxes installed by WS
- Power service & pull boxes installed by WS
- Perimeter fence installed by WS
- Existing secure entrance gates installed by WS
- Existing water line



B. What control techniques are planned for construction?

Our team employs an organized system of controls to ensure that the schedule and costs are managed and controlled during all project phases, from the earliest of design planning through construction completion. While the development of the schedule occurs during the earliest stages of design and preconstruction, maintenance of the schedule requires an equal amount of effort and effective communication. Once the project has started, major alterations to construction scope details or sequencing can impact the schedule. It is our team's experience that with proper communication, our actions can be prioritized so that we maintain the planned completion of the work. We accomplish this by the distribution of schedule updates that contain accurate data for completed items "as-built" as well as work yet to be done. These schedule updates continue to assist us in identifying our most crucial areas of focus. Once again, feedback from all parties is welcomed and utilized. **Early recognition of potential delays or conflicts leads to a swift resolution.** Clear and consistent identification of the critical path, which can change throughout the course of the project, is important as well. This proactive approach to schedule maintenance begins immediately along with the work. From building permits to construction to project close-out, the schedule remains an effective tool for the project team.

During the preconstruction phase, the Wharton-Smith team will employ our expertise to provide innovative ideas and value engineering to the project, the goal of which is to provide cost savings to the project budget, which can later be used for unforeseen conditions, Owner requested change orders, or realized savings to Charlotte County. Our constructability reviews and design reviews will assist the project team in eliminating ambiguity, conflicts, and missing information. Our estimates are constantly checked and updated to accurately reflect the project in its current design stage and to eliminate scope creep throughout the estimating process.

Once the design is completed and the project transitions to the bidding phase, our focus is to form a select bidders list that is populated with relationship minded subcontractors and suppliers, particularly subcontractors in the Charlotte County area. The collaborative list will allow us to avoid change order-driven companies, which can only result in conflict and added cost. The team then has the responsibility to issue comprehensive scopes of work/supply for the vendors and subcontractors. These scopes will be accurate in order to eliminate any gaps or overlaps.

PRODUCTION PLANNING SYSTEM (PPS)

The Production Planning System (PPS) process starts by conducting the pre-job planning meeting that is attended by the project team and the integrated subcontractors. In the meeting the key roles are identified, the project scope is reviewed, and the significant challenges are discussed. One of the action items of the meeting is to establish the planning room and the setup of the production planning boards. These boards make up the backbone of the system as they are used daily to track each activity on the project using a crew based model. They do this by using an "old school" colored post-it note system (shown here) in our office trailers so that the planning can be nimble and adjusted as needed. Each crew supervisor knows their associated color and will meet daily with the Wharton-Smith management team at the End of Shift meeting to review what was accomplished that day. They coordinate with the other crews and then plan the activities for the next day. It is through this constant collaboration between the field crews that hindrances are identified, discussed, and resolved. The PPS is a planning tool that helps improve quality by improving installation, eliminating wasted motion, and reducing potential and costly rework. All notes are published on the board for maximum transparency among the project team and owner.



HOW DOES IT WORK?

TECHNOLOGY SPOTLIGHT

To maintain a high level of quality and accuracy during construction, we are using **DroneDeploy** in conjunction with structionsite on our projects. Structionsite allows us to store our 360 degree photos and link them to the construction documents. DroneDeploy allows us to combine our drone photos into one map and extract a 3D model of the job site at any time.

With several certified drone pilots on staff, implementing this powerful technology provides a more detailed understanding of the project/site to our clients and results in a higher level of accuracy and efficiency during construction. Some benefits of utilizing this technology include:



Efficiency

Capture job site data in real time with interactive maps and automatically organize photos across the entire project life cycle – from pre-con to close-out.



Visibility

Keep a clear record of all structural elements, validate quality of work and detect issues early.



Communication

Share annotated reports or 360 walkthroughs and integrate DroneDeploy with project management software.



Safety

Inspect hard to reach areas, such as roofs and facades, without putting anyone at risk.

With our experience working adjacent to the airport, we have received FAA clearance many times to utilize our drones. Our local team has mastered this process!



DRONEDEPLOY | RECENT SUCCESS STORY

Using Drone Deploy's advanced mapping program the onsite project team was able to review each mapped flight plan to:

- Quickly identify high risk areas on the jobsite such as blind spots, cluttered lay down areas, and non-leveled terrain to ensure the job site was operating safely throughout the entirety of the project.
- Monitor the proper use of site subcontractors turbidity barriers, silt fencing, and drain socks to ensure there was no pollution happening throughout the duration of the project.
- Export flight data as needed from specific date ranges to share with subcontractors. Being able to visually share the existing site conditions to subcontractors without requiring them to physically travel to the site resulted in substantial cost savings over the duration of the project.



CCSO 911 ADMIN/DISTRICT 3 SITE

C. Demonstrate Ability To Meet Project Cost Control

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 Wharton-Smith's job to work with the design team, not only during the design phase, but also during the bidding and construction phases in order to maximize the best value for the County.

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 Services Executive Juanmiguel Gorut** will work directly with the County and the design team to document any changes or savings ideas for the project, identify impacts to the schedule and construction costs, develop new schedules, and updated cost estimates. This will help the County make informed decisions in a timely manner. Pending Owner expectations, we can provide budget estimates at the following stages of the project conceptual, schematic, design/development, and Guaranteed Maximum Price (GMP).

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

The cost tracking system that our team implements involves the County every step of the way, and truly maintains the transparency for how the GMP is created, how it was administered and maintained, and how it is closed out. Wharton-Smith has been successfully completing CMAR projects since 1995. We are proud to say that we have never exceeded a GMP on any CMAR project. **In fact, our track record with Charlotte County alone has resulted in well over \$650,000 returned back as project savings on our previous projects!** This is a direct result of our effective cost control protocols. We have worked alongside Charlotte County to utilize the project savings in order to enhance your projects. This result directly stems from the experienced personnel we employ, the management systems we utilize, and the relationships we build.



COST CONTROL EXPERIENCE THAT MATTERS!

Wharton-Smith has been successfully completing CMAR projects since 1995. We are proud to say that we have never exceeded a GMP on any CMAR project. This directly stems from the experienced personnel we have, the management systems we employ, and the relationships we build.

We are pleased to say that our preconstruction plan is based on:

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

We will utilize our large regional subcontractor base and leverage mutual relationships to obtain the most competitive pricing, thus ensuring the best pricing on your project.

Cost Control and Reporting During Construction

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

For cost accounting, we use 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 following items:

- ✓ **Monthly cost narrative**
Describes the current construction cost estimate status of the project
- ✓ **Cost control report**
Describes the current cost and payment status for the project
- ✓ **Project accounting report**
Provides detailed accounting of all expenditures for the project

VALUE ENGINEERING SUCCESS

The best way to demonstrate our abilities in Value Engineering is our recent successes on similar projects. In the last five years, similar projects that we have completed for Charlotte County have come in under budget and in most cases at the end of each project, unused funds were returned to the county. Below are some examples:

- Airport Rescue Fire Fighter Training Facility - **\$220,000 was returned to the County!**
- Jail Infirmary - **\$200,000 was returned to the County!**
- Fire Stations #2 & #5 - **\$275,819 was returned to the County!**

D. Demonstrate Abilities In Value Engineering Opportunities

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 lifelong and low maintenance. We thoroughly review items such as end-user costs for running the facility after construction. We will continue value engineering throughout construction maintaining the highest quality standards, and to ensure budget compliance, without jeopardizing the quality of the project. Due to our strong relationships with local

architects, we have an excellent track record of collaborating through each deliverable to identify VE opportunities.



TILT-WALL CONSTRUCTION IN PROGRESS

E. Demonstrate Ability Preparing Accurate Estimates Vs. Actual

Our preconstruction team will ensure the viability of the project's budget and schedule and will develop an effective plan for the procurement and construction phases of the project using an open-book policy. Once selected as the contract manager for this project, our preconstruction team will gather the information required to look at the project in depth and recommend ways to save the county money without sacrificing quality or program.

The best way to demonstrate our ability to produce accurate estimates is by showcasing a few of our key team members, similar, successfully completed projects, and describe the methods we took to ensure our clients' budgets were met. Our team's cost control methodology has resulted in numerous successful projects where significant dollars were saved.

The proof is in the final result—every project we have completed for Charlotte County was completed within budget!

F. Recent, Current, & Projected Workload

Wharton-Smith has additional resources in a wide variety of disciplines available to meet the needs of the Emergency Operations Center Expansion project. On the following page is our current and projected workload as well as a matrix representing the forecasted percentage of time/availability for each proposed team member during the preconstruction and construction phases.

Workload

WHARTON-SMITH (SOUTHWEST COMMERCIAL DIVISION)		
NAME OF PROJECT TYPE/OWNER	% COMPLETE	COMPLETION DATE (EST.)
Mid County Hurricane Repairs, Charlotte County	90%	Various/Ongoing
Sheriff's District 4 Headquarters, Charlotte County	80%	May 2025
Sheriff's Admin/911 Headquarters, Charlotte County	50%	November 2025
Supervisor of Elections, Charlotte County	55%	September 2025
Fire Stations 3, 6 and 17, Charlotte County	Precon.	TBD
Fire Station 81, City of North Port	Precon.	TBD

Availability

NAME & ROLE	PRE-CONSTRUCTION	CONSTRUCTION
John Carlson, Project Executive	10%	25%
Caryn Huff, Area Manager	As Needed	As Needed
Juanmiguel Gorut, Preconstruction Executive	100%	As Needed
Mike Nunez, Project Manager	10%	100%
Chad Roeder, Area Superintendent	As Needed	25%
Junior Etienne, Superintendent	As Needed	100%
Tripp Lytle, Project Engineer	As Needed	100%
Eve Hinds, Comms, Security & Low-Voltage Systems Expert	As Needed	As Needed
Kyle Jennings, Utilities Subject Matter Expert	As Needed	As Needed
Colton McVety, BIM/VDC Engineer	10%	20%
Johnny Santos, Director of Operations	As Needed	As Needed

The most resources in Florida!

Should unforeseen circumstances occur and additional resources are required to supplement our team, we have the necessary support and backup staff at all levels with experience in every aspect of engineering and construction within our Florida offices.

790+

**EMPLOYEES STAFFING OUR
FLORIDA OFFICES**

220+

**EMPLOYEES IN
SOUTHWEST FLORIDA**



Proposed Approach



Tab V. Proposed Approach

A. What is your approach to constructability and bidding?

The goal of constructability reviews is to minimize potential problems during construction. If not properly addressed, these issues could result in change orders, claims, and time extensions. The most beneficial time to perform a constructability review is prior to final completion of design (whenever possible) or prior to bidding the construction contract. Our in-house team of construction specialists along with our Director of Operations Johnny Santos, Area Manager Caryn Huff, Project Executive John Carlson, Project Manager Mike Nunez, and our Superintendents perform these reviews, which are structured to cover all aspects of construction related to the project, including:

- ✓ Inconsistencies between plans and specifications
- ✓ Limitations of access for work to be conducted
- ✓ Compatibility of materials
- ✓ Coordination of trades
- ✓ Sequencing and project scheduling

Quality Assurance and Control Plan

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

Our formal Quality Management (QM) program includes the development of clear, quantifiable and measurable requirements. Our quality control staff will start by developing a plan tailored specifically for the Emergency Operations Center Expansion project. During preconstruction, project team meetings will be held regularly to discuss the constructability of the 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.

Our extensive QM program will provide you with the knowledge, expectation, and follow-through to ensure that a quality project is completed on time. Our high-level of quality work is especially evident in the areas where we self-perform work. Our QM program focuses on constant feedback and improvement as we track and perform work.

Some of the ways we will ensure quality during the construction phase includes holding pre-task meetings with our subcontractors, providing mock-ups in order to establish a level of quality, and performing independent testing of installed systems. Throughout construction, our Director of Operations Johnny Santos, and Superintendents will continually walk the project site working with the architect, engineers, and end user to ensure expectations of quality are exceeded. All materials unloaded on site are inspected for completeness and construction quality from our suppliers. We recognize that quality work is the key to success on any project we undertake, and our team is committed to exceeding your expectations on this project.



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. Some items we would identify for this project include hardscape, CIP concrete, roofing, windows, drywall, stucco & paint.

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.

We will also focus on using as many **local subcontractors** on the project as possible through our community outreach program. 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 Direct Experience
- ✓ The Owner and Design Consultant's Recommendations
- ✓ Manpower Availability
- ✓ Location
- ✓ Bonding
- ✓ Past Relevant Experience
- ✓ Project Staff
- ✓ Financial Strength

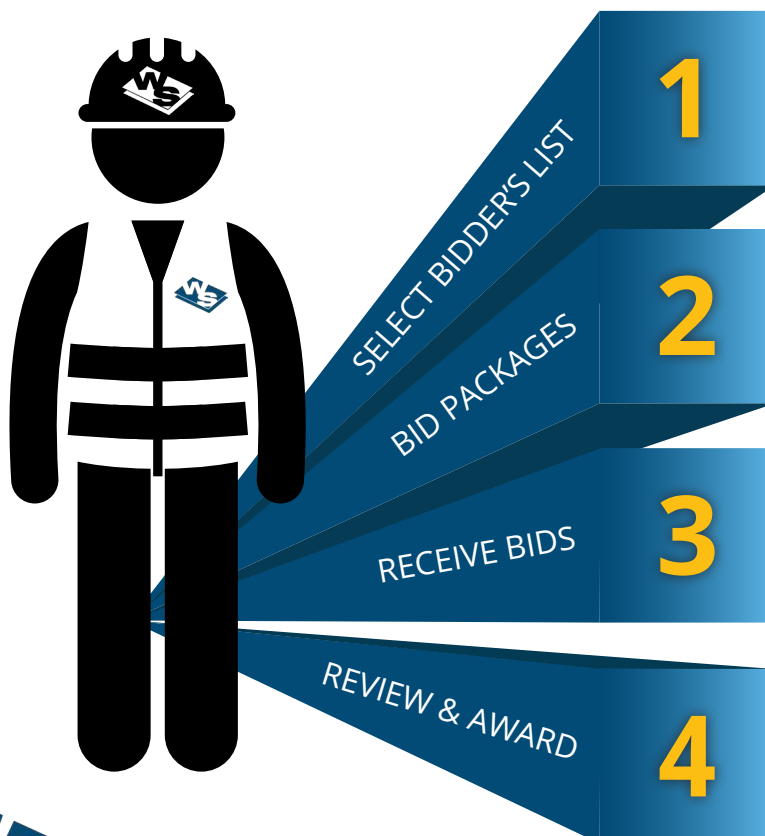
When subcontractors are pre-qualified correctly, the award process is simply the lowest responsive and complete bid. Our team has a database of over

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 County 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 County 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 County 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.

4 STEPS TO GMP

How our subcontractors are selected to provide a Guaranteed Maximum Price (GMP):



1 We solicit subs with your input to create a bidder's list. The goal is three or more bids on all packages.

2 To eliminate scope gaps, we issue bid packages detailing work scopes and custom forms to all trades.

3 We can receive bids at our office or yours on single or multiple bid days, allowing early procurement of key bid packages.

4 Conduct a high level review and a recommendation for award for your approval.

B. What challenges do you anticipate and how do you propose to solve them?

The Wharton-Smith team has identified key challenges on the Emergency Operations Center Expansion project. The challenges, along with our risk mitigation strategy, unique approach, and contingency plan, are summarized below.

CHALLENGE	KEY ISSUE	RISK MITIGATION STRATEGY	UNIQUE APPROACH/ STRENGTH	CONTINGENCY PLAN
#1 BUDGET	<ul style="list-style-type: none"> Cost escalation Market conditions 100% Documents 	<ul style="list-style-type: none"> Robust solicitation to obtain 4 to 5 quotes on major trades Flexibility on sole source specifications Value management 	<ul style="list-style-type: none"> Leverage our local buying power in the region In-house MEP expert estimators Recent cost data Expert in the public safety market sector in the region 	<ul style="list-style-type: none"> Experience with projects with similar budget challenges Extensive experience with market conditions In-house utilities and communications experts
#2 SCHEDULE	<ul style="list-style-type: none"> Long lead equipment Strained labor market Establishing supporting infrastructure 	<ul style="list-style-type: none"> Robust labor outreach Early procurement of long lead items Work with manufacturers to locate available equipment Lead team in the expedited review of long lead items 	<ul style="list-style-type: none"> Expert in this market sector Strong relationships with subcontractors and large equipment manufacturers Review critical long lead item submittals The most staffing resources available 	<ul style="list-style-type: none"> Experience with projects with similar schedule challenges Extensive experience with market conditions
#3 SITE CONSTRAINTS	<ul style="list-style-type: none"> Maintaining open site for fire training activities 	<ul style="list-style-type: none"> Safe egress route Logistics planning 	<ul style="list-style-type: none"> Intimately familiar with this site from recent experience (2023) Familiar with training operations 	

Challenge #1: Budget

The current labor and materials market is strained. Although we are moving in the direction of recovery there are lingering issues with both labor and materials. Both elements could potentially pose a threat to the budget and schedule for the Emergency Operations Center project. Starting now, our team is developing the risk matrix and will work with the County to understand and implement a strategy to ensure minimal impact.

We continue to see gradual price escalations and now threats of tariffs that could affect materials prices. Rest assured, Wharton-Smith is the largest buyer of construction materials in the southwest Florida region, and we will leverage that buying power to provide Charlotte County with the lowest cost. As an added benefit to Charlotte County, **we have the most recent cost data for Public Safety projects in the area.** We will leverage this information to get you the highest quality product at the most competitive price.

Challenge #2: Schedule

Since early 2020, we have seen unprecedented material pricing and delivery times escalations. These disruptions can have catastrophic consequences if not properly managed. A proactive approach will yield the best results. On several recent local projects, we “broke out” early equipment bid packages to start the manufacturing process and offset the long lead times.

Another strategy is identifying alternative materials that may have better pricing and delivery. With any approach we settle, Charlotte County can be assured that the process will be seamless and effective because Wharton-Smith is a strong buyer in the west Florida construction industry.

SCHEDULE SUCCESS

STAFF POSITION	1 Jun 23	2 Jul 23	3 Aug 23	4 Sep 23	5 Oct 23	6 Nov 23
	Buyout				Construction	
1 Project Executive	0.10	0.10	0.10	0.10	0.10	0.10
2 Sr. Project Manager	-	-	-	-	-	-
3 Project Manager	1.00	1.00	0.50	0.50	1.00	1.00
4 Assistant Project Manager	-	-	-	-	-	-
5 General Superintendent	-	-	-	-	-	-
6 Area Superintendent	0.10	0.10	0.10	-	0.10	0.10
7 Sr. Superintendent	1.00	1.00	0.50	0.75	1.00	1.00
8 Superintendent	-	-	-	-	-	-
9 Assistant Superintendent	-	-	-	0.50	1.00	1.00
10 Project Engineer	0.50	0.50	1.00	1.00	1.00	1.00

CCSO DISTRICT 4

For this project we implemented an “early procurement” strategy that allowed us to release long lead equipment items while reducing the amount of staff time at the front end of the schedule. This strategy proved to be successful as we received all long lead equipment early or on time and saved the county money upfront on the General Conditions.

Although it is the intent to use subcontractors on this project, Wharton-Smith has in-house craft workers to support our team, if needed. Craft workers, or “boots on the ground”, are today’s market’s most sacred and scarce resource. Getting the materials onsite is futile if there are no onsite workers to install them! The worker shortage represents a threat to all Florida construction projects. Wharton-Smith combats that threat by maintaining a local workforce of more than 700 people. We also wholly own our fleet of construction equipment, including bulldozers, loaders, and excavators. This allows us to adequately support your project and control the things that matter!

You have our guarantee that we will allocate the required resources, people, and equipment to the Emergency Operations Center Expansion project. This will ensure that your project stays on schedule!

Challenge #3: Site Constraints

Maintaining an active Emergency Operations Center while performing selective demolition and reconstruction presents several logistical and safety challenges. This is where Wharton-Smith shines! We are experts at successfully completing renovation projects on occupied sites. We demonstrated our ability in this area while constructing the ARFF facility. Our highest priority for this project was keeping the fire fighters safe during the training activities that were taking place alongside our construction area. This requires careful planning and extensive communication with the county. We will employ the same level of care for the EOC project. Our understanding of the plan recommended by Harvard Jolly includes cutting an opening into the tilt-wall panels at the rear of the building to allow for a 5,000 SF addition. Once the addition is constructed staff will be moved into this area so the interior can be renovated to provide additional EOC operations space. Our team is very familiar with tilt-wall construction as demonstrated on the Jail Infirmary and Sheriff 911 projects. We will prepare task plans to make sure the county is notified on days that we plan to cut into the structure. We also will make sure all occupants can work safely within the building while we construct the addition. Noise and dust control will be key elements in our construction planning. Extremely noisy or high risk work will be performed after hours.

C. What methods will you employ to ensure Charlotte county receives a quality project within budget and schedule?

Quality control and quality assurance is the responsibility of all members of our project team. The team, along with all other staff assigned to this project, will oversee our program to ensure compliance with our companies’ policy. In addition, Wharton-Smith has an in-house quality control department and an extensive quality control manual that is strictly adhered to. The quality control department ensures that the policies are being followed.

The quality of every project begins in the preconstruction phase. Our quality control program is designed to ensure the proper time is spent on planning each project.

Below are the steps we will take to keep the project on schedule and within budget to deliver a quality facility.

PRECONSTRUCTION	CONSTRUCTION	CLOSE-OUT/WARRANTY
<ul style="list-style-type: none"> • Proactive Scheduling • Accurate Estimates • Ongoing Value Engineering • Long-lead Early Procurement 	<ul style="list-style-type: none"> • Detailed Mock Ups • Quality Control Planning • Stringent Safety • Accurate & Transparent Reporting • Independent Testing • Peer Review Inspections • Pre-Inspection Reviews 	<ul style="list-style-type: none"> • Living Punchlist • Detailed Close-Out Package • Comprehensive Warranty Walk Throughs

D. Explain your approach to bonding (i.e. sub guard, surety) on this project as a construction manager at risk and describe your bonding requirements for all subcontractors.

Being a public entity builder, our team has structured our organizational practices from head to toe for maximum efficiencies to best benefit our clients. We understand this project is grant funded, and therefor, take an open-book collaborative approach. We agree upon and establish the initial fee, our only interest after that is finding savings via value engineering techniques that will either generate credits to the owner upon completion or establish buyout savings to be used to enhance the scope of work and program goals along the way. This starts with our own overhead in which we aim to minimize expenses by leveraging our sound financials to produce extremely competitive rates for general liability, payment and performance bonds, and builders risk policies. While we certainly have the financial strength to implement a subguard program and float the potential front-end costs in the event it is needed, these types of programs often serve as a fee enhancement to the General Contractor if they go unused, and we promote that all savings should go back to the County as a steward of these funds.

As a public entity builder, we truly understand the "at-risk" element of the CMAR contract structure, with that being our fee as the element at-risk, and therefore, we remain accountable for all other items on the project while under our watchful management without the need for potential enhancements as a safety measure to reach our fee.

For the Emergency Operations Center Expansion project, Wharton-Smith will require sub-bonds for all packages that total over the \$100,000 threshold

911 COMMUNICATIONS SYSTEM

Through our involvement with the design, construction, and coordination of the Sheriff's Administration/Hardened 911 Facility, we understand that the existing EOC serves as a backup location for Public Safety's communications/dispatch center. We have extensively coordinated with the Sheriff's consultant, Alpha-Omega Communications, regarding the installation of the communications tower that will be installed at the Sheriff's Administration site. While this tower does not directly communicate with the EOC, we understand that this tower is a critical component providing a microwave link to the gun range tower. We will be able to leverage our experience with the extensive low voltage cabling and specialized communications systems required for the Sheriff's Administration/Hardened 911 Facility while we complete this work at the EOC.

from our prequalified subcontractor base of bidders and/or for subcontractors providing scopes of work related to building envelope. These costs will then be included within each specific bid package as part of selecting the qualified low-bidder, and ultimately, included in the overall GMP, in which you will be able to track and see exactly what you are paying for on a case by case basis with all associated savings returned to the owner upon the final reconciliation of the project.

VI.

Recently Accomplished Similar Projects





Project Similarities

Florida Public Safety Project
Emergency Operations Center
Hardened Structure

Public Safety Complex | City of Tavares, FL

Wharton-Smith provided General Contracting services on this two-story, 38,527 SF **Public Safety Complex** for the City of Tavares. The new facility houses a fire station, police station, and **emergency operations center**.

The fire station features four drive-through apparatus bays with diesel exhaust system, a dayroom with a kitchen and dining area, and second-floor bunk and shower rooms, slide pole, and motorized hoist hose rack. The police station includes a sally port, fitness center, and locker rooms shared with the fire department, administration offices, breakrooms, patrol room, detective unit, interrogation rooms, criminal investigation lab, indoor shooting range, and evidence and records storage. **The emergency operations center has a community meeting room and a command center with overnight accommodations and a shared entrance lobby with ballistic-rated doors and windows, elevator, and restrooms.** Employee parking is an asphalt-paved vehicle entry and parking lot with security fence and motorized operable gate. The guest entry drive and parking are irrigated with lush landscaping and sodding.

Owner

City of Tavares
201 East Main Street
Tavares, FL 32778
Richard Keith, Fire Chief
352-516-1180
rkeith@tavares.org

Architect

GatorSketch Corp.

Size

38,527 SF

Project Cost

\$13,686,606

Completion Date

February 2021





Project Similarities
 Charlotte County Public Safety Project
 Hardened Structure
 Similar Team

Fire Stations #2 & #5 | Charlotte County, FL

Wharton-Smith provided Construction Management at Risk (CMAR) services to Charlotte County, Florida for the construction of the new Fire Stations #2 & #5 in Port Charlotte and Punta Gorda.

The new Fire Station #2 is a 12,160 SF fire station containing bunk rooms, offices, conference room, secure EMS storage, fully-equipped commercial kitchen, fitness room, and dedicated decontamination areas. Fire Station #2 also has a large-scale fueling area with diesel fuel, unleaded gasoline, DEF tanks, and dispensing equipment. The fire station was built on 3.13 acres of a larger 10.11-acre parcel that will be used for the future construction of the County's new Sheriff's Department. Due to this future project, the fire station project included off-site utility improvements including potable water main extension and the installation of a new reclaimed water main and force main.

The new Fire Station #5 is a 9,232 SF fire station containing bunk rooms, offices, secure EMS storage, fully-equipped commercial kitchen, fitness room, and dedicated decontamination areas. The construction of the fire station is a **hardened building shell that is complete with Level E missile-rated impact glass and doors, as well as a standby generator fueled by two 1,000-gallon underground LP tanks.**

Owner

Charlotte County, FL
 18500 Murdock Circle, Bldg D
 Port Charlotte, FL 33948
 Gary Burdahl (Retired)
 941-623-1009
 Gary.Burdahl@charlottecountyfl.gov

Architect

Wilder Architecture, Inc.

Size

#2: 12,160 SF

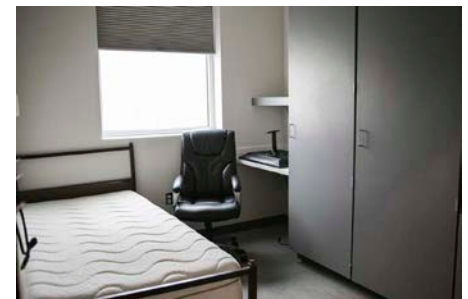
#5: 9,232 SF

Project Cost

\$9,600,000

Completion Date

July 2022





Project Similarities

- Same Project Site!
- Charlotte County Public Safety Project
- Active/Occupied Site
- Same Team
- Completed Under Budget

Airport Rescue Fire Fighter Training Facility (ARFF) | Punta Gorda, FL

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

The project scope included the following elements:

- ✓ Full size 737 Airplane simulator on a concrete burn pit
- ✓ 800 SF Control tower building containing control room and multi-stall restrooms with showers
- ✓ Covered hospitality area with fans and spray system
- ✓ Liquid Propane (LP) tank to supply the simulator
- ✓ Water recirculation system to capture water during burns
- ✓ Installation of required parking areas
- ✓ All related site work testing, surveying, and FAA coordination

Owner

Charlotte County, FL
18500 Murdock Circle, Bldg D
Port Charlotte, FL 33948
Gary Burdahl (Retired)
941-623-1009
Gary.Burdahl@charlottecountyfl.gov

Architect

Wilder Architecture, Inc.

Size

800 SF building | 44-acre site

Project Cost

\$9,069,216

Completion Date

May 2022





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

Wharton-Smith is currently providing Construction Management services for the new Sheriff's Administration Hardened 911 Facility. The 8-acre site is part of the District 3 campus masterplan. This new **hardened facility** is a 63,500 SF **tilt-wall** administration office with support services for Senior and Executive Commands, Finance, Intelligence, Community Affairs, Human Resources, MIS, and Operational Support. Key features for the project include **communications/Dispatch**, RTIC, Records, Investigations and a fleet vehicle maintenance center. The building will implement sustainable building practices paralleling LEED or similar rating principles.

This building will house 911 Communications for Charlotte County. There will be redundancy from this building to the EOC.

Owner

Charlotte County, FL
18500 Murdock Circle, Bldg D
Port Charlotte, FL 33948
Justin Dunn
941-740-4767
justin.dunn@charlottecountyfl.gov

Architect

Schenkel Shultz

Size

104,639 Total SF

Project Cost

Phase 1 - \$11,301,978
Phase 2 - \$37,491,000 (Est.)

Completion Date

Phase 1 - January 2020
Phase 2 - November 2025 (Est.)





Project Similarities
 Charlotte County Public
 Safety Project
 Active/Occupied Site
 Hardened Structure

Sheriff District 4 Headquarters | Punta Gorda, FL

Wharton-Smith is currently providing Construction Management services for the replacement District 4 office for the Charlotte County Sheriff's Administration. The scope consists of the demolition of the existing sheriff's office, supervisor of elections storage and transit facility to make room for the new replacement facility. The complex will ultimately have a 20,000 SF sheriff's office space, separate training offices, and a large training room outfitted to host 80 people. **This building sits on the training complex** that includes the firing range, obstacle course and K-9 training.

Amenities will include a fitness center, locker room, storage, breakroom, reception area, and a K9 kennel inclusive of outdoor runs. **The building is being constructed as an essential facility and will be hardened beyond the hurricane-rated impacts required by applicable building codes.** The building will also utilize integrated building automation systems, building information modeling during construction, and implement sustainable building practices paralleling LEED or similar rating system principles.

Owner

Charlotte County, FL
 18500 Murdock Circle, Bldg D
 Port Charlotte, FL 33948
 Pedro Agosto, Project Manager
 941-875-5662
 pedro.agosto@charlottecountyfl.gov

Architect

Schenkel Shultz

Size

20,286 SF

Project Cost

\$13,132,151

Completion Date

May 2025 (Est.)





Transit Facility | Port Charlotte, FL

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

This project sits adjacent to the existing Charlotte County fuel yard and is the headquarters of Transit operations for the entire County. This site was home to Public Works, Maintenance, and Operations, and required demolition of an existing building. Planning was required to maintain electrical service to the site to keep the neighboring fuel yard in operation.

Owner

Charlotte County, FL
18500 Murdock Circle, Bldg D
Port Charlotte, FL 33948
Gary Burdahl (Retired)
941-623-1009
Gary.Burdahl@charlottecountyfl.gov

Architect

Hall Darling Design Studios P.A.

Size

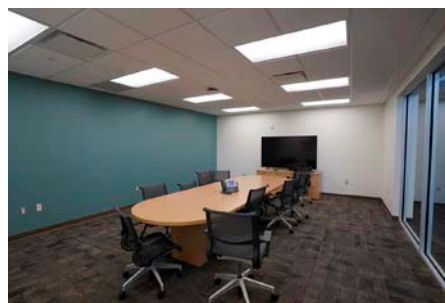
5,880 SF

Project Cost

\$3,388,883

Completion Date

December 2021





Project Similarities

- Active/Occupied Site
- Essential Facility
- Hardened Structure
- Two-Story Tilt-Wall
- Commercial Kitchen

Southwest Water Reclamation Facility Operations Building | Cape Coral, FL

Wharton-Smith provided Construction Management at Risk Services for the construction of a new 25,000 SF **tilt-wall** Operations and Administration Building on the existing Southwest WRF site. The two-story building was constructed utilizing tilt wall construction. This building is designed to create state-of-the-art office spaces for staff and a permanent structure for the plant's computer systems, in lieu of a temporary modular trailer, with a Control Room that over looks the site, Supervisory Control and Data Acquisition (SCADA) Room, laboratories, training spaces, a conference room, break room, and offices. The facility includes open areas for maintenance purposes and a mezzanine. Additionally, a 500 SF pre-engineered metal building was also constructed for warehouse-type storage.

This project is part of a larger utilities plant operation that provides services to the City of Cape Coral. Careful planning was required prior to construction to safeguard the existing staff working at this plant so as not to disrupt daily operations.

Owner

City of Cape Coral
1720 Everest Parkway
Cape Coral, FL 33904
Matt Astorino
239-242-3533
mastorin@capecoral.net

Architect

Stantec Consulting Services, Inc.

Size

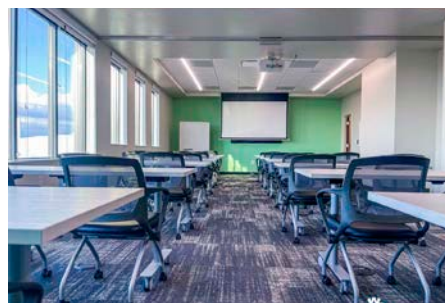
34,000 SF

Project Cost

\$15,595,873

Completion Date

May 2023





Project Similarities

Punta Gorda Utilities
Active/Occupied Site
Facility Expansion
Hurricane Rated

Shell Creek Water Treatment Plant Reverse Osmosis Plant | Punta Gorda, FL

Wharton-Smith provided Construction Management at Risk services for the City of Punta Gorda's Shell Creek WTP Reverse Osmosis Addition project. This project consisted of two buildings: the reverse osmosis processing plant and the sodium hypochlorite building. The project is located adjacent to the existing Punta Gorda Water Treatment Plant and was completed by both Wharton-Smith's water and commercial departments. Our commercial department managed the vertical construction while our water department constructed the overall plant and horizontal construction components.

The 16,225 SF reverse osmosis processing plant consists of administration offices, plant laboratories, a control room, communications room, high pressure feed pump room, chemical storage rooms, a workshop, electrical room, breakroom/conference room, and restrooms.

Owner

City of Punta Gorda
326 W. Marion Ave.
Punta Gorda, FL 33950
Tom Jackson
941-575-5055
tjackson@cityofpuntagordafl.com

Architect

Tetra Tech, Inc.

Size

16,225 SF RO Processing Plant
500 SF Chemical Storage Building

Project Cost

\$23,607,987

Completion Date

May 2020



2. Schedule & Cost Control

Scheduling – Charlotte Sports Park Renovation

Wharton Smith contracted with Charlotte County to provide renovations to the Charlotte Sports Park. The entire facility had extensive damage from Hurricane Ian. The cost of the repairs was \$17.7 million and had to be completed on or before January 1, 2024 to meet the Spring Training Schedule. All areas had to be evaluated by our team to determine the damage and repairs needed. From there, estimating, design, permitting and insurance/FEMA coordination was required along with detailed planning and scheduling. Our team had to rely on our strong subcontractor relationships to work through all of the scheduling details such as availability of materials, lead times, holiday closings and logistics.

Due to the solid relationships we have within Charlotte County and the skill of our team, the project was completed right on time. This project clearly demonstrates the skill and ability of our team to schedule and successfully execute a project. No scheduling challenge is too difficult for our team to overcome!

Cost Control - Tavares Public Safety Complex

The Owner Direct Purchase Order Program was completely foreign to the City of Tavares, but our team knew this process would be beneficial to the Owner by helping them save the sales tax dollars on the materials used on the project. Our administration team was able to implement this program by working together with the City of Tavares and assisted them in developing the process. Through our collaborative approach, we were able to obtain 20% participation in the ODPO Program which resulted in actual sales tax savings of \$158,873, money which was returned to the Owner.

3. Successful Value Engineering Solutions

Value Engineering Solutions – Shell Creek Administration Building

The Shell Creek WTP Process & Administration project had been delayed several years and, due to escalation costs over five years, the budget was at great risk. Wharton-Smith was tasked with extensive value engineering efforts to get the project cost more near the budget. However, this was an important project for the City, and they did not want to settle for a building that was too “plain”. The Wharton-Smith team evaluated numerous

options on the main process/administrative building. Options being evaluated ranged from pre-engineered metal building to split face decorative block (basis of design). In the end the option selected was standard smooth block finished with a textured coating. It provided a similar finished look as the more expensive split faced block but saved the City of Punta Gorda \$150K in cost.

4. Successful Experience With Local Subcontractors

Wharton-Smith has strong, long-term relationships with subcontractors in the region. There are several reasons for this; first, our subcontractors appreciate that we have clear lines of communication when it comes to submittal approvals and scheduling. Second, our subcontractors know that we do high-quality work which results in safe and organized jobsites. Finally, we make a point to pay our subcontractors in a timely manner.

In addition to the above, we do many things to foster our relationships with our local subcontractors such as hosting subcontractor appreciation events. We also mentor smaller local contractors to help them grow their local business. We have long-term relationships with local subcontractors that you will see on our job sites such as Keesling Construction, R. Simpson Stucco, Fortune Electric, and Adams Group. We value the relationships we have with these subcontractors and understand the impact they have on the local economy. We will continue to work with local subcontractors to provide high-quality projects for Charlotte County while supporting the local economy.

5. Additional Construction Costs Caused By Design Deficiencies, Not Program Changes

Occasionally, we encounter issues in the Construction Documents referred to as design deficiencies. Wharton-Smith reviews the documents during the design process at various checkpointsto perform constructability reviews and identify and resolve issues ahead of the design completion. However, in rare cases, issues cannot be identified until systems are in place and operational. Recently, after we completed Charlotte County Fire Stations #2 and #5 and the buildings were occupied, we were alerted to a loud water hammer within Fire Station 2 when any toilet or urinal was flushed. **The morning after we were notified, we were on site**

with our plumbing subcontractor working to identify the cause and to develop a resolution.

We worked with the County, the design team, and our trade partners to troubleshoot the issue and install devices to eliminate the issue. **At no cost to the County**, we installed larger hammer arrestors, tested different diaphragms on toilet flushometers, installed a pressure reducing valve and pressure gauges, inspected the backflow preventer, engaged a third-party engineer, performed flow tests, installed a temporary water service, and verified the installation met the intent of the Construction Documents. We dedicated a sizable amount of resources to resolve this issue without added cost to the County and minimized the impact to the Fire Department Personnel who occupy the building.

6. Construction Problems And Means Taken To Solve Them

Corrective Resolution – Charlotte County Sheriff’s Administration/Hardened 911 Facility

Due to an accelerated start for the concrete tilt-panels and a challenging hollow core subcontractor, we elected to proceed with the tilt-panels prior to finalizing the shop drawings for the hollow core area of the building. In coordination with the Structural Engineer, the Architect, the tilt-panel subcontractor, and the hollow core Engineer, we were able to design post installed embeds that allowed construction to proceed. These embeds are typically cast into the concrete of the tilt-panels; however, without the hollow core shop drawings, it was not yet known where these embeds would be required. Developing post installed embeds allowed us to continue with the construction and installation of the tilt-panels, allowing us to complete the building structure ahead of schedule despite almost a month of delays due to Tropical Storms and Hurricanes in 2024.

7. Communication With Design Team During Both Pre-Construction And Construction Phases

We have worked on numerous projects with various architects and will conduct many project meetings in a team effort. During the preconstruction phases of the projects, we have detailed discussions regarding the project budget and the information available to date to provide accurate cost estimates. In our role as Construction Manager, it is our responsibility to communicate clearly with the design team in

order to keep the project within budget during pre-construction. During the construction phase, we continue to keep the lines of communication open with the design team in order to efficiently process submittals and requests for information (RFIs). Prompt transfer of information is key to keeping a project on schedule and minimizing errors in the field.

8. Methods To Incorporate Sustainability And Green Building Practices In The Construction Management Process

Sustainable Construction is not only a LEED requirement for our team but also an operations requirement and is utilized in most aspects of what we do. Strict stormwater pollution prevention, indoor air quality, construction waste management, and low-impact construction are normal practices for our firm and are implemented like clockwork throughout our projects. As a member of the U.S. Green Building Council, Wharton-Smith has experience on more than 20 LEED/Sustainable projects and 7 projects have obtained LEED Gold certification. Our team’s integrated design approach to sustainable projects is one of collaboration and communication, inclusive of all parties involved.



LEED GOLD ORLANDO FIRE STATION #1

The process usually starts with a kick-off meeting. At this time, our team, together with our design team, specialists, and consultants, will meet with Charlotte County, building users, operations and maintenance staff, and stakeholders to review and outline the project’s performance and operation goals. This meeting will be the beginning of the project’s “Owner Program Requirements.” Once everyone has created their wish lists, these goals are then scored in priority of cost impact and importance.

The team reviews and discusses alternate resources available for achieving these goals (incentive programs, grants, and other available funding) and

outlines, which would benefit from a return on investment studies. Although some of the goals outlined may initially appear in the cost impact column, return on investment studies may outline short payback periods and change the priority order for the goal. Once established, it is these goals that will act as the platform for both the building's design and the project's sustainable objectives.

During design, our professionals, led by Area Manager Caryn Huff, will work closely with Charlotte County and the design team to develop a custom plan of action. We have developed an extensive database of sustainable products and techniques. If desired, we can also provide energy audits, building analysis, and air quality studies to help provide an added resource for setting the desired goals.

Our team will address sustainability standards and guide Charlotte County through the available options. Each option will involve the evaluation of associated costs and constructability issues. This will not only send a positive message to the local community but will add value to the facilities by saving money, energy, and natural resources.

District 9 Medical Examiner's Office Orange County, FL	LEED Gold
Edward Doyle Police Headquarters City of Maitland, FL	LEED Gold
Building F Renovation Seminole State College, FL	LEED Gold
Fire Station #11 City of Kissimmee, FL	LEED Silver
Fire Station #35 Orange County, FL	LEED Certified
Maitland Fire Station #45 City of Maitland, FL	LEED Certified

"Wharton Smith identified value-added solutions, kept all critical members of the County and the Fire Department involved in the decision making and was always responsive to our needs. The Wharton Smith staff was tenacious in problem-solving and delivered an exceptional product."

- Larry Lippel, Battalion Chief / ARFF/AMF Charlotte County Fire & EMS



Experience and Capabilities



Tab VII. Experience and Capabilities

A. Government Facilities With Multiple Organizations And Stakeholders

Our collective team has over 115 years of experience providing quality building construction services for public and municipal clients. Our team's strong depth of experience with government facility projects throughout the state of Florida range from small renovation projects under \$1 million to multi-phased renovation/remodeling projects and new construction in excess of \$50 million. Our projects span everything from fire and police stations, public safety complexes, justice centers and jails, K-12 schools, higher education facilities, community centers and more.

Our experience working with municipalities on projects within the government market sector, and particularly with projects that require continued operations, has taught us the importance of working with the owner and design team members to ensure the dignity of project commitments are held in place by creating optimal adjacencies, organization, functionality and security throughout the construction phases. The majority of Wharton-Smith's project experience has been with complex remodel, renovation, and expansion projects within occupied facilities—**this is our specialty!** Communication and coordination will be paramount to the success of this project and we will work with the County, individual stakeholders, and design team to ensure our construction sequence is well-planned-out and the safety and security of the facility is maintained at all times.

The Emergency Operations Center Expansion project is unique. The goals of Charlotte County, requirements of multiple user groups, complex building systems, redundancy of 911 communications, and structural tie-in of the addition are all essential. Cost management is a critical component of this project since it is grant funded making it even more important that we are good stewards of public funds. As construction manager it is our job to work closely with the owner and design team to ensure the project stays within the budget constraints while also achieving the best quality and value.



PUBLIC SAFETY COMPLEX, CITY OF TAVARES



B. Life Cycle Cost Analysis Including Value Engineering

Our team views the life cycle cost analysis as the total cost of an item during the life of an item. These costs are generally calculated in terms of present worth or annual cost. The types of cost that we can include in our life cycle cost analysis study are demonstrated in the following lists:

- ✓ Capital investment of first costs
- ✓ Operational costs
- ✓ Maintenance costs
- ✓ Replacement costs
- ✓ Other costs that might require consideration are salvage value, lost revenue, and added rental cost.

To ensure the life cycle cost analysis is giving you the best value for the project, we apply value engineering to help identify areas where we can reduce cost and enhance the project's value.

We accomplish this through the following:

- ✓ Meetings/discussions with the client, architect/engineer, and consultants
- ✓ Establishing of criteria for the different schemes
- ✓ Regular project meetings to discuss ideas and suggestions
- ✓ Discussing alternatives with the specialty contractors, investigating current market trends, and capabilities
- ✓ Extensive reporting with regular feedback to the project team

We believe value engineering is an integral part of the overall project approach and subsequently these are review measures that will be implemented throughout the course of the preconstruction and construction processes. Subsequent to the schematic phase, we view value engineering and life cycle cost analysis to be refinement tools since much of the project's scope and program has been established by this time. Options will be established, reviewed, and tracked throughout construction, however, as a means of assurance to remain on budget and/or schedule, as the need may arise.

C. Critical Path Method

In order to establish the optimum plan for our projects, our team applies the scheduling principals of the critical path method (CPM) to determine the sequence of activities through the project. A network of activities and their duration produces our longest path of activities, which will determine the project's end date. Using our P6 scheduling program, this sequence of activities is followed to maintain the project's completion and to foresee any potential issues. As an added measure to ensure schedule adherence, we utilize 6 week look ahead schedules and Production Planning boards.

D. Preconstruction Services With A Focus On Minimizing Cost While Maximizing Scope

Wharton-Smith recommends that our preconstruction team participates in every upcoming programming and design meeting. Project Executive John Carlson 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 such as high priority "wants" may be added to the project as alternates 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. Items falling below the line become "wants." This becomes the basis for the cost estimate model and design work can resume.

E. Utilization Of Building Information Modeling (BIM) To A Level 4

BIM applications imitate the building process. Instead of creating two-dimensional (2D) drawings, buildings are modeled from construction elements such as walls, slabs, and roofs. This allows architects

and engineers to design projects in the same way they would be built. This gives the decision makers the ability to see, communicate, identify conflicts, share ideas, and establish solutions in advance. We can also add the fourth dimension of time to our drawings by showing the progress of the structure as it relates to the schedule. We call this value stream production planning in the Wharton-Smith production system. Now project leaders are able to see the workzone and all of its physical limitations long before we send a crew out. We also use Navisworks Manage, which allows us to bring in fabrication drawings from outside subcontractors, take a virtual tour, and holistically review the integrated model for clashes with all of the stakeholders.

Most importantly, it's the people behind the software that make the difference. We have a seasoned in-house team of professionals in our Virtual Construction Department that includes local team member Colton McVety, ready to bring your project to life. **BIM will be critical to this project due to tying into the existing building and systems.**

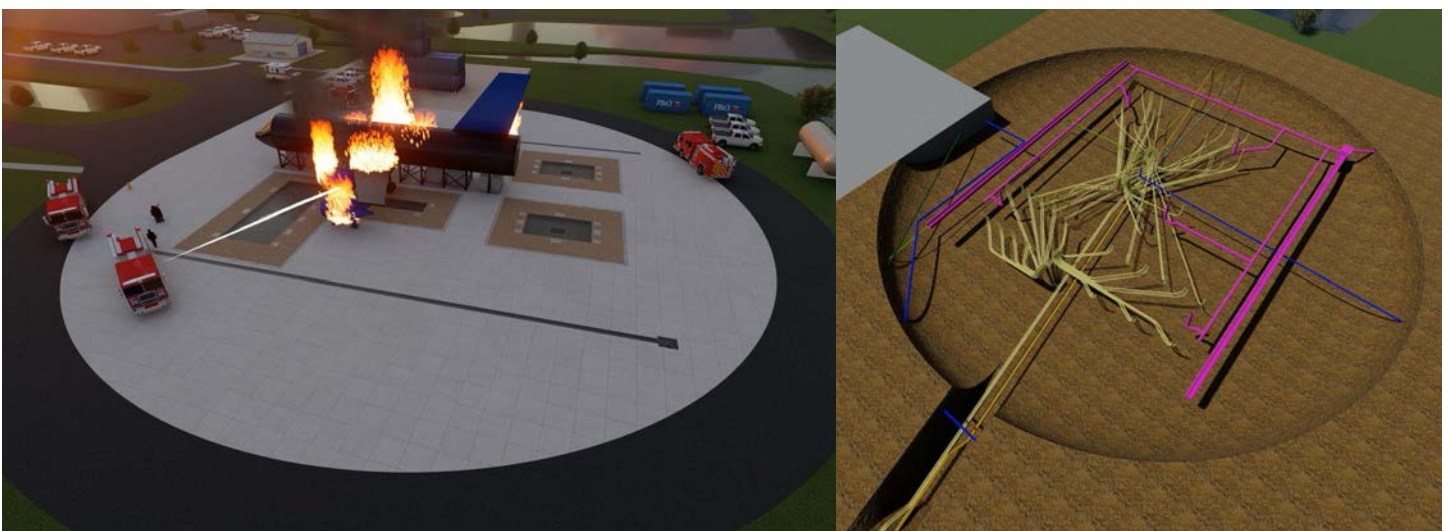
Wharton-Smith's BIM team has the capability to facilitate any level of development (LOD) of BIM required by the Charlotte County staff. Our Virtual Design department has been expanded to include drones linked to Drone Deploy and Struction Site.

We have utilized BIM on several Charlotte County projects and it is attributed to our success during construction with minimal conflicts in the field. Some of these projects include the Sheriff District 4/K-9 HQ, Sheriff 911, Supervisor of Elections and the more complex ARFF project.

F. Permitting In Southwest Florida And Charlotte County

We have developed a highly efficient method for regulatory requirements. By determining all permitting/approval requirements early in the process, we can customize a plan to 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 regulatory agencies to agree on 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.

Our proposed team has managed numerous project permits including those required for Charlotte County Fire Stations #2 and #5, Community Development Center, Sheriff's District 3 Office, and recently, the Sheriff's District 4 Headquarters. As public sector builders, Wharton-Smith has permitted 1,300+ government projects throughout Florida and in the following counties: Lee County, Collier County, Hillsborough County, Pasco County, Orange County, Volusia County, and Seminole County to name a few. We have very strong relationships with the Community Development staff based on years of experience. Many members of our team are familiar working with the county's Accela permitting system.



ARFF AIRCRAFT SIMULATOR UNDERGROUND INFRASTRUCTURE BIM MODEL



Volume of Work

The total of payments received from Charlotte County within the last 24 months is \$44,649,067.90.





Location



Tab IX. Location

We will manage this project out of our regionally based office in North Port. Wharton-Smith has been headquartered in Sanford, Florida for the past 40 years and currently operates seven branch offices throughout the state. With our team members Area Manager Caryn Huff, Project Executive John Carlson, Area Superintendent Chad Roeder, Project Engineer Tripp Lytle, and BIM/VDC Engineer Colton McVety whom reside locally in Charlotte and South Sarasota counties, we are well positioned to respond to any and all needs that may arise at the Charlotte County Emergency Operations Center Expansion project.

Wharton-Smith Local Office:

2525 Bobcat Village Center Road, Unit 105, North Port, FL 34288

Tel: (941) 621-4723



WHARTON-SMITH



**WE
SUPPORT
PUBLIC
SAFETY!**



WE BUILD COMMUNITIES!



Litigation



Tab X. **Litigation**

Have you been named as a defendant or co-defendant in a lawsuit in the last five years?

Wharton-Smith has **not** been named as a defendant or co-defendant in a lawsuit in the last five years.



Minority Business



Tab XI. Minority Business

Wharton-Smith is not a certified minority business enterprise with the State of Florida; however, we have been very successful in exceeding the MWBE participation percentage goals set forth by the owners with whom we work. This success has been achieved due to a variety of factors.

First, public pre-bid advertisements are placed in local publications. We also make a personal commitment to contact, both in writing and by phone, all minority-, women-, and veteran-owned businesses that we have in our pre-qualified database of over 3,200 subcontractors in the state of Florida. This approach has provided us with ample participation by minority subcontractors and suppliers on previous projects. In most cases, the minority participation goals have been met or exceeded using a combination of few larger subcontractors and many smaller subcontractors.

Maximizing participation begins during preconstruction. Our team will host public outreach events for minority subcontractors to learn about the project, ask questions, and initiate the pre-qualification process with Wharton-Smith, if necessary. In appropriate instances, we will partner with minority- and women-owned businesses to assist with bonding and insurance requirements so they can meet Charlotte County's contractual requirements. Our team also offers training and workshops to assist with pay applications, change orders, Owner Direct Purchase (ODP), and safety.

Another aspect of our success achieving, and exceeding, minority participation goals is due to our 40-year presence in Central Florida. Since 1984, we have worked with thousands of local, minority businesses with whom we have built longstanding relationships.



Scan the QR code to hear from VMG Construction President, Victor Galvan describe his firm's journey and the Mentor-Protege relationship between VMG and Wharton-Smith.



MENTORSHIP SUCCESS!

Wharton-Smith partners with minority businesses on nearly every one of our projects to ensure we are always supporting the communities we serve in the most effective ways possible. On many of our Central Florida projects, we partner with VMG Construction, a minority-owned firm located in Orange County, Florida. Through our Mentor-Protege relationship, VMG has not only grown in the number of employees, but they have become one of the fastest growing concrete installation contractors in Central Florida. VMG began as a small concrete foundation company and has grown to be one of the largest and most diverse. They now provide an array of concrete services including foundations, vertical concrete construction, and tilt-panel walls. Wharton-Smith and VMG Construction have grown together with VMG now performing nearly \$20 million annually on Wharton-Smith projects.



VMG Construction President, Victor Galvan (Left)
Wharton-Smith, Inc. President & CEO, Tim Smith (Right)

PART V - SUBMITTAL FORMS
PROPOSAL SUBMITTAL SIGNATURE FORM

1.	Project Team Name and Title	Years experience	City of office individual will work out of for this project	City individual's office is normally located	City of individual's residence						
	John Carlson, Project Executive	20	North Port	North Port	Port Charlotte						
	Caryn Huff, Area Manager	34	North Port	North Port	Venice						
	Mike Nunez, Project Manager	7	North Port	North Port	Arcadia						
	Chad Roeder, Area Superintendent	27	North Port	North Port	North Port						
	Junior Etienne, Superintendent	4	North Port	North Port	Lehigh Acres						
	Tripp Lytle, Project Engineer	7	North Port	North Port	Venice						
	Juanmiguel Gorut, Preconstruction Executive	20	Tampa	Tampa	Tampa						
	Johnny Santos, Director of Operations	35	Tampa	Tampa	Land O Lakes						
2.	Magnitude of Company Operations										
	A) Total professional services fees received within last 24 months:			\$ 0							
	B) Number of similar projects started within last 24 months:			5							
	C) Largest single project to date:			\$ 165,000,000							
3.	Magnitude of Charlotte County Projects										
	A) Number of current or scheduled County Projects			5							
	B) Payments received from the County over the past 24 months (based upon executed contracts with the County).			\$ 44,649,067.90							
4.	Sub-Consultant(s) (if applicable)	Location	% of Work to be Provided	Services to be Provided							
	N/A										
5.	Disclosure of interest or involvement: List below all private sector clients with whom you have an active pending contract and who have an interest within the areas affected by this project. Also, include any properties or interests held by your firm, or officers of your firm, within the areas affected by this project.										
	Firm N/A	Address									
	Phone #	Contact Name									
	Start Date	Ending Date									
	Project Name/Description										

NAME OF FIRM Wharton-Smith, Inc.

(This form must be completed and returned)

6. Minority Business:Yes _____ No ☒

The County will consider the firm's status as an MBE or a certified MBE, and also the status of any sub-contractors or sub-consultants proposed to be utilized by the firm, within the evaluation process.

Comments or Additional Information:

The undersigned attests to his/her authority to submit this proposal and to bind the firm herein named to perform as per contract, if the firm is awarded the Contract by the County. The undersigned further certifies that he/she has read the Request for Proposal, Terms and Conditions, Insurance Requirements and any other documentation relating to this request and this proposal is submitted with full knowledge and understanding of the requirements and time constraints noted herein.

By signing this form, the proposer hereby declares that this proposal is made without collusion with any other person or entity submitting a proposal pursuant to this RFP.

In accordance with section 287.135, Florida Statutes, the undersigned certifies that the company is not on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List and does not have business operations in Cuba or Syria (if applicable) or the Scrutinized Companies that Boycott Israel List or is not participating in a boycott of Israel.

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

Addendum No. 1 Dated 2/6/2025 Addendum No. _____ Dated _____ Addendum No. _____ Dated _____

Addendum No. 2 Dated 2/14/2025 Addendum No. _____ Dated _____ Addendum No. _____ Dated _____

Type of Organization (please check one):

INDIVIDUAL
CORPORATION

☒

PARTNERSHIP
JOINT VENTURE

☐
☐

Wharton-Smith, Inc.

Firm Name

941-621-4723

Telephone

N/A

Fictitious or d/b/a Name

59-2392802

Federal Employer Identification Number (FEIN)

750 Monroe Road

Home Office Address

Sanford, FL 32771

City, State, Zip

40

Number of Years in Business

2525 Bobcat Village Center Road, Unit 105, North Port, FL 34288

Address: Office Servicing Charlotte County, other than above

Caryn Huff, Area Manager

Name/Title of your Charlotte County Rep.

813-240-4165

Telephone

Darin A. Crafton, COO, Commercial

Name/Title of Individual Binding Firm (Please Print)

Darin A. Crafton

Signature of Individual Binding Firm

3/4/2025

Date

dcrafton@whartonsmith.com

Email Address

(This form must be completed & returned)

DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that Wharton-Smith, Inc. does:
(name of business)

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

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



Proposer's Signature

3/4/2025

Date

(This form must be completed & returned)

BYRD ANTI-LOBBYING CERTIFICATION

Certification for Contracts, Grants, Loans, and Cooperative Agreements

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

- (1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of an Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
- (2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
- (3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, U.S.C. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

3/4/2025

Date

Darin A. Crafton

Type or Print Name



Signature

COO, Commercial

Title

END OF PART V

(This form must be completed & returned)

**HUMAN TRAFFICKING AFFIDAVIT
for Nongovernmental Entities Pursuant To FS. §787.06**

Charlotte County Contract #20250233

The undersigned on behalf of the entity listed below, (the "Nongovernmental Entity"), hereby attests under penalty of perjury as follows:

1. I am over the age of 18 and I have personal knowledge of the matters set forth except as otherwise set forth herein.
2. I am an officer or representative of the Nongovernmental Entity and authorized to provide this affidavit on the Company's behalf.
3. Nongovernmental Entity does not use coercion for labor or services as defined in Section 787.06, Florida Statutes.
4. This declaration is made pursuant to Section 92.525, Florida Statutes. I understand that making a false statement in this declaration may subject me to criminal penalties.

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

Further Affiant sayeth naught.



Signature

Darin A. Crafton

Printed Name

COO, Commercial

Title

Wharton-Smith, Inc.

Nongovernmental Entity

3/4/2025

Date

(This form must be completed & returned)



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

941-621-4723

www.whartonsmith.com