



110 Athens Street Suite A Tarpon Springs, FL 34689 p 312.519.9949 f 312.561.4718

May 20, 2026

Kim Chamberlain
Senior Contract Specialist Charlotte County Purchasing Division
18500 Murdock Circle, Suite 344
Port Charlotte, FL 33948-1094

Re: RFP No. 20260397, Countywide Elevator Assessment

Dear Ms. Chamberlain,

Axiom LLC, doing business as The Elevator Consultants (TEC), is pleased to submit this proposal for the Countywide Elevator Assessment. We are an independent, vendor-neutral elevator consulting firm. We carry no tools, sell no equipment, and accept no work, leads, gifts, or compensation of any kind from elevator manufacturers or service contractors. We work for building owners only. For a public assessment whose purpose is an objective, defensible picture of 19 elevators and 4 wheelchair lifts across 11 County buildings, that independence is the single most important qualification a firm can bring, and it is the foundation of everything we do.

TEC is headquartered in Florida, in Tarpon Springs, roughly two hours from Port Charlotte. We are a Florida-based, certified Minority-Owned Business Enterprise, and we have performed multi-building, multi-elevator assessment programs for county and municipal governments, a major convention center, federal facilities, large hospital systems, and institutional portfolios nationwide.

This proposal responds to every element of the Scope of Services and is structured to deliver all required reports within the 120 calendar day window and within the County's not-to-exceed budget. Andy Kohl will serve as Principal-in-Charge, Project Manager, and lead designer for the engagement and will be your point of accountability from kickoff through final report review.

We appreciate the opportunity and would welcome the work.

Sincerely,

Laurie Axiom
President
Axiom Elevator Consultants LLC

EXECUTIVE SUMMARY

Charlotte County needs to know, building by building and unit by unit, which of its elevators and wheelchair lifts should continue under maintenance, which should be modernized, and which should be replaced, and what each path will cost and when. That is precisely the assessment TEC performs.

We will inventory and physically assess all 23 vertical transportation units across the 11 listed locations, cross-reference each against Florida state elevator records, evaluate condition and code compliance, review the existing maintenance contracts and service history, and deliver a written report for each building and unit. Our findings are consolidated into an executive summary with a prioritized, risk-ranked matrix that sorts every unit into the County's three categories, supported by order-of-magnitude capital costs and phasing options the County can build a budget around.

What sets TEC apart on this project:

- **True independence.** We have no relationship with any elevator company, so our recommendations carry no hidden agenda. The County is not asking the contractor to grade its own report card.
- **A working alternative to manufactured obsolescence.** TEC maintains an active network of reused and refurbished parts. When a contractor says a component is "obsolete," we can frequently show a repair or refurbishment path that keeps a unit safely in service for years, which is the core of real value engineering on older equipment like the County's 1928, 1968, and 1981 units.
- **Florida presence and Florida code fluency.** We work within ASME A17.1, ASME A18.1 for the wheelchair lifts, the Florida Building Code, ADA, NFPA fire service requirements, and the records of the Florida Department of Business and Professional Regulation, Bureau of Elevator Safety.

The result is a deliverable the County can act on immediately: safer equipment, lower lifecycle cost, defensible capital planning, and clear accountability for whoever holds the maintenance contracts.

UNDERSTANDING OF SCOPE

The County has 19 elevators and 4 wheelchair lifts in 11 buildings, with equipment spanning nearly a century, from the 1928 Historical Court House and the 1968 Port Charlotte Library to the 2022 Schindler unit at Fire Station 10 on Gasparilla Island. That age spread is the heart of the project. It almost guarantees that the portfolio contains units in every one of the County's three categories at once: newer equipment that simply needs continued, properly verified maintenance, mid-life equipment that needs targeted upgrades, and end-of-life equipment that warrants modernization or replacement. Our job is to tell the County, with evidence, which is which.

We understand the assignment as a task-based professional services engagement with no public input component, performed in the County's stated priority order, with all on-site access hosted by Facilities Management Department personnel. We understand that site visits are subject to Procurement guidelines and personnel availability, and we will schedule around the County's calendar.

We also understand the specifics that make this portfolio distinct, and we plan for them:

- The **wheelchair lifts** at the Justice Center, the Historical Court House, and Tringali Community Center are platform lifts governed by ASME A18.1 and ADA, and we assess them to that standard, not the elevator code.

- The **1928 Historical Court House** is a historic structure, where accessibility and modernization decisions must respect the building. We flag those constraints rather than recommending generic upgrades.
- **Fire Station 10 on Gasparilla Island** requires barrier-island access logistics, which we build into the schedule so it does not become a bottleneck.
- The **Justice Center, jail infirmary, and EOC** are secure and mission-critical facilities. We sequence and conduct that work to avoid disrupting operations, coordinated entirely through Facilities Management.

The challenges we anticipate are predictable and we solve them up front: incomplete service records on older units (we cross-reference state records and reconstruct history from on-site evidence), coordinating access across 11 separate facilities inside 120 days (handled through a single Facilities Management point of contact and a locked priority sequence), and distinguishing genuine obsolescence from contractor convenience (handled through our parts network and independent equipment knowledge). None of these is new to us.

TEC QUALIFICATIONS AND INDEPENDENCE

TEC provides expertise across all areas of vertical transportation, with team experience averaging more than 30 years. Our consultants come from every major manufacturer as well as the independent side of the industry, and are trained on both proprietary and non-proprietary equipment, including KONE, TK Elevator, Schindler, Otis, FujiTec, Mitsubishi, MCE, GAL, Hollister Whitney, Imperial, SmartRise, and modular and non-proprietary control systems. That last point matters to this RFP: the County states a preference for firms experienced with third-party, non-proprietary controls and electronics. TEC evaluates proprietary and non-proprietary equipment objectively and can advise the County on where proprietary lock-in is driving cost and where non-proprietary alternatives protect competition on future maintenance and modernization.

Our independence is not a marketing line, it is a condition of employment. TEC's Code of Conduct binds every team member to represent the client and only the client. We accept no compensation, incentives, referrals, or affiliations from any elevator service provider. The County's evaluation criteria specifically prefer "independence from elevator manufacturers and Contractors," and TEC is built entirely around that standard.

Our principals are active nationally, serving on ASME elevator code committees, the National Association of Elevator Safety Authorities, BOMA, IFMA, and other industry bodies, and we hold QEI (Qualified Elevator Inspector) certification on staff. TEC is a Florida-based, certified 100% Minority-Owned Business Enterprise.

Our forte is exactly what the County is buying: lifecycle cost analysis and value engineering. We are experts at finding proactive ways to get existing equipment to run to its full life cycle, and at finding alternatives to unnecessary modernization and expensive upgrades. Anyone can recommend a full modernization. TEC's discipline is determining when a unit genuinely needs it and when it does not, which is where the County's money is saved.

PROJECT TEAM

TEC will perform this engagement as the sole prime consultant. There are no subconsultants and no joint-venture partners, which removes coordination risk and keeps a single firm accountable for the entire deliverable. A dedicated account team is assigned, trained in TEC's methodology for a consistent deliverable across all 11 locations.

Andy Kohl, Principal-in-Charge, Project Manager, and Lead Designer. Approximately 40 years in vertical transportation. QEI Certified. With TEC since 2010 as principal consultant, covering modernization specifications, due diligence, maintenance specifications, code and repair upgrades, expert work, and negotiations. Prior industry roles include Modernization Manager at Schindler, District Manager at ThyssenKrupp, business owner of an elevator parts company, and manufacturers representative. BS, John Carroll University. MBA, University of Notre Dame. Andy is the County's single point of accountability for technical accuracy and final findings.

Mike DeGonia, Field Technical Project Manager. Approximately 19 years in vertical transportation. With TEC since 2017, covering field assessment, modernization, new construction, and maintenance specifications, with a prior background in electrical work. Mike owns field execution and the on-site schedule, and is the person responsible for keeping the assessment phase on track across all 11 locations.

Monica Medrane, Account Manager. Approximately 16 years as a vertical transportation account manager. With TEC since 2010. Monica is the County's day-to-day coordination contact for scheduling site access with Facilities Management, status updates, and report delivery logistics. Bachelor of Science, Loyola University Chicago.

Per the County's requirement, TEC commits that the Principal-in-Charge, Project Manager, and lead designer (Andy Kohl) and the named key personnel will not be substituted without the express written permission of the County.

WORK PLAN AND METHODOLOGY

TEC's work plan follows three phases that mirror the County's own evaluation structure: a design phase, a data gathering phase, and a reporting phase. Throughout, TEC keeps the engagement on schedule and within budget through constant communication, a locked task sequence, and our proprietary tracking platform, the ElevatorApp, which gives the County's Facilities Management team a live view of progress, findings, and the punch-list items that follow.

Phase 1, Design Phase. We begin with a kickoff meeting with Facilities Management to confirm objectives, access protocols, the priority sequence, and the County's preferred reporting format. We collect existing maintenance contracts, service and callback records, and inspection history, and we cross-reference every unit against Florida state elevator records. We deliver meeting agendas, minutes, action items, and a full design schedule, as the RFP requires. Mike DeGonia builds the site-access calendar around Facilities Management availability.

Phase 2, Data Gathering Phase. TEC conducts on-site assessments in the County's priority order, hosted by Facilities Management. For each unit we record the full inventory: manufacturer, model and type (hydraulic, traction, or MRL), year installed and modernization history, capacity, speed, number of stops, and control and drive equipment. We then physically assess every major sub-system, including the hoistway and pit, machine room or control space, cab, doors and entrances, controllers, drives, motors and pumps, safety devices, and emergency systems. We evaluate wear, obsolescence, and parts availability, review service records and breakdown and outage history, and measure performance objectively using calibrated instruments, including speed, floor-to-floor and door timing, leveling accuracy, ride quality, door hold and nudging times, and door pressure. The data is gathered with a safety-first approach and documented with photographs that capture the as-is condition. Wheelchair lifts are assessed to ASME A18.1 and ADA. Our code and compliance review covers current Florida and state elevator codes, ASME A17.1, ASME A18.1 for the lifts, ADA accessibility, and fire service and emergency operation requirements. Our maintenance evaluation reviews the existing contracts, the adequacy of the preventive maintenance program against the County's actual needs, and the risks created by any deferred maintenance.

Phase 3, Reporting Phase. TEC consolidates all findings into clear, actionable reports. Each unit is graded on equipment condition and on the maintenance being delivered, using TEC's established rating system across the seven maintenance areas we evaluate (housekeeping, lubrication, repair, replacement, adjustment and performance, callbacks, and service hours). Every unit is then placed into one of the County's three categories, continued operation and maintenance, modernization and upgrade, or full replacement, and ranked by urgency and risk. We provide order-of-magnitude capital costs, anticipated remaining service life, operational and downtime impact, and energy and sustainability considerations, along with any building alterations that a recommended path would require. We review the complete deliverable with County stakeholders.

Project control. Schedule is owned by Mike DeGonia and tracked daily in the ElevatorApp. Technical accuracy and final findings are owned by Andy Kohl, with TEC's internal quality control reviewing all data before it reaches the County. Cost is controlled by a defined, fixed engagement structure within the County's not-to-exceed budget, with no change orders unless the County itself requests added scope in writing. TEC's current workload has the capacity to dedicate this team to the engagement and complete it inside 120 days.

SCHEDULE AND 120-DAY COMPLETION PLAN

TEC will complete all work within 120 calendar days of contract issuance, in the County's stated priority order, with deliberate margin built in for access coordination and quality control.

Days 1 to 10, Design Phase. Kickoff with Facilities Management, document collection, Florida state records cross-reference, and the locked site-access schedule. Deliverables: agenda, minutes, action items, and full design schedule.

Days 10 to 70, Data Gathering Phase. On-site assessments in priority order: Administration Complex Building A, the Public Safety Building and EOC, the Justice Center and its two wheelchair lifts, Fire Station 10 on Gasparilla Island, Administration Complex Building B, Sports Park, the Health Department, the Jail Infirmary, the Historical Court House and its wheelchair lift, the Port Charlotte Library, and the Tringali Community Center wheelchair lift. Island and secure-facility access is sequenced early enough to absorb any rescheduling.

Days 45 to 100, Analysis and Drafting. Data consolidation, equipment and service grading, individual building and unit reports, cost and phasing development, and the risk-ranked prioritization matrix. This phase overlaps the tail of data gathering so reporting is well underway before fieldwork closes.

Days 100 to 115, Quality Control and Executive Summary. Andy Kohl and TEC quality control review every report and finding. The executive summary, prioritized matrix, and capital phasing are finalized.

Days 115 to 120, Delivery and Review. Electronic and hard-copy reports delivered, and a review meeting held with County stakeholders.

DELIVERABLES

TEC will provide everything the Scope of Services requires:

- A written report for each building and each elevator and wheelchair lift, documenting inventory, condition, code compliance, performance, and maintenance findings, with photographic documentation.
- An executive summary with prioritized recommendations across the County's three categories.

- A matrix ranking every unit by urgency and risk, scoring condition, age, reliability and callback history, parts availability and obsolescence, and facility criticality.
- Order-of-magnitude capital cost estimates with phasing options, anticipated service life, operational and downtime impact, and energy and sustainability considerations.
- Identification of any required physical building alterations tied to recommended work.
- A deficiency and punch list per unit for items the County may choose to enforce against the responsible contractor under the existing maintenance agreements.
- Electronic and hard-copy versions of all reports, in the format the County prefers.

As an option the County may keep beyond the engagement, the ElevatorApp can provide continuous oversight of the equipment and the contractors' completion of any punch-list items, giving Facilities Management a live record between assessments.

RELEVANT EXPERIENCE

TEC has performed multi-building, multi-elevator assessment and capital-planning programs for government, institutional, and large portfolio clients that closely match the size and complexity of this countywide assessment. Public-sector and government clients include the City of Columbus, the City of Chicago, Frederick County, the McCormick Place Convention Center, and federal facilities for the United States Postal Service. These engagements involved exactly the work the County is requesting: inventorying and assessing diverse equipment across multiple buildings, evaluating code compliance and maintenance performance, and producing prioritized, cost-loaded capital recommendations.

On schedule and cost control, our recent multi-site programs demonstrate the discipline this RFP scores. In multi-building healthcare and institutional portfolio assessments, TEC has assessed large counts of units across many locations on fixed timelines and within fixed engagement budgets, coordinating access through a single facilities point of contact and tracking progress in the ElevatorApp, with no scope creep and no change orders absent client-initiated additions.

On value engineering, which is the heart of the County's highest-weighted criterion, TEC's record is built on finding the lower-cost, defensible path. Using our independent equipment knowledge and our parts network, we routinely identify repair and refurbishment options that keep older units safely in service rather than defaulting to full modernization, and we recover deferred maintenance that the County is already paying for under existing contracts. Across our engagements, we consistently increase safety, decrease cost, and extend the life of the equipment.

REFERENCES

Reference : Florida Department of Management, Contact name: Jennifer Reed Project description (size and scope): TEC assessed approximately 200 elevators for the State of Florida to determine equipment condition and remaining life cycle and to prioritize the units against the State's requirements. The assessment evaluated the condition of each unit, identified deficiencies and obsolescence, and produced prioritized recommendations to guide the State's repair, modernization, and capital planning decisions. This project closely matches the Countywide Elevator Assessment in both approach and intent: a large, multi-building public-sector portfolio assessed for condition and life cycle, then ranked by priority to support government capital planning.

Reference : Senior Management Services, Contact name: Tom Howard, Project description (size and scope): TEC provided full vendor management for the client's entire elevator portfolio. The engagement included equipment and maintenance assessment, oversight of maintenance service and contractor accountability tracking, inspection management, and capital planning and operating-expense management across all of the client's vertical transportation equipment. TEC served as the client's independent advocate, holding the service provider accountable to its contract and giving the client clear visibility into equipment condition, compliance, and cost. This ongoing relationship demonstrates TEC's ability to manage a multi-building portfolio, evaluate maintenance performance, and support long-term capital and operational planning, all central elements of the County's scope.

Reference : Florida Department of Management, Contact name: Etor Agudu, Project description (size and scope): TEC provided assessment and consulting services for compliance with the elevator door lock monitoring code requirement across 72 units. TEC assessed the affected equipment, determined the scope of work required to bring each unit into compliance, and oversaw the project through completion of the code-required installations. As an independent consultant, TEC represented the State's interest throughout, verifying that the work performed met the code requirement and was completed properly. This engagement reflects the same combination of code-compliance evaluation, multi-unit coordination, and owner-side project oversight required under the Countywide Elevator Assessment

Additional references available upon request.



Charlotte County Purchasing Division
18500 Murdock Circle, Suite 344
Port Charlotte, Florida 33948-1094

Phone 941.743.1378

NOTICE OF AVAILABILITY

REQUEST FOR PROPOSALS
CHARLOTTE COUNTY, FLORIDA

The County of Charlotte will be receiving sealed proposals at the Purchasing Division, Suite 344, Charlotte County Administration Center, 18500 Murdock Circle, Port Charlotte, FL 33948-1094, for:

RFP NO. 20260397
COUNTYWIDE ELEVATOR ASSESSMENT

Charlotte County is requesting proposals from qualified firms in elevator controls and equipment to evaluate existing elevator and wheelchair lift systems in County-owned buildings and provide professional recommendations.

PRE-SUBMITTAL CONFERENCE: 2:00 p.m. (EST), MAY 12, 2026
PURCHASING CONFERENCE ROOM, ROOM 344

PROPOSAL DUE DATE: 3:00 p.m. (EST), MAY 20, 2026

Proposal Documents may be obtained by accessing the Charlotte County Purchasing Division's website at <https://purchasingbids.charlottecountyfl.gov> under "Purchasing Bids Online", document number 263972. Any questions can be answered by contacting Kim Chamberlain, Senior Contract Specialist at 941.743.1527, or email: kimberly_chamberlain@charlottecountyfl.gov.

ELECTRONIC BID SUBMISSIONS: All submittals for this project shall be submitted electronically. Please visit <http://bit.ly/3TYAyKa> and follow given instructions.

Notice of Availability
Posted: April 24, 2026



Charlotte County Purchasing Division
18500 Murdock Circle, Suite 344
Port Charlotte, Florida 33948-1094

Phone 941.743.1378
Fax 941.743.1384

STATEMENT OF NO SUBMITTAL

If you **do not** intend to submit on this commodity/service, please return this form to the above address immediately. If this statement is not completed and returned, your company may be deleted from the Charlotte County Vendors' list for this commodity/service.

We, the undersigned, have declined to submit on requested commodity/service **RFP #20260397, COUNTYWIDE ELEVATOR ASSESSMENT**, for the following reason(s):

- _____ Specifications too "tight", i.e. geared toward one brand or manufacturer only (explain below).
- _____ Insufficient time to respond to the Request for Proposal.
- _____ We do not offer this product or service.
- _____ Our schedule would not permit us to perform.
- _____ Unable to meet bond/insurance requirements.
- _____ Unable to meet specifications.
- _____ Specifications are unclear (explain below).
- _____ Remove us from your vendors' list for this commodity/service.
- _____ Other (specify below).

Remarks: _____

Company Name: _____

Contact Person (typed or printed): _____

Contact Person Signature: _____

Phone: _____ Fax: _____

E-Mail Address: _____

Note: Statement of No Submittal may be emailed to kimberly.chamberlain@charlottecountyfl.gov.

**TABLE OF CONTENTS
COUNTYWIDE ELEVATOR ASSESSMENT
RFP NO. 20260397**

Notice of Availability	1
"No Submittal" Response Page	2
Table of Contents	3
PART I - GENERAL INSTRUCTIONS	4 - 8
PART II - SCOPE OF SERVICES	9 - 11
PART III - PROPOSAL FORMAT & CRITERIA FOR AWARD	12 - 15
PART IV - SUBMITTAL FORMS	16 - 19

**REQUEST FOR PROPOSAL
COUNTYWIDE ELEVATOR ASSESSMENT
RFP 20260397**

PART I - INSTRUCTIONS

RP-01 INTENT:

A. It is the intent of the County to select a firm who clearly demonstrates the highest level of ability and proven reliability to perform the professional services specified in the Scope of Services. Brief summaries applicable to the required work should be included with the proposal.

B. **Time and Date Due** - Charlotte County will accept proposals from individuals, corporations, partnerships, and other legal entities authorized to conduct business in the State of Florida until **3:00 p.m., May 20, 2026.**

C. In order to ensure that all prospective proposers have sufficient information and understanding of the County's needs, a **Pre-submittal Conference** will be held on **May 12, 2026 @ 2:00 p.m., Administration Complex, 18500 Murdock Circle, Purchasing Division Room 344, Port Charlotte, Florida.** Attendance of this meeting is not mandatory; however, interested proposers are encouraged to attend.

RP-02 CONTRACT AWARDS: The County anticipates entering into a contract with one (1) firm who submit the proposal judged to be most advantageous to the County. The selected firm shall be required to sign a formal agreement in the standard form currently used by Charlotte County for professional services.

The proposer understands that this RFP does not constitute an agreement or a contract with the proposer. A proposal is not binding until proposals are reviewed and accepted by the Board of County Commissioners and a contract is executed by both parties.

RP-03 DEVELOPMENT COSTS: The County shall not be liable for any expense incurred in connection with preparation of a response to this Request for Proposal (RFP). Proposers should prepare a straightforward and concise description of the proposers' ability to meet the requirements of the RFP.

RP-04 INQUIRIES: The County will not respond to oral inquiries. Proposers may submit written or emailed inquiries regarding this RFP to Purchasing, 18500 Murdock Circle, Suite 344, Port Charlotte, Florida 33948 or kimberly.chamberlain@charlottecountyfl.gov or may be addressed at the pre-submittal conference. The County will respond to written or emailed inquiries received at least five (5) calendar days prior to the RFP due date.

The County will record its responses to inquiries and any supplemental instructions in the form of written addenda. It shall be the responsibility of the proposer, prior to submitting their proposals, to view the website <https://purchasingbids.charlottecountyfl.gov> to determine if addenda were issued, acknowledging and incorporating them into their proposal.

RP-05 PROPOSAL SUBMISSION AND WITHDRAWAL: The County will receive proposals electronically. Please visit <http://bit.ly/3TYAyKa> and follow given instructions.

Proposals received after the established deadline will not be opened. Proposers may withdraw their proposal by notifying the County in writing at any time prior to the due date. Proposals not so withdrawn shall, upon opening, constitute an irrevocable offer for a period of 120 days to provide Charlotte County the services set forth in these specifications until one of the proposals has been accepted by the Board of County Commissioners. Upon opening, proposals become "public records" and shall be subject to public disclosure in accordance with Chapter 119, Florida Statutes.

RP-06 PROPOSAL RESTRICTIONS: In accordance with Ordinance #96-002, the manufacture, use, display or other employment of any facsimile or reproduction of the Charlotte County Seal, without the express, prior, written approval of the Board of County Commissioners of Charlotte County, Florida, is hereby declared to be unlawful and punishable as a Second-Degree Misdemeanor as provided in Section 165.043, Florida Statutes.

RP-07 DRUG FREE WORKPLACE: Charlotte County is a Drug Free Workplace. It is strongly suggested that the attached Drug Free Workplace Form be signed and returned to this office with the proposal.

RP-08 PUBLIC ENTITY CRIMES STATEMENT: In accordance with Florida Statutes Sec. 287.133(2)(a), "A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a

contract to provide any goods/services to a public entity, may not submit a bid on a contract with a public entity for construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a Contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for Category Two, for a period of 36 months from the date of being placed on the convicted vendor list".

RP-09 CANCELLATION/TERMINATION: The County shall have the right to unilaterally cancel, terminate or suspend this Contract, in whole or in part, by providing the successful proposer thirty (30) days written notice by certified mail.

It is expressly understood by the County and the Contractor that funding for any successive fiscal years is contingent upon appropriation of monies by the Board of County Commissioners. In the event funds are not available or not appropriated, the County reserves the right to terminate the Contract and/or individual leases. The County will be responsible for any outstanding invoices prior to the termination.

RP-10 RESERVED RIGHTS: The County reserves the right to accept or reject any and/or all proposals, to waive irregularities and technicalities, and to request resubmission. Any sole response received the first submission date may or may not be rejected by the County, depending on available competition and timely needs of the County. The County shall be the sole judge of the proposal and the resulting agreement that is in its best interest, and its decision shall be final.

The County reserves the right to accept or reject any or any part of the submissions, if it is deemed in the best interest of the County. The County, in its sole discretion, may expand the scope of work to include additional requirements. The County reserves the right to investigate as it deems necessary to determine the ability of any firm to perform the work or services requested. The firms, upon request shall provide information the County deems necessary in order to make a determination.

RP-11 EQUAL EMPLOYMENT OPPORTUNITY CLAUSE: Charlotte County, Florida, in accordance with the provisions of Title VII of The Civil Rights Act of 1964 (78 Stat. 252) and the Regulations of the Department of Commerce (15 CFR, Part 8) issued pursuant to such Act, hereby notifies all firms it will affirmatively ensure in any contract entered into pursuant to this advertisement, women-owned and minority business enterprises (collectively MBEs) will be afforded full opportunity to submit proposals in response to this advertisement and will not be discriminated against on the grounds of gender, race, color or national origin in consideration for an award. 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. Interested MBEs and certified MBEs are encouraged to respond.

All firms are hereby notified that the successful firms must and shall comply with the Civil Rights Act of 1964, the Age Discrimination in Employment Act, the Rehabilitation Act of 1973, the Americans with Disabilities Act and the Florida Civil Rights Act, all as amended. Specifically, firms agree that:

No person shall, on the grounds of race, color, sex, religion, age, disability, national origin or marital status, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program, activity or service funded through this Contract.

- Contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, disability, national origin or marital status. Contractor agrees to post in a conspicuous place, available to employees and applicants for employment, notices setting forth the provisions of this non-discrimination clause.
- Contractor will, in all solicitations or advertisements regarding program activities, services provided or applications for employment, state that all qualified applicants will receive consideration for services or employment without regard to race, color, religion, sex, age, disability, national origin or marital status.
- County may require Contractor to submit reports as may be necessary to indicate non-discrimination. County officials will be permitted access to Contractor's books, records, accounts and other sources of information and its facilities as may be pertinent to ascertain compliance with non-discrimination laws.

It is expressly understood that County shall have the right to terminate this Contract upon receipt of evidence of discrimination.

RP-12 PAYMENT: Request for payment must be submitted to Charlotte County Purchasing on a form approved by the County in accordance with contract documents. Price shall be net and all invoices payable according to the Local Government Prompt Payment Act (F.S.218.74).

RP-13 PERFORMANCE EVALUATION: At the end of the Contract, the receiving department will evaluate the successful proposers' performance. This evaluation will become public record.

RP-14 INSURANCE REQUIREMENTS: Contractor and subcontractors shall procure and maintain until all of their obligations

have been discharged, including any warranty periods under this Contract are satisfied, insurance against claims for injury to persons or damage to property which may arise from or in connection with the performance of the work hereunder by the Contractor, his agents, representatives, employees or subcontractors.

The insurance requirements herein are minimum requirements for this Contract and in no way limit the indemnity covenants contained in this Contract. The County in no way warrants that the minimum limits contained herein are sufficient to protect the Contractor from liabilities that might arise out of the performance of the work under this Contract by the Contractor, his agents, representatives, employees, or subcontractors. Contractor is free to purchase such additional insurance as may be determined necessary.

A. **MINIMUM SCOPE AND LIMITS OF INSURANCE** - Contractor shall provide coverage with limits of liability not less than those stated below. An excess liability policy or umbrella liability policy may be used to meet the minimum liability requirements provided that the coverage is written on a "following form" basis.

1. **Commercial General Liability – Occurrence Form (CG 00 01)**

Policy shall include bodily injury, property damage, broad form contractual liability and Explosion, Collapse and Underground (XCU) coverage.

- General Aggregate \$2,000,000
- Each Occurrence \$1,000,000

- a. The policy shall be endorsed to include the following additional insured language: "Charlotte County a political subdivision of the state of Florida and it officers, employees, agents and volunteers" shall be named as an additional insured with respect to liability arising out of the activities performed by, or on behalf of the Contractor.
- b. Contractor's subcontractors shall be subject to the same minimum requirements identified above.
- c. Policy shall be endorsed for a waiver of subrogation against the Charlotte County.

2. **Automobile Liability**

Bodily injury and property damage for any owned, hired, and non-owned vehicles used in the performance of this Contract. Automobile liability must be written on a standard ISO form (CA 00 01) covering any auto (Code 1), or if Contractor has no owned autos, hired (Code 8) and non-owned (Code 9) autos.

Combined Single Limit (CSL) \$1,000,000

- a. The policy shall be endorsed to include the following additional insured language: "Charlotte County a political subdivision of the state of Florida and it officers, employees, agents and volunteers" shall be named as an additional insured with respect to liability arising out of the activities performed by, or on behalf of the Contractor, including automobiles owned, leased, hired or borrowed by the Contractor".
- b. Contractor's sub-contractors shall be subject to the same minimum requirements identified in this section.
- c. Policy shall contain a waiver of subrogation against the Charlotte County.

3. **Worker's Compensation and Employers' Liability**

Workers' Compensation	Statutory
Employers' Liability	
Each Accident, bodily injury or disease	\$1,000,000

- a. Policy shall contain a waiver of subrogation against the Charlotte County.
- b. Contractor's sub-contractors shall be subject to the same minimum requirements identified in this section.
- c. If the contractor has no employees the contractor must submit to the County the Workers Compensation Exemption from the State of Florida.

4. **Professional Liability (Errors and Omissions Liability) for Prime Contractors**

- a. Estimated Projection Construction Cost up to **\$9,999,999**

Each Claim	\$1,000,000
Annual Aggregate	\$2,000,000
- b. Estimated Projection Construction Cost from **\$10,000,000 to \$19,999,999**

Each Claim	\$2,000,000
Annual Aggregate	\$2,000,000
- c. Estimated Projection Construction Cost from **\$20,000,000 to \$40,000,000**

Each Claim	\$3,000,000
Annual Aggregate	\$3,000,000

- d. In the event that any professional liability insurance required by this Contract is written on a claims-made basis, Contractor warrants that any retroactive date under the policy shall precede the effective date of this Contract; and that either continuous coverage will be maintained or an extended discovery period will be exercised for a period of five (5) years beginning at the time work under this Contract is completed.
- e. Policy shall contain a waiver of subrogation against Charlotte County.

5. Professional Liability (Errors and Omissions Liability) for Subcontractors

In addition to the insurance requirements for the Contractor, the contractor's registered sub-contractors (including structural, civil, mechanical, plumbing, electrical engineering, landscape architecture, survey, geotechnical and materials testing) are required to carry Professional Liability insurance at the same levels and conditions as the Contractor.

Additional Insured – All policies, **except** for the Workers Compensation and Professional Liability shall contain endorsements naming the County its officers, employees, agents and volunteers as additional insured with respect to liabilities arising out of the performance of services contained herein. The additional insured endorsements shall not limit the scope of coverage for the County to vicarious liability but shall allow coverage for the County to full extent provided by the policy, even if those limits exceed those required by this contract. Such additional insured coverage shall be at least as broad as Additional Insured (Form B) endorsement form ISO, CG 20 10 11 85 or both CG 20 10 and CG 20 37 if later revisions used.

Waiver of Subrogation Rights – The Contractor shall require the carriers of required coverages to waive all rights of subrogation against the County, its officers, employees, agents and volunteers. Contractor agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation. All general or auto liability insurance coverage provided shall not prohibit the Contractor and Contractor's employees or agents from waiving the right of subrogation prior to a loss or claim. The Contractor hereby waives all rights of subrogation against the County.

Policies Primary and Non-Contributory – For any claims related to this contract, the Contractor's insurance coverage shall be primary insurance as respects the County, its officers, employees, agents and volunteers. Any insurance or self-insurance maintained by the County, its officers, employees, agents or volunteers shall be excess of the Contractor's insurance and shall not contribute with it.

Severability of Interests – The Contractor agrees to ensure that coverage provided to meet these requirements is applicable separately to each insured and there will be no cross liability exclusions that preclude coverage for suits between the Contractor and the County or between the County and any other insured or additional insured under the policy.

Proof of Coverage - Prior to the commencement of performance of services the Contractor shall furnish to the County Purchasing Division Certificates of Insurance and amendatory endorsements or copies of the applicable policy language effecting coverage required. These certificates shall provide that such insurance shall not be terminated or expire without notice thereof in accordance with the policy provisions and Contractor shall maintain such insurance from the time the Contractor commences performance of services until completion of such services. Within seven (7) calendar days of notice of award, the Contractor shall furnish a copy of the Declaration page and required endorsements for all applicable policies and will provide complete certified copies of the policies and endorsements immediately upon request.

Acceptability of insurance carrier – Unless otherwise approved by Risk Management, Insurance shall be written by insurers authorized to do business in the State of Florida and with a minimum Best Insurance Guide rating of "A:VII".

Deductibles and Self-Insured Retention – Any and all deductibles or self-insured retentions in excess of \$10,000 shall be declared to and approved by Risk Management. The County may require the Contractor to purchase coverage with a lower deductible or retention or provide proof of ability to pay losses and related investigations, claim administration and defense expenses within the deductible or retention.

Failure to Procure Coverage – In the event that any policy of insurance required under this contract does not comply with the requirements, is not procured or is cancelled and not replaced, the County has the right but not the obligation or duty to terminate the contract or obtain insurance if it deems necessary and any premiums paid by the County will be promptly reimbursed by the Contractor or County payments to the Contractor will be reduced to pay for County purchased insurance.

Insurance Review – Insurance requirements are subject to periodic review by the County. The Risk Manager or designee is authorized, but not required, to reduce, waive, or suspend any insurance requirements whenever Risk Management determines that any of the required insurance is not available, is unreasonably priced or is not needed to protect the interests of the County.

In addition, if Risk Management determines that heretofore, unreasonably or unavailable types of insurance coverage or coverage limits become reasonably priced or available, the Risk Manager or designee is authorized, but not required, to change the above insurance requirements to require additional types of insurance coverage or higher coverage limits, provided that any such change is reasonable in light of past claims against the County, inflation, or any other item reasonably related to the County's risk. Any change requiring additional types of insurance coverage or higher coverage limits must be made by amendment to this contract. Contractor agrees to execute any such amendment within thirty (30) days of receipt.

Any failure, actual, or alleged, on part of the County to monitor or enforce compliance with any of the insurance and indemnification requirements will not be deemed as a waiver of any rights on the part to the County.

RP-15 UNAUTHORIZED ALIEN WORKERS: Charlotte County will not intentionally award publicly funded contracts to any contractor who knowingly employs unauthorized alien workers, constituting a violation of the employment provisions contained in 8 U.S.C. Section 1324a [Section 274A of the Immigration and Nationality Act ("INA")]. The County shall consider employment by any Contractor of unauthorized aliens a violation of Section 274A of the INA. Such violation by the Contractor of the employment provisions contained in Section 274A of the INA shall be grounds for termination of this Agreement by the County. In addition, pursuant to Section 448.095 of the Florida Statutes, all persons or firms entering into contracts with Charlotte County are required to register with, and use, the E-Verify system of the U.S. Department of Homeland Security to electronically verify the employment eligibility of all newly hired employees. The County may terminate this Agreement for failure on the part of the Contractor to use E-Verify. Contract termination for failure to use E-Verify is not considered a breach of contract pursuant to s. 448.095(2)(c)3, *Fla. Stat.*

RP-16 EMPLOYEE BACKGROUND CHECK: If an owner, except a stockholder in a publicly traded corporation, or an employee of the Contractor has been convicted of any offenses requiring registration as a sexual offender or sexual predator, regardless of the location of conviction, the Contractor shall ensure that the offender's or predator's work on the project is consistent with the terms of his probation and registry requirements.

RP-17 PUBLIC RECORDS CLAUSE TO CONTRACTORS "ACTING ON BEHALF OF THE COUNTY": Pursuant to Section 119.0701 of the Florida Statutes, Contractors acting on behalf of the County must comply with the public records laws, specifically: a) keep and maintain public records required by the County to perform the contracted services; b) upon request from the County's custodian of public records, provide the County with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119 of the Florida Statutes or as otherwise provided by law; c) ensure that public records that are exempt or confidential from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract; and d) upon completion of the contract, keep and maintain all public records required by the County to perform the service, and meet all applicable requirements for retaining public records.

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO RETAIN AND PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE COUNTY'S CUSTODIAN OF PUBLIC RECORDS AT (941) 743-1441, E-MAIL TO RECORDS@CHARLOTTECOUNTYFL.GOV, 18500 MURDOCK CIRCLE, BLDG. B, Suite 109, PORT CHARLOTTE, FLORIDA 33948.

RP-18 SOCIAL, POLITICAL, OR IDEOLOGICAL INTERESTS: Charlotte County will not request documentation of, or consider a vendor's social, political, or ideological interests when determining if the vendor is a responsible vendor. Charlotte County does not give preference to vendors based on social, political, or ideological interests.

END OF PART I

PART II
SCOPE OF SERVICES

RP-19 PURPOSE: Charlotte County is requesting proposals from qualified firms in elevator controls and equipment to evaluate existing elevator and wheelchair lift systems in County-owned buildings and provide professional recommendations.

RP-20 PROJECT DESCRIPTION: Inspect existing equipment to determine its inclusion in one of three categories:

1. Continued operation and maintenance
2. Modernization/upgrade needs
3. Full replacement

RP-21 PROJECT OBJECTIVES: The goal is to improve safety, reliability, code compliance, energy efficiency, and lifecycle value.

RP-22 GENERAL SCOPE OF SERVICES: This is for a task-based professional services agreement with no public input. During the design phase, the consultant is responsible to provide meeting agendas, meeting minutes, action items, and a full design schedule. All on site access will be hosted by Facilities Management Department personnel. The scope of services shall include, but not be limited to the following:

A. Inventory and Documentation: Identify all elevators within the specified buildings. Record:

1. Manufacturer
2. Model/type (hydraulic, traction, MRL)
3. Year installed and modernization history
4. Capacity, speed, number of stops
5. Control systems and drive equipment
6. Cross reference the above information with the Florida state records
7. Any other information the firm considers relevant

B. Physical Condition Assessment: Inspect major components including, but not limited to:

1. Hoistway and pit
2. Machine room or control space
3. Cab, doors, and entrances
4. Controllers, drives, motors, pumps
5. Safety devices and emergency systems
6. Evaluate wear, obsolescence, and availability of replacement parts
7. Service records and breakdown history
8. Frequency of outages
9. Ride quality and leveling accuracy
10. Assess remaining useful life of major components
11. Any other component the firm considers relevant

C. Code and compliance review: Assess compliance with:

1. Current state elevator codes
2. ASME A17.1 / CS 844 (or other applicable standards)
3. ADA accessibility requirements
4. Fire service and emergency operation requirements
5. Any other relevant requirement

D. Maintenance Evaluation: Review and evaluate:

1. Existing maintenance contracts
2. Adequacy of preventive maintenance program
3. Risks related to deferred maintenance
4. Other aspects of maintenance deemed relevant by the firm

E. Recommendations and Cost Analysis: Include:

1. A description of work required including physical building alterations if required
2. Estimate capital costs (order-of-magnitude)
3. Anticipated service life
4. Impact on operations and downtime
5. Energy efficiency and sustainability considerations
6. Any other projections based on the firm's experience

F. Deliverables: The firm shall provide:

1. A written report for each building and elevator
2. Executive summary with prioritized recommendations
3. Cost estimates and phasing options
4. Photographic documentation (where appropriate)
5. A matrix ranking elevators by urgency and risk
6. Electronic and hard-copy versions of all reports

G. Locations of equipment to be evaluated (In order of priority).

Priority	Location	No. of Elevators	No. of Wheelchair Lifts
1	Charlotte County Administration Complex-Bldg. A 18500 Murdock Circle, Port Charlotte Serial Numbers: 42078, 42079, 42080 Year Built: 1989	3	None
2	Public Safety Building Emergency Operations Center 25671 Airport Road, Punta Gorda Serial Number: 93330 Year Built: 2007	1	None
3	Charlotte County Justice Center 350 East Marion Avenue, Punta Gorda Serial Numbers: 54626, 54627, 54628, 54629, 54630, 54631, 54632 WCL: 56682, 56683 Year Built: 1999	7	2
4	Fire Station 10 71 Gasparilla Way, Englewood (Gasparilla Island) Schindler Serial #GRN6262 Year Built: 2022	1	None
5	Charlotte County Administration Complex-Building B 18500 Murdock Circle, Port Charlotte Serial Number: 31753 Year Built: 1981	1	None
6	Sports Park 2300 El Jobean Road, Port Charlotte Serial Numbers: 96407, 96408 Year Built: 1987	2	None
7	Charlotte County Health Department 1100 Loveland Boulevard, Port Charlotte Serial Number: 95721 Year Built: 2010	1	None
8	Charlotte County Jail – Infirmary 26601 Airport Road, Punta Gorda Serial Number: 105746 Year Built: 2000	1	None
9	Historical Court House 226 Taylor Street, Punta Gorda Serial Number: 94042 WCL: 94767 Year Built: 1928	1	1
10	Port Charlotte Library 2280 Aaron Street, Port Charlotte Serial Number: 62221 Year Built: 1968	1	None
11	Tringali Community Center – Wheelchair Lift 3460 South McCall Road, Englewood WCL: 108983 Year Built: 1983	None	1

H. Site Visits: Site visits are subject to Procurement guidelines and schedule availability of personnel.

RP-23 PROPOSED PROJECT BUDGET AND SCHEDULE: The project budget for elevator assessment shall not exceed \$300,000 and must be completed within 120 calendar days from the date of the issuance of the contract.

END OF PART II

**PART III
PROPOSAL FORMAT & EVALUATION METHOD**

RP-24 RULES FOR PROPOSALS:

A. The proposal must name all persons or entities interested in the proposals as principals. The proposal must declare that it is made without collusion with any other person or entity submitting a proposal pursuant to this RFP.

B. The following is an excerpt from Charlotte County Resolution #2011-221 and applies to this proposal: "**Any questions regarding a project or submittal shall be directed to the designated person in the Purchasing Division for a response. From the time the notice of request for proposals is published until the contract is awarded, there shall not be any contact between a proposer, agent or other representative and any member of the selection committee, user department, Administration, or any member of the Board of County Commissioners regarding the project or proposal submitted by any proposer. Should any member of the selection committee initiate contact or fail to report any contact, such committee member may be subject to disciplinary action up to and including dismissal. If any proposer, agent or other representative contacts any committee member, user department, Administration or member of the Board of County Commissioners regarding a request for proposals or submitted proposal, the proposer is subject to sanctions up to and including having the County disqualify the firm's submittal.**"

C. For your information, the members of the Professional Services Committee for this project are as follows:

1. Robb Green, Senior Projects Coordinator, Facilities Management
2. Michael Seneca, Deputy Chief, Public Safety
3. Tom Robinson, Inspections Coordinator, Community Development

RP-25 PROPOSAL FORMAT: Firms shall prepare their proposals using the format outlined in the Consultant Evaluation Form on pages 14 and 15. The proposer shall present a comprehensive and integrated picture of the capabilities of the project team to meet all project objectives and complete a successful project. The proposal shall address specific methodologies, strategies, and action plans rather than general description. Wherever possible, specific examples of past work shall be used to illustrate skills and capabilities in similar projects.

RP-26 PROPOSAL REQUIREMENTS: In addition to the information required in the Consultant Evaluation Form, provide the following information:

A. Team Organization, Management and General Qualifications - Multiple firm or joint venture teams should clearly identify the roles and responsibilities of the proposed participants. Team and project management structure should be documented. The principal within the prime firm responsible for the project and the proposed project manager should be identified and a statement presented that those persons would not be substituted without the express permission of the County or could be grounds for cancellation of a recommended award, or termination of agreement. Teams should demonstrate experience in previous similar projects.

B. Work Plan - Firms submitting should demonstrate their understanding of the project. An outline description of anticipated project tasks in sequence should be prepared. Firms should identify anticipated deliverables and a general schedule for a project of this magnitude.

C. Individual Qualifications - Firms should submit the resumes of key people. Firms should specifically identify the lead designer on the project and his/her qualifications. Provide a statement indicating that the designer will not be substituted without the express permission of the County.

D. Experience and References – Each submitter shall supply at least three (3) references indicative of experience in other projects of similar size and complexity. Said reference list shall include the Company name, a contact name, a project description and telephone number. A reference list is also required for the lead designer that will be assigned specifically to this project and shall include the Company name, a contact name, a project description and telephone number

E. Specialized Experience Preferred: The proposed should have strong experience with multi-use government facilities as well as elevator construction, controls and maintenance in that environment. Firms with experience in third party non-proprietary controls/electronics and other equipment are preferred. Licensed professional architects and/or engineers and/or certified elevator inspectors. Independence from elevator manufacturers and Contractors. Knowledge of current elevator codes and ADA requirements.

Proposals are to be typed on the firm's letterhead, specifically referring to the project and the scope of services, containing all

required information. That information is to be submitted electronically. Please visit <http://bit.ly/3TYAyKa> and follow given instructions.

RP-27 EVALUATION METHOD AND CRITERIA:

A. General - The County shall be the sole judge as to the merits of the proposal, and the resulting agreement. The County's decision will be final. **Please note that proposals will be evaluated on content, not bulk.**

The County's evaluation criteria will include, but shall not be limited to, considerations listed on **Proposal Requirements, pages 12 and 13**. As mentioned in PROPOSAL FORMAT, the proposals should be prepared using the format outlined in the Consultant Evaluation Form on pages 14 and 15.

B. Selection - The Professional Services Committee shall evaluate the proposals submitted. Telephone discussions will be held with all firms submitting and a short list of firms from proposals will be ranked in order. Final approval will be by the Board of County Commissioners who may request public presentation.

RP-28 ANTICIPATED SCHEDULE: The projected schedule of events for this proposal is as follows:

April 24, 2026	County advertises for proposals
May 12, 2026	Pre-Submittal meeting
May 20, 2026	Proposal due date
May 28, 2026	Professional Services Committee short lists firms

EVALUATION FORM

**CONSULTANT EVALUATION FORM
CHARLOTTE COUNTY, FLORIDA**

RFP# 20260397, COUNTYWIDE ELEVATOR ASSESSMENT

<i>Evaluation Criteria</i>	<i>Value</i>	<i>Assigned Value</i>	<i>Weight</i>	<i>Score</i>
I. TEAM PROPOSED FOR THIS PROJECT A. Background of the personnel 1. Project Manager 2. Other Key Personnel 3. Consultants	1-5		X 10	
II. PROPOSED MANAGEMENT PLAN A. Team Organization 1. Assessment Design Phase 2. Assessment Data Gathering Phase 3. Assessment Reporting Phase	1-5		X 10	
III. PREVIOUS EXPERIENCE OF TEAM PROPOSED FOR THIS PROJECT A. Describe projects	1-5		X 15	
IV. PROJECT CONTROL A. Schedule 1. What techniques are planned to assure that schedule will be met? 2. Who will be responsible to assure that schedule will be met? B. Cost 1. What control techniques are planned? 2. Demonstrate ability to meet project cost control. 3. Who will be responsible for cost control? C. Recent, current and projected workload	1-5		X 12	
V. PRESENT PROPOSED DESIGN APPROACH FOR THIS PROJECT A. Describe proposed design philosophy. B. What challenges do you anticipate and how do you propose to solve them? C. Describe innovative approaches to this project.	1-5		X 15	
VI. PRESENT EXAMPLES OF RECENTLY ACCOMPLISHED SIMILAR PROJECTS A. Describe the projects to demonstrate. 1. Schedule control. 2. Cost control. 3. Successful value engineering solutions	1-5		X 15	
VII. DESCRIBE YOUR EXPERIENCE AND CAPABILITIES IN THE FOLLOWING AREAS. A. Multiple government facilities with elevator and lift systems. B. Life cycle cost analysis including value engineering	1-5		X 20	

**PART IV - 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
	Monica Medrane	16	Tarpon Springs	Tarpon Springs	Tarpon Springs
	Mike DeGonia	19	Tarpon Springs	Tarpon Springs	Tarpon Springs
	Andy Kohl	36	Tarpon Springs	Tarpon Springs	Tarpon Springs
2.	Magnitude of Company Operations				
	A) Total professional services fees received within last 24 months:			\$ 5,200,000.00	
	B) Number of similar projects started within last 24 months:			185	
	C) Largest single project to date:			\$ 490,000	
3.	Magnitude of Charlotte County Projects				
	A) Number of current or scheduled County Projects			0	
	B) Payments received from the County over the past 24 months (based upon executed contracts with the County).			\$ 0	
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 Axium Elevator Consultants LLC
(This form must be completed and returned)

6. Minority Business:	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
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. _____ Dated _____ Addendum No. _____ Dated _____ Addendum No. _____ Dated _____
 Addendum No. _____ Dated _____ Addendum No. _____ Dated _____ Addendum No. _____ Dated _____

Type of Organization (please check one): INDIVIDUAL CORPORATION PARTNERSHIP JOINT VENTURE

Axium Elevator Consultants LLC 727-940-2012
 Firm Name Telephone

110 Athens Street Suite A 26-1218365
 Fictitious or d/b/a Name Federal Employer Identification Number (FEIN)


Tarpon Springs, FL 34689 19
 Home Office Address Number of Years in Business

City, State, Zip Number of Years in Business

Address: Office Servicing Charlotte County, other than above

 Name/Title of your Charlotte County Rep. Telephone

Laurie Axium
 Name/Title of Individual Binding Firm (Please Print)

 May 20, 2026
 Signature of Individual Binding Firm Date

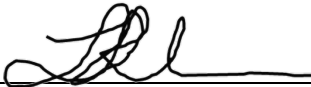
laurie@tecv.com
 Email Address

DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that Axium Elevator Consultants LLC 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

5/20/2026

Date

NAME OF FIRM Axium Elevator Consultants LLC
(This form must be completed and returned)

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

Charlotte County Contract #20260397

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

Laurie Axium

Printed Name

Principal

Title

Nongovernmental Entity

May 20, 2026

Date

END OF PART IV

NAME OF FIRM Axium Elevator Consultants LLC

(This form must be completed and returned)

Certificate Number

FL354011



Advancing Economic
Impact Together

This certificate attests that the below mentioned company is an NMSDC-Certified
Minority Business Enterprise(MBE)

Axium, LLC

Doing Business As

DBA The Elevator Consultants

11-01-2025

Issuance Date

10-31-2026

Expiration Date

A handwritten signature in black ink, reading "Donald R. Cravins, Jr.", is written over a horizontal line. The signature is fluid and cursive.

Donald R. Cravins, Jr.
President and CEO
NMSDC

541330,541350,541519,541618,
541990,561210

NAICS Codes

72000000,80000000

UNSPSC Codes

Regional Affiliate: Florida State MSDC



Elevator Consulting Proposal

Prepared by:

TEC

The Elevator Consultants

312.519.9949

www.theelevatorconsultants.com

May 20, 2026

Kim Chamberlain
Senior Contract Specialist
Purchasing Division
Charlotte County
18500 Murdock Circle, Suite 344
Port Charlotte, FL 33948-1094

Project: RFP No. 20260397, Countywide Elevator Assessment
Located at Charlotte County Facilities

Dear Kim,

We are pleased to present our proposal for elevator assessments at eleven (11) Charlotte County Facilities. This includes up to twenty-three (23) vertical transportation units. The Elevator Consultants will perform a comprehensive assessment. Below is an outline of our scope of services and pricing:

SCOPE OF SERVICES:

A. Inventory and Documentation: Identify all elevators within the specified buildings. Record:

1. Manufacturer
2. Model/type (hydraulic, traction, MRL)
3. Year installed and modernization history
4. Capacity, speed, number of stops
5. Control systems and drive equipment
6. Cross reference the above information with the Florida state records
7. Any other information the firm considers relevant

B. Physical Condition Assessment: Inspect major components including, but not limited to:

1. Hoistway and pit
2. Machine room or control space
3. Cab, doors, and entrances
4. Controllers, drives, motors, pumps
5. Safety devices and emergency systems
6. Evaluate wear, obsolescence, and availability of replacement parts
7. Service records and breakdown history
8. Frequency of outages
9. Ride quality and leveling accuracy
10. Assess remaining useful life of major components
11. Any other component the firm considers relevant

C. Code and compliance review: Assess compliance with:

1. Current state elevator codes
2. ASME A17.1 / CS 844 (or other applicable standards)
3. ADA accessibility requirements
4. Fire service and emergency operation requirements
5. Any other relevant requirement

D. Maintenance Evaluation: Review and Evaluate:

1. Existing maintenance contracts
2. Adequacy of preventive maintenance program
3. Risks related to deferred maintenance
4. Other aspects of maintenance deemed relevant by the firm

E. Recommendations and Cost Analysis: Include:

1. A description of work required including physical building alterations if required
2. Estimate capital costs (order-of-magnitude)
3. Anticipated service life
4. Impact on operations and downtime
5. Energy efficiency and sustainability considerations
6. Any other projections based on the firm's experience

F. Deliverables: The firm shall provide:

1. A written report for each building and elevator
2. Executive summary with prioritized recommendations
3. Cost estimates and phasing options
4. Photographic documentation (where appropriate)
5. A matrix ranking elevators by urgency and risk
6. Electronic and hard-copy versions of all reports

G. Locations of equipment to be evaluated (In order of priority) – below.

Fee:

The Elevator Consultants will perform the Countywide Elevator Assessment for a fixed, not-to-exceed fee of \$49,800, inclusive of all site visits to the 11 locations, individual reports for all 23 units, the prioritized risk matrix, capital cost and phasing recommendations, and review meetings with County stakeholders. Standard travel and document reproduction are included. Any additional buildings or units, or work beyond the scope described herein, will be authorized in writing in advance.

Additionally, Charlotte County Facilities, FL, will have free access to the ElevatorApp™ for three (3) months upon contract execution. This real-time software-as-a-service (SaaS) platform automates the monitoring and tracking of maintenance service contracts, changes, and charges associated with your equipment. ElevatorApp™ also collects Maintenance Control Program (MCP) data for code compliance, providing transparency into your service provider contract and delivering essential data for inspections. The app's reporting, alerts, and aggregated data allow access from any electronic device, keeping you informed about your building's equipment.

We appreciate the opportunity to provide this proposal for an elevator assessment. If you have any questions regarding the proposal or the project, please feel free to contact me at 727.940.2012. We look forward to working with you.

Sincerely,

Monica Medrane
The Elevator Consultants

Priority	Location	No. of Elevators	No. of Wheelchair Lifts
1	Charlotte County Administration Complex-Bldg. A 18500 Murdock Circle, Port Charlotte Serial Numbers: 42078, 42079, 42080 Year Built: 1989	3	None
2	Public Safety Building Emergency Operations Center 25671 Airport Road, Punta Gorda Serial Number: 93330 Year Built: 2007	1	None
3	Charlotte County Justice Center 350 East Marion Avenue, Punta Gorda Serial Numbers: 54626, 54627, 54628, 54629, 54630, 54631, 54632 WCL: 56682, 56683 Year Built: 1999	7	2
4	Fire Station 10 71 Gasparilla Way, Englewood (Gasparilla Island) Schindler Serial #GRN6262 Year Built: 2022	1	None
5	Charlotte County Administration Complex-Building B 18500 Murdock Circle, Port Charlotte Serial Number: 31753 Year Built: 1981	1	None
6	Sports Park 2300 El Jobean Road, Port Charlotte Serial Numbers: 96407, 96408 Year Built: 1987	2	None
7	Charlotte County Health Department 1100 Loveland Boulevard, Port Charlotte Serial Number: 95721 Year Built: 2010	1	None
8	Charlotte County Jail – Infirmary 26601 Airport Road, Punta Gorda Serial Number: 105746 Year Built: 2000	1	None
9	Historical Court House 226 Taylor Street, Punta Gorda Serial Number: 94042 WCL: 94767 Year Built: 1928	1	1
10	Port Charlotte Library 2280 Aaron Street, Port Charlotte Serial Number: 62221 Year Built: 1968	1	None
11	Tringali Community Center – Wheelchair Lift 3460 South McCall Road, Englewood WCL: 108983 Year Built: 1983	None	1