



*Building Since 1891*

Request for Qualifications No. 2024000098

CONSTRUCTION MANAGEMENT AT RISK SERVICES FOR

# **WILLIAM R. GAINES, JR. VETERANS MEMORIAL PARK AND G.C. HERRING PARK**

## **PROPOSAL**

30 January 2024

**PREPARED FOR:**

Senior Division Manager - Purchasing  
Charlotte County Administration Complex  
18500 Murdock Circle, Suite 344  
Port Charlotte, Florida 33948-1094



**A PARTNER YOU CAN TRUST.**

**PREPARED BY: Owen-Ames-Kimball Company**

📍 11941 Fairway Lakes Drive, Fort Myers, FL 33913 📞 (239) 561-4141 📠 (239) 561-1996



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30 January 2024

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

Re: Letter of Interest | RFP 2024000098 | CMAR William R. Gaines Jr. Veterans Memorial Park and G.C. Herring Park

Dear Members of the Selection Committee:

First and foremost, **Thank you so much for allowing us to be of service to Charlotte County.** Charlotte County is a valuable client to O-A-K/Florida, Inc. dba Owen-Ames-Kimball Company (O-A-K) as we have worked together on projects for the past 22 years. We are delighted to be considered for the Construction Manager At Risk (CMAR) for the second phase of William R. Gaines Jr. Veterans Memorial Park in conjunction with the first phase of G.C. Herring Park. The potential for these properties are unlimited, and by engaging the selected design team, they will, without a doubt, design a facility that will meet and most likely exceed your expectations. When completed, the project will fulfill Charlotte Counties' mission of having new park amenities that enhance the quality of life for its residents and visitors.

O-A-K is a partner that you can trust in helping you fulfill this mission. O-A-K/Florida, Inc. was founded in Southwest Florida more than 40 years ago. A lot has changed here in Charlotte County in nearly four (4) decades, but O-A-K remains a constant partner in delivering high quality, well-built facilities that have stood the test of time for government agencies, municipalities and private enterprise.



#### **Experience in the Construction of Parks, Facilities and Government Structures**

O-A-K brings an unparalleled wealth of experience to the construction of parks, park facilities, and various government facilities. With a dedicated focus on client needs, O-A-K excels in crafting specialized, multi-building, and multi-phased campus facilities for government agencies. Our extensive track record includes the successful completion of projects such as Amanecer Elementary and the expansion of Lehigh Acres Middle School, showcasing their proficiency in adhering to county standards and property evaluation. Operating in Charlotte County and the surrounding areas, O-A-K is well-versed in local conditions and utilities. O-A-K's commitment to teamwork, open communication, and expertise in barrier-free design, LEED principles, and advanced construction technologies positions our team as the ideal partner for this exciting parks project. O-A-K's comprehensive approach, from pre-construction to construction management, guarantees user-ready facilities that align with the cities' priorities and deliver optimal solutions at every crucial decision point.

Our team is excited, available and humbled to have the opportunity to be considered for the CMAR on the second phase

Owen-Ames-Kimball Company | 11941 Fairway Lakes Drive; Fort Myers, FL 33913 | O: (239) 561-4141 | F: (239) 561-1996



of William R. Gaines Jr. Veterans Memorial Park in conjunction with the first phase of G.C. Herring Park.. We bring to you and this important project 54 highly qualified team members, nine of which will be committed to this project. These individuals have, on average, 29 years of construction industry experience and have worked at O-A-K 13 years. They each have recent, relevant experience working together and independently on high-profile and multi-phased projects.

Consistency is important when building two parks throughout Charlotte County on active and busy sites. It is our intention that the team members we are proposing to you will be involved in both the pre-construction and construction phases. **Our team members will not be substituted without the express permission of the County.** Kevin James is our Project Manager and he will be our senior team leader for this project.

With a legacy spanning four decades in government construction in Charlotte and Lee Counties, O-A-K brings the right expertise to this project. Our understanding of the project's scope reflects a commitment to professionalism and efficiency. Our commitment to client needs, teamwork, and expertise positions us as the ideal partner for these ambitious projects.

The scope of work includes the construction of various elements in both parks, adhering to Community Services design standards, Crime Prevention Through Environmental Design principles, and meeting grant requirements. William R. Gaines Jr. Veterans Memorial Park Phase 2 involves the construction of a large pavilion, Bocce Ball Courts, Pickleball Courts, a Tennis Court, and sanitary utility connections. G.C. Herring Park Phase 1 includes playgrounds, a basketball court, a multi-purpose field area, Pickleball and Tennis courts, Sand Volleyball courts, a large pavilion, additional parking, and lighting.

O-A-K's comprehensive approach encompasses pre-construction services, including design review and recommendations, budgetary reviews, and collaboration with design consultants. During the construction phase, we assume the role of an independent general contractor, handling bid packages, project scheduling, quality control, and all construction activities. Our team is dedicated to guaranteeing construction costs, coordinating with on-site County work, and ensuring the successful completion of each park.

The proposed project budget for William R. Gaines Jr. Veterans Memorial Park Phase 2 is \$1,750,000, while G.C. Herring Park Phase 1 is \$2,791,000, including \$200,000 in grant funding. O-A-K is committed to completing the design and construction within 365 calendar days for each park, with significant overlap in the construction periods. Our Critical Path Method-based design schedule ensures transparent progress reporting throughout the project.

Our approach to the proposed project budget and schedule is grounded in precision and accountability, embracing qualifications-based selection and collaboration with design consultants and County staff. O-A-K stands ready to meet the challenge, leveraging Building Information Modeling (BIM), COBie protocols, and integrating LEED principles to construct cutting-edge parks that enhance public safety infrastructure in Charlotte County.

O-A-K is excited, available, and honored to be considered for the Construction Manager at Risk role for the second phase of William R. Gaines Jr. Veterans Memorial Park and the first phase of G.C. Herring Park. Our commitment to professionalism, efficiency, and excellence aligns with the cities' priorities, delivering optimal solutions at every crucial decision point. We look forward to the opportunity to contribute to the success of these vital community projects.

Whether it is a remodeling project of a few hundred dollars or two multi-million dollar parks, O-A-K approaches each project given to us with the same care and deliberate processes that continue to make us successful in bringing our projects in on time and on budget. From the first client meeting through close-out and warranty period, we put our client's needs and wants first. We guide our clients smoothly through the myriad of construction phases with an



eye to value engineering, always striving to bring a project in under budget and ahead of schedule. The inability for a client to use a facility means a loss of time devoted to their field and inconvenience to the residents, visitors and staff members. We work quickly and efficiently to provide you, our client, with a well-built, well-timed project.

We provide a system that is very accommodating to our client's unique needs and requirements and provide a professional approach to our projects to align the goals and expectations of the project with the correct group of subcontractors that can deliver the correct end product in the required time frames.

Our **financial strength** coupled with our **reputation in the industry** for fair and equitable practice, i.e. always paying our subcontractors on the 15th of every month for work performed even if we haven't been funded by the owner, insures **local high quality small and large subcontracting firm participation at very competitive pricing**. As your CM, O-A-K will make sure all subcontractor insurance certificates are present and current for each bid package; assure bonding requirements are met; prepare and administer all contracts during construction.

### Expedited Service

We understand that some jobs need immediate attention and a quick turn around. Our team is willing and able to provide this type of service for any size job. Each of us are available to Charlotte County 24/7.

### Direct Material Purchase (DMP)

Charlotte County Government qualifies as a sales tax exempt entity and may buy material directly and not pay Florida State sales tax (7%) on that purchase. **This is a savings to you.** This applies only to material that can be directly delivered to the project and not to any labor portion of fabrication or installation. The material purchased must be used 100% on the project that qualifies for the tax exemption. We have extensive experience managing this program and will do so for you on these projects.

### Exceptional Pre-Construction Services

Our in-house estimators know the local market and prices. As such, we will provide you with **exceptionally accurate** 30%, 60%, 90% and 100% estimates. Our team members have the ability to utilize **BIM technology** to ensure building conflicts are identified early in the design phase which in turn eliminates costly changes during construction. Additionally, a **life-cycle cost analysis** is performed when **evaluating value engineering options**. Saving a dollar upfront could sometimes cost more in the long-term. We are very transparent and open-book and will share with you all the options. Our team tracks lead times on a daily basis to ensure timely order of materials to maintain the projects schedule.

### Full-Time Supervision

Our proposed on-site Project Superintendents will manage and supervise the subcontractors (including adhering to legal documentation of work status, proper attire and language protocols), develop and implement the site safety plan and manage the project schedules. Throughout construction the **superintendents will be on-site 100% of the time**.

### Web-based project documentation



O-A-K utilizes a secure web-based project management system, **PROCORE**, that hosts all project documents, photos, contact information, schedule information, etc. This service is offered at no additional charge. Whether you choose to utilize our web-based project management system to access cost information or prefer to place a phone call to one of our team members, we guarantee you'll get your questions and/or concerns answered immediately.

We recommend regularly scheduled team meetings with you (owner), the design team, and our team at which time the components of the project are presented, discussed, and decisions reached. Safety, quality, and schedule are the main topics of discussion.

## Schedule and Cost Control

We are responsible for tracking and maintaining the project schedule throughout construction. We will establish and issue budgets, document all meetings and establish **clear lines of communication** between the team members and trade contractors. Our role in maintaining the budget is to candidly report what your project costs are at any given time. We will provide you with extensive budget detail in flexible formats so that costs are tracked, monitored and controlled. Our Project Manager and Job Site Superintendent prepare two-week look-ahead schedules and keep a running list of long lead items to ensure on-time delivery.

## Lean Construction

Our company structure was developed and is managed in such a way that **guarantees the most efficient, cost effective and timely construction process**. Our project managers and project superintendents have the authority to make decisions out in the field that are in the best interest of the owner. We keep our project construction schedules as tight as possible without sacrificing quality as we understand and appreciate that time is money. O-A-K has always followed the lean construction method for all of its projects. By engaging and working alongside the end users, the design team and our team are able to work together to create a project that is not only efficient but is also cost effective and the construction materials used meets the needs of the client.

## Potential Challenges & Risks

Owen-Ames-Kimball Company always uses a **forward thinking approach** to help eliminate unnecessary surprises and problems which equals a cost savings for the Owner, by way of positive problem solving ahead, not unnecessary and costly change orders and construction interruptions during the project. In today's environment with long-lead times on materials, we are taking additional measures to ensure our projects stay within budget and schedule. Working in close collaboration with the local subcontractors we engage them early and continuously throughout the buyout period to stay ahead of potential material delivery delays and cost escalations. In some instances we will order material in phases to help mitigate these cost escalations.

## Safety

Owen-Ames-Kimball Company has an **excellent safety record**. Our safety program was recently recognized by the Associated Builders and Contractors (ABC) Association with the Safety Star Award, the highest safety award a contractor can receive. We have had ZERO OSHA Safety Violations and no lost work day accidents in the last five years. We will develop a safety and security plan, with input from you, our owner, that meets our stringent safety requirements. **Our most important job is to ensure that we have zero accidents or injuries.**

## Warranty

**We are well known for supporting our projects long after warranty periods have lapsed;** we want to be your primary source for projects past, present and future. We commit to you that we will bring and all resources to ensure the successful outcome of this project should we be given the chance to do so.

On behalf of the entire O-A-K team, I want to thank you for your consideration and time.



Matthew J. Zwack  
President, LEED® AP  
Owen-Ames-Kimball Company

## I. TEAM PROPOSED FOR THIS PROJECT

### A. BACKGROUND OF PERSONNEL

**Owen-Ames-Kimball Company (O-A-K)** has chosen some of our most experienced and capable personnel to provide construction management services for the William R. Gaines Jr. Veterans Memorial Park and G.C. Herring Park project. Our team members each have recent, **relevant experience working together and independently** on projects with similar scope and challenges. Experience examples include **parks, multi-use government facilities and public safety facilities.**

#### A1. PROJECT MANAGER



##### **Kevin James**

Kevin is the proposed **Project Manager** for the William R. Gaines Jr. Veterans Memorial Park and G.C. Herring Park. He will provide overall team leadership and oversight through the entirety of the project. He will be our team's main point of contact and will lead the weekly owner-architect-contractor (OAC) meetings.

Kevin is a collaborative team player who brings creative ideas and solutions to projects. He is budget focused and brings forward budget saving alternatives when appropriate. Kevin brings 36 years of construction industry experience and is a proud father and grandfather who enjoys spending time with his wife and family exploring SW Florida.

#### A2. OTHER KEY PERSONNEL



##### **Abel Natali, LEED® AP BD+C, CSI, CDT, CCM**

Abel is the proposed **Preconstruction Manager** for the William R. Gaines Jr. Veterans Memorial Park and G.C. Herring Park. He will work with our Estimating and BIM Coordination to provide accurate and detailed budget estimates at the initial, 30%, 60%, 90% & 100% design drawings. Abel started his career with Owen-Ames-Kimball Co. in 2006 working on three hurricane recovery replacement schools (Neil, East & Meadow Elementary Schools) for Charlotte County Public Schools and he was a part of the team that LEED® certified the first elementary school in Florida, Neil Armstrong Elementary School. Together with SSAI, Abel worked on the Englewood Charlotte Library Addition and Renovation and most recently on the Lovers Key State Park Welcome and Discovery Center. **To get to know Abel a little better, take your phone camera and place it over the QR Code on the left. This will provide you with a brief overview of Abel at both work and home.**



##### **Ryan Propp**

Ryan is the proposed **General Superintendent and Chief Safety Officer** for this project. Ryan will work hand-in-hand with Kevin and Abel throughout the Preconstruction phase to coordinate site logistics, site safety, identify and track long-lead items, etc. During construction Ryan will be on-site weekly assisting our proposed Job Site Superintendents and will attend most, if not all, of the OAC meetings.

Ryan is highly respected by our owners and subcontracting partners for being fair and straightforward. He is always looking weeks ahead on projects, identifying any potential delays, and reacting well in advance so as not to delay a projects schedule. Ryan is a SW Florida native and an avid boater who enjoys spending time with his wife and family on the water.



## I. TEAM PROPOSED FOR THIS PROJECT

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### A2. OTHER KEY PERSONNEL (CONTINUED)



#### **Brandon Henderson**

Brandon is the proposed **Civil Superintendent** for this Parks project. He brings more than 30 years of construction industry experience and has worked at Owen-Ames-Kimball Co. 3 years. Brandon is a very active and hands-on site/civil superintendent always out within the project site overseeing the workmanship and ensuring the site is safe. The subcontracting partners respect Brandon for his tough yet fair expectations. He demands quality and will make the trade partner start over if it's not to his liking. Brandon comes from the trades and he knows construction. Brandon is a proud Charlotte County resident and loves to spend time with his family outside of work. **Brandon was the Civil Superintendent on the \$96 Million Aubrey Rogers High School.**



#### **Brian Slowinski**

Brian Slowinski is a perfect fit for Superintendent for this Parks project, boasting 30 years of construction expertise, with an impressive 10-plus years at Owen-Ames-Kimball Co. Notably, Brian has successfully delivered various government and school projects, including Amanecer Elementary and the Lehigh Acres Middle School expansion. Brian's hands-on leadership style ensures active oversight, emphasizing impeccable workmanship and site safety. Renowned for setting tough yet fair expectations, subcontractors respect his commitment to quality. Brian's local roots as a long time Charlotte County resident underscores his commitment to these crucial projects.



#### **Gabe Garcia**

Gabe joined Owen-Ames-Kimball (O-A-K) full-time as an Assistant Project Superintendent, after spending two summers as an O-A-K intern. His goal is to become a Project Superintendent, with his training in the field being the first step. He is involved with day-to-day field operations, and performs hands-on work when necessary. Gabe's recent project was the construction of the Amanecer Elementary School in Lehigh Acres, FL.

## I. TEAM PROPOSED FOR THIS PROJECT

### A2. OTHER KEY PERSONNEL (CONTINUED)



#### **Jo Durocher**

Jo is our **Division Controller, in charge of Accounting and Human Resources**. Jo brings invaluable experience in her role with Owen-Ames-Kimball Co., supporting our entire project team with accounts payable and receivable. Jo also leads our Direct Material Purchase (DMP) program for which we would plan on implementing with you on this project. This will save the County 7% on materials purchased through this program.



#### **Taylor Sawatzky**

Taylor is our director of strategic development and in charge of **grants and community engagement**. He has extensive experience with community outreach and keeping the public informed during projects. His main goal is to keep the community affected as up-to-date and informed as possible. Community outreach has ranged from websites and Facebook pages to flyers, handouts and hard hat tours. Ground Breaking and ribbon cutting ceremonies are also a vital part of his role when it comes to projects.

Taylor is a proud Army veteran and very active in the community and serves in a leadership capacity for local non-profits. He is always looking-out for grant opportunities for our clients and will do so on this project should Charlotte County be interested.



#### **Matthew J. Zwack, LEED® AP**

Matthew is our **President and Principal-in-Charge**. He brings extensive and relevant Southwest Florida construction experience to this project. He has been a Port Charlotte resident since 2004 and active in the community serving on a number of local non-profit boards including most recently on the Charlotte Local Education Foundation. Matthew is engaged in every project that we are fortunate to build. You will see him at the Owner-Architect-Contractor (OAC) meetings, walking the site with our job site superintendents, and out in the community.

Matthew is available anytime by phone (cell: 239-462-7978) or by email (mzwack@oakfl.com).



To get to know Matthew a little better, take your phones camera and place it over the QR Code on the left. This will provide you with a brief overview of Matthew at both work and home. \* When this video was produced Matthew was our Director of Operations. On January 1, 2021 Matthew succeeded Dave Dale to become the 3rd President in O-A-K/Florida, Inc. 41-year history.

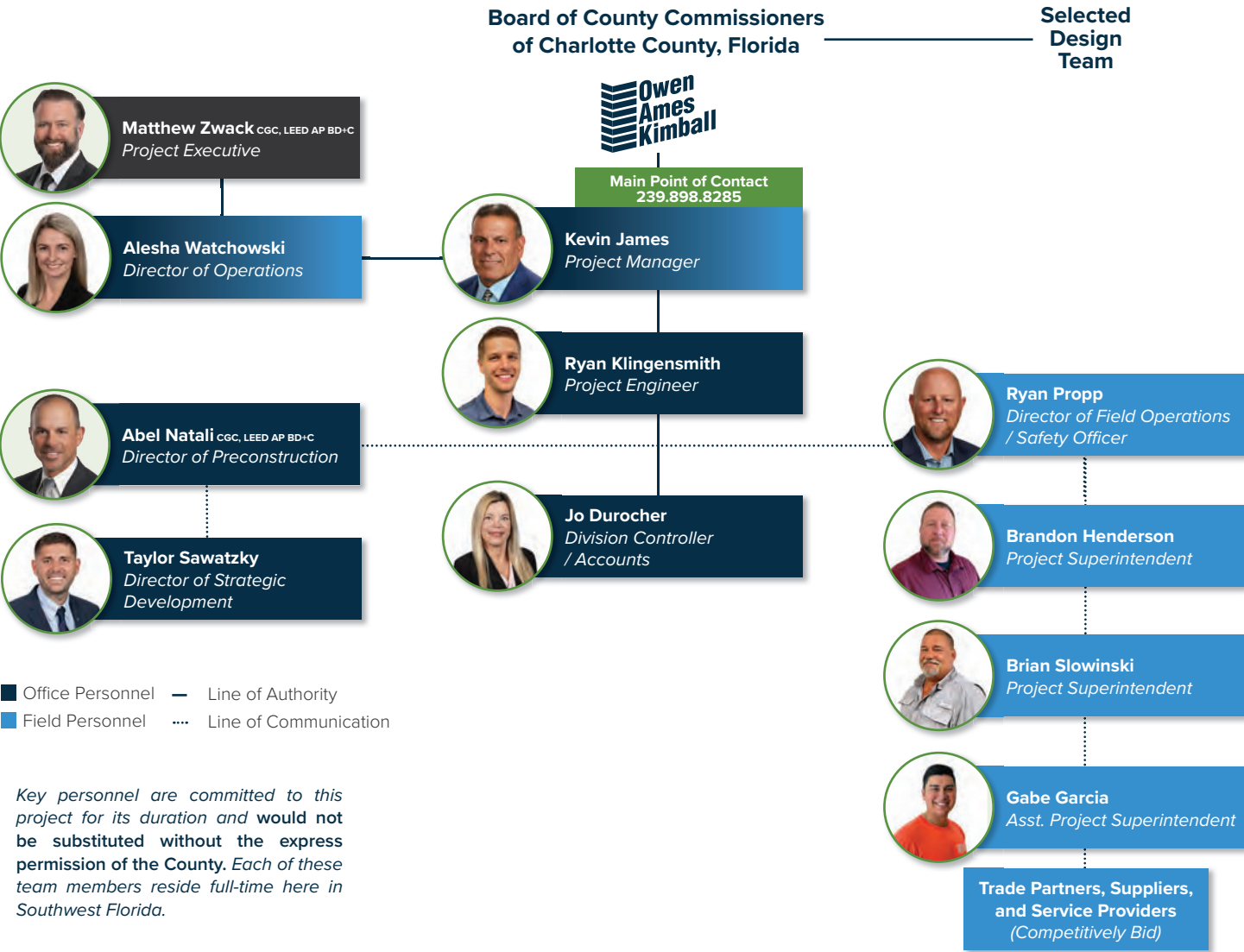
### A3. CONSULTANTS

There are many great firms in our area that we consult with on a regular basis. We haven't contracted with anyone and wouldn't do so without first consulting with you, our client.

I. TEAM PROPOSED FOR THIS PROJECT

A4. STAFFING LEVELS AND POSITIONS PROPOSED

O-A-K’s team features a depth of resources to supervise this important project. Key personnel shown are committed to this project for its duration and would not be substituted without the express permission of the Owner. Each of these team members reside full-time here in Southwest Florida.



Ownership Structure

O-A-K is 100% employee-owned. We all have a vested interest in the successful outcome of the important project.

Employee Tenure

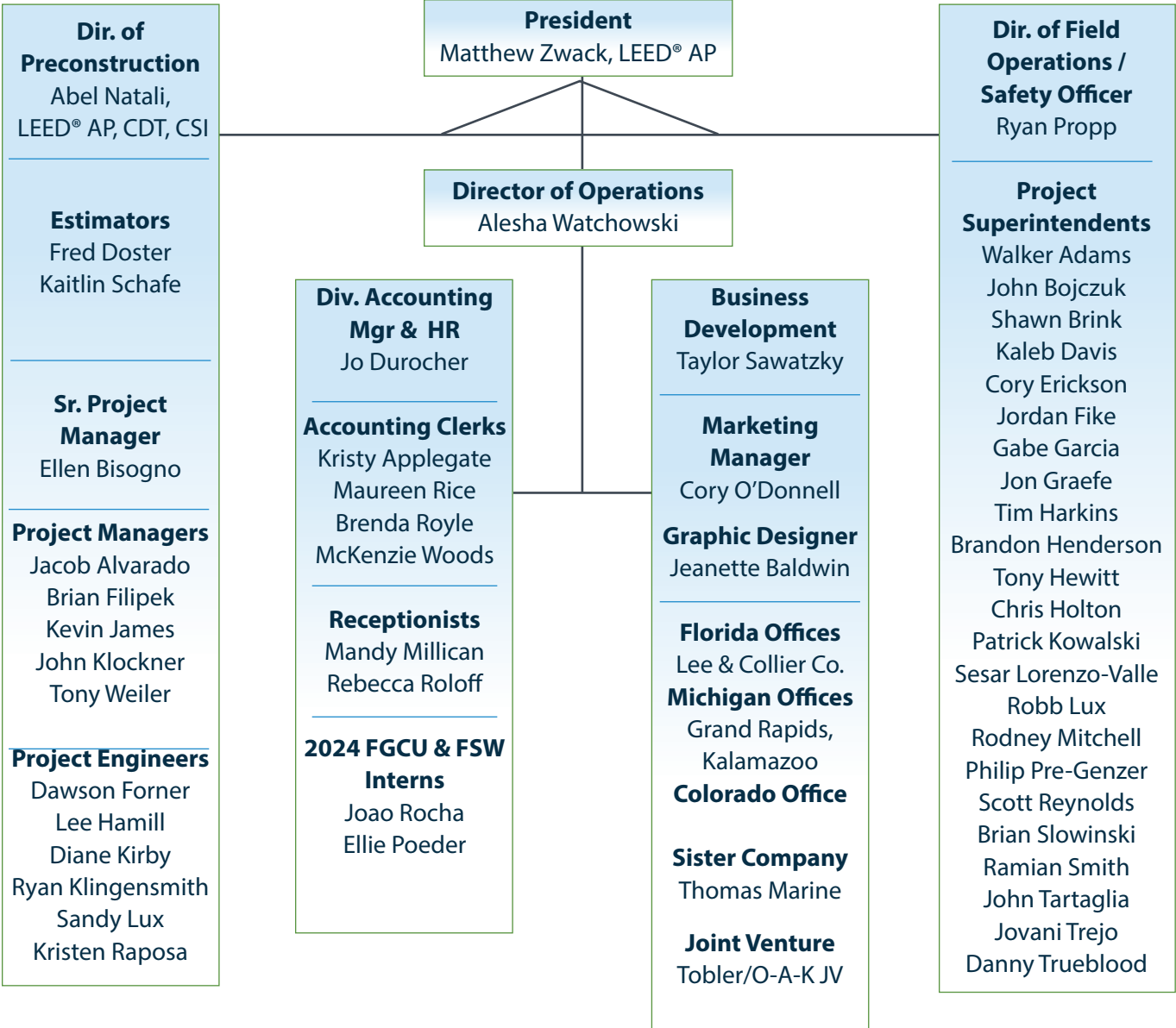
O-A-K is known for providing consistency on projects. The average employee has worked for O-A-K for more than 10 years.

TITLE / ROLE	# OF PERSONNEL
Senior Project Managers	1
Project Managers	6
Assistant Project Managers	3
General Superintendents	1
Project Superintendents	21
Assistant Superintendents / Foremen	6
Estimators	4
Administrative Support	7
Human Resources Manager	1
Business Development / Special Projects	1
President	1
TOTAL PERSONNEL (SW FL)	54



I. TEAM PROPOSED FOR THIS PROJECT

Owen-Ames-Kimball Company Southwest Florida Operations Organizational Chart



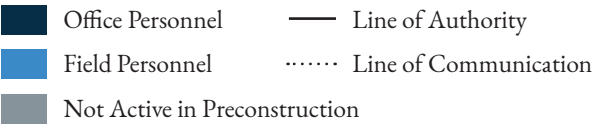
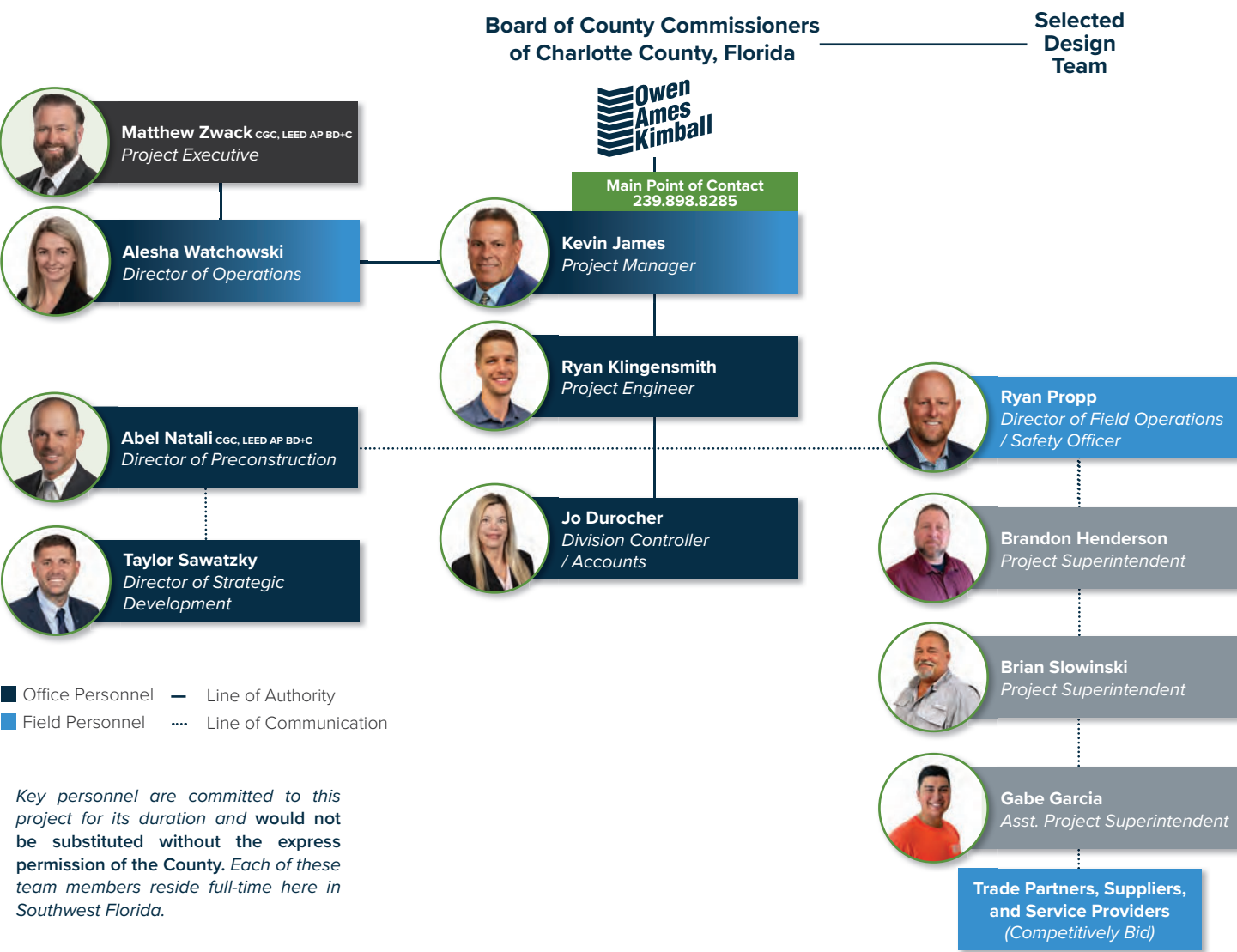
**Employee Tenure**  
Owen-Ames-Kimball Company is known for providing consistency on projects. The average employee has worked for O-A-K for more than **12 years**.

Senior Project Manager	1
Estimators	4
Project Managers	5
Department Directors	4
Project Superintendents	21
Assistant Superintendents, Foremen	4
Project Engineers	5
Administrative Support	7
Human Resources Manager	1
Business Dev./Special Projects	1
President	1
Total Personnel - Southwest Florida	54

**Ownership Structure**  
Owen-Ames-Kimball Company is **100% employee-owned**. We all have a vested interest in the successful outcome of these important project on a continuing basis.

II. PROPOSED MANAGEMENT PLAN

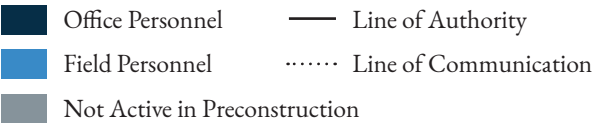
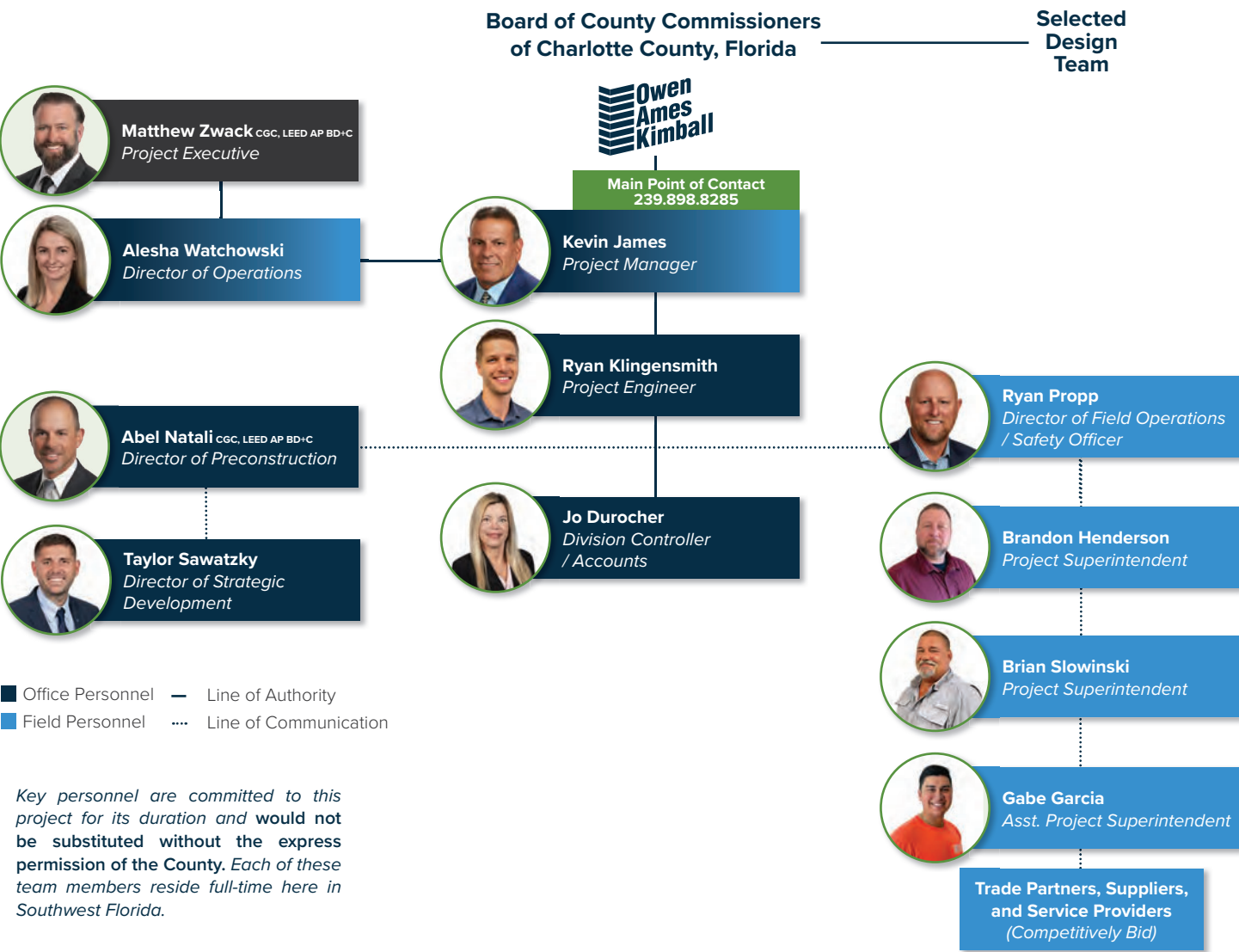
A1. TEAM ORGANIZATION | PRECONSTRUCTION PHASE



Above: Abel Natali leading a Preconstruction Meeting on a recently completed government facility.

II. PROPOSED MANAGEMENT PLAN

A2. TEAM ORGANIZATION | CONSTRUCTION PHASE



Above: Ground Breaking Ceremony for the Lovers Key State Park Welcome and Discovery Center





# KEVIN JAMES

PROJECT MANAGER

36 years construction experience



Cape Coral High  
Florida Southwestern College



MOT Advanced Certification



## KEVIN'S ROLE

Kevin began his construction career in 1986 working in the skilled trades, excelling at aluminum, masonry and concrete work. As construction coordinator in the custom homes field, he drafted proposals, performed takeoffs, tracked job cost and production as well as worked directly with the clients of \$250,000 - \$1.4 million homes. Kevin is well versed in many office softwares such as Excel and ProCore, which makes him capable of any task required from start to finish of construction.

## FEATURED PROJECTS

### *Family Health Centers - Summer Ridge Lane*

35,968 sq.ft. | \$8,648,587 (Fort Myers, FL)

### *Family Health Centers - Lehigh Acres*

62,000 sq. ft. | \$16,103,771 (Fort Myers, FL)

### *Hendry County General Services Agreement*

Courthouse Restroom Renovation - 2019 | \$80,000

### *Hendry County Courthouse/Administration Bldg. Facade Repairs*

\$1,200,000 (LaBelle, FL)

### *Hendry County Phase 1 Historic Courthouse Repairs*

\$256,000 (LaBelle, FL)

### *Estimator, Phase II Historic Courthouse Repairs - 2019*

\$1,800,000 (LaBelle, FL)

### *Collier Co. separate renovation, repair and replacement projects in multiple locations.*

Work included HVAC, Roofing, Interior Build-Outs,

Parking Garage Rehab and Demolition

Multiple Projects | \$8,700 - \$200,000 (Collier County, FL)

### *Florida SouthWestern State College General Services Agreement*

*Building S Renovations*

\$1,700,0000 (Fort Myers, FL)



## INTERESTS + ACTIVITIES

30 Hour OSHA Trained & First Aid Certified

Traffic Signal Specialist

- Technician Level 1

- Electrician Level 2

## II. PROPOSED MANAGEMENT PLAN

### PROJECT MANAGER REFERENCE LIST

**Ms. Teri Buchanan**

Family Health Centers of SW Florida  
P.O. Box 1357  
Fort Myers, FL 33902  
(239) 931-3867  
TBuchanan@fhcswf.org



FAMILY HEALTH CENTERS - SUMMER RIDGE

**Mr. David Morris P.E.**

Lee County Port Authority  
1000 Terminal Access Road  
Fort Myers, FL 33913  
(239) 590-4608  
drmorris@flylcpa.com



RSW AIRFIELD LIGHTING VAULT

**Mr. Eric Anderson**

Lee Health  
4211 Metro Parkway Suite 200  
Fort Myers, FL 33916  
(239) 343-4814  
eric.anderson@leememorial.org



COLLIER COUNTY MOSQUITO CONTROL HANGAR



# MATTHEW J. ZWACK

PRESIDENT  
O-A-K FLORIDA

26 years construction experience



Brookings H.S.  
Building Trades Program



LEED AP, BD + C



## MATTHEW'S ROLE

Matthew joined Owen-Ames-Kimball (O-A-K) in 2005 as an assistant superintendent, working on the new 310,000 sf South Fort Myers High School. His leadership skills and quality expectations didn't go unnoticed, and Matthew was quickly promoted to Job Site Superintendent. In 2021, he assumed the role of President. Matthew is a LEED Accredited Professional Certified for Building Design and Construction and is a Florida Licensed General Contractor.

## FEATURED PROJECTS

### Aubrey Rogers High School

297,124 sq. ft. | \$97,996,018 (North Naples, FL)

### Amanecer Elementary School

127,745 sq. ft. | \$46,622,392 (Lehigh Acres, FL)

### FGCU Daveler & Kauanui School of Entrepreneurship

27,000 sf | \$6,382,614 (Fort Myers, FL)

### New Lehigh Acres Middle School

167,103 sf | \$34,494,233 (Lehigh Acres, FL)

### Family Health Centers - Summer Ridge Lane

35,968 sq.ft. | \$8,648,587 (Fort Myers, FL)

### Family Health Centers - Lehigh Acres

62,000 sq. ft. | \$16,103,771 (Fort Myers, FL)

### Southwest Florida International Airport CCTV

#### Security System Upgrades

220 new cameras | \$8,210,118 (Fort Myers, FL)

### St. John XXIII Parish Life Center & Adoration Chapel

21,954 sq. ft. | \$5,517,311 (Fort Myers, FL)

### Southwest Florida Community Foundation Collaboratory

22,500 sq. ft. | \$5,297,702 (Fort Myers, FL)



## INTERESTS + ACTIVITIES

At-Large Member, Horizon Council in Lee County

Board Member, The Foundation for Lee County Public Schools and The United Way of Lee, Hendry Glades, and Okeechobee.

O-A-K Shareholder & Director  
Licensed FL General Contractor





# ABEL NATALI

PROJECT MANAGER /  
DIR. OF PRECONSTRUCTION

16 years construction experience



B.S. Finance | Business Admin,  
University of Florida



Budgeting Expert | LEED AP



## ABEL'S ROLE

Abel joined Owen-Ames-Kimball (O-A-K) in 2006 as an assistant superintendent for the Marco Marriott Resort and Spa \$52 million renovation. Examples of Abel's projects include the three hurricane recovery replacement schools for Charlotte County Public Schools - Neil Armstrong, Peace River and East elementary schools. Abel is bilingual and a licensed Florida Realtor and General Contractor. He is also a LEED Accredited individual and is working towards his pilot's license.

## FEATURED PROJECTS

### Aubrey Rogers High School

297,124 sq. ft. | \$97,996,018 (North Naples, FL)

### Amanecer Elementary School

127,745 sq. ft. | \$46,622,392 (Lehigh Acres, FL)

### FGCU Daveler & Kauanui School of Entrepreneurship

27,000 sf | \$6,382,614 (Fort Myers, FL)

### New Lehigh Acres Middle School

167,103 sf | \$34,494,233 (Lehigh Acres, FL)

### Lovers Key Welcome & Discovery Center

6,250 sq. ft. | \$5,535,336 (Bonita Springs, FL)

### Southwest Florida Community Foundation Collaboratory

22,500 sq. ft. | \$5,297,702 (Fort Myers, FL)

### Heights Early Learning & Education Center

36,000 sq. ft. | \$10,127,639 (Fort Myers, FL)

### Family Health Centers - Lehigh Acres

62,000 sq. ft. | \$16,103,771 (Fort Myers, FL)

### Family Health Centers - Summer Ridge Lane

35,968 sq.ft. | \$8,648,587 (Fort Myers, FL)



## INTERESTS + ACTIVITIES

Board member, United Way Allocations Committee, IMAG History & Science Center, FGCU Construction Advisory Board, and the BVHS Facilities Committee

Volunteer, Habitat for Humanity, the University of Florida/ Alachua School District Champs Mentoring Program, and the Harry Chapin Food Bank

O-A-K Shareholder & Director

Father of Three, Little League Coach



# ALESHA WATCHOWSKI

DIRECTOR OF OPERATIONS

11 years construction experience



B.S. Construction Management,  
A.A.S. Civil Engineering



Gulfshore Business 40 Under 40



## ALESHA'S ROLE

*Alesha joined Owen-Ames-Kimball (O-A-K) in 2014 upon her graduation and has worked her way from Project Manager Assistant to Director of Operations. Alesha manages the day-to-day operations of her diverse projects, with a focus on documentation, material management, budgeting, coordination, preconstruction, estimating, and making sure she exceeds our clients' expectations. Alesha also helps coordinate training and procedural processes throughout O-A-K.*

## FEATURED PROJECTS

### *Amanecer Elementary School*

127,745 sq. ft. | \$46,622,392 (Lehigh Acres, FL)

### *Aubrey Rogers High School*

297,124 sq. ft. | \$97,996,018 (North Naples, FL)

### *New Lehigh Acres Middle School*

167,103 sf | \$34,494,233 (Lehigh Acres, FL)

### *Fort Myers High School HVAC Renovations*

\$6,033,482 (Fort Myers, FL)

### *Rasmussen University Interior Renovations*

\$1,365,803 (Fort Myers, FL)

### *Fort Myers Broadcasting Newsroom Remodel*

7,230 Sq. Ft. | \$1,020,108 (Fort Myers, FL)

### *North Fort Myers Academy of the Arts CEP Renovations*

\$2,392,750 (North Fort Myers, FL)

*Alesha and her colleagues at O-A-K always complete their projects on time, within budget and scope, while keeping our quality standards. [O-A-K] understands how to manage various types of projects while keeping students and faculty safety in the forefront.*

— MS. TINA SILCOX

*Asst. Director, Construction Project Management,  
The School District of Lee County*



## INTERESTS + ACTIVITIES

Member, Sigma Lambda Chi International  
Construction Honors Society

O-A-K Shareholder

Dog mom (Keiko)

Graduated Cum Laude B.S. Construction  
Management and A.A.S. Civil Engineering  
Technology from Ferris State University



# RYAN KLINGENSMITH

PROJECT ENGINEER

4 years construction experience



North Fort Myers High School



Microsoft Office Specialist



## RYAN'S ROLE

*Ryan serves as Project Engineer for O-A-K. Aspiring to become a Project Manager with a specialization in government construction, Ryan is deeply involved in day-to-day field operations. Having recently contributed to the rebuild of the Franklin Park Elementary in Florida, Ryan excels in preconstruction, constructability analysis, project scheduling, and subcontractor management. Ryan is a team player who enjoys creative problem solving and multitasking. He has a background as a technology specialist for the School District of Lee County, where he worked with students and staff. He also has hands-on experience as a handyman. He takes ownership of his projects and delivers quality products. In his spare time, he loves hiking, camping, woodworking, and fishing with his family.*

## FEATURED PROJECTS

*Franklin Park Elementary Rebuild, Fort Myers, FL*

*Size: 110,000 SF | Cost: \$66,283,152*

*RSW Chamberlain Pkwy Rehabilitation, Fort Myers, FL*

*\$2,619,587.68*

*Cape Coral Technical College Nursing Lab Renovation Phase 1 & 2,  
Cape Coral, FL*

*Size: 1,200 SF | Cost: \$650,000*

*Butcher Private*

*\$1,760,000.00 (Naples)*

*St Matthew's House Offices*

*\$850,000.00 (Naples)*

*Chandonnet Residence Renovation*

*\$672,000.00 (Naples)*

*St Matthew's House Outlet Bins Thrift Store*

*\$500,000.00 (Fort Myers)*



## INTERESTS + ACTIVITIES

Father and Husband

OSHA 30-Hour Trained

Trained in CPR/AED/First Aid

Procore Certified





# RYAN PROPP

DIRECTOR OF FIELD OPERATIONS

26 years construction experience



Cypress Lake High School  
Fort Myers



EPA Lead-Safe Certified



## RYAN'S ROLE

*Ryan started with Owen-Ames-Kimball in 2005 as a superintendent. Prior employment experience includes project superintendent for a residential builder from 2000 to 2003. Ryan supervised the construction of \$3-10 million custom projects for both companies. Ryan comes from a trades background and has strong carpentry and finish trades supervision skills. Ryan is particularly adept at managing difficult projects, is owner-oriented and is highly regarded by owners with whom he has worked.*

## FEATURED PROJECTS

**Aubrey Rogers High School, North Naples**

297,124 sq. ft. | \$97,996,018 (North Naples, FL)

**Amanecer Elementary School**

127,745 sq. ft. | \$46,622,392 (Lehigh Acres, FL)

**FGCU Daveler & Kauanui School of Entrepreneurship**

27,000 sf | \$6,382,614 (Fort Myers, FL)

**MM Middle School Expansion**

15,389 sq. ft. | \$5,591,459 (Lehigh Acres, FL)

**New Lehigh Acres Middle School**

167,103 sf | \$34,494,233 (Lehigh Acres, FL)

**Family Health Centers - Lehigh Acres**

62,000 sq. ft. | \$16,103,771 (Fort Myers, FL)

**SWFL International Airport Airfield Lighting Vault**

2,250 sq.ft. | \$3,139,007 (Fort Myers, FL)

**SW Fla International Airport (RSW) - Rehab. Of Taxiways A, F and G2**

200,500 sq.yds. pavement, lighting, & signage | \$14,404,291 (Fort Myers, FL)

**SW Fla International Airport (RSW) - RSW - Cargo Ramp and Taxiway A3 & A4 Rehabilitation**

95,000 sq.yd. | \$4,665,038 (Fort Myers, FL)



## INTERESTS + ACCOLADES

Chief Safety Officer / O-A-K Florida

OSHA 30 Hour Trained

First Aid Certified

NPDES Stormwater Management Inspector

O-A-K Shareholder





# BRANDON HENDERSON

PROJECT SUPERINTENDENT  
(SITE/CIVIL)

18 years construction experience



Sandusky High School Graduate  
(Ohio)



Advanced MOT certified (FDOT)



## BRANDON'S ROLE

*Brandon has served as a Project Superintendent for more than 20 years in the site/civil construction industry. He began his career in the Local 324, Operating Engineers of Detroit, MI, where he learned the trade of operating earthwork equipment. After moving to Florida, Brandon operated as earthwork foreman for several key projects of a major civil construction firm and was promoted to Project Superintendent within two years. Most recently, he served as Project/Site Superintendent overseeing multiple site/civil projects with many of them being related to FDOT. His strengths are innovative ideas, thorough planning, aggressive schedule management, and strong personal relations, which are natural qualities for his role as Project Superintendent. Brandon lives in Punta Gorda and is an avid outdoorsman in his spare time.*

## FEATURED PROJECTS

*Aubrey Rogers High School, North Naples, FL*  
Size: 297,124 SF | Cost: \$97,996,018

*Immokalee High School Addition, Immokalee, FL*  
Size: 39,305 SF | Cost: \$13,087,134

*Collier County Continuing Service Work*  
Cost: \$18,439,490 (Naples, FL)

*SR 93A (I-75) at SR 60, Interchange Improvements, Florida DOT\**  
Cost: \$52,309,860

*SR 93A (I-75) at SR 64, Interchange Improvements, FDOT\* Sarasota, FL*  
Cost: \$39,141,064

*SR 93A (I-75) at University Parkway Diverging Diamond, Florida DOT Sarasota, FL*  
Cost: \$74,506,000



## INTERESTS + ACCOLADES

Advanced MOT certified (FDOT)

Mining Safety Training

SHEMS Safety Program, Daily Risk

Assessments, and JHAs



# BRIAN SLOWINSKI

PROJECT SUPERINTENDENT

30 years construction experience



Worked in SW Florida since 1996  
Jessica Lunsford Act Certified



30 hour OSHA Health Safety



## BRIAN'S ROLE

Brian started work in the construction industry with J & R Drywall in 1994 before graduating high school. He became a foreman for the company in 1997, working primarily on commercial projects. Brian started his own business, BSC Construction, in 2001 where he specialized in interior build-outs as well as commercial and residential remodels. O-A-K was pleased to welcome Brian in 2010 as a project superintendent. He's a proud Charlotte County resident.

## FEATURED PROJECTS

### *Amanecer Elementary School & MM Middle School Expansion*

**Size:** 127,745 SF | **Cost:** \$46,622,392 (Lehigh Acres, FL)

### *Aubrey Rogers High School*

**Size:** 297,124 SF | **Cost:** \$97,996,018 (North Naples, FL)

### *Immokalee High School Addition*

**Size:** 39,305 SF | **Cost:** \$13,087,134 (Immokalee, FL)

### *The New Lehigh Acres Middle School*

**Size:** 167,103 SF | **Cost:** \$34,494,233 (Lehigh Acres, FL)

### *Chico's FAS Early Education & Child Development Center*

**Size:** 16,648 SF | **Cost:** \$2,606,345 (Fort Myers, FL)

### *SPG-Albert Whitted Airport Runway 7-25 & South Connector Taxiways Rehabilitation*

**Cost:** \$2,385,607 (St. Petersburg, FL)

### *Southwest Florida International Airport CCTV Security System Upgrades*

**Cost:** \$8,210,118 (Fort Myers, FL)



## INTERESTS + ACTIVITIES

CPR & First-Aid certified

Avid Boater and Fisherman

## II. PROPOSED MANAGEMENT PLAN

### B. PERSONNEL RESUMES



# GABRIEL GARCIA

ASSISTANT SUPERINTENDENT

3 years construction experience



B.S. Construction Management,  
Florida Gulf Coast University



OSHA 30-Hour Trained



### GABE'S ROLE

*Gabe joined Owen-Ames-Kimball (O-A-K) full-time in 2022 as an Assistant Project Superintendent, after spending two summers as an O-A-K intern. His goal is to become a Project Superintendent, with his training in the field being the first step. He is involved with day-to-day field operations, and performs hands-on work when necessary. Gabe's recent project was the construction of the Amanecer Elementary School in Lehigh Acres, FL.*

### FEATURED PROJECTS

#### *Amanecer Elementary School*

127,745 sq. ft. | \$46,622,392 (Lehigh Acres, FL)

#### *MM Middle School Expansion*

15,389 sq. ft. | \$5,591,459 (Lehigh Acres, FL)

#### *Immokalee High School Addition*

39,305 sq. ft. | \$13,087,134 (Naples, FL)

#### *New Lehigh Acres Middle School*

167,103 sq. ft. | \$34,494,233 (Lehigh Acres, FL)

#### *Naples High School Campus Remodel (Renovations)*

Various | \$1,000,000 (Naples, FL)



### INTERESTS + ACTIVITIES

3 Summers in O-A-K Summer Internship Program

Gym & Fitness







# TAYLOR SAWATZKY

DIRECTOR OF  
STRATEGIC DEVELOPEMENT

13 years construction experience



B.S. MBA Business Management  
Florida Gulf Coast University



Education Committee, GCBX



## TAYLOR'S ROLE

*With a proven track record of creating effective business development strategies, Sawatzky has quickly made a name for himself in the construction industry. A relationship builder at heart, Taylor is passionate about learning, improvement, and innovation. Raised in LaBelle, Sawatzky has worked in the building industry for many years, gaining valuable experience in community engagement, business development, and project management. A certified Project Management Professional and Public Manager, Sawatzky is also a proud veteran of the United States Armed Forces and a graduate of Leadership Collier.*

## FEATURED PROJECTS

### *Aubrey Rogers High School*

297,124 sq. ft. | \$97,996,018 (North Naples, FL)

### *Amanecer Elementary School*

127,745 SF | \$46,622,392 (Lehigh Acres, FL)

### *MM Middle School Expansion*

15,389 sq. ft. | \$5,591,459 (Lehigh Acres, FL)

### *Immokalee High School Addition,*

39,305 SF | \$13,087,134 (Immokalee, FL)

### *\*Veterans Community Park*

80,000 SF | \$12 Million (Marco Island, FL)

### *\*Marco Island Fire Station 50*

12,200 SF | \$12.5 Million (Marco Island, FL)



## INTERESTS + ACCOLADES

Program Committee Jr Achievement  
Florida Southwestern State College  
Architecture and Construction Advisory  
Board  
CBIA Ambassador Committee  
CSI Advisory Committee Lee County  
schools  
Certified Public Manager(CPM)  
Leadership Collier Alumni  
Proud Veteran

*\*Denotes experience prior to joining O-A-K*



## II. PROPOSED MANAGEMENT PLAN

### C. ROLES AND RESPONSIBILITIES OF PARTICIPANTS

**Owen-Ames-Kimball Company (O-A-K)** has chosen some of our most experienced and capable personnel to provide construction management services for the Fire Stations 3, 6, and 17. Our team members each have recent, **relevant experience working together and independently** on projects with similar scope and challenges. Experience examples include **multi-use government facilities, and construction within a V-Zone**. The resumes of key staff members assigned to this project are included in this section. A few of those staff members and their capabilities are detailed below. Our extensive

experience working with Charlotte County Government and with construction management projects make our firm an ideal choice for this project.

We bring to you and this important project 54 highly qualified team members, eleven (11) of which will be committed to this project. These individuals have, on average, 24 years of construction industry experience and have worked at O-A-K 13 years.

Name	Title	Time in Construction	Project Responsibilities
Matthew J. Zwack LEED® AP	President	26 Years	Team Leadership, Resource Allocation, Overall Responsibility, Project Execution Plan
Alesha Watchowski	Director of Operations	10 Years	Team Leadership, Second Tier of Job Site Support, Subcontractor Control Support, Job Site Safety Support, Quality Control, Project Close-out
Kevin James Ryan Klingensmith	Project Manager Project Engineer	36 Years 4 Years	Value Engineering, Project Management, Bidding, Sub-contractor Contracts, Document Control, Project Controls, Cost Analysis, Cost Control, Quality Assurance, Budget Monitoring, Schedule Adherence, Project Close-out
Abel Natali, LEED® AP	Preconstruction Mgr. Estimator / BIM Coordinator	16 Years	Preconstruction Leadership, Lead Estimating Support, Bidding Support, Resource for Project Management
Ryan Propp	General Superintendent / Chief Safety Officer	25 Years	Second Tier of Job Site Support, Subcontractor Control Support, Job Site Safety Support, Quality Control, Project Close-Out
Brandon Henderson Brian Slowinski	Project Superintendents	17 Years 30 Years	Overall On-Site Leadership, Daily Subcontractor Scheduling, Quality Assurance, Job Site Safety, RFI Generation/Coordination, Materials Expediting / Receiving, Shop Drawing Review, Project Close-Out
Gabriel Garcia	Asst. Project Superintendents	3 Years	On-site Leadership, Daily Subcontractor Scheduling, Quality Assurance, Job Site Safety, RFI Generation/Coordination, Materials Expediting/Receiving, Shop Drawing Review, Project Close-out
Jo Durocher	Div. Controller Accounts Payable / Receivable	13 Years	Project management support with Account Payable & Receivable, Direct Material Purchase (DMP)

## II. PROPOSED MANAGEMENT PLAN

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### PRECONSTRUCTION PHASE

Owen-Ames-Kimball's efforts will be focused on providing Charlotte County with a **quality project** at the **lowest possible GMP**, while insuring safety for the public and the workforce. A successful project requires proper preparation and total involvement in the **pre-construction phase** with the owner and the design professionals. We will provide **problem solutions, conflict resolution, and value engineering** early in the pre-construction stages to eliminate construction slowdowns or interruptions while actual construction activity is taking place.

**Forward thinking in the construction phasing plans** will help greatly to **expedite** the **total project schedule**. It will be our teams plan to work with the design professionals and see that plans for the foundations portion of the project are ready early so that the work phase can start well ahead of the actual construction. This early start will greatly aid the project, but more importantly, if and when conflicts in the field are encountered there will be time to fix the situation without holding up the project. It will also be our intent to physically verify as-built drawings and utilities in areas of question by pot-holing prior to construction activity.

Our experience has taught us that **keeping the local residents and businesses informed** and involved in the project can be a much needed ingredient for success. As the construction process moves forward our construction phasing and subsequent Maintenance of Traffic (MOT) plans will be discussed with local residents and business owners with regards to access points and overall safety. As plans change, the project neighbors will be kept informed, eliminating surprises. With this being a highly secure facility, any and all information that needs to be passed along to outsiders will be thoroughly vetted before being released.

With regard to construction phasing, our team will **always remain flexible**. As problems occur, and should these require a potential work stoppage, we will be prepared ahead of time to skip over a certain section and continue the work in other areas to eliminate any project delays.

We will use our South Florida construction experience to be prepared for local weather conditions. At the inception of the project all measures will be taken with the sub-contractors to design, implement, and maintain construction water management procedures to help mitigate weather delays. These of course will all be predicated on strict pollution abatement procedures to eliminate street sedimentation. With these measures in place, after a rain event, the project will be ready for continued construction activities.

Our team will see that the **bid packages** are submitted to the appropriate trades as **early as possible**. This will **help eliminate any delays** in construction start up. To help ensure that we can get as many **local contractors** as possible involved in the project, bid packages will be broken down into **small trade packages** as the economies of the project will allow.

In the bid review process our team has established policies with regard to preferred pricing for local subcontractors and suppliers. This has a positive result for the Owner on two fronts. First, it insures the best possible pricing and keeps the local economy working and involved in the projects successful completion.

Overall our team brings the best of all resources for project management to the Owner. Our team provides vast local construction experience, a proven track record of successful performance, local community involvement and a philosophy of cooperation not confrontation.

## II. PROPOSED MANAGEMENT PLAN

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### CONSTRUCTABILITY REVIEW

Constructability reviews start immediately. Matthew Zwack, your Principal-in-Charge, manages this effort with our in-house team. As reviewing the bid documents, we continually evaluate the different components of the building and bring alternative means and methods to the Team for discussion. We bring a thorough knowledge of the existing building, and bring the experience of similar projects. This experience is a valuable asset for the project.

### VALUE ENGINEERING

Our experience has taught us that up to **80% of savings** that can be realized are achieved during the **design phase**. It is our responsibility to provide value engineering input to the Team through the design phase. Value Engineering goes hand in hand with estimating and the constructability reviews. It takes place from the start of design through the completion of construction.

Our in-house team provides the knowledge and experience to assure that Charlotte County receives the best value...not only in the initial cost but also over the life of the facilities.

The Owen-Ames-Kimball Company approaches cost control, value delivery as a proactive effort from project inception to completion in order to control both ultimate cost and received value of a facility.

This is accomplished with seven key ingredients:

#### 1. Accurate and Comprehensive Budgeting and Estimating

We provide in-house detailed estimates of construction with data specific to the Southwest Florida marketplace. By accurately targeting the ultimate build-out budget costs of each trade early in design, bid receipts can be compared against a marketplace-based budget. Awards are made from a knowledgeable perspective as to market costs. Proposals for added work, if any, are accurately reviewed to ensure validity and fair market value for the price paid.

#### 2. Building a Proactive Relationship with the Design Team and Owner

Throughout the project design phase, O-A-K provides the project team information through which it can manage costs to a budget. Working with individual designers we identify less expensive ways to accomplish design and programmatic goals of the project at an equal or higher standard of quality. We bring to the table the necessary knowledge to support cost-benefit decisions and we are a valuable team member in the design phase efforts to control cost.

#### 3. Buying Within the Marketplace at the Best Possible Price

Communications to prospective bidders are clear, and completely present the conditions under which the project has been organized and will be built. Each project is publicized comprehensively and in a positive light so prospective bidders want to be successful.

#### 4. Value Engineering during Systems Selection and Construction

Design phase value engineering work is commonplace at O-A-K. We are proactive in the design phase and monitor anticipated costs thoroughly. Our chief estimator, general superintendent and project manager work as a team in the pre-construction phase with ensures our value engineering efforts.

## II. PROPOSED MANAGEMENT PLAN

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### 5. Managing the Construction Effort to Ensure Efficient Field Operation

This is standard procedure at O-A-K. We are well known for sound, efficient and fair management. Our reputation is a key ingredient in cost control of the end product. Although it is difficult to quantify, owners working with O-A-K experience a very low incidence of claims from subcontractors. This results from our firm-yet-fair management perspective. We believe and advocate subcontractor's absorption of "nickel-dime" extras in exchange for our efficient field management and ethical business.

### 6. An Accurate Accounting System Operated by Competent Personnel

The above steps, key to the "subjective side" of cost control, must be coupled with a structured approach to cost accounting that is timely. Using Computer Guidance accounting software, our staff maintains comprehensive job cost accounting information. Using this system, the company can provide extensive cost detail in flexible formats so that cost can be tracked, monitored and controlled.

### 7. O-A-K Takes a Proactive Position to Minimize Unnecessary Expense

Historically, our company has been perceived as both non-litigious and not "claims oriented." This results from the above six ingredients of our cost control program coupled with a management philosophy of straightforward, quality service to our clients. This standing is the most effective means of cost control, value engineering, and project delivery management available in the marketplace.

**Cost control is everyone's job!** This aspect of a project starts with the first owner meeting to review how a design could be more cost efficient to accounting reviewing invoices for accuracy to the project manager exploring savings on materials to the job site superintendent managing the sub-consultants time and materials. Cost control procedures are the ultimate responsibility of the Project Manager and the Principal-in-Charge as a form of checks and balances.

## SCHEDULING

**Scheduling is a critical part of every project and has a direct impact on cost.** It is important to provide a careful review by environmental, regulatory and governmental agencies (i.e. Charlotte County, The Charlotte County Fire and Emergency Medical Services Department, etc.) that have jurisdiction over your project. Their review and input early and continuously **eliminates delays and/or costly corrective work.** These elements need to be factored into each schedule. Any potential delivery problems need to be exposed early in the project so unnecessary delays can be avoided later. Construction techniques and safety matters also need to be considered as the schedule is developed for your project. Phasing of the project may be necessary to facilitate your requirements. Cash flow projections, generated by proper scheduling techniques, are information that you may need to provide proper planning. To accomplish this, it is important to begin planning and scheduling even during the design phase so construction methods, procedures, material and equipment are considered and integrated into the project at an early date.

Our scheduling is done through the use of a computer generated Gantt schedule. Even though we prepare the schedule, we request and encourage input from you and our subcontractors. The schedule is presented to all bidders at the pre-bid meeting so they are fully aware of their own schedule requirements prior to bidding. We invite input from the successful bidders after the bid process, to assure further commitment.

Furthermore, **subcontractors** are interviewed prior to the award of their contract, to ensure their **understanding and acceptance of the schedule.** Contractors and suppliers may also be required to complete a Material/Shop Drawing Delivery



## II. PROPOSED MANAGEMENT PLAN

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Form that assists in identifying key delivery dates they must commit to and meet. Once construction commences, the schedule is discussed at each progress meeting. A two-week segmented schedule is also provided at these meetings so each contractor is aware of their commitment for the upcoming period, as well as the overall schedule commitment.

The schedule also includes Owner and Architect related activities and decision time frames, as well. We are bold enough to challenge the timeliness of you and your architect, so they do not have an adverse effect on the schedule. In some instances, phasing of the project is required to allow the continuation of existing operations, to take advantage of weather, price or material availability constraints, or to simply improve on the overall construction schedule. We understand the impact that construction progress has on productivity, costs and safety. Our scheduling approach to these often-uncertain environmental factors, provides the best method of project management control.

**The ability of the project manager and superintendent to work successfully with the owners, architect, engineers and trade contractors is essential.**

**Communication is key to the success of any project.** Kevin James, your project manager, is a construction industry guru having more than 8 years of experience and bringing the latest in technology innovation to the team. He has worked on many government projects and is an excellent communicator and is very organized. Brandon Henderson and Brian Slowinski are your job site superintendents and have more than 50 years of combined experience.

**Our team uses a state-of-the-art highly secure cloud-based project management system called ProCore.** Every member of the team will have access to our system which is very easy to use and navigate.

Our system provides a **complete record of every meeting** that is held by the project team. It tracks meeting dates and times, locations, meeting topics, and attendees. Minutes will be distributed to meeting attendees via email, and each attendee has the ability to approve and/or amend the minutes within Procore.

Every meeting item, along with its assigned responsibility and due dates, will be made available for review by any project team member with the appropriate system permissions. For more sensitive meeting topics, meetings can be classified as “Private”, so that minutes for those meetings will only be available to meeting participants.

The meeting minutes provides an invaluable record of who said what, when, and what issues were discussed and assigned to individuals during the course of the project. Our system provides a safe, secure and centralized archive for all of the project’s meeting minutes and will be accessible and available at any future date, so that meeting minutes can be easily reviewed.

### **Reporting Procedures**

Our preferred method of interface with all parties of the process is through daily communication. During the design/pre-construction phase, our staff has constant communication with the design team while preparing the budget estimates. We recommend regularly scheduled Team Meetings with Charlotte County, the selected design team and sub-consultants, and Owen-Ames-Kimball Company at which the components of the project are presented, discussed, and decisions reached.

## II. PROPOSED MANAGEMENT PLAN

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Regular Progress Meetings are held, where safety, quality, and schedule are the main topics of discussion. We use several forms of communication to update the team on project progress. These include:

- Regularly scheduled Team meetings
- Monthly project report
- Monthly financial report
- Daily communication with the Field Superintendent
- Construction progress meetings
- 24/7 access via internet and mobile phone

We are also **available for any meetings with the staff** to present the project and give regular updates.

### **Our Schedule will be developed at these project levels:**

Total Program Schedules:

- Typically are generated in the concept planning phase of a total project management contract.
- Total Project Schedules map planning, design, permitting, estimating, bid pricing, construction, and project turnover activities in order to form a baseline map to fulfill owner long-term project needs.
- Are initiated by office project management staff and finalized by the project manager after consultation and review with the general superintendent.
- Are communicated to the Project Team - the County & City, Design Team, and Owen-Ames-Kimball personnel - in order to track the overall project.
- Become base activities for more detailed components scheduling, i.e. design development may be broken down further.

Construction Activity Schedule:

- Details the field construction activities and the direct support project management activities necessary to plan, implement, and track on-site job progress.
- Breaks project down into logical phases and trade by trade activity schedules.
- Typically prepared with the use of not less than 75% complete working drawings sufficient to provide logistics planning, phasing analysis, and site usage studies.

## CONSTRUCTION | CLOSE-OUT | WARRANTY

### **Bidding**

O-A-K will provide the following services:

- Issuing addenda as may be required to clarify issues
- Pre-submittal conferences
- Response to questions from the sub-contractors, design team and owner
- Contract negotiation services

### **Construction and Construction Close-out**

O-A-K will provide the following deliverables:

- Conduct weekly coordination meetings
- Progress Reports

## II. PROPOSED MANAGEMENT PLAN

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- Issue Change Order Responses and Clarifications to Field
- Request for Information
- Communications and Progress Reports
- Processing of Shop Drawing Submittals
- Coordination of Inspection Services
- Monitoring Project Schedule
- Construction Cost Accounting
- Issue Certificate of Substantial Completion
- Issue Final Completion

It is the intent of our team to use a **forward thinking approach** to help **eliminate unnecessary surprises** and problems which equals a **cost savings** for the Owner, by way of positive problem solving ahead, not unnecessary and costly change orders and construction interruptions during the project.

The following is a list of expected deliverables for this project. As always, our team remains flexible and understands there are other portions of this project that may not fit on a list. We are committed to building a quality project for the County.

### Management Deliverables (Work Plan)

1. Provide design review and recommendations to the design team in respect to selection of systems, materials, cost reducing alternatives, availability of materials and labor.
2. Hold design review meetings with the team. Prepare and distribute minutes of design meetings. Follow up on decisions made, pending items, and recommendations.
3. Periodically review the design and make recommendations to the team.
4. Conduct a ready check of the final documents so as to minimize gaps, double coverage's, errors and omissions.
5. Assist in the interface of the various design disciplines so as to prepare trade packages for bidding to meet local conditions.
6. Conduct solicitation of bids for the project.
7. Perform pre-awards with subcontractors.
8. Provide project schedule identifying all critical areas of work to be accomplished.
9. Lead in permitting of the project.
10. OAK will prepare monthly written reports for the project team during all construction phases.

### Project Close Out

Every project has different goals and outcomes. Our team is ready to get-to-work on this very important project. We understand that it is our job as your construction manager to present a range of solutions for each issue and then help the County and design team members process the information to reach the most beneficial end. Ultimately, each building deserves to be a functional, financially feasible structure that is a source of public pride and valuable asset to the Community at large.

### Warranty Period

**We are well known for supporting our projects long after warranty periods have lapses;** we want to be your primary source for projects past, present and future.

### III. PREVIOUS EXPERIENCE OF THE TEAM PROPOSED

The Owen-Ames-Kimball Company (O-A-K) is honored and humbled to be providing Construction Management Services to all our local governments and municipalities here in Southwest Florida. We value the long standing relationships that we have developed over the past 40 years of building here in SWFL and take pride in the work that we do. We standby all our projects long after they are completed and our owners know that we are only a phone call away. Here is a small sampling of a few of our valued government clients:

- |                                       |   |
|---------------------------------------|---|
| 01 Charlotte County Government        | 08 Lee County Government                          |
| 02 Charlotte County School District   | 09 Collier County Government                      |
| 03 The School District of Lee County  | 10 City of Fort Myers                             |
| 04 Lee County Port Authority          | 11 Naples Airport Authority                       |
| 05 Florida Southwestern State College | 12 The School District of Collier County          |
| 06 Florida Gulf Coast University      | 13 City of Marco Island                           |
| 07 City of Naples                     | 14 Florida Department of Environmental Protection |



The pages that follow are examples of recent and relevant projects that Owen-Ames-Kimball Company (O-A-K) has been fortunate to have completed that are of similar size and scope to what is planned for this project. Many of the team members listed within our Ability of Professional Personnel have worked on these projects. We have the time and resources to devote to your project and are ready to begin immediately.

Our **estimating is very accurate, generally within 1 to 3% of the actual final total construction cost.**

Two recent examples include:

#### Family Health Centers - Estero

Estimated - \$4,600,000  
Actual - \$4,628,327,000

#### Family Health Centers - Lehigh Acres

Estimated - \$16,103,771  
Actual - \$1,525,464

In addition to our **vertical expertise** we also have **site-civil experience** which can be very beneficial in estimating site work. We own our own equipment and can price out the site piece before bidding it out to the subcontractors. You will be guaranteed that the site cost will not exceed our number which you will know in advance of bids coming in. If a sub-contractor comes in with a lower number, which happens from time to time, than naturally we will proceed with the better number. **Bid openings are always open book.**

We bring extensive experience working on new construction facilities located within close proximity to both residential and commercial dwellings. You can count on us to ensure that disruptions are non-existent or kept to a minimum (planned during off peak times). We recently completed a major renovation and large addition to the Waterman Broadcasting Studios (home to NBC-2 & ABC-7). **The studio was up and operational throughout the project. NBC-2 has 19 live shots every day and required us to work around these times.**



**ELLEN BISOGNO, SR. PROJECT MANAGER, ATOP THE THERMAL WATER TANK AT GULF COAST HIGH SCHOOL. OUR TEAM MEMBERS TAKE A HANDS ON APPROACH AND ARE VERY INVOLVED IN THE PROJECT.**





### III. PREVIOUS EXPERIENCE OF THE TEAM PROPOSED



collier county public schools  
**AUBREY ROGERS HIGH SCHOOL**

#### SUMMARY

<i>Location</i>	Naples, FL
<i>Size</i>	60-acres   295,071 sf
<i>Estimate</i>	\$97,996,018
<i>Final Cost</i>	\$78,563,902*
<i>Completion</i>	May 2023
<i>Delivery</i>	Construction Management



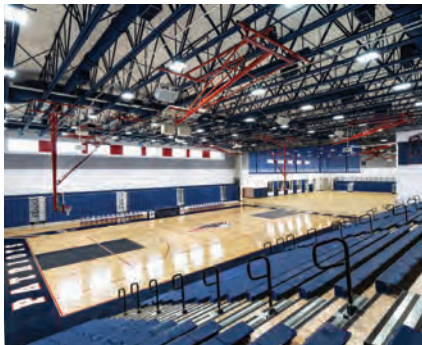
<i>Owner</i>	Marc Rouleau, P.E. Executive Director, Facilities Collier County Public Schools 5775 Osceola Trail Naples, FL 34109 (239) 377-0630 roulem@collierschools.com
<i>Architect</i>	Robert Werthamer Zyscovich Architects 100 Biscayne Blvd, 27th Floor Miami, FL (305) 372-5222 rwerthamer@zyscovich.com rsr@rgarchitectspa.com

The new high school creates unique learning experiences to foster new 21st-Century literacies through innovative learning environments, progressive pedagogies, collaborative settings, and real-world relevant learning experiences for future generations of life-long learners.

The new school offers seven (7) learning pods that will include a welcome center, learning studios, gym, commons area, student union, engineering academy & a performing arts center. The spaces will incorporate 46 Learning Studios, 6 Skill Labs, 6 Resource Rooms, 5 Academies, 4 Science Labs, 6 Science Demo Labs, JROTC, Exceptional Education Suite, 2 Art Labs / 2 Music Classrooms, Wellness Gym & Auxiliary Gym, Student Union / Media Center, Auditorium 1,350 Seats, Commons Dining, and Administration / Guidance.

#### O-A-K Team

Sr. Project Manager	Ellen J. Bisogno
Project Manager	Brian Filipek
Superintendents	Shawn Brink, Rodney Mitchell, Cory Erickson, Brandon Henderson
Preconstruction	Abel Natali
Operations	Ryan Propp
Executive	Matthew J. Zwack





III. PREVIOUS EXPERIENCE OF THE TEAM PROPOSED



SUMMARY

Location	Fort Myers, FL
Size	5,600 sf/30 acres
Estimate	\$2.9 million
Final Cost	\$3 million*
Completion	January 2014
Delivery	Construction Management
*Owner increased scope	



**Owner** Mr. Kraig Feighery  
Alico Family Golf Center  
16300 Lee Road  
Fort Myers, FL 33912  
(239)565-4080

**Architect** Mr. Matthew Bechtel  
Sheeley Architects  
12800 University Dr. #420  
Fort Myers, FL 33907  
(239)482-2121

New construction of a lighted outdoor golf facility with a 5,600 sf clubhouse. This property includes an 18-hole miniature golf course, finely crafted driving range with 60 grass tee boxes and 10 covered tee boxes with cooling misters, short game area with putting and chipping areas. On the southeast area of the property, 9 holes of hybrid SNAG (Starting New at Golf) course were installed.

The clubhouse is home to a PGA teaching school staffed by PGA professionals which offers lessons, clinics, and camps for all ages. It also contains a pro shop, food and beverage areas, and party rooms.

**O-A-K Team**  
Project Manager                      Howard Gold  
Superintendent                      Tim Harkins  
Chief Estimator                      Steve Richards  
VP of Operations                      Patrick Conran  
Principal in Charge                      Dave Dale





III. PREVIOUS EXPERIENCE OF THE TEAM PROPOSED



six lakes country club  
COUNTRY CLUB  
RENOVATIONS

SUMMARY

Location	Fort Myers, FL
Size	21,000 sf
Estimate	\$5.7 million
Final Cost	\$5.7 million
Completion	March 2018
Delivery	Construction Management at Risk

**Owner**  
Ms. Bonnie Allen  
Six Lakes Country Club  
9151 Littleton Rd.  
North Fort Myers, FL 33903  
(239)995-0595

**Architect**  
Mr. Jeff Mudgett  
Parker Mudgett Smith Architects  
2136 McGregor Blvd.  
Fort Myers, FL 33901  
(239)332-1171

**O-A-K Team**  
Project Manager                Scott Schneider  
Job Site Superintendent      Tim Harkins  
General Superintendent      Mike Woods  
Asst. Superintendent        Chad Lee  
Chief Estimator                Abel Natali  
Chief Safety Officer          Matthew Zwack  
Principal of Charge          Dave Dale



The new 21,000 sf facility replaced the Country Club’s 40-year-old 16,000 sf clubhouse and includes a 70-seat full-service restaurant, cart barn, **pro shop**, sandwich shop, swimming pool and spa, administrative offices, a banquet/entertainment hall seating 400, community kitchen, card room, fitness center, billiards room, library, and computer room. The new outdoor swimming pool and spa includes two lap lanes and a large water aerobics area. New to the clubhouse is the Sand Bar, a unique outdoor seating bar with bar and food service.





III. PREVIOUS EXPERIENCE OF THE TEAM PROPOSED



fiddlesticks country club  
FITNESS CENTER

SUMMARY

Location	Fort Myers, FL
Size	7,500 sf
Estimate	\$1.2 million
Final Cost	\$1.2 million
Completion	June 2008
Delivery	Construction Management

**Owner**  
Greg Pick, General Manager  
Fiddlesticks Country Club  
15391 Cannongate Drive  
Fort Myers, FL 33912  
(239) 768-1111

**Architect**  
Joeleen Collins, AIA  
J.Co. Design  
130 Willowcreek Blvd.  
Sweetwater, TN 37874  
(239) 851-8199

O-A-K Team

Project Manager	Butch McGovern
Job Site Superintendent	Ryan Propp
General Superintendent	Rex Budd
Chief Estimator	Abel Natali
Chief Safety Officer	Matthew Zwack
Principal of Charge	Dave Dale



7,500 sq. ft. fitness center for Fiddlesticks members  
Architectural finishes to match Fiddlesticks club house  
High end architectural mill work and stone flooring  
Restrooms for existing tennis facilities  
Men’s/women’s locker rooms  
Men’s/women’s steam showers • Areas for massage services

Tennis pro shop

Large aerobics area with specialized aerobics flooring  
Large open area for fitness equipment / workout area





III. PREVIOUS EXPERIENCE OF THE TEAM PROPOSED



SUMMARY

Location	Fort Myers, FL
Size	8.8 acres
Estimate	\$500 thousand
Final Cost	\$1.9 million*
Completion	March 2019
Delivery	Construction Management
	*Owner increased scope

Owner	Ms. Nicole Monahan, P.E. City of Fort Myers 2200 Second St. Fort Myers, FL 33902 (239)275-0225
Architect	Mr. Ramon Acevedo GMA Architects & Planners, Inc. 43 Barkley Circle, Suite 202 Fort Myers, FL 33919 (239)275-0225

O-A-K Team	
Project Manager	Randy Kapellusch
Job Site Superintendent	Tommy Brown
Chief Estimator	Shan Gaar
VP of Operations	Matthew Zwack
Principal in Charge	Dave Dale



Updates to this 9 acre sports facility included renovations of the soccer, football, and multi-use fields, along with the covered basketball courts and playground area. An 8,906 sf recreational building was constructed with bleachers, press box, flag pole, goal posts, and score board. New lighting and fencing was also installed. The project also included utility work, drainage, sidewalks, and paving for 182 parking spots.



III. PREVIOUS EXPERIENCE OF THE TEAM PROPOSED



florida department of environmental protection  
LOVERS KEY WELCOME & DISCOVERY CENTER

SUMMARY

Location	Fort Myers Beach, FL
Size	6,520 sf / 30-acres
Estimate	\$5.4 Million
Final Cost	\$5.5 Million*
Completion	November 2020
Delivery	Construction Management
	* Price increased due to scope changes

Owner	Andy Carrier, Project Manager Florida Department of Environmental Protection 1843 South Tamiami Trail Osprey, FL 34229 (941) 882-7201 andy.j.carrier@floridadep.gov
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Architect	John Bryant Sweet Sparkman Architects 2168 Main Street Sarasota, FL 34237 (941) 952-0084
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O-A-K Team	
Project Manager	Fred Doster
Superintendents	John Tartaglia
Preconstruction	Abel Natali
Operations	Ryan Propp
Executive	Matthew J. Zwack



The building’s main floor includes a 2,000 sq. ft. environmental exhibit center, a 1,000 sq.ft. Multi-purpose room, and a large, covered deck providing outdoor classroom space for environmental education programs. The interior “discovery” area incorporates hands-on exhibits that showcase the park’s bounty of flora and fauna, as well as its history. Among its sustainable features are well-shaded glass walls made to withstand a Category 4 hurricane and a roof with natural cypress cladding on its underside to enhance the building’s organic feel. The building is solar-ready to accommodate a future installation of a photovoltaic system.items onsite to avoid material shortage or delivery delays.





### III. PREVIOUS EXPERIENCE OF THE TEAM PROPOSED



#### SUMMARY

<i>Location</i>	Englewood, FL
<i>Size</i>	Apprx 7,200 sf
<i>Estimate</i>	\$200 Thousand
<i>Final Cost</i>	\$1.9 Thousand
<i>Completion</i>	April 2013
<i>Delivery</i>	General Contractor



**Owner**

Roger Warner  
Charlotte County Purchasing  
18500 Murdock Circle, Suite 344  
Venice, Florida 34292  
(941) 743-1378

**Engineer**

Karl Kokomoor  
DMK Associates, Inc.  
421 Commercial Court, Suite C-D  
Venice, Florida 34292  
(941) 412-1293

In conjunction with the Englewood Library addition & renovations, Charlotte County had the four tennis court next door at Tringali Park renovated. Courts #3 and 4 had been locked and closed to play due to asphalt pavement cracking and the proliferation of weeds.

The renovation included resurfacing, incidental concrete and new galvanized fence posts in a continuous foundation, with vinyl coated chain link. All courts can be used for tennis or pickleball.

#### O-A-K Team

Project Manager	Frank Mullins
Superintendents	Tim Harkins
Preconstruction	Steve Richards
Operations	Frank Bell
Executive	Dave Dale





III. PREVIOUS EXPERIENCE OF THE TEAM PROPOSED



SUMMARY

Location	Fort Myers, Florida
Size	44,248 sf
Estimate	\$12.5 million
Final Cost	\$12.4 million
Completion	September 2007
Delivery	Construction Management at Risk



**Owner**  
Rick Starace  
Business Manager  
Canterbury School  
8141 College Parkway  
Fort Myers, FL 33919-5197  
(239) 481-4323

**Architect**  
Ron Weaver  
BSSW Architects  
1500 Jackson Street, Suite 200  
Fort Myers, FL 33901  
(239) 278-3838

**O-A-K Team**  
Project Manager Ken Gentry  
Superintendent Gene Carr  
Pre-Construction Steve Richards  
Project Director Dave Dale  
Executive Steve Shimp

As part of Canterbury’s new Upper School project, sports facilities were also constructed.  
Practice athletic fields were added  
Tennis courts renovated and expanded  
Gymnasium  
Track & Football field rehabilitation  
Soccer field equipment  
Extensive site-work included lake reconfiguration, major drainage changes and nature area and Wenger Audio Sound Booths.  
Accelerated 10-Month Schedule • Built on an Active Campus





III. PREVIOUS EXPERIENCE OF THE TEAM PROPOSED



the community school of naples  
FIELD HOUSE & ATHLETIC FIELDS

SUMMARY

Location	Naples, Florida
Size	50,300 sf
Estimate	\$7 million
Final Cost	\$6.9 million
Completion	September 2007
Delivery	Construction Management at Risk



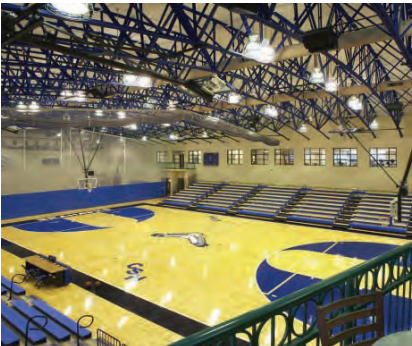
**Owner**  
Maurice Kent  
The Community School of Naples  
13275 Livingston Road  
Naples, FL 34101  
(239) 597-7575

**Architect**  
Chris Chivetta  
Hartings & Chivetta Architects, Inc.  
700 Corporate Park Drive, Suite 400  
St. Louis, MO 63105  
(314) 863-5717

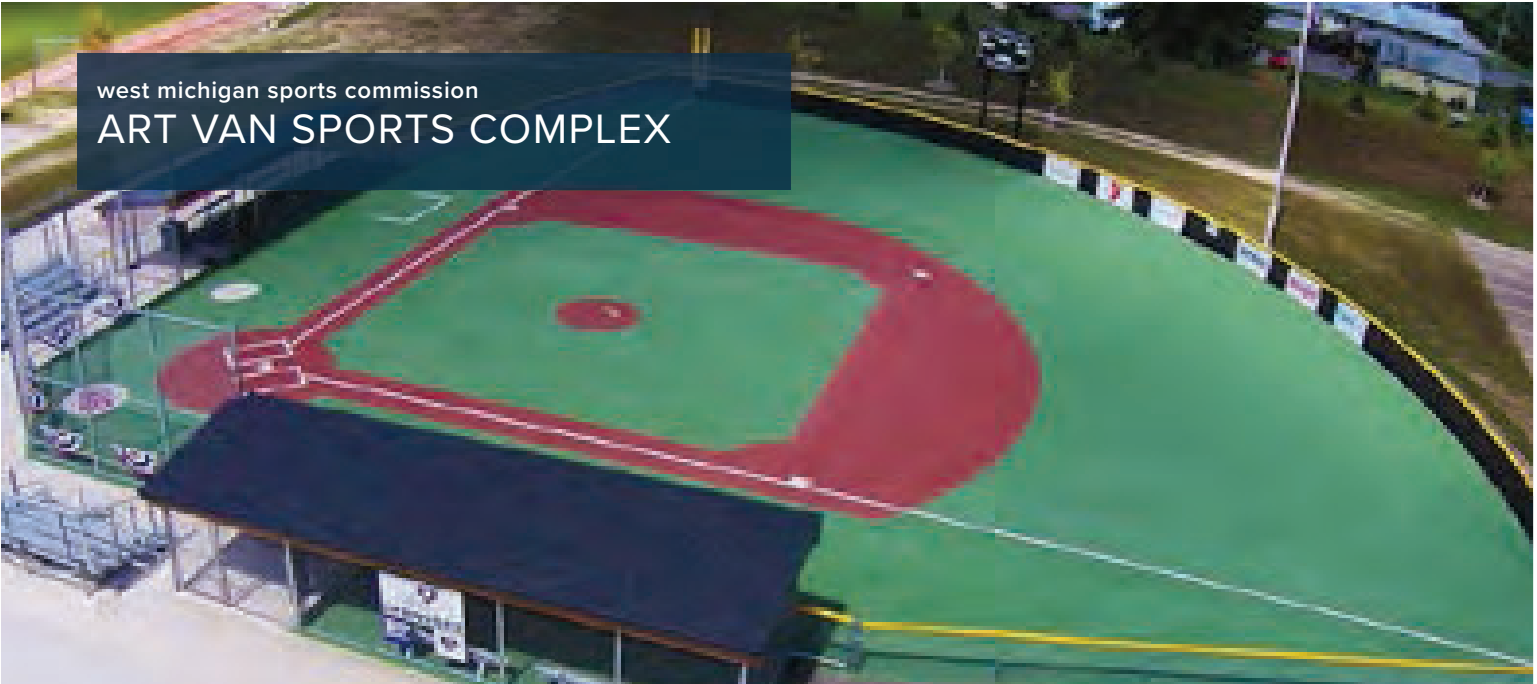
2 Acres of Athletic Fields Facilities including soccer fields, running track, baseball & softball fields, dugouts, concessions and press box buildings with **6 tennis courts**.  
Features of the two-level, 50,300 SF field house include:  
Three-court gymnasium allowing for multiple simultaneous functions  
Spectator seating for 900  
State-of-the-art wellness and fitness center with climbing wall  
More than 200 student lockers with restrooms separate from the locker rooms  
Athletic administration areas  
Lobby and concession area with reception and events facilities  
Hardwood floors

O-A-K Team

Project Manager	Abrie Spies
Superintendent	Scott Reynolds
Pre-Construction	Steve Richards
Project Director	Dave Dale
Executive	Steve Shimp



### III. PREVIOUS EXPERIENCE OF THE TEAM PROPOSED



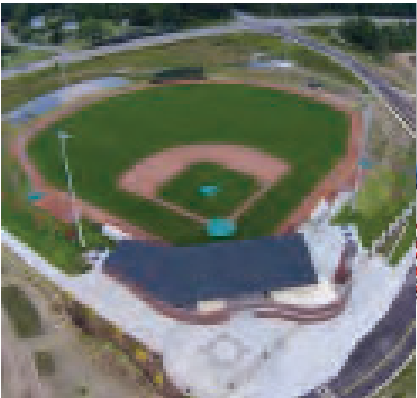
#### SUMMARY

<i>Location</i>	Rockford, MI
<i>Size</i>	9 new ball fields, spectator facilities and extensive sitework
<i>Estimate</i>	\$7,800,000
<i>Final Cost</i>	\$7,430,000
<i>Completion</i>	August 2014
<i>Delivery</i>	Construction Management

<i>Owner</i>	Mr. Mike Guswiler, Executive Director West Michigan Sports Commission 141 Monroe Ave NW, Suite 700 Grand Rapids, MI 49503 (616) 233-3561
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<i>Architect</i>	Ms. Cheryl Scales Civil Engineering Manager Progressive AE 1811 4 Mile Rd NE Grand Rapids; MI 49525 (616) 361-2664
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<i>O-A-K Team</i>	
Project Director	Jeff Weber
Project Manager	Jeremy Amshey
Superintendents	Jim Bockheim, LEED AP
Preconstruction	Kris Ford, LEED AP
Executive	Frank Stanek, PE, LEED AP



- This championship-caliber baseball/softball complex includes:
- A premier championship stadium with covered grandstand seating for 1,000 spectators
  - Seven additional baseball/softball fields
  - A separate field for special-needs children funded by the West Michigan Miracle League (completed separately in 2013; incorporated into Art Van Sports Complex baseball quad)
  - Covered dugouts
  - Parking for 500 vehicles
  - Spectator facilities with restrooms and concessions
  - World-class lighting systems and scoreboard technology

<b>Responsibilities</b>
Construction Management at Risk
Pre-Construction Services
Total Project Scheduling of Design and Construction
Accelerated Schedule to Accommodate Permitting and Land Acquisition Delays

### III. PREVIOUS EXPERIENCE OF THE TEAM PROPOSED



#### SUMMARY

**Location:** Grand Rapids, MI  
**Size:** 90,000 sf + extensive site work  
**Estimate:** \$115 Million  
**Final Cost:** \$115 Million  
**Completion:** 2021  
**Delivery:** Construction Management

**Owner:** Mr. David Hooker  
President & CEO  
1000 East Beltline Ave NE  
Grand Rapids, MI 49525  
(616) 957-1580  
dhooker@meijergardens.org

**Architect:** Ms. Elisa Testa  
Tod Williams Billie Tsien Architects  
222 Central Park South  
New York City, NY 10019  
(212) 582-2385  
etesta@twbta.com

#### O-A-K Team

**Project Manager:** Dave Fleece  
**Superintendents:** Bill McLaughlin, Erick Wieda,  
Eric Albin, Rick Lineberry  
Ralph Shiffer  
**Pre-Construction:** Kris Ford  
**Project Director:** Jeremy Amshey  
**Executive:** Frank Stanek, PE

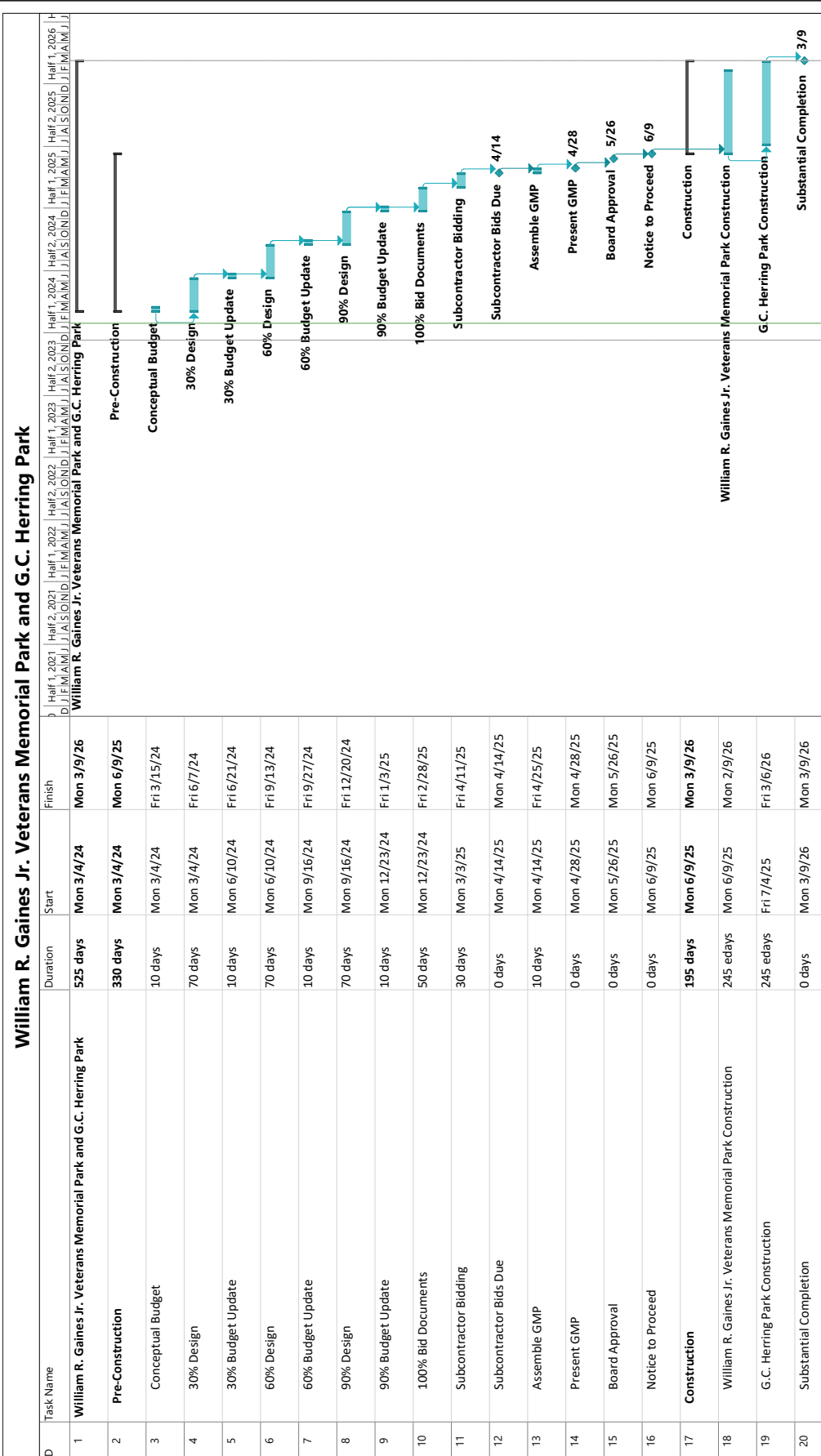


This \$115 million capital expansion project includes three new buildings totaling 90,000 sf and extensive renovations and reconfigurations to the 158-acre campus. **O-A-K has overseen all work at the Meijer Gardens since it was founded in 1995.**

Highlights of this project include:

- **A new 60,000 sf, LEED-certified Welcome Center**, featuring a new plaza that will bridge the space between the main entrance and outdoor amphitheater
- **A new 20,000 sf, LEED-certified Covenant Learning Center**, connected to the current facility, featuring six classrooms and an interactive education area
- **A new Peter C. and Emajean Cook Transportation Center** to transport people within the 158-acre park
- **Expanded and upgraded Frederik Meijer Gardens Amphitheater**, to increase seating capacity
- **A reimagined and expanded BISSELL Inc. Scenic Corridor**
- **A new Outdoor Picnic Pavilion**
- **A new Padnos Families Rooftop Sculpture Garden** on the roof of the Covenant Learning Center
- **Expanded and accessible parking and urban gardens**







# PROJECT CONTROL

## A. WHAT TECHNIQUES ARE PLANNED ASSURING SCHEDULE IS MET?

The O-A-K Team's approach includes an overall Project Master Schedule, which integrates the detailed activities of design, public & community presentation-comment-adjustment, permit applications and approval, funding requests, procurement, fabrication, and the sequence and flow of work/field activities necessary to monitor and control the progress of all project activities.

Kevin James, your Project Manager, starts the development of the project schedule immediately. It indicates all aspects of the project, including the design phase. This keeps the Team on track during the design phase. As documents are being developed, the schedule expands to incorporate all the components of construction. The schedule becomes a part of the bid documents and is explained in detail to the bidding contractors at the pre-bid meetings. Schedule is a main topic of discussion at pre-award meetings and at every job site meeting.

## SUBCONTRACTOR SCHEDULING

The project construction activity schedule portion of the overview schedule is published by O-A-K as part of the bidding documents to which subcontractors bid. It is therefore incorporated into our subcontracts as a contract document. In pre-award conferences with the successful trade bidder the schedule is reviewed in detail from an input perspective. Assuming the potential for variations or improvements, we make revisions to accommodate input.

It should be noted that subcontractor input, using this approach is viewed as an enhancement. We do not, however, believe it is healthy to "let the subs build the job," as many construction managers do in their scheduling. We believe it is clearly the role of the construction manager to set the schedule, not the subcontractors.

It is the responsibility of the project manager to assure that the schedule will be met prior to the project site work beginning - the job site superintendents, aided by the project manager and our general superintendent, is responsible for the work schedule on a project.

## B. WHAT CONTROL TECHNIQUES ARE PLANNED FOR CONSTRUCTION?

Now more than ever is it important to stay well ahead of the project schedule and identify any potential scheduling delays. Identifying long lead items early and procuring these items well in advance of needing them onsite is vital to keeping the project on schedule. We have strong relationships with our trade partners, suppliers and manufactures. We stay in contact weekly with our sources to receive updates on lead times for critical components. We utilize this information to update project schedules, source other materials if required and provide regular updates to you, our client. We will also procure materials early in the process if needed, to ensure they arrive onsite in time for installation.

## IV. PROJECT CONTROL

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### C. DEMONSTRATE ABILITY TO MEET PROJECT COST CONTROL.

The Owen-Ames-Kimball Company approaches cost control, value delivery as a proactive effort from project inception to completion in order to control both ultimate cost and received value of a facility.

This is accomplished with seven key ingredients:

#### **1. Accurate and Comprehensive Budgeting and Estimating**

We provide in-house detailed estimates of construction with data specific to the Southwest Florida marketplace. By accurately targeting the ultimate build-out budget costs of each trade early in design, bid receipts can be compared against a marketplace-based budget. Awards are made from a knowledgeable perspective as to market costs. Proposals for added work, if any, are accurately reviewed to ensure validity and fair market value for the price paid.

#### **2. Building a Proactive Relationship with the Design Team and Owner**

Throughout the project design phase, O-A-K provides the project team information through which it can manage costs to a budget. Working with individual designers we identify less expensive ways to accomplish design and programmatic goals of the project at an equal or higher standard of quality. We bring to the table the necessary knowledge to support cost-benefit decisions and we are a valuable team member in the design phase efforts to control cost.

#### **3. Buying Within the Marketplace at the Best Possible Price**

Communications to prospective bidders are clear, and completely present the conditions under which the project has been organized and will be built. Each project is publicized comprehensively and in a positive light so prospective bidders want to be successful.

#### **4. Value Engineering during Systems Selection and Construction**

Design phase value engineering work is commonplace at O-A-K. We are proactive in the design phase and monitor anticipated costs thoroughly. Our chief estimator, general superintendent and project manager work as a team in the pre-construction phase which ensures our value engineering efforts.

#### **5. Managing the Construction Effort to Ensure Efficient Field Operation**

This is standard procedure at O-A-K. We are well known for sound, efficient and fair management. Our reputation is a key ingredient in cost control of the end product. Although it is difficult to quantify, owners working with O-A-K experience a very low incidence of claims from subcontractors. This results from our firm-yet-fair management perspective. We believe and advocate subcontractor's absorption of "nickel-dime" extras in exchange for our efficient field management and ethical business.

#### **6. An Accurate Accounting System Operated by Competent Personnel**

The above steps, key to the "subjective side" of cost control, must be coupled with a structured approach to cost accounting that is timely. Using Computer Guidance accounting software, our staff maintains comprehensive job cost accounting information. Using this system, the company can provide extensive cost detail in flexible formats so that cost can be tracked, monitored and controlled.

## IV. PROJECT CONTROL

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We provide a detailed and comprehensive cost accounting system that provides you with the exact financial status of the project at any point in time. This system not only reports the costs, but maintains costs as well. Our monthly invoice documentation includes a recap sheet, a breakdown of each contractor/supplier invoice, all partial and final lien waivers, and sworn statements. Our accounting service saves you a considerable amount of time and money. We provide you with one monthly invoice with all the backup information, you write us one monthly check, and we pay all the trade contractors and suppliers.

### **7. O-A-K Takes a Proactive Position to Minimize Unnecessary Expense**

Historically, our company has been perceived as both non-litigious and not “claims oriented.” This results from the above six ingredients of our cost control program coupled with a management philosophy of straightforward, quality service to our clients. This standing is the most effective means of cost control, value engineering, and project delivery management available in the marketplace.

Our preliminary assessment of the \$10M for the project budget is that it is feasible. Our initial cost modeling was completed without detailed scope knowledge but with a good sense of the existing conditions and taking into consideration the County’s needs and requirements for this project. We’ve also identified the following project specific key items:

**Getting up to speed quickly** – O-A-K will engage all of our in-house resources to develop a basis and initial estimate as soon as we’re given notice of intent from Collier County. We anticipate this process taking two – three weeks depending on level of detail currently available.

**Fixed cost** – Estimating accuracy remains paramount to determine if design fits within the fixed cost set for this project. We recognize that this fixed budget cannot be exceeded and view this similarly to our other public clients. On over a billion dollars of recent work, we have never exceeded the available funds or asked a client for general fund money to complete a project.

**Bid Category Descriptions** – The specifications and instructions we provide to bidding trade contractors precisely define the pricing parameters. This protects the owner from any unexpected costs.

**Pre-Established Unit Costs** - At the start of a project, we carefully define, by trade, all necessary materials. We establish unit costs for each trade, which creates accurate budgets. Should there be change orders, the pricing is clearly defined and everyone knows what to expect.

**Pre-Bid Meetings** – All bidding trade contractors are required to attend our mandatory pre-bid meetings. They also receive scope letters. This comprehensive introduction to the scope of the project ensures that subcontractor estimates are well informed and accurate.

**Trade Contractor Cost Control** – By taking a proactive approach to all phases of construction, O-A-K is able to prevent unexpected costs and unwarranted claims. We thoroughly and accurately evaluate costs up front and then measure performance each step of the way to ensure that trade contractors are performing as projected.

IV. PROJECT CONTROL

D. DEMONSTRATE ABILITIES IN VALUE-ENGINEERING OPPORTUNITIES.

Our process during value engineering is to function as the initial “clearinghouse” for any ideas we develop or which the design / owner team wishes we consider. We’ll maintain a value engineering log detailing the idea, budget and schedule considerations, and the outcome of the analysis (accepted, rejected, on-hold). If a project is tracking over budget during a design review, we’ll aggressively generate options to achieve the budget. We strive to maintain design intent – prioritizing ideas that do not affect the overall design intent aesthetics, and function of the building. Ultimately, we analyze the impact of value engineering ideas, but the decision lies with the owner and designer for acceptance. On a recent \$30 million project in Grand Rapids, we developed over 250 value engineering ideas, saving over \$4 million, while maintaining the form of the design and full function of the building space.

E. ACCURACY IN PREPARING ESTIMATES VS. ACTUAL

The importance of accuracy with a project of this size and complexity cannot be overstated. Our job as your Construction Manager is to provide a comprehensive, accurate plan for every piece of the moving puzzle - and then execute that plan. Our results-driven approach includes:

- **Accurate Budgets** – We hold a goal of +/- 2% variance from final estimate to actual bid results, which we have consistently met on the vast majority of our projects (see variance graph on the following page);
- **Thorough Constructibility Review** – We engage experienced field and management personnel to analyze drawings and make sure the plan put in place is efficient and constructible when it comes time to build.
- **Detailed Accounting Process** – Our accounting process is both thorough and transparent. We compile all required paperwork, track on-time payments, and ensure that trade contractors are only paid for the amount of work completed each month.
- **On-Time Completion** – We establish and then closely monitor every detail of the schedule to ensure on-time completion. Our track record of accurate scheduling is unsurpassed.



**St. John XXIII Parish Life Center**  
Estimated - \$6,239,603.00  
Actual - \$6,025,479.14



**SWFCF Collaboratory**  
Estimated - \$5,455,106.00  
Actual - \$5,477,256.00



**New Hope Presbyterian Church**  
Estimated - \$6,226,797.00  
Actual - \$6,000,301.44

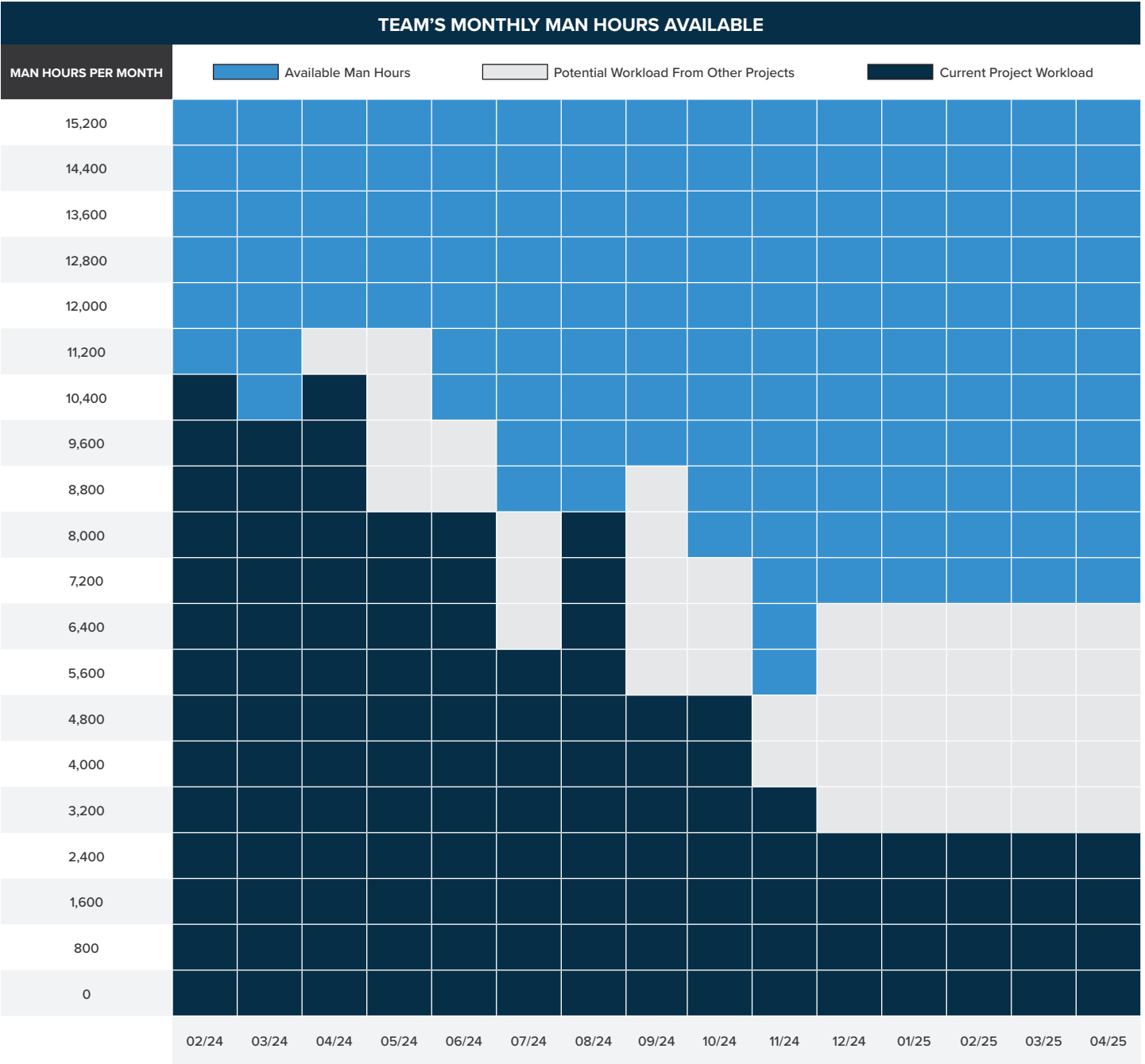


IV. PROJECT CONTROL

PROJECT WORKLOAD

F. Recent, Current and Projected Workload

This CMAR project comes at an ideal time and our team is available and excited to partner with you. We are currently finishing a number of projects, which allows us to start the estimating and planning for this project immediately. We have a lighter work load than we usually have so we can commit our resources to your projects immediately.



## IV. PROJECT CONTROL

### CURRENT WORKLOAD

Project Title & Location	Completed Project Size in Dollars	Required Completion Date (Month/Year)	Name, Address & Phone Number of Owner
Collier County Government Main Campus Upgrade Naples, FL	\$16.5 million	TBD	Collier County Board of County Commissioners Attn: Jim Flanagan 3295 Tamiami Trail E, Blvd C-2 Naples, FL 34112 (239) 252-8946
Lehigh Senior HS Re-Roof	\$6 Million	Jun-24	Lee County School District Attn: Steve Hanna 3308 Canal Street Fort Myers, FL 33916 (239) 479-4207
Franklin Park Elementary School Re-build Fort Myers, FL	\$65 million	Jul-24	Lee County School District Attn: Matthew Burbach 3308 Canal Street Fort Myers, FL 33916 (239) 479-4207
RSW Rental Car Service Bay Relocation Fort Myers, FL	TBD	Jul-26	Lee County Port Authority Attn: Emily Underhill 11000 Terminal Access Rd Fort Myers, FL 33914 (239) 590-4601
Page Field General Aviation Airport South Quadrant Hangars & Ramp Page Field Airport (FMY) Fort Myers, FL	\$10,428,000	Jul-24	Lee County Port Authority Attn: Emily Underhill 11000 Terminal Access Rd Fort Myers, FL 33914 (239) 590-4601
Lee Health Outpatient Center - Surfside Expansion - Cape Coral, FL	\$7.4 Million	Jan-24	Lee Health Attn: Eric Anderson 4211 Metro Parkway Suite 200 Fort Myers, FL 239-343-4814
Pelican Bay Community Center Expansion Naples, FL	\$10 million	TBD	Pelican Bay Foundation Attn: Melanie Miller 6251 Pelican Bay Blvd Naples, FL 34108 (239) 597-8081 x250
Punta Gorda Airport Design-Build Services for New FBO Hangar Punta Gorda, FL	\$1.8 million	TBD	Charlotte County Airport Authority Attn: Gary Duncan 8079 Golf Course Blvd Punta Gorda, FL 33982 (941) 639-1101 x104
Bonita Springs Elementary Historic Renovations	\$10 Million	TBD	Lee County School District Attn: Matthew Burbach 3308 Canal Street Fort Myers, FL 33916 (239) 479-4207
Cape Coral Technical College Expansion	\$25 Million	TBD	Lee County School District Attn: Tina Silcox 3308 Canal Street Fort Myers, FL 33916 (239) 479-4207

## V. PROPOSED APPROACH

### A. WHAT IS YOUR APPROACH TO CONSTRUCTABILITY AND BIDDING?

#### CONSTRUCTABILITY

Constructability reviews start immediately. Matthew Zwack, your Principal-in-Charge, and Kevin James, your project manager, manages this effort with our in-house team. As the documents are being developed, we continually evaluate the different components of the project and bring alternative means and methods to the Team for discussion. We bring a thorough knowledge of the existing site and bring the experience of similar projects. This experience is a valuable asset for the project.



#### QUALITY ASSURANCE

During the construction phase, our superintendents are the primary staff supervising and implementing quality control and to continue to assess the project for ways to build it better. We utilize other checks and balances to insure quality throughout the project. Our general superintendent will be on site and review each project to insure quality is in conformance. At different key points in any given project additional inspections or supervision is dispatched to a project. This can include independent engineering review and structural inspection, roof inspections, additional supervision or support.

Additionally, we have a Quality Control Program in which we have assembled more than 700 items to be tracked depending on the type of construction to assure a well-built project.

We achieve and maintain a high quality standard by using Quality Management System throughout design and construction that is ISO-9001 compliant. Routine business planning and clearly set strategies, goals and objectives are communicated and assigned for action within the firm. Trade contractors attend pre-bid and post-bid meetings to detail each part of the project, require that the schedule and guidelines are met, and maintain the quality standards of the project.



Regular progress meetings are held with the Team to specify progress on the project and areas that need attention. Site inspections occur daily to enforce quality standards. We are an employee-owned company and each member of our Team is a corporate shareholder. Each has a vested interest in the success of your project. We work hard to assure that your projects are of the highest quality.

#### BIDDING - OPEN BOOK PROCESS

We will assign all components of the project to detailed bid categories. The bid categories will be developed according to the Construction Specifications Institute (CSI) codes and will give the subcontractors detailed information regarding their scope(s) of work. This information will be organized succinctly and hard copies will be included with



## V. PROPOSED APPROACH

all bid documents. Before bid day, we will conduct pre-bid meetings where the bid categories, schedule, quality and safety are discussed in detail. When bid day arrives, we encourage Charlotte County to be present for the opening process. During the following week, we will schedule and facilitate post-bid interviews with the lowest and most qualified bidders to ensure that they have a thorough understanding of and commitment to your project. A proper understanding of work scope, schedule, safety, quality and all unique aspects of a project by all affected parties is the key to success. Our process of continual communication throughout the bid and award process will ensure an accurate understanding and successful project. We will accept the bids on the Counties behalf; review them thoroughly and present recommendations for award to you.

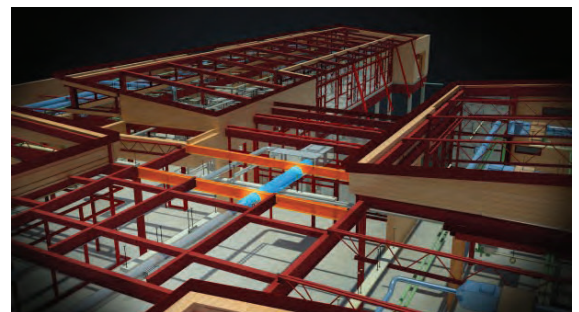
### B. WHAT CHALLENGES DO YOU ANTICIPATE AND HOW DO YOU PROPOSE TO SOLVE THEM?

**Construction Delays** - are possible due to inclement weather, material shortages, etc. In the event of construction delays, we search for alternate activities that can be fast tracked to provide efficiencies further along in the project to re-gain time. We also instruct our subcontractors to add additional crews or work longer hours to catch up if they fall behind. Most important to this situation, we search out potential delays before they happen and make contingency plans that are incorporated into the schedule. We also make sure the cause of delays are communicated to all involved parties so they know not just that the project is delayed, but why it is and how we intend to fix it.

**Material Price Escalation** - as our sub-contractors become busier and suppliers have less materials on hand, the cost increases on the available materials. We will overcome this by obtaining full market coverage in all our trade categories during the bid cycle and receive signed Purchase Orders quickly thereafter to lock in the pricing. The pre-construction to construction phase needs to be relatively close for this methodology to work best. We hold our suppliers to a constant price for the life of the contract or we establish a pre-determined price escalation to establish a price guarantee. This commitment from our suppliers, along with our timely payment schedules allows us to ensure price escalations do not affect us or Charlotte County.

**Errors and Omissions** - O-A-K takes a team approach with the design / engineering team members when it comes to E&O. Should we encounter an Error or an Omission during construction, we will work through the issue and a cost assignment will be determined among the team members. Should O-A-K be responsible, we will take responsibility.

**Shortage of Quality Tradesmen and Women** – O-A-K is looking to have the best tradesmen and women working on your project. We are very fortunate to have long standing and wonderful relationships with all our sub-contractors. They know and respect our quality expectations. We don't beat our subs up on price and they know that they will receive payment for work completed. Our sub-contractors want to work for us and in many cases provide us with preferential pricing based on our fair practices and pay policy. We do receive the best of the best among the quality tradesmen and women.



## V. PROPOSED APPROACH

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**The Southwest Florida construction market is making a positive rebound.** The residential market is leading the way followed by the commercial sector. We are beginning to see trade price increases as our sub-contractors are beginning to once again have project backlogs. Our subcontractors are continuing to experience a shortage of quality tradesmen and women but we anticipate this problem to correct itself as more skilled individuals will return to the area as the local construction industry strengthens.

### C. WHAT METHODS WILL YOU EMPLOY TO ENSURE CHARLOTTE COUNTY RECEIVES A QUALITY PROJECT WITHIN BUDGET AND SCHEDULE?

We would like to emphasize that **O-A-K is first and foremost an advocate for Charlotte County.** As an extension of your staff, we realize the importance of teamwork throughout every phase of the project. We value constant communication with the County's team members and know that in order to exceed your expectations, we must facilitate open and candid dialogue at all times. We will be available to you 24/7.

**Minimizing Disruption to the parks and the surrounding neighborhood.** Our goal is to exceed your expectations. One of the best ways to do this is to focus on ensuring zero disruptions to the surrounding neighborhood and to manage every aspect of the project - from Pre-Construction through Post-Construction. This is where we excel. We will ensure that all our trade partners abide by all posted speed limits along the neighboring roads and that deliveries are made during off-peak times so as not to disturb the neighbors.

The **relationships that we have with our local trade partners** is another distinguishing feature that we bring and provides our clients with best in-market pricing and schedule. Not only do our trade partners appreciate our payment policy, but we often times receive preferential pricing as they know they will be paid upon completion of work each month.

Our extensive **quality control program is best in class** within our industry. Our job site superintendents are in the field working alongside our trade partners, ensuring a safe and clean site, and that the quality of the work being performed is as expected.

Our **proactive scheduling, long lead time checks and daily communication with our trade partners and suppliers** keeps our projects on schedule and budget.

## V. PROPOSED APPROACH



**The Heights Early Learning & Educational Center**

### THE HEIGHTS EARLY LEARNING & EDUCATIONAL CENTER - CASE STUDY

Our team is very proud of this project for several reasons. The project had an extremely tight schedule to begin with, only to face a substantial delay in receiving all the needed permits, which delayed our construction start date. We had 10-months to build a fairly complex 3-story building, on the campus of the existing and very active Heights Center Campus. The site was extremely tight, and we had to work around the school traffic until, unfortunately, COVID-19 required the school to close. Through the buy-out and Direct Material Purchase (DMP) process, we were able to add a good amount of money to the owner's project contingency fund, which turned out to be a very good thing.

COVID-19 affected this project more than any other we had. The first issue came with the huge rooftop Trane AC units. Trane sent us a Force Majeure letter, basically telling us we would get the units when we get them, and they didn't care that this was a school that needed to be open on-time for the start of the Fall 2020 Semester. This required us to bring in three (3) very large temporary AC units so we could install all of the finishes under air. Using the temporary AC units was a huge inconvenience. Two of them we set on the roof and ran them through the ductwork so they were out of the way, but the 3rd one had to sit on the ground so it was in the way of completing

the site work in that area, and there was temporary ducts running through the spaces that we were trying to finish. The temporary ACs cost the project quite a bit of money.

We also had an issue with the tile that was coming from Italy. The tile manufactures blamed COVID-19 and did not get the tile shipment out in time. The tile got stuck in an Italian Port. We knew it was stuck there and would eventually get here, but we knew for sure it wouldn't get here on time, so we had to quickly find enough tile in the US that we could get in-time, have the owner approve the additional cost, and order to ensure its arrival for installation. Fortunately, we were able to make that all work, and now we have 16-pallets of Italian tile in our shop that we need to figure out what to do with.

Another huge hurdle that we had to overcome was the elevator. The elevator company, was about like Trane, and told us we would get the elevator whenever we get it. We pushed and pushed and were able to get the elevator installed and working before school started, but we did have to get a Temporary Certification of Occupancy (TCO) without an elevator so they were able to move-in and get set up in the couple of weeks before school started.

Even with all the challenges, extremely tight schedule and COVID-19 supply delays, our team members managed this project perfectly, got it done on-time and were still able to give the client back savings at the end of the project. The client was extremely happy, from start to finish, we made the process seamless for her and the end result is a beautiful, high quality and very functional educational building home to the GLAD Kids Early Learning Center and the Harlem Heights Community Charter School.



**Temporary Rooftop A/C units**



## VI. EXAMPLES OF RECENT PROJECTS

# LOVERS KEY WELCOME CENTER

## 1. PROJECTS DELIVERING SIMILAR GOVERNMENT FACILITIES

Lovers Key State Park is located between Fort Myers Beach and Bonita Beach in Lee County. The FDEP hired Sweet Sparkman Architecture & Interiors to design and permit a high New Welcome and Discovery Center at Lovers Key State Park. The facility includes a main floor approximately 5,000 SF with an event space along with an outdoor deck and interpretive museum space. Support spaces expected to include administrative area, restroom facilities, and a galley kitchen.

## 2. SCHEDULE AND COST CONTROL

Owner hired a Construction Manager to oversee the schedule and update the schedule periodically. The Construction Manager worked in conjunction with Sweet Sparkman to control the schedule and critical path of the project. This project was completed on schedule. Building materials at the Visitor Center were cast in place concrete.

One of the community partners for this project was the FOLKS (Friends of Lovers Key). Sweet Sparkman and O-A-K helped manage these passionate volunteers and incorporate their resources into the project.

## 3. SUCCESSFUL VALUE ENGINEERING SOLUTIONS

We changed out the foundation columns to footers.

## 4. SUCCESSFUL EXPERIENCES WITH LOCAL SUBCONTRACTORS

This was a challenging project and our local subcontractors stepped up to the challenge. Despite the COVID-19 pandemic we were able to finish the project on budget and schedule. We have very good relationships with the local subcontractor market, we pay them on time and provide them with regular updates as to the schedule, etc. It definitely takes a team of professionals working together towards the same goal to be successful.

Use your camera to scan the QR code on the right to watch a short video of this project where our trade partner, Westcoast Structural, is pouring the deck of the Lovers Key Welcome & Discovery Center was poured. It took 35 full trucks to deliver all of the concrete and they started the pour at 4:00 a.m.



## VI. EXAMPLES OF RECENT PROJECTS

### 5. ANY ADDITIONAL CONSTRUCTION COSTS CAUSED BY DESIGN DEFICIENCIES, NOT PROGRAM CHANGES.

There were no additional construction cost caused by design deficiencies. Project was delivered on budget in adherence to the schedule.

### 6. CONSTRUCTION PROBLEMS AND MEANS TAKEN TO RESOLVE.

The building needed to be elevated to accommodate coastal flooding. The result is a structure sited within an existing opening in the vegetation, that is building on columns that mirror the rugged mangrove root systems that protect the barrier island. Some columns extend to the roof full height to give the impression of a building nestled within roots.

**FLOOD AND V-ZONES** - The building is built to withstand 160 MPH winds and is on the Risk Category Table II. The Flood zone is categorized as AE and the elevation is 14 ft. The structure is landward of the Coastal Construction Control Line

### 7. COMMUNICATION WITH DESIGN TEAM DURING BOTH PRE-CONSTRUCTION AND CONSTRUCTION PHASES

Communication is a key component to a successful project and we utilize a variety of methods to ensure everyone is fully informed. Each morning our job site superintendents will hold a subcontractor meeting onsite to go through the days activities and ensure that everyone is following proper safety protocol. They are also informed of large construction equipment movements and specific times this will occur.

The owner, design team and O-A-K held weekly team meetings where we discussed the schedule, cost, and challenges and provided solutions when/if they surfaced. We touched base with the Park Manager, Kate Mosses, on a daily basis to provide her and her team with updates as to our progress and what they should expect in the weeks ahead. Keeping everyone informed is something that we pride ourselves on and talk about often at team meetings.



Above left: O-A-K and Sweet Sparkman Celebrate the Opening of the Visitors Center



Right: O-A-K and Mark Generales with the FOLKS celebrate winning a Summit Award for Best Commercial Project by the Lee County Building Industry Association.

## VI. EXAMPLES OF RECENT PROJECTS

# COLLABORATORY

### 1. PROJECTS DELIVERING SIMILAR GOVERNMENT FACILITIES

#### The Southwest Florida Community Foundation Collaboratory

The renovated train station and a 15,000-square-foot addition designed and built to earn LEED Gold certification is home to the foundation's new regional offices and the Collaboratory, offering meeting and tenant spaces, social gathering and special events venues, and shared working and collaborations space all powered by state-of-the-art Florida Lambda-Rail broadband internet. As a public-private partnership with the Southwest Florida Community Foundation and the City of Fort Myers, the 22,500-square-foot project included the renovation of the almost 100 year old Atlantic Coast Line Railroad depot which the foundation preserved not only the original Spanish Mission-style architecture in the station's arches, but also some of the windows, doors, benches and signage.



### 2. SCHEDULE AND COST CONTROL

What an exciting project this was to construct. The project was funded through a \$10 million New Market Tax Credit deal which encourages economic development in distressed neighborhoods. With this being said we had a number of deadlines to make and a budget that had to be met. Throughout construction the owners were making changes to the design and finishes and it was our job to keep both the budget and schedule on track. Despite these many changes our team was successful and the project came in both under budget and ahead of schedule.

### 3. SUCCESSFUL VALUE ENGINEERING SOLUTIONS

Time was not on our side with this project, as we had funding deadlines to meet for the grant requirements. We had some specified products coming from Europe that got delayed and as a result we identified a number of similar, like-kind products that we could receive in time for installation. We presented the options to the owner and they actually liked the products better than what they originally had ordered so not only did this save our schedule but it also saved the client money and the alternative options were less expensive.

### 4. SUCCESSFUL EXPERIENCES WITH LOCAL SUBCONTRACTORS

Yes, we had a great experience utilizing local subcontractors. With this project being located in the heart of downtown Fort Myers within close proximity to the Dunbar community, we reached out to the community leaders and influencers to engage the smaller subcontracting partners from the neighborhood. We provide them with



## VI. EXAMPLES OF RECENT PROJECTS

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bidding assistance and made sure the bid packages were small enough that most all could participate. We achieved a DBE and WMBE participation rate that far exceeded our initial estimate and goal.

### 5. ANY ADDITIONAL CONSTRUCTION COSTS CAUSED BY DESIGN DEFICIENCIES, NOT PROGRAM CHANGES.

By utilizing Building Information Systems (BIM) throughout design all deficiencies were identified early before construction started. This saved both time and money.

### 6. CONSTRUCTION PROBLEMS AND MEANS TAKEN TO RESOLVE.

From a construction perspective, the trickiest obstacle was converting a nearly 100-year old building into a modern, high tech and high efficiency space all while preserving the historic attributes.

From the design perspective the greatest challenge was providing a solution that meets the project's functional and operational requirements within the established budget.

By collaborating as a project team — owner, construction manager and designers — we were able to assemble a priority list of needs with their associated costs. As a team, we crafted a design that met the project needs as outlined, addressing efficiency in operations, energy and maintenance.

### 7. COMMUNICATION WITH DESIGN TEAM DURING BOTH PRE-CONSTRUCTION AND CONSTRUCTION PHASES

Communication is a key component to a successful project and we utilize a variety of methods to ensure everyone is fully informed. Each morning our job site superintendents will hold a subcontractor meeting onsite to go through the days activities and ensure that everyone is following proper safety protocol. They are also informed of large construction equipment movements and specific times this will occur.

The owner, design team and ourselves hold weekly team meetings where we discuss the schedule, cost, and challenges but always provided solutions when/if they arise. We touch base with nearby residents / businesses on a regular basis to provide them with updates as to our progress and what they should expect in the weeks ahead. We do this through a dedicated project website, flyers, neighborhood events, and milestone site tours if applicable. Keeping everyone informed is something that we pride ourselves on and talk about often at team meetings.

## VI. EXAMPLES OF RECENT PROJECTS

### 8. METHODS TO INCORPORATE SUSTAINABILITY AND GREEN BUILDING PRACTICES IN THE CONSTRUCTION MANAGEMENT (CM) PROCESS.

The Southwest Florida Community Foundation's Collaboratory has achieved Leadership in Energy and Environmental Design **Gold certification** using the LEED v4 Building Design + Construction: New Construction rating system.

"It's incredibly exciting to see a project that doesn't just succeed as a high-performance facility, but is designed to actively educate everyone that visits on how they can achieve the same here in Southwest Florida," said Chris Ressler, president of the SWFL branch of the U.S. Green Building Council. "This combination of performance and education is exactly what LEED and the USGBC stand for."

Collaboratory earned significant points toward certification for the following building aspects: performance-based air quality design and assessment by including a smart air scrubber system into the HVAC systems; committing to the reuse of the historic Atlantic Coast Line Train Station; achieving zero rainwater run off through the combination of permeable paving and rain gardens; high efficient water usage plumbing fixtures; and overall energy use optimization.

"We hope this building and its LEED Gold designation can be an example and inspiration to others to make the investment in sustainable building design," said Sarah Owen, president and CEO of the Southwest Florida Community Foundation. "The up-front costs more than pay off in both commitment to the mission and the money poured back into the community from decades of savings down the road."



## VII. EXPERIENCE AND CAPABILITIES

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### A. GOVERNMENT FACILITIES WITH MULTIPLE ORGANIZATIONS AND STAKEHOLDERS

We are accustomed to working on these type of projects. For instance, the Lovers Key State Park Welcome and Discovery Center was a collaborative project between the State of Florida Department of Environmental Protection and the Friends of Lovers Key (FOLK). The FOLK group is a 501(c)3 state sanctioned, citizen support organization (CSO) that directly supports the mission of Lovers Key State Park (LKSP). They are authorized to raise funds in support of Lovers Key State Park's objectives through donations, grants and merchandise sales. It was the FOLK group who spearheaded the Welcome and Discovery Center and wanted to have ample say in its design and finishes. The FL DEP held the purse to the project so we balanced the needs and wants of the FOLK group to align with the available budget.

### B. LIFE CYCLE COST ANALYSIS AND CONTROL INCLUDING VALUE ENGINEERING

An accurate evaluation of the cost of a building over its life cycle is one of the most important requirements of a successful value analysis program. Most cost estimates developed in the construction industry deal only with the initial capital costs from the viewpoint of the construction cost of the initial total capital expenditure, yet the life of the building or facility will extend over 20 to 50 years or more. During this period, the cost of maintaining and servicing the facility, including the cost of utilities such as steam, electrical power, or natural gas, will equal or exceed the initial capital cost.

Life cycle cost analysis from the client's viewpoint must therefore take into account both capital and future operation and maintenance costs if maximum value is to be achieved. This technique provides the client with an analysis of true "total costs" over the life of the building, and allows decision-making to ensure that maximum benefit is realized at the lowest total cost. Owen-Ames-Kimball Co.'s life cycle costing offers many benefits, including reducing the total cost of ownership, assistance in selecting alternatives that are environmentally sustainable while minimizing premature building obsolescence, and providing a useful "yardstick" for measuring the overall economy of various design alternatives.

### C. CRITICAL PATH METHOD

A key component to a project's success is scheduling. Owen-Ames-Kimball uses Microsoft Project software to develop multi-level schedules for Critical Path Method of scheduling.

An overview schedule is developed early in the project planning process. This project overview or global view of a project addresses the total team effort, including design, financing, permitting, and construction activities. This overview schedule is completed with the design team, owner, and the O-A-K management team.

The project construction activity schedule is the blueprint for trade coordination. This critical path driven study identifies key trades and activities so that the project can be managed with the knowledge of what future priorities will drive project completion. This schedule is updated at least monthly and is the responsibility of the project manager, general superintendent, and executive superintendent.



## VII. EXPERIENCE AND CAPABILITIES

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Targeted time-frame schedules look at short durations and cover more detail within a given time frame than the project construction activity schedule. They are short term, typically field generated, and look at critical short-term needs of the job. This feature not only shows the future schedule for completion but retains the original “Baseline Schedule” as updates are made. Primarily this schedule is managed by the executive superintendent however the general superintendent and project manager also monitor the activity on this schedule.

Other techniques for maintaining a project’s schedule is to review early-on shop drawings and submittals for long lead items that can affect critical path activities within the construction schedule. We also place a deadline on completion on all remaining schedules. Shop drawing submittal dates are specifically cited in all subcontracts issued by Owen-Ames-Kimball. This type of activity is done by the principal-in-charge and the project manager.

Submittals for items such as long-lead item ordering and permitting are also tracked using a detailed submittal log generated early in the project process. This log lists all expected submittals and establishes processing timeliness. Our management software, *Construction Project Manager (CPM)* and *Procore*, tracks submittals. Submittal dates from trade contractors are incorporated specifically in subcontracts and also tracked.

### D. PRECONSTRUCTION SERVICES WITH A FOCUS ON MINIMIZING COST WHILE MAXIMIZING SCOPE

During the design/development phase, O-A-K would assist the design team by preparing a construction budget as a tool for the design team. We would suggest alternatives in systems, elements, or methods, if we felt the client needs could be met more economically or a better end product can be achieved in a different manner. This would be based on current trade market availability and pricing. An example might be for some wall sections a better value would be masonry rather than concrete. Other times the reverse might be true. The same would hold for structural steel trusses versus light gauge steel trusses, and so on. Sometimes design parameters guide the ultimate decisions, sometimes schedules, and sometimes budget, all depending on the base needs of the client. Our expertise in approaching the project with the knowledge availability and capability of the local subcontractor and supplier marketplace and approximate pricing would be critical to a successful project outcome.

During the construction document phase of the project, we assist the design team by providing a detailed project construction schedule, constructability analysis, coordinating review of the documents, and updating the budget with current information. We do this so that when subcontractors bid on the final drawings, they know the exact project parameters and time frame for delivering all components. At this time, O-A-K will also give guidance as necessary as to details to achieve water tightness, workability, code compliance, or overall project efficiency. Examples might be, suggesting secondary sill pans on exterior windows, using aluminum or fiberglass exterior doors due to proximity to the saltwater, bronze glow treatment to air conditioning coils due to salt air corrosion, adjusting reinforcement lap configuration to match anticipated joint location, suggesting coating specification to accommodate joint expansion details and so on.

We continually explore opportunities to extend cost savings if it makes sense for the project and still meets the client’s goals during the construction phase. Examples of this might be that we become aware of crushed concrete being available in a location close to the project and suggest its use as a substitute for the limerock under the parking lot. We may bring forward subcontractor suggestions for material changes on specific pricing situations.

## VII. EXPERIENCE AND CAPABILITIES

Through these project processes, we try to bring all reasonable suggestions to the client and design team for consideration without slowing the overall process or compromising the quality of the project.

### E. UTILIZATION OF BUILDING INFORMATION MODELING (BIM) TO A LEVEL 4

Building Information Modeling (BIM) is a tool that we have been using since 2014. Working in collaboration with the design team, we are able to develop a real-time six dimensional model that incorporates every building component. We are then able to incorporate our construction scheduling into the model and highlight lead times, installation/construction timeframes, etc. This provides us invaluable sequencing data that will help us develop the most efficient and optimized project schedule.

Using our Building Information Modeling (BIM) system, our experts are able to compile the Fire Stations 3, 6, and 17 plans into a conceptual six-dimensional building map. This system will provide an efficient means of:



- Virtual representation for budgeting and estimating.
- Detailed subcontractor coordination prior to construction.
- Preemptive discovery of conflicts between underground utilities, HVAC, electrical, etc.
- Minimizing field fabrication.
- Post-construction facility maintenance.

Prior to the preconstruction phase of the project, O-A-K will work with the project team to develop a BIM Execution Plan which will outline the team and their roles and responsibilities, define the expected level of detail for the construction models, identify all uses for the BIM, and establish the means of communication. By instituting this framework early, the BIM manager will set the tone for the project and minimize surprises throughout the process.

Throughout the design process, O-A-K will utilize the BIM models from the design team by conducting constructibility reviews and preliminary interference checks which will help to ensure that the County's building systems will fit within the building parameters. After the design is complete and the final design is approved, O-A-K will recreate the BIM Execution Plan (BEP) to incorporate the subcontractors participating in the BIM process.

### F. PERMITTING IN SOUTHWEST FLORIDA & CHARLOTTE COUNTY

Ensuring a streamlined permitting process is a critical path item to ensuring this project is completed on schedule. Our team is very familiar with Charlotte County and the permitting requirements that are needed for a project of this size, scope and location. We will begin in earnest with the South Florida Water Management District (SWFWMD) as they tend to be the biggest hurdle. Fortunately we have established wonderful relationships over the years with this agency and are very familiar with their requirements so this should be a very smooth and timely process. We will work in tandem with the design team to ensure that the required permits are received and the project can begin as scheduled.

## VIII. VOLUME OF WORK

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### VOLUME OF WORK - TOTAL OF PAYMENTS RECEIVED FROM COUNTY WITHIN THE 24 MONTHS

The total payments received from Charlotte County within the last 24 months is \$0.00.

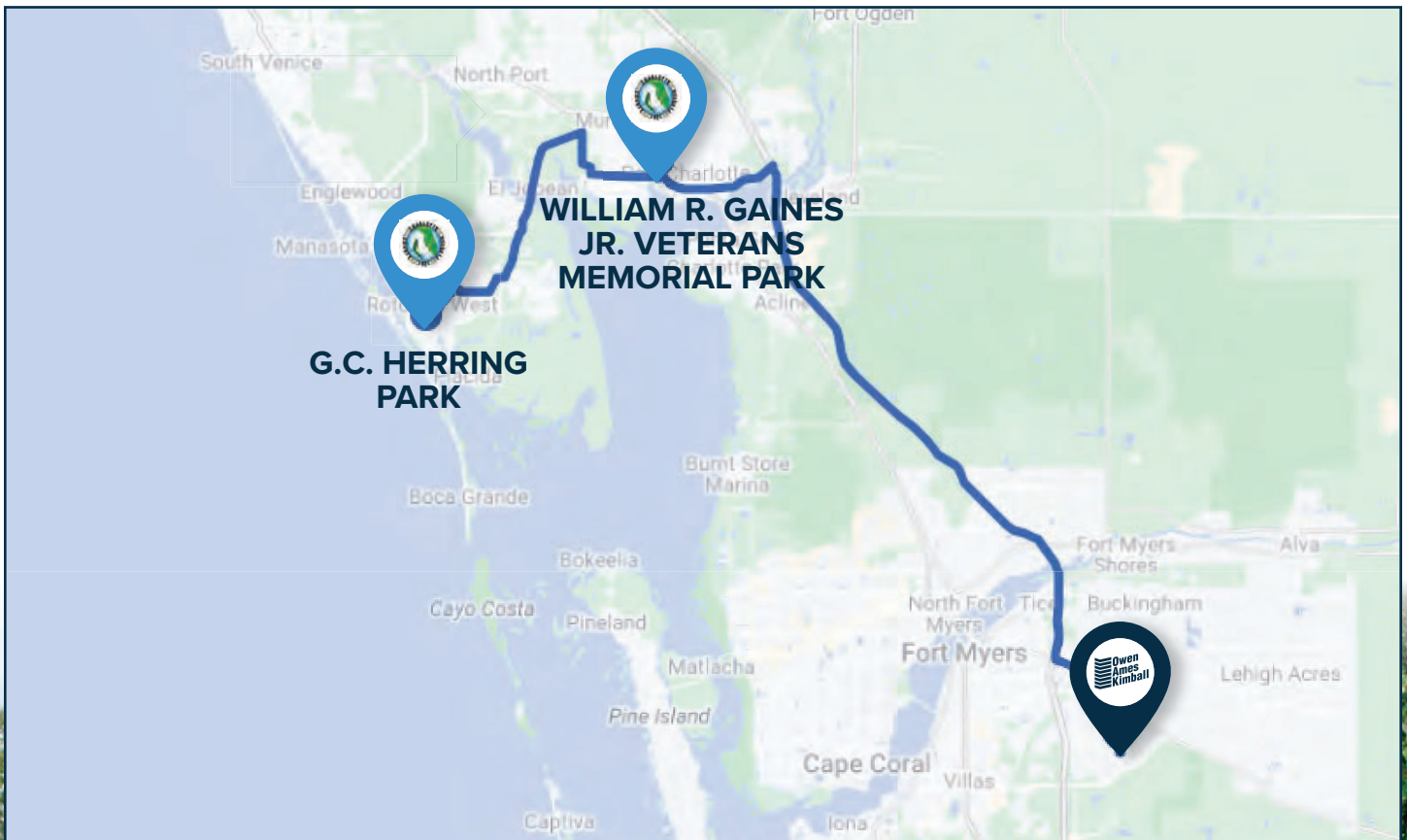


## IX. LOCATION

O-A-K's home office is located at 11941 Fairway Lakes Drive, Fort Myers, Florida 33913, 62 miles from G.C. Herring Park, and approx. 42 miles from William R. Gaines, Jr Veterans Memorial Park. **Our selected superintendents Brandon Henderson (Punta Gorda) and Brian Slowinski (Port Charlotte) live just minutes away from each of these parks.**

O-A-K provides on-site job site supervision for all Charlotte County Government work. With our on-site job trailers and our close proximity to your County offices, as well as our other O-A-K project sites throughout Charlotte and Lee Counties, our staff and equipment will be readily available for these important projects. **Our team members live throughout Southwest Florida and are only minutes from your two parks, and can be on-site within minutes and are available 24/7.**

**O-A-K's Fort Myers office will provide support for this project.** The Fort Myers office is located in the Gateway development in East Lee County at 11941 Fairway Lakes Drive, Fort Myers, FL 33913. This address has been our Florida headquarters location for the past 30 years. O-A-K has had an office in Southwest Florida and has been working and supporting this community for the past 42 years.



*Owen-Ames-Kimball Company Florida Corporate Office*



## IX. LOCATION

# CONSTRUCTION EQUIPMENT

O-A-K also owns a Construction Yard located within Gateway and is located in Lee County, where we keep large and small equipment and tools that is always at the ready when the need arises.

All of us at Owen-Ames-Kimball work tirelessly to provide our clients with an exceptional construction experience, starting with the preconstruction phase and all the way through close out. We know that a properly planned, fully coordinated project is the key to the successful outcome of any construction effort, and we are going to do whatever it takes to make that happen.

It's not often that you find the President of the Company and Job Site Superintendents operating construction equipment. But at O-A-K, we are unique in that regard and a majority of our team members are licensed and experienced operators.



*John Tartaglia, Job Site Superintendent stops to take a photo with project managers Ellen Bisogno and Kevin James.*



## X. LITIGATION

# LEGAL

**OUR TEAM IS NON-LITIGIOUS. WE DON'T HAVE ANY CURRENT LITIGATION PENDING.**

**Owen-Ames-Kimball Company retains the following attorney:**

George H. Knott

Knott Ebelini Hart, Attorneys at Law

**Mailing Address:** Post Office Box 2449; Fort Myers, Florida 33902

**Voice:** (239) 334-2722

In the last nine years we have been mentioned in the following cases:

**Lee County, Florida Civil Court Case No. 17-CA-2251 - Derek Egan v. O-A-K/Florida, Inc.**

The plaintiff brought suit for a slip and fall accident he had while at his place of employment. He claims that immediately following our subcontractors installation of new tile floor that he slipped and fell. It turns out the plaintiff is a repeat slip and fall victim.

**Status: Owen-Ames-Kimball Company settled this case in December 2018.**

iii. Describe in detail any projects within the last three (3) years where liquidated damages, penalties, liens, defaults, cancellations of contract or termination of contract were imposed, sought to be imposed, threatened or filed against your organization.

We have zero (0) incidents. O-A-K has completed all of our projects within the allotted schedule.

**OWEN-AMES-KIMBALL COMPANY HAS NEVER FAILED TO COMPLETE ANY AWARDED WORK.**





## XI. MINORITY BUSINESS

# MINORITY BUSINESS

**O-A-K/Florida, Inc. is not certified as a minority business enterprise. We do have an exceptionally strong and proven DBE and W/MBE program and look forward to utilizing our experience on this contract.**

### DBE and W/MBE History and Plan

O-A-K agrees to ensure that DBEs and W/MBEs will have the maximum opportunity to participate in this work and commit to working with Charlotte County on achieving satisfactory DBE and W/MBE contracting opportunities, as our project history attests. In order to accomplish these goals, O-A-K also runs a Legal Bid Advertisement in the local newspaper 30 days prior to bid opening and sends Bid Invitations to all DBE and W/MBE subcontractors listed in the Owen-Ames-Kimball Company database. Other unique tools used by O-A-K to encourage DBE and W/MBE participation include direct mailings, telephone contact by project manager, targeted packaging of trade bids to accommodate bidding by DBE and W/MBE firms, pre-bid community outreach and educational meetings, specific DBE and W/MBE provisions discussed at the pre-bid conference, qualification assistance to potential firms, payment program to help fund operations through construction process, assistance in collateral material preparation and distribution, contacted local media to provide information to the community on this project opportunity.

Project	DBE Goal %	Actual DBE %
New Lehigh Acres Middle School	0%	33%
Amanecer Elementary School	0%	21%
Aubrey Rogers High School	0%	15%
Naples Airport - Aircraft Rescue Fire Station	8.9%	23.8%
RSW - TSA Checkpoint Modifications	10%	19.6%
RSW - FIDS Upgrade	5%	14%
RSW - CCTV Upgrade	8%	20%
FMY - Airside Perimeter Road	13%	51%
Corkscrew Road Safety Improvements	5%	7.67%
FMY- Page Field North Terminal Tenant Improvements	10%	37.50%

**O-A-K is always committed to the success of Charlotte County's DBE & M/WBE program and will continue to emphasize its importance and strive for achieving/exceeding its goals in all projects.**



Matchmaker Workshop at FGCU



McCollum Hall Restoration Kick-Off Ceremony

## REQUIRED FORMS

### Owen-Ames-Kimball Company Reference List

**Mr. Jim Hehl**

Assistant Vice President, Physical Plant  
Florida Gulf Coast University  
10501 FGCU Boulevard South  
Fort Myers, FL 33965  
Tel: (239) 590-1313  
jhehl@fgcu.edu



FGCU CENTER FOR ENTREPRENEURSHIP

**Mr. Steve Hanna**

Project Manager  
Lee County School District  
3308 Canal Street  
Fort Myers, FL 33916  
Tel: (239) 479-4274  
stephenlh@leeschools.net



NEW LEHIGH ACRES MIDDLE SCHOOL

**Ms. Katie Moses**

Park Manager, Lovers Key State Park  
Florida Dept. of Environmental Protection  
8700 Estero Blvd  
Fort Myers Beach, FL 33931  
Tel: (239) 463-4588  
Catherine.Moses@FloridaDEP.gov



LOVERS KEY WELCOME AND DISCOVERY CENTER

**Mr. Jonathan Romine**

Chief Operations Officer  
The Collaboratory  
2031 Jackson Street  
Fort Myers, FL 33901  
Tel: (239) 274-5900  
jromine@collaboratory.org



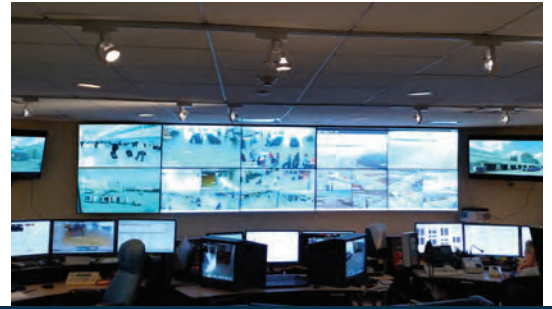
SWFL COMMUNITY FOUNDATION - COLLABORATORY

## REQUIRED FORMS

### Owen-Ames-Kimball Reference List

**Mr. Adam Nguyen**

Senior Manager - Eng. & Construction  
Lee County Port Authority  
11000 Terminal Access Road  
Fort Myers, FL 33913  
Tel: (239) 590-4610  
ahnguyen@flylcpa.com



LEE COUNTY PORT AUTHORITY - CCTV UPGRADE

**Mrs. Kathryn Kelly**

Executive Director & Founder  
Harlem Heights Foundation  
15570 Hagie Drive  
Fort Myers, FL 33908  
Tel: (239) 340-6300  
kathryn@heightsfoundation.org



HEIGHTS EARLY LEARNING & EDUCATION CENTER

**Mr. Mark Generales**

Chairman of the Board  
Friends of Lovers Key  
9240 Bonita Beach Road  
Bonita Springs, FL 33919  
Tel: (239) 676-5676  
markg@southerntrustfinancial.com



LOVERS KEY WELCOME AND DISCOVERY CENTER

**Ms. Holly Atkins**

Business Manager  
St. John XXIII Parish  
13060 Palomino Lane  
Fort Myers, FL 33912  
Tel: (239) 561-2245  
holly@johnxxiii.net



ST. JOHN XXIII PARISH HALL



## REQUIRED FORMS

### 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
	Kevin James, Project Manager	36	Fort Myers	Fort Myers	Cape Coral
	Abel Natali, Director of Preconstruction	17	Fort Myers	Fort Myers	Fort Myers
	Ryan Propp, General Superintendent	27	Fort Myers	Fort Myers	Fort Myers
	Brandon Henderson, Project Superintendent	17	Fort Myers	Fort Myers	Punta Gorda
	Brian Slowinski, Project Superintendent	31	Fort Myers	Fort Myers	Port Charlotte
	Gabriel Garcia, Project Superintendent	4	Fort Myers	Fort Myers	Fort Myers
	Alesha Watchowski, Director of Operations	10	Fort Myers	Fort Myers	North Fort Myers
	Matthew J. Zwack, President	27	Fort Myers	Fort Myers	Port Charlotte & Naples
2.	<b>Magnitude of Company Operations</b>				
	A) Total professional services fees received within last 24 months:			\$ 12,000,000	
	B) Number of similar projects started within last 24 months:			36	
	C) Largest single project to date:			\$98,000,000	
3.	<b>Magnitude of Charlotte County Projects</b>				
	A) Number of current or scheduled County Projects			1   PGD Hangar	
	B) Payments received from the County over the past 24 months (based upon executed contracts with the County).			\$0	
4.	<b>Sub-Consultant(s)</b> (if applicable)	<b>Location</b>	<b>% of Work to be Provided</b>	<b>Services to be Provided</b>	
		N/A			
5.	<b>Disclosure of interest or involvement:</b> 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	Address			
	Phone #	Contact Name			
	Start Date	Ending Date			
	Project Name/Description	N/A			

NAME OF FIRM O-A-K/Florida, Inc. DBA Owen-Ames-Kimball Company  
(This form must be completed and returned)



## REQUIRED FORMS

### 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 01/24/24 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☐  
☐O-A-K/Florida, Inc.

Firm Name

239-561-4141

Telephone

Owen-Ames-Kimball Company

Fictitious or d/b/a Name

59-2190605

Federal Employer Identification Number (FEIN)

11941 Fairway Lakes Drive

Home Office Address

Fort Myers, FL 33913

City, State, Zip

42

Number of Years in Business

Same as above

Address: Office Servicing Charlotte County, other than above

Abel Natali, Director of Preconstruction

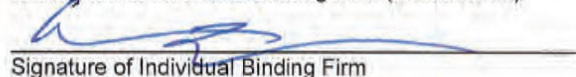
Name/Title of your Charlotte County Rep.

239-561-4141

Telephone

Matthew J. Zwack, President

Name/Title of Individual Binding Firm (Please Print)



Signature of Individual Binding Firm

30 January 2024

Date

mzwack@oakfl.com

Email Address

(This form must be completed &amp; returned)


## REQUIRED FORMS

### DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that O-A-K/Florida, Inc.  
DBA Owen-Ames-Kimball Co.  
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

30 January 2024  
\_\_\_\_\_  
Date

END OF PART IV

(This form must be completed & returned)



## REQUIRED FORMS

Owen-Ames-Kimball Company's strong financial position, impressive staff or professionals, proven track record on large and complex projects and strong support of repeat customers, this firm is able to obtain bonding support for **single projects in excess of \$250,000,000** and **aggregate work programs in excess of \$500,000,000**



560 5<sup>th</sup> Street NW, Suite 202  
Grand Rapids, MI 49504

January 12, 2024

RE: Bonding Capacity of O-A-K/Florida, Inc. dba Owen-Ames-Kimbal Co.  
11941 Fairway Lakes Dr.  
Fort Myers, FL 33913

To Whom it May Concern,

This letter is to confirm Owen-Ames-Kimball Company's bonding capacity. Owen-Ames-Kimball Company has enjoyed a 20+ year bonding relationship with their surety, Travelers Casualty and Surety Company of America (current A.M. Best Rating A++XV). As a result of Owen-Ames-Kimball Company's strong financial position, impressive staff of professionals, proven track record on large and complex projects and strong support of repeat customers, this firm is able to obtain bonding support for single projects in excess of \$250,000,000 and aggregate work programs in excess of \$500,000,000.

Based on this history, Owen-Ames-Kimball Company should be pre-qualified for any job(s) up to \$250,000,000.

EPIC is honored to be part of Owen-Ames-Kimball Company's risk management and bonding team. Should you have any questions, please contact me.

Sincerely,

A handwritten signature in blue ink that reads 'David J. Hop'.

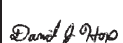
David Hop  
Managing Principal

Epic Insurance Brokers  
David Hop  
Managing Principal  
E: david.hop@epicbrokers.com

250 Monroe Ave NW  
Grand Rapids, MI 49503  
P: (616) 822-5941

## REQUIRED FORMS

O-A-K's current insurance certificate is provided below. Our \$20 million umbrella policy "sits" on top of our general, automobile and employers (part of workers compensation insurance) liability limits. The additional information requested about our insurance company(s) is detailed in the right side bar.

Client#: 164731		OWENNAME1		DATE (MM/DD/YYYY) 1/12/2024															
<b>ACORD</b> <b>CERTIFICATE OF LIABILITY INSURANCE</b>																			
<p>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</p> <p>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).</p>																			
<b>PRODUCER</b> EPIC Insurance Midwest 560 5th Street, Suite 202 Grand Rapids, MI 49504		<b>CONTACT NAME:</b> Patti Zuk <b>PHONE (A/C, No, Ext):</b> - <b>FAX (A/C, No):</b> - <b>E-MAIL ADDRESS:</b> patti.zuk@epicbrokers.com																	
<b>INSURED</b> O-A-K/Florida, Inc. 11941 Fairway Lakes Dr. Fort Myers, FL 33913		<table border="1"> <thead> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A : National Union Fire Ins Co of Pittsburg</td> <td>19445</td> </tr> <tr> <td>INSURER B : New Hampshire Insurance Company</td> <td>23841</td> </tr> <tr> <td>INSURER C : The Charter Oak Fire Insurance Company</td> <td>25615</td> </tr> <tr> <td>INSURER D : Arch Specialty Insurance Company</td> <td>21199</td> </tr> <tr> <td>INSURER E : Allied World National Assurance Company</td> <td>10690</td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </tbody> </table>				INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : National Union Fire Ins Co of Pittsburg	19445	INSURER B : New Hampshire Insurance Company	23841	INSURER C : The Charter Oak Fire Insurance Company	25615	INSURER D : Arch Specialty Insurance Company	21199	INSURER E : Allied World National Assurance Company	10690	INSURER F :	
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<b>COVERAGES</b> <b>CERTIFICATE NUMBER:</b> <b>REVISION NUMBER:</b>																			
<p>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>																			
INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS													
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:		GL3118752	09/01/2023	09/01/2024	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$500,000 MED EXP (Any one person) \$10,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COM/PROP AGG \$2,000,000 \$													
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY		CA2446812	09/01/2023	09/01/2024	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$													
E	<input checked="" type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB DED. <input checked="" type="checkbox"/> RETENTION \$10,000		03119130	09/01/2023	09/01/2024	EACH OCCURRENCE \$10,000,000 AGGREGATE \$10,000,000 \$													
B	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE/OFFICER/ MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N/A	W013326633	09/01/2023	09/01/2024	<input checked="" type="checkbox"/> PER STATUTE E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000													
C	Leased/Rented Equ		QT6607S015455TIA22	09/01/2023	09/01/2024	\$375,000/\$1,000 Ded.													
D	Professional & Pollution Liab.		CPP00344101014	09/01/2023	09/01/2024	\$3,000,000 per Occ/Agg \$50,000 Retention													
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) RFP 2024000098   CMAR William R. Gaines Jr. Veterans Memorial Park and G.C. Herring Park, certificate holder its officers, employees, agents and volunteers are named as additional insureds on a primary and non contributory basis as required by written contract. A waiver of subrogation applies in favor of additional insured as required by written contract.																			
<b>CERTIFICATE HOLDER</b> Charlotte County Board of County Commissioners 18500 Murdonck Circle Port Charlotte, FL 33948-1094			<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 																
ACORD 25 (2016/03) 1 of 1 The ACORD name and logo are registered marks of ACORD © 1988-2015 ACORD CORPORATION. All rights reserved.																			

### Insurance Company Carrier(s):

Epic Brokers

Attn: Patti Zuk, Director

560 5th Street NW, Ste. 202

Grand Rapids, MI 49504

Direct: (616) 822-5941

patti.zuk@epicbrokers.com

### Insurance Companies Raties:

A.M. Best Ratings

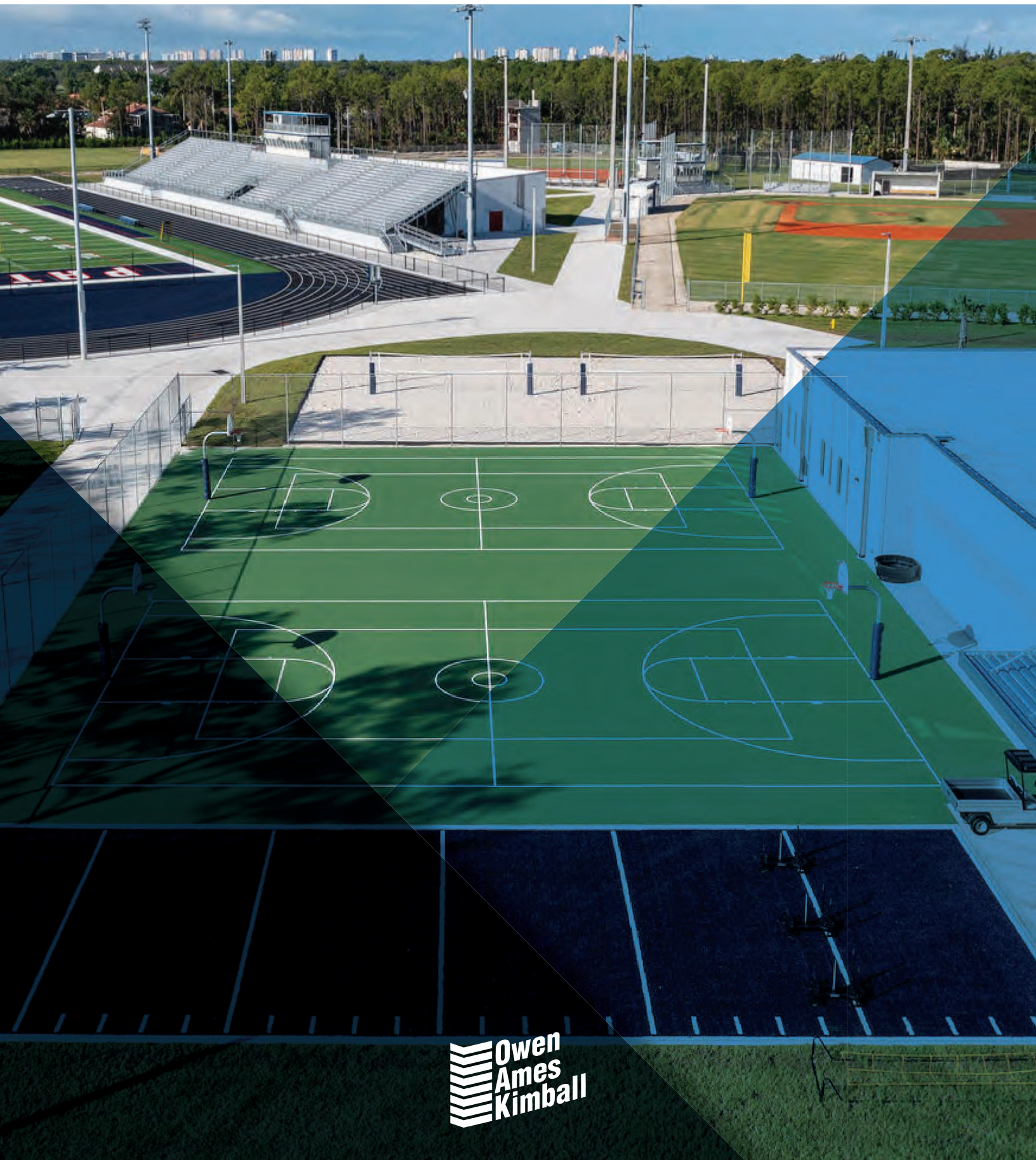
National Union Fire Ins. Co.: A (XV)

New Hampshire Ins. Co.: A (XV)

Allied World Nat. Assurance Co.: A (XV)


Arch Speciality Ins. Co.: A+ (XV)






**A PARTNER YOU CAN TRUST.**

**PREPARED BY:** Owen-Ames-Kimball Company

 11941 Fairway Lakes Drive, Fort Myers, FL 33913

 (239) 561-4141

 (239) 561-1996