

Statement of Qualifications

Continuing Construction Management Professional Services for Minor Projects

RFQ No. FPUR-180009-GD



October 23, 2017



Wharton-Smith, Inc.
CONSTRUCTION GROUP

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October 23, 2017

Purchasing Representative
Gayle Dykeman, Senior Buyer
Purchasing Division, City of Gainesville
P.O. Box 490, Mail Station 32
Gainesville, FL 32627

Re: RFQ No. FPUR-180009-GD; Continuing Construction Management Professional Services for Minor Projects

Dear Ms. Gayle Dykeman and Selection Committee Members:

Wharton-Smith, Inc. has reviewed your Request for Qualifications (RFQ# FPUR-180009-GD) for Continuing Construction Manager at Risk (CMAR) Services and fully understands the role and key responsibilities as the Construction Manager (CM) for your projects. Wharton-Smith offers Gainesville the CM experience, diverse company resume, available resources, and overall approach to make any project a success.

Wharton-Smith understands the requirements for your projects. With this proposal, Wharton-Smith is extending our hand as an offer to partner with Gainesville on all projects, large or small, immediately upon our selection. As a vested firm on your projects, our desire and efforts toward successful outcomes will match those of the City. Your projects will come with unique needs. The City requires a CM with the ability to address those requirements.

We offer Gainesville the required diverse construction experience. The City's RFQ outlined a wide range of project types to be performed under this contract. Wharton-Smith is one of few or the only proposer than can offer Gainesville a company resume filled with successful projects of every type. Most importantly, we have completed nearly all of these types of projects using a collaborative delivery model (CMAR or Design-Build). While in this proposal highlights four of those projects, we want the City to be aware of our proven track record in delivering:

We will happily provide Gainesville numerous examples of each type of these projects upon request as we are limited to only a few reference projects in this RFQ.

- Parks
- Streetscapes
- Solid Waste
- Pump Stations
- Pipelines
- Water and Wastewater Plant Modifications
- Roadway Improvements
- Storm water and Drainage
- Interior Renovation
- Sports Facilities

We have the most CMAR experience. Our CM process has been refined over the past 22 years, giving Gainesville an established system to rely on to complete critical tasks such as taking this project from current design to construction, completing design and constructability review, providing the most accurate cost estimates, permitting with the building department and regulatory agencies, and, most importantly, maintaining financial transparency. Our success on the **Paynes Prairie Sheetflow Restoration** project for the City of Gainesville was a glowing example of our process put to action. In short, our refined CMAR system makes complex projects simpler, cost driven projects cheaper, and schedule driven projects faster. We have been selected on 25 Continuing CMAR services contracts and have delivered CMAR and Design-Build Services to 82 public Florida clients.

With more than 300 completed CM projects worth over \$1 billion, we are very proud to make the following statements:

- ✓ **Wharton-Smith has never exceeded a CMAR GMP**
- ✓ **Wharton-Smith has never finished a CMAR project late**



Wharton-Smith will provide the best value. Our CM experience and client commitment will provide Gainesville with the lowest cost, without sacrificing quality. Cost control efforts begin in design and continue throughout construction and project close-out using tools such as:

\$ Accurate Cost Estimates, \$ Design and Constructability Reviews \$ Value Engineering, \$ Our Bidding Process, \$ Total Financial Transparency, \$ Self-performance, \$ Lowest bond and insurance costs

The financial tools we employ have a proven track record and will provide the City with the best value.

Your projects will be delivered on-time. Wharton-Smith knows what's critical to your projects. These projects are no place for a learning curve. Our ability to self-perform will allow us to maintain control of important areas of the schedule such as concrete, underground utilities, and equipment installations. We will expedite key procurement activities such as shop drawings or material ordering for critical items. Our lessons learned from previous projects will cut months of the schedule.



We are offering to fully partner with Gainesville on the challenges ahead. We will use our past experience with Gainesville to exceed your expectations on every level. Our labor & equipment resources, CM experience, cost control and scheduling tools offer the fastest and most cost effective solution to the City. We are ready to get started!

Sincerely,
WHARTON-SMITH, INC.

Pat Hewitt
Executive Vice President
Wharton-Smith, Inc.

Nathan Hillard
Project Director
Wharton-Smith, Inc.

CMQS 0

COMPANY INFORMATION and CERTIFICATION (CMQS 0)

PROJECT NUMBER: FPUR-180009-GD
 PROJECTNAME: Continuing Construction Management Services for Minor Projects
 FIRMNAME: Wharton-Smith, Inc.
 ADDRESS OF PROPOSED OFFICE IN CHARGE: 750 Monroe Road, Sanford, FL 32771
 Telephone & Fax Numbers: Phone: (407) 321-8410 Fax: (407) 829-4453
 E-Mail Address & Website Address: nhillard@whartonsmith.com www.whartonsmith.com
 Florida Corporate Charter Number: C94383
 Federal ID Number: 59-2392802

For how many years has your firm been providing
 construction management services? General contracting? 22 years ; 32 years
 Total billings, past three calendar years (submitting office)? \$372,503,595
 Total billings, past three calendar years (company-wide)? \$648,788,176

Notarized signature below certifies the following:

I. Regarding information furnished by the applicant herewith, and as may be provided subsequently (including information presented at interview, if a finalist):

- a) All information of a factual nature is certified to be true and accurate (subject to perjury laws, Chapter 837, Florida Statutes).
- b) All statements of intent or proposed future action (including the assignment of personnel and the provision of services) are commitments that will be honored by the applicant if awarded the contract.
- c) The provision of false information could be cause for my firm's disqualification from applying for other OWNERS of Gainesville work for a period of up to three years.

II. Applicant acknowledges that:

- a) If any information provided by the applicant is found to be, in the opinion of the Selection Committee or the OWNERS, substantially unreliable, this application may be rejected.
- b) The Selection Committee may reject all applicants and may stop the selection process at any time.
- c) The selection of finalists for interview will be made on the basis of information provided herein. Finalists will be ranked based on additional criteria, the interview, and the results of reference checks.
- d) It is understood that this sealed submittal must be received at OWNERS, 200 East University Avenue, Room 339, City Hall, Gainesville, FL 32601 attention Gayle Dykeman, no later than 3:00 PM, October 23, 2017.
 Facsimile (FAX) submittals are not acceptable and will not be considered. In addition, proposer must provide one (1) electronic copy of their submittal in PDF format on a CD or USB flash drive. The statement of qualifications shall be clearly labeled: Statement of Qualifications for Continuing Construction Management Services for Minor Projects.
- e) Failure to file a protest within the time prescribed in City of Gainesville Purchasing Procedures shall constitute a waiver of proceedings.
- f) Failure to sign this form will result in disqualification.

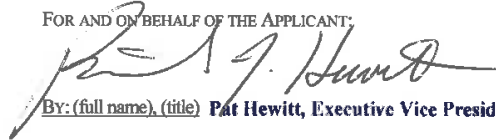
CMQS 0

III. The undersigned certifies that he/she is a principal or officer of the firm applying for consideration and is authorized to make the above acknowledgments and certifications for and on behalf of the applicant.

IV. The undersigned certifies that the Applicant has not been convicted of a public entity crime within the past 36 months, as set forth in Section 287.133, Florida Statutes.

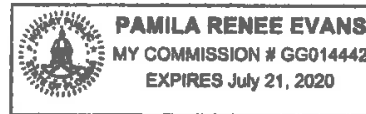
SWORN TO AND SUBSCRIBED TO ME,
A NOTARY PUBLIC, THIS 23rd DAY
OF (month), (year) **October, 2017**

FOR AND ON BEHALF OF THE APPLICANT:


By: (full name), (title) **Pat Hewitt, Executive Vice President**

(SEAL)

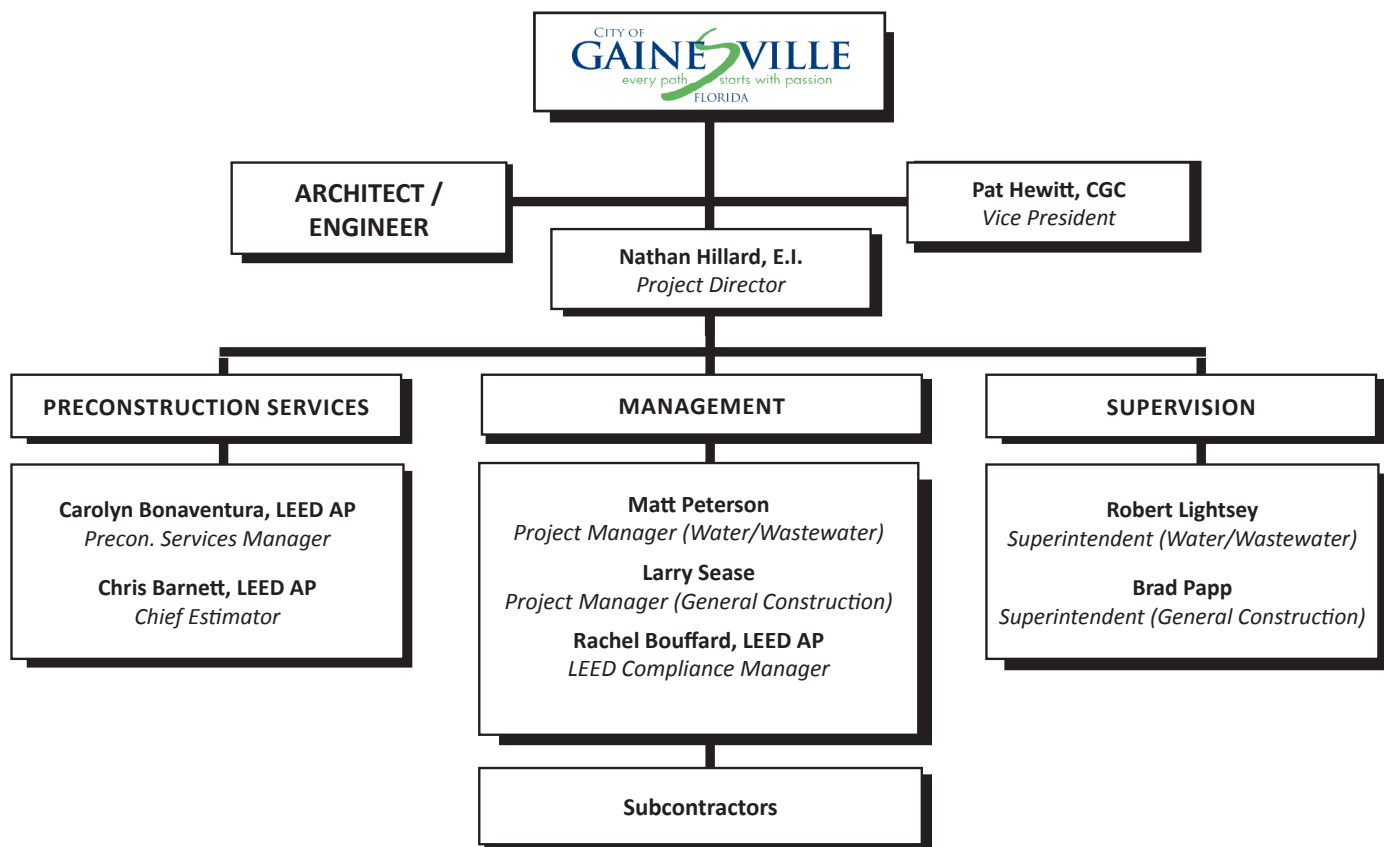




CMQS 1

Name all personnel who will be part of the pre-construction management team for this duration project. Identify each Person's title, project specific responsibilities, and city of residence.

We have proposed a highly qualified team of professionals to successfully manage the CM at Risk Continuing Contracts for the City of Gainesville. Key staff members have been chosen based on distinct qualifications in the required scope areas. Each individual has significant experience in completing municipal work by utilizing the CM approach. The core members of our team have the availability, capacity, and willingness to perform the required services for the CM at Risk Services for Continuing Contracts. It is important to note that Wharton-Smith has additional resources in a wide variety of disciplines available to meet your needs for this contract. This type of depth of bench allows us to put together the most qualified team to best meet the criteria of each specified task order and ensure we are always available to successfully complete the projects under the Continuing Contract. Our team member's roles are outlined in following pages.



CMQS 1



Education:

B.S., Civil Engineering,
University of Florida

Registration/Certification:

Florida State Certified General
Contractor

Florida State Certified
Mechanical Contractor

Pat Hewitt, CGC, *Vice President*

Pat is responsible for providing daily leadership to all regional projects, and he is directly responsible to the client for all phases of management of the construction phase. He works with WSI executives, managers and superintendents on the development of potential project needs, budget and schedules. Pat also interfaces with Clients and Engineers as needed on project progress, issues and concerns.

Wharton-Smith: 18 years

Total: 30 years

City of residence: Maitland, FL



Education:

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

Registration/Certification:

OSHA 40-Hour
Standard First Aid / CPR

Nathan Hillard, E.I., *Project Director*

As Sr. Preconstruction Manager, Nate will handle all tasks associated with preconstruction services. He will provide design and constructability reviews on all drawing phases (60%, 90%, 100%). Nate will oversee all cost estimates and the project tracks toward the GMP. He will also provide value engineering concepts that will be presented to the team for review.

Wharton-Smith: 13 years

Total: 15 years

City of residence: Titusville, FL



Education:

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

Registration/Certification:

EIT Certification
OSHA 10-Hour
NPDES Certified Stormwater
Inspector

Matt Peterson, E.I., *Project Manager (Water/Wastewater)*

As Project Manager, Matt will assist with bid packages, schedules, constructability reviews, value engineering, and site logistics during the pre-construction phase of the project. During construction, he will be responsible for managing all construction activities, including scheduling, quality control, cost control, change orders, and close-out.

Wharton-Smith: 11 years

Total: 11 years

City of residence: Orlando, FL



Education:

B.S., Construction
Management, University of
Florida

Registration/Certification:

Green Globes Professional
Florida Certified Building
Contractor- CBC1256951
Florida Certified Roofing
Contractor- CCC1328810

Larry Sease, GGP, *Project Manager (General Construction)*

Larry is a skilled Project Manager and Green Globes Professional with a 14-year record of overseeing all phases of multi-million dollar construction projects. As Senior Project Manager he is responsible for the overall management of the project and for providing daily leadership to the project team. During the preconstruction phase, he assists with bid packages, schedules, constructability reviews, value engineering, and site logistics. During the construction phase, he oversees construction activities which include scheduling, quality control, cost control, change orders, and close-out.

Wharton-Smith: 10 years

Total: 14 years

City of residence: Debary, FL

CMQS 1



Registration/Certification:

Backhoe
Loader
High Reach Forklift
Trenching
Effective Supervisory
Management
First Aid and CPR
OSHA 10-Hour

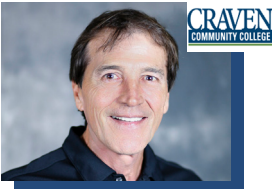
Robert Lightsey, *Superintendent (Water/Wastewater)*

As Superintendent, Robert is responsible for the supervision and coordination of the day-to-day on site project activities of the subcontractors and Wharton- Smith employees. His areas of responsibility include safety inspections, daily reports, two-week look ahead schedules, delivery coordination, storage and installation requirements, project final quality and start up planning. Safety and quality control, three-week look ahead scheduling, daily reports, labor and equipment resources, subcontractor control, start ups, testing and close out.

Wharton-Smith: 12 years

Total: 16 years

City of residence: Debary, FL



Education:

A.S., Business
Administration, Craven
Community College

Registration/Certification:

State Certified Building
Contractor
OSHA 10-Hour

Brad Papp, *Superintendent (General Construction)*

As Project Superintendent, Brad is responsible for supervision of all field activities, including the coordination of all subcontractors and field construction activities and supervisory review of all on-site construction.

Wharton-Smith: 19 years

Total: 40+ years

City of residence: New Smyrna Beach, FL



Education:

B.S., Construction
Management, University of
Florida

Registration/Certification:

LEED AP BC+D
DBIA Design-Build Profes-
sional
OSHA 30- Hour

Carolyn Bonaventura, LEED AP, *Preconstruction Services Manager*

As Preconstruction Services Manager, Carolyn will handle all tasks associated with preconstruction services. She will provide design and constructability reviews on all drawing phases (60%, 90%, 100%). Carolyn will oversee all cost estimates and the project tracks toward the GMP. She will also provide value engineering concepts that will be presented to the team for review.

Wharton-Smith: 1 years

Total: 13 years

City of residence: Apopka, FL



Education:

B.S., Construction
Management, University of
North Florida

Registration/Certification:

LEED AP
OSHA 30-Hour

Chris Barnett, LEED AP, *Chief Estimator*

Chris has experience estimating in the construction industry. He is responsible for the cost estimate, GMP development, value engineering, and works closely with the construction team to develop the bid packages and determine best value recommendations. Chris has the knowledge and the know-how to support all estimating aspects of the City of Gainesville Continuing Services Projects.

Wharton-Smith: 3 years

Total: 8 years

City of residence: Lutz, FL

CMQS 2

**CONSTRUCTION SERVICES FOR MINOR PROJECTS QUALIFICATIONS
SUPPLEMENT (CMQS))**

QUESTION 2 – EXPERIENCE & REFERENCES

NOTE: Complete one 2-page form for each of the (up to 3) “most related” projects – see instructions.

Project Information

Project # and Title: Altamonte SR 436 Lift Station

Project Location: Altamonte Springs, FL

Services provided (check applicable boxes)

☒ CM At-Risk ☐ GC (Low Bid) ☐ Design-Builder ☐ CM Agency ☐ Subcontractor ☐ Other

Pre-Construction services provided? ☒ YES ☐ NO

Current Status: Completed

Size of project (gross square feet): N/A (Utility Project)

Program / Pre-Design Budget: Not Provided by Owner

Design Development Budget: Not Provided by Owner

GMP Proposal (Original): \$860,986

Final Contract Value: \$860,986

Construction Start (NTP) Date: 10/13/14

Original Substantial Completion Date (at NTP): 2/28/15

Actual Substantial Completion Date: 02/28/15

LEED Certified? No

Staffing Information (for this project)

Principal: Pat Hewitt On proposed (project title) team?

☒ YES ☐ NO

Project Manager: Nathan Hillard On proposed (project title) team?

☒ YES ☐ NO

Project Engineer: Jorge Quinones On proposed (project title) team?

☐ YES ☒ NO

Superintendent: Jim Gramlich On proposed (project title) team?

☐ YES ☒ NO

Other: Pamila Hines On proposed (project title) team?

☐ YES ☒ NO

CMQS 2

Other: _____ On proposed **(project title)** team?
☐ YES ☐ NO

Narrative description of project/facility, including space type(s), major building components, and construction type(s):

This project was the addition sanitary sewer and water facilities in an unincorporated area of Altamonte Springs. The addition of a new restaurant and WAWA gas station required the addition of these utilities in a timely fashion so the City could add these businesses as rate payers. The project included a duplex lift station with concrete wet well, 800 LF of 8" sanitary sewer pipe, numerous manholes, 1,750 LF of open cut 8" water main, 1,350 LF of 4" directional drilling, two (2) air release valve vaults, and all associated electrical, controls, and restoration. The project was completed in an accelerated timeframe to accommodate restaurant and WAWA grand openings.

Explanation of relevance/similarity to the **Continuing Renovation/Construction Minor Projects** (see instructions):

In addition to being completed through CMAR continuing services project delivery, the Altamonte project had several similarities to the City's project outlined in Section C (page 4 of the RFQ) including water and wastewater piping, new construction, and roadway work.

CMQS Question 3 (Experience & References) continued

Owner Contact Information

Owner/Client: Altamonte Springs

Contact Person or PM: Karen McCullen

Address: 225 Newburyport Avenue, Altamonte Springs, FL 32701

Phone and Fax: Ph: (407) 571-8335 F: (407) 571-8156

E-mail Address: KMcCullen@altamonte.org

Designer Contact Information

Architect/Eng.: Reiss Engineering, Inc.

Contact Person or PM: Melanie Peckham

Address: 1016 Spring Villas Point, Winter Springs, FL 32708

Phone and Fax: Ph: (407) 679-5358 F: (407) 679-5003

E-mail address: mdpeckham@reisseng.com

CMQS 2

Subcontractor #1 Information (highest dollar value trade contract on this project)

Sub-Contractor: Sanpik, Inc. Contact Person or

PM: Matthew Sands, President

CSI Division/Trade: 15 - Underground Pipe Installation

Value of Sub-Contract: \$181,025

Address: 576 Monroe Road, Suite 1304, Sanford, FL 32771

Phone and Fax: Ph: (407) 450-6969

E-mail Address: m.sands@sanpikinc.com

Subcontractor #2 Information (second highest dollar value trade contract on this project)

Sub-Contractor: C.E. James, Inc. Contact Person or

PM: Jim Cunningham, President

CSI Division/Trade: 15 - Underground Pipe Installation

Value of Sub-Contract: \$175,980

Address: 826 Eyrie Drive, Oviedo, FL 32765

Phone and Fax: Ph: (407) 468-2453

E-mail Address: jec@cejamesinc.com

Subcontractor #3 Information (third highest dollar value trade contract on this project)

Sub-Contractor: Sinns and Thomas Contact Person or

PM: Eric Sinns, President

CSI Division/Trade: 16 - Electrical

Value of Sub-Contract: \$36,744

Address: 1030 Ridge Street, Winter Springs, FL 32708

Phone and Fax: Ph: (407) 467-5333

E-mail Address: esinns@sinnsandthomas.com

CMQS 2

**CONSTRUCTION SERVICES FOR MINOR PROJECTS QUALIFICATIONS
SUPPLEMENT (CMQS))**

QUESTION 2 – EXPERIENCE & REFERENCES

NOTE: Complete one 2-page form for each of the (up to 3) “most related” projects – see instructions.

Project Information

Project # and Title: City of Casselberry Continuing Minor Services

Project Location: Casselberry, Florida

Services provided (*check applicable boxes*)

☒ CM At-Risk ☐ GC (Low Bid) ☐ Design-Builder ☐ CM Agency ☐ Subcontractor ☐ Other

Pre-Construction services provided? ☒ YES ☐ NO

Current Status: Completed

Size of project (gross square feet): Varies

Program / Pre-Design Budget: N/A

Design Development Budget: N/A

GMP Proposal (Original): Under \$2 Million

Final Contract Value: Under \$2 Million

Construction Start (NTP) Date: February 2012 (Contract Start)

Original Substantial Completion Date (at NTP): Varies

Actual Substantial Completion Date: February 2017 (Contract End)

LEED Certified? No

Staffing Information (*for this project*)

Principal: N/A On proposed **(project title)** team?

☐ YES ☐ NO

Project Manager: Matt Kirkland On proposed **(project title)** team?

☐ YES ☒ NO

Project Engineer: N/A On proposed **(project title)** team?

☐ YES ☐ NO

Superintendent: Darol Watson On proposed **(project title)** team?

☐ YES ☒ NO

Other: John Lyons On proposed **(project title)** team?

☐ YES ☒ NO

CMQS 2

Other: _____ On proposed **(project title)** team?

☐ YES ☐ NO

Narrative description of project/facility, including space type(s), major building components, and construction type(s):

As part of a Continuing Services Contract with the City of Casselberry, Wharton-Smith has been providing preconstruction and construction management services on projects with minor renovations to existing facilities. The projects under this contract consist of planning, design, permitting, construction and code inspection. Already completed projects under this contract have included demolition, drywall, flashing installment, rubber flooring, bathroom renovation, site work, electrical, and HVAC. Select projects include:

- **City of Casselberry City Hall Modification (\$8,400)**
- **City of Casselberry Police Renovation (\$15,840)**
- **City of Casselberry Recreation Center Renovation (\$204,221)**
- **Generator Replacement - Preconstruction (\$697,385)**
- **Office Renovations (\$770,910)**

Explanation of relevance/similarity to the **Continuing Renovation/Construction Minor Projects** (see instructions):

In addition to being completed through CMAR continuing services project delivery, the Casselberry projects had several similarities to the City's project outlined in Section C (page 4 of the RFQ) including remodeling, commercial buildings, and structure rehabilitation.

CMQS Question 3 (Experience & References) continued

Owner Contact Information

Owner/Client: The City of Casselberry

Contact Person or PM: Mark Gislar

Address: 95 Triplet Lake Drive, Casselberry, FL 32707

Phone and Fax: Ph: (321) 436-9114 F: (407) 262-7767

E-mail Address: _____

Designer Contact Information

Architect/Eng.: Various

Contact Person or PM: _____

Address: _____

Phone and Fax: _____

E-mail address: _____

CMQS 2

****Wharton-Smith only had one subcontractor, who completed all the necessary work.**

Subcontractor #1 Information (highest dollar value trade contract on this project)

Sub-Contractor: Pioneer Construction Contact Person or
PM: John Parra

CSI Division/Trade: Demo, Drywall, Acoustical Ceilings, Flooring Painting

Value of Sub-Contract: \$10,290

Address: 13812 Red Mangrove Drive, Orlando, FL,

Phone and Fax: Ph: (407) 233-8848 / F: (407) 2687336

E-mail Address: pcporlando@yahoo.com

Subcontractor #2 Information (second highest dollar value trade contract on this project)

Sub-Contractor: _____ Contact Person or
PM: _____

CSI Division/Trade: _____

Value of Sub-Contract: _____

Address: _____

Phone and Fax: _____

E-mail Address: _____

Subcontractor #3 Information (third highest dollar value trade contract on this project)

Sub-Contractor: _____ Contact Person or
PM: _____

CSI Division/Trade: _____

Value of Sub-Contract: _____

Address: _____

Phone and Fax: _____

E-mail Address: _____

CMQS 2

**CONSTRUCTION SERVICES FOR MINOR PROJECTS QUALIFICATIONS
SUPPLEMENT (CMQS))**

QUESTION 2 – EXPERIENCE & REFERENCES

NOTE: Complete one 2-page form for each of the (up to 3) “most related” projects – see instructions.

Project Information

Project # and Title: Paynes Prairie Sheetflow Restoration

Project Location: Gainesville, FL

Services provided (check applicable boxes)

☒ CM At-Risk ☐ GC (Low Bid) ☐ Design-Builder ☐ CM Agency ☐ Subcontractor ☐ Other

Pre-Construction services provided? ☒ YES ☐ NO

Current Status: Completed

Size of project (gross square feet): 258.18 Acres

Program / Pre-Design Budget: Original Budget/Program: \$12 to \$15 Million

Design Development Budget: We did not estimate until drawings were 90% complete

GMP Proposal (Original): \$22,085,970

Final Contract Value: \$23,394,848.94

Construction Start (NTP) Date: 8/20/12

Original Substantial Completion Date (at NTP): 9/16/15

Actual Substantial Completion Date: 8/18/15

LEED Certified? No

Staffing Information (for this project)

Principal: _____ On proposed **(project title)** team?

☐ YES ☐ NO

Project Manager: Larry Sease On proposed **(project title)** team?

☒ YES ☐ NO

Project Engineer: Jeffrey Williams On proposed **(project title)** team?

☐ YES ☒ NO

Superintendent: Brad Papp On proposed **(project title)** team?

☒ YES ☐ NO

Other: _____ On proposed **(project title)** team?

☐ YES ☐ NO

CMQS 2

Other: _____ On proposed **(project title)** team?

☐ YES ☐ NO

Narrative description of project/facility, including space type(s), major building components, and construction type(s):

Wharton-Smith provided preconstruction and construction management services for a 125-acre constructed enhancement wetland, which polished the base flow from Sweetwater Branch before it is discharged to a mile long sheetflow distribution channel. Two miles of agricultural drainage canals in Paynes Prairie Preserve State Park were filled in. This restored the historic Sheetflow to over 1300 acres of wetlands on Paynes Prairie. The project included several recreational opportunities for the citizens of Gainesville. A network of trails allow visitors to walk along the berms that form the enhancement wetland. An outdoor classroom provides a sheltered place for school groups to gather and learn more about wetlands and their role in Florida's environment. A viewing tower and Visitors Center have been planned as future additions to the park. The tower provides unsurpassed views of Paynes Prairie in a location easily accessible to Downtown Gainesville. The solar panels on the roof of the tower provide electrical energy to the Visitors' Center.

Explanation of relevance/similarity to the **Continuing Renovation/Construction Minor Projects** (see instructions):

In addition to this project being performed for the City of Gainesville and being completed through CMAR project delivery, the Payne's Prairie project had several similarities to the City's project outlined in Section C (page 4 of the RFQ) including wetland restoration, structures, and park improvements.

Owner Contact Information

Owner/Client: City of Gainesville DBA Gainesville Regional Utilities

Contact Person or PM: Alice Rankeillor, P.E.

Address: 405 Northwest 39th Avenue, Box 490, Station 58, Gainesville, FL 32627

Phone and Fax: Ph: (352) 393-8408

E-mail Address: RankeilloAl@cityofgainesville.org

Designer Contact Information

Architect/Eng.: Jones, Edmunds & Associates, Inc.

Contact Person or PM: Walter A. Nickel, P.E.

Address: 730 NE Waldo Road, Gainesville, FL 32641-3604

Phone and Fax: Ph: (352) 377-5821 F: (352) 377-3166

E-mail address: wnickel@jonesedmunds.com

CMQS 2

Subcontractor #1 Information *(highest dollar value trade contract on this project)*

Sub-Contractor: Barco Duval Engineering Contact _____ Person _____ or _____
 PM: Shane Ricci
 CSI Division/Trade: Site work
 Value of Sub-Contract: \$11,287,043.16
 Address: 7587 Wilson Blvd. Jacksonville, FL 32210
 Phone and Fax: Ph: (904) 772-1313 F: (904) 771-7912
 E-mail Address: _____

Subcontractor #2 Information *(third highest dollar value trade contract on this project)*

Sub-Contractor: Florida Green Keepers, Inc. Contact _____ Person _____ or _____
 PM: Chris Short
 CSI Division/Trade: Landscape / Wetland
 Value of Sub-Contract: \$875,268.78
 Address: 1401 NW 53rd Avenue, Gainesville, Florida 32609
 Phone and Fax: Ph: (352) 373-4932 F: (352) 395-6461
 E-mail Address: _____

Subcontractor #3 Information *(third highest dollar value trade contract on this project)*

Sub-Contractor: La Frontier Builders Contact _____ Person _____ or _____
 PM: Chad Zachary
 CSI Division/Trade: Rough Carpentry
 Value of Sub-Contract: \$429,470.05
 Address: 1730 W. McCulloch Rd., Oveido, FL 32765
 Phone and Fax: Ph: (407) 359-1300 F: (407) 359-9003
 E-mail Address: _____

CMQS 2

**CONSTRUCTION SERVICES FOR MINOR PROJECTS QUALIFICATIONS
SUPPLEMENT (CMQS))**

QUESTION 2 – EXPERIENCE & REFERENCES

NOTE: Complete one 2-page form for each of the (up to 3) “most related” projects – see instructions.

Project Information

Project # and Title: Tohopekaliga Water Authority Continuing Minor Services

Project Location: Kissimmee, Florida

Services provided (check applicable boxes)

☒ CM At-Risk ☐ GC (Low Bid) ☐ Design-Builder ☐ CM Agency ☐ Subcontractor ☐ Other

Pre-Construction services provided? ☒ YES ☐ NO

Current Status: Ongoing

Size of project (gross square feet): Varies

Program / Pre-Design Budget: N/A

Design Development Budget: N/A

GMP Proposal (Original): Under \$2 Million

Final Contract Value: Under \$2 Million

Construction Start (NTP) Date: March 2014 (Contract Start)

Original Substantial Completion Date (at NTP): Ongoing

Actual Substantial Completion Date: N/A

LEED Certified? No

Staffing Information (for this project)

Principal: Pat Hewitt On proposed (project title) team?

☒ YES ☐ NO

Project Manager: Matt Peterson On proposed (project title) team?

☒ YES ☐ NO

Project Engineer: Brent Shepherd On proposed (project title) team?

☐ YES ☒ NO

Superintendent: Robert Lightsey On proposed (project title) team?

☒ YES ☐ NO

Other: _____ On proposed (project title) team?

☐ YES ☐ NO

CMQS 2

Other: _____ On proposed **(project title)** team?

☐ YES ☐ NO

Narrative description of project/facility, including space type(s), major building components, and construction type(s):

Wharton-Smith's Water/Wastewater Division currently holds a Construction Manager at Risk Continuing Minor Services Under \$2 Million contract with the Tohopekaliga Water Authority (TWA). Projects under this contract entail minor works of expansion, replacement, and improvements of existing water reclamation facilities and wastewater treatment plants. Improvements have consisted of the rehab of an existing pretreatment structure, rehab of an existing sludge storage tank, clarifier replacements, and replacement of electrical gear.

- **WRF #3 Digester Rehab (\$604,498**
- **South Bermuda Diffuser Replacement (\$687,872)**
- **South Bermuda Clarifier Replacement (\$1,429,212)**
- **South Bermuda & Walnut Pretreatment Screens (\$991,959)**
- **Harmony WWTP Expansion Ph 1 (\$251,253)**
- **Camelot WRF Clarifier Improvements (\$902,782)**

Explanation of relevance/similarity to the **Continuing Renovation/Construction Minor Projects** (see instructions):

In addition to being completed through CMAR continuing services project delivery, the TOHO projects had several similarities to the City's project outlined in Section C (page 4 of the RFQ) including underground piping, water reclamation plant equipment, and structure rehabilitation.

CMQS Question 3 (Experience & References) continued

Owner Contact Information

Owner/Client: Toho Water Authority Contact

Person or PM: Deborah Beatty

Address: 951 Martin Luther King Blvd., Kissimmee, FL 34741

Phone and Fax: P: (407) 944-5023 F: (407) 343-4264

E-mail Address: dbeatty@tohowater.com

Designer Contact Information

Architect/Eng.: CPH Engineers, Inc.

Contact Person or PM: David Mahler, P.E.

Address: 1117 E. Robinson Street, Orlando, FL 322801

Phone and Fax: P: (407) 425-0452 F: (407) 648-1036

E-mail address: dmahler@cphengineers.com

CMQS 2

****Harmony WWTP Expansion**

Subcontractor #1 Information (highest dollar value trade contract on this project)

Sub-Contractor: BL Smith Electric, Inc. Contact Person or

PM: Bill Smith, President

CSI Division/Trade: 16 - Electrical

Value of Sub-Contract: \$80,589

Address: 29252 US Highway 27, Dundee, FL 33838

Phone and Fax: Ph: (863) 439-7401

E-mail Address: bls@blsmithelectric.com

****South Bermuda Clarifier Replacement**

Subcontractor #2 Information (second highest dollar value trade contract on this project)

Sub-Contractor: Universal Painting Corporation Contact Person or

PM: John Aldrich, President

CSI Division/Trade: 09 - High Performance Coatings

Value of Sub-Contract: \$136,276

Address: 3810 Drane Field Road, Suite 3, Lakeland, FL33811

Phone and Fax: Ph: (813) 767-9212

E-mail Address: jpa@uipcl.com

**** WRF #3 Digester Rehab**

Subcontractor #3 Information (third highest dollar value trade contract on this project)

Sub-Contractor: Settled Solids Management Contact Person or

PM: Jerry Mims, President

CSI Division/Trade: 02 - Hazardous Materials Removal

Value of Sub-Contract: \$79,474

Address: 711 Progress Way, Sanford, FL 32771

Phone and Fax: Ph: (321) 303-1741

E-mail Address: SSM@hydro-int.com

CMQS 3

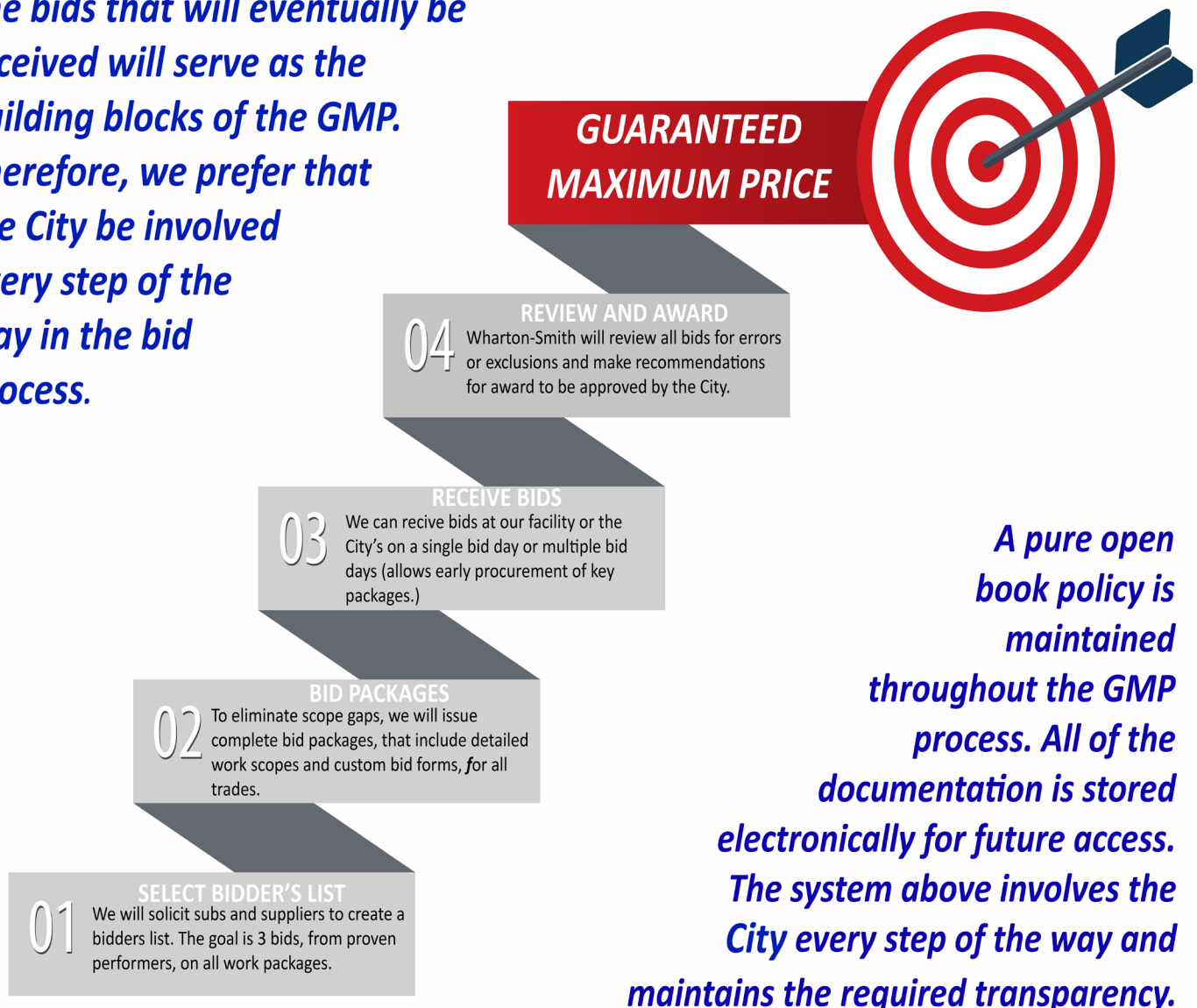
What means will be used to identify, notify, pre-qualify, and procure subcontractors for the disciplines involved in these projects? How will the trade contracts be proactively, rather than reactively managed? What specific steps will be taken to ensure communication and to minimize conflicts between trades in the field as well as conflicts between the CM and subcontractors? Other than tracking and processing, what is the CM's role in technical correspondence between subcontractors and the owners A/E? Elaborate on your understanding of the City Local Small Business Procurement Program.

SUBCONTRACTOR SELECTION AND MANAGEMENT

We will first develop a bidder's list based on our experience with trusted performers, input from the project team, contract documents, and required qualifications. We already have a working knowledge of hundreds of local qualified subcontractors, vendors and equipment suppliers. We also have extensive experience with public advertising based on State Revolving Fund requirements or small business initiatives like the one put forth by the City.

It is a challenge to be certain that at least three competitive, responsive bids are received on every bid package. Many vendors are not accustomed to turning in a sealed bid on time the day of the bid, they are kept on task with General Contractors staying on them on bid day. We were a General Contractor years before we were Construction Managers.

The bids that will eventually be received will serve as the building blocks of the GMP. Therefore, we prefer that the City be involved every step of the way in the bid process.



After subcontractor selection, and we transition to construction, communication will remain our best tool to swiftly identify and resolve outstanding project issues and ensure that the construction schedule is being maintained. We welcome the entire project team, including Gainesville and the A/E, to attend our regular meetings, held with subcontractors, including:

- **Weekly Schedule Review**
- **Subcontractor Safety Meetings**
- **Subcontractor Coordination Meetings**
- **Productivity Planning System**
- **Quality Control Pre-task Meetings**
- **Weekly Safety Meetings**

The goal of all the aforementioned policies is to keep the City informed with real time information and involved during every step of the project and in all aspects.

TECHNICAL CORRESPONDENCE

We fully understand that our responsibility is much more than passing or “pushing” the papers along when it comes to technical questions, RFI’s, and shop drawings. We are the first line reviewer! It is our job to first determine that RFI’s are not easily answered in the contract documents, that shop drawings are prepared adequately and are acceptable, and that any subcontractor “change orders” are truly changes. Our role is as an agent of the City. However, we have to be capable of performing these tasks. This is where our unique in-house personnel assets will serve the City so well. Wharton-Smith has on staff numerous Florida based:

General Contractors * Professional Engineers * Leed AP’s * Engineers-In-Training

In other words, we bring a well-rounded technical competence to the table that most other firms don’t have.

SMALL BUSINESS PROCUREMENT PROGRAM

In order to ensure that the City’s initiative is met, Wharton-Smith will take a three-step approach:

1. **Utilize the City’s existing small business directory** – there are numerous firms, already certified, that could perform services on our projects for the City depending on the precise scope of work.
2. **Advertisement** – Wharton-Smith will perform all pre-bid advertisements in Gainesville and surround area publications, including the Gainesville Sun and other area media. We may identify firms that meet the City’s small business criteria, but simply haven’t registered or applied.
3. **Custom Bid Packages** – We have extensive experience in creating bid packages that are the size and scope that allow the small businesses to bid. By creating opportunities more in their “wheelhouse” it encourages participation and meets the City’s goals.

What’s important to the City is that Wharton-Smith has been meeting and exceeding similar small business or minority initiatives through our CMAR process for over 22 years in Florida. ***We have never failed to meet a SBE/MBE goal!***



South Bermuda Diffuser Replacement | Toho Continuing Services

CMQS 4

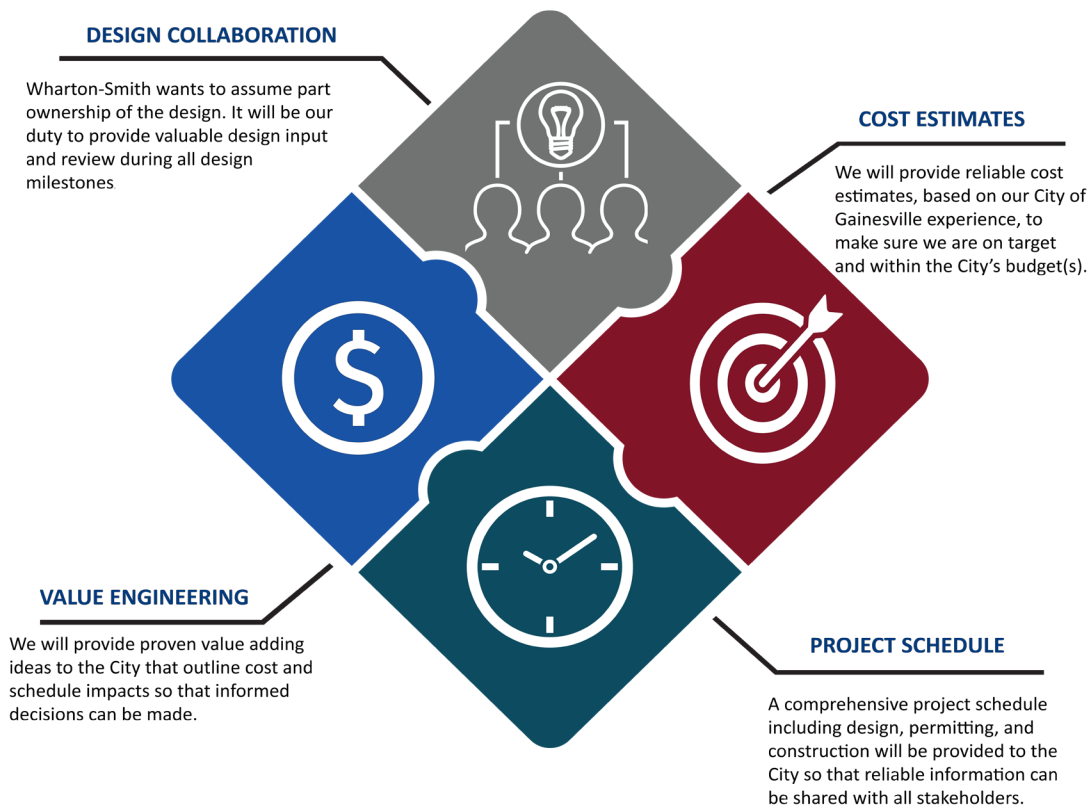
a) Describe the team's approach to, and methods for, cost estimating during the pre-GMP phase and cost control during the construction phase, specifically when the unforeseen arises. b) How are cost estimates developed and how dependent are they upon estimates by potential subcontractors? c) Provide examples of previous cost estimates. Were they lump sum packages or unit pricing, or a combination of both?

COST CONTROL

Our role in the project begins with a kick off meeting to review the project scope, schedule and budget. From the start we want to be certain we understand your expectations on these areas of the project. Our approach to pre-construction services is to focus on our three core responsibilities: design review (constructability and VE included), comprehensive cost estimates, and preliminary construction schedules. These tasks, done proactively, have the greatest positive affect on the cost and quality of your projects. Our detailed cost estimates, at 30% design or later, are done as if we were bidding the project. As a self-performing contractor we know what it costs to put work in place in Florida. For items in which we don't self-perform, such as electrical or HVAC, we rely on the relationships with quality subcontractors to provide reliable estimates. This approach provides cost estimates that are reliable and whole.

While schedule will be critical on your projects, we will not ignore our opportunities for value engineering. However, it is important that value engineering ideas can be implemented without impacting the schedule. The goal is to provide the County with value engineering concepts that are value adding, non-schedule impacting, and viable.

PRECONSTRUCTION COST CONTROL



This collaborative approach will ensure three very important things:

- **100% of the VE savings goes directly back to the Lee County**
- **There are no redesign costs**
- **There are no schedule impacts**

The cost estimates are presented in the same "pure open-book" format as the GMP. We will provide a breakdown of all our direct costs (subcontractors and suppliers), general conditions, bond, fee, contingency, and allowances. Again, this is a full "open book" approach which provides Gainesville an account of where every penny is allocated. On the following page are samples of the summary sheets that are "backed-up" with copies of all takeoffs, subcontractor estimates, allowance calculations, contingency breakdowns, and bids:

TAB 5 COST ESTIMATING / CONTROL

COST SUMMARY

	LABOR	EQUIPMENT	MATERIALS	SUBS	TOTALS
Total Direct			\$1,930,000	\$1,032,510	\$2,962,510
Sales Tax (6%)				\$116,799	\$116,799
Contingency				\$200,000	\$200,000
Owner Allowance					
Bond				\$26,597	\$26,597
Insurance - General Liability					
Fee (8.0%)				\$268,337	\$268,337
General Conditions	\$49,862	\$5,400	\$16,643	\$3,000	\$74,905
TOTAL	\$49,862	\$5,400	\$1,946,643	\$1,647,206	\$3,649,148

COST OF WORK (DIRECTS)

DESCRIPTION	QTY	UOM	LABOR \$	EQUIP- MENT \$	MATERIALS	SUBS \$	TOTALS	VENDOR SUB
PURCHASE ORDERS							\$1,930,000	
Screens & Grit Equipment - South Site	1	LS			\$950,000		\$950,000	HYDRO-DYNE
Screens & Grit Equipment - Central Site	1	LS			\$950,000		\$950,000	HYDRO-DYNE
NPW Booster Pumps	1	LS			\$30,000		\$30,000	PLUG
SUBCONTRACTS							\$1,032,510	
Building Subcontractor	1	LS				\$27,160	\$27,160	CROWTHER
Painting Subcontractor	1	LS				\$30,000	\$30,000	UNIVERSAL
Mechanical Subcontractor		LS				\$575,350	\$575,350	W-S
Instrumentation Subcontractor	1	LS				\$100,000	\$100,000	COMMERCE
Electrical Subcontractor						\$300,000	\$300,000	COGBURN
ALLOWANCES								
Building Permits	1	LS						None
TOTAL DIRECT COST					\$1,930,000	\$1,032,510	\$2,962,510	

GENERAL CONDITIONS

DESCRIPTION	QTY	UNIT	MH/ UNIT	BASE RATE	LABOR		EQUIPMENT		MATERIAL		SUBCONTRACTS		TOTALS
					TOTAL MH	\$	RATE	\$	U/P	\$	U/P	\$	
PROJECT MANAGEMENT TEAM													
Mechanical Sr. Craft Foreman	26	WK	40	\$42.00	1,040	\$43,680		\$0		\$0		\$0	\$43,680
RELATED MANAGEMENT COSTS													
Holiday & Vacation Pay	1	LS		\$30.00	0	\$3,360		\$0		\$0		\$0	\$3,360
TEMP. FACILITIES & UTILITIES													
Cellular Telephone Monthly Charges	6	MO		\$30.00	0	\$0		\$0	\$100	\$600		\$0	\$600
Job Offices Supplies	6	MO		\$30.00	0	\$0		\$0	\$100	\$600		\$0	\$600
Tool Trailers <u>1 REQUIRED</u>	6	MO		\$30.00	0	\$0		\$0	\$100	\$600		\$0	\$600
Temporary Toilets <u>1 REQUIRED</u>	6	MO		\$30.00	0	\$0		\$0	\$100	\$600		\$0	\$600
CONSTRUCTION EQUIPMENT & TOOLS													
Small Tools and Supplies	1	LS		\$30.00	0	\$0		\$0	\$5,243	\$5,243		\$0	\$5,243
PM Automobile w/ Fuel, Oil, Grease	6	MO		\$30.00	0	\$0	\$600	\$3,600	\$600	\$3,600		\$0	\$7,200
APM & Foreman Vehicle Allowance	6	MO		\$30.00	0	\$0	\$300	\$1,800	\$400	\$2,400		\$0	\$4,200
SAFETY, HEALTH & HOUSEKEEPING													
Clean-up at End of Project	1	LS	41.94	\$30.00	42	\$1,260		\$0		\$0		\$0	\$1,260
Clean-Up Throughout Duration of Project	26	WK	2	\$30.00	52	\$1,562		\$0		\$0		\$0	\$1,562
Dumpsters	6	MO		\$30.00	0	\$0		\$0	\$500	\$3,000		\$0	\$3,000
PERMITS, FEES, INSURANCE, LEGAL, ETC.													
Builder's Risk Insurance - Coastal County	6	MO		\$30.00	0	\$0		\$0		\$0	\$500	\$3,000	\$3,000
TOTAL GENERAL CONDITIONS					1,134	\$49,862		\$5,400		\$16,643		\$3,000	\$74,905

CMQS 5

a) Does your staff review design submittals with an eye for errors, discrepancies, conflicts, and other potential change order issues? If so, who specifically does that? b) What means are used to cross-check design submittals against the City design & construction parameters and standards, previous review comments, Value Engineering input, and other direction or feedback? c) Describe the methods used by the team to maintain quality control during the construction phase. d) Briefly describe the firms' existing quality assurance policies & procedures and explain how they're tailored to each project.

QUALITY CONTROL

Pre-construction Phase

Much like safety, the focus on quality control needs to begin during the preconstruction phase. During pre-construction we have three (3) great opportunities to influence the level of quality of our final delivered product.

Design Collaboration – If you notice, we did not use the word “review.” Wharton-Smith wants to partner with the City and the A/E and truly have an ownership stake in the design. Our feedback at 30%, 60%, and 90% design milestones will ensure the design is buildable after all accepted value engineering concepts.

Shop Drawing Reviews – Simple step often overlooked by other contractors. The equipment and materials that we approve must be functional and meet the level of quality required by the City, the A/E, and Wharton-Smith. Wharton-Smith reviews every shop drawing and stamps each document with our approval. Once again, this demonstrates our ownership stake in the project.

Subcontractor Selection – The development of the select bidders list for the City's projects is a critical step in our focus on quality. This allows Wharton-Smith and Gainesville to invite to bid subcontractors and suppliers that are capable, and willing, to provide the quality product that meets our joint expectations.

Construction Phase

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

- ✓ Wharton-Smith's expectations for aesthetic quality
- ✓ Conformance with Architect's/Engineer's quality standards
- ✓ Conformance with City of Gainesville quality standards

By outlaying our expectations before the work begins, it provides the subcontractor a baseline of quality to follow as the work is completed. Quality control begins on ground zero of the project.

Quality is everyone's job! We employ a Production Planning system to ensure high quality execution. Production Planning is a process of identifying critical activities (for both Wharton-Smith and subcontractors) and major “chunks” of work six weeks in advance. All activities are tracked on the planning room white board (see image).



Wharton-Smith Production Planning Room

work is complete. By keeping an eye on the critical work path, bottlenecks, and other constraints the quality control program is able to keep the pace of the project moving. Critical items will be completed right the first time.

The effort put forth by both our Quality Control department and our proposed project team will guarantee that your projects are constructed in a productive environment while maintaining the highest quality of standards.

Built with Quality...



... Delivered with Pride!

Each activity is reviewed to confirm that all materials are on-site, required personnel are available and scheduled, and prerequisite



CMQS 6

a) Describe how the team will develop and maintain the construction schedule throughout the construction process. Who develops the schedule that accompanies the GMP proposal? Who is responsible for updating and adhering to the schedule during construction? b) What role, if any, do potential subcontractors play in developing the schedule? What role, if any, do actual subcontractors play in refining and maintaining the schedule? c) Given your understanding of the Owner's goals, requirements, and constraints, elaborate on ideas you have for "fast-tracking" the project without sacrificing quality or introducing unreasonable risk.

SCHEDULING

The City's projects can only be successful with accurate and useful schedule. By getting the project completed on-time or early, it creates the following cost advantages for Gainesville:

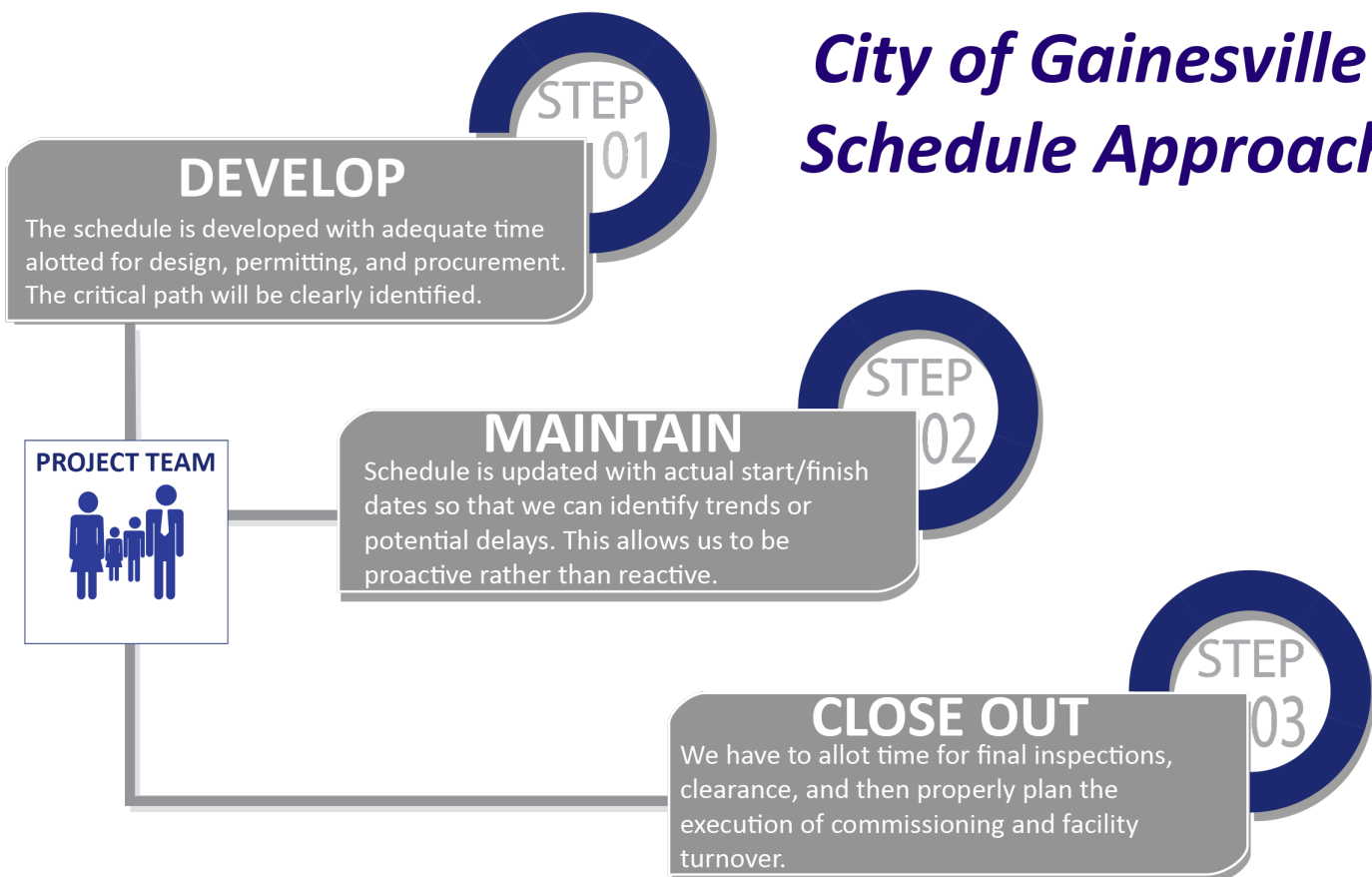
- Shortened project durations
- Less City administration costs
- Less Architect/Engineer administration costs



Our scheduling is performed in-house by our experienced managers utilizing Primavera® P6 software for computer generated project Critical Path Method (CPM) scheduling. The earliest versions of the schedule, drafted by the pre-construction manager with input from the project manager and potential subcontractors, are provided with the cost estimates at design milestones. Subcontractor involvement is very important. We find it beneficial to have input from the people that will perform the work when it comes to trades like electrical, roofing, or HVAC. The subcontractors will be most "in tune" with current labor market trends and material lead times. We continue to receive subcontractor input, at our weekly subcontractor coordination meetings, throughout the construction phase. That information is loaded into the master construction schedule.

With the City's projects our three step approach to the project schedule will be comprehensive development, proactive maintenance and a timely close-out.

City of Gainesville Schedule Approach



We will always be looking to accelerate the schedule. Early material procurements on equipment (at 60% design or earlier) and early subcontractor work packages such as site development or demolition are techniques we have used for several decades to get the work done faster than expected and faster than our competition.

CMQS 7

a) Outline your firm's approach to jobsite safety management, training, & education, enforcement and OSHA compliance. Provide proof of your firm's Experience Modification Rate for the past three years. b) Describe the experience of the proposed staff with building commissioning. c) LEED or equivalent accreditation is preferred; enclose copies of proposed staff's LEED similar accreditation(s) and describe the experience of the proposed project management staff with sustainable construction and LEED certification efforts.

SAFETY

At Wharton-Smith, our first priority is that our employees get home safely to their families every night. We understand that this isn't possible without making safety a company-wide effort. Safety is everyone's job! Our comprehensive safety program is more stringent than the requirements set forth by OSHA.

We understand that the desire to beat schedules and meet budgets can sometimes influence people to work less safely than they originally intended. To combat that threat, we employ several tools:

Training	All of our personnel are OSHA-certified as Competent Persons in Confined Space Entry, Fall Protection, Scaffolding, Rigging, or Trenching & Excavation. We also provide MOT training. Each project has at least one employee trained in CPR and First Aid. When appropriate, we also provide this training to our subcontractors.
Subcontractor Selection	The select bidders list must be comprised of proven safety performers. For new bidders, we will perform a thorough review of their industry standard safety metrics (EMR, LTA, etc.) prior to putting them on the bidders list.
Site Specific Safety Plan	Prior to mobilization Wharton-Smith will submit to the City for approval a site specific safety plan in which we outline our plan for all areas of safety. This includes hurricane preparedness, fuel storage, ingress and egress, site utilization, and many other items.
Inspections	Our superintendents perform daily documented safety inspections scaffolding, confined spaces, and trenching. Each project is also inspected by our Safety Department staff bi-weekly. Those inspections include an electronic report that identifies hazardous conditions and assigns corrective actions. Each report is reviewed by our management team, including the president of the company.
Meetings	Subcontractors attend pre-mobilization safety meetings to review our safety rules and execute a written commitment. Our superintendents hold a safety task assignment (STA) meeting with our employees every morning to review potential dangers. Lastly, we hold weekly "toolbox" safety meetings for all personnel onsite.



Gilbert Orcasitas will be our safety manager assigned to your projects. Gilbert, a **Certified Construction Health and Safety Technician**, offers

Gainesville over 31 years of construction experience.

Through implementation of our comprehensive safety program in both the preconstruction and construction phases, we will deliver to Gainesville a project that is delivered on-time, under budget, and with zero accidents.

August 3, 2017

Wharton-Smith, Inc. FEIN #59-2392802
PO Box 471028
Lake Monroe, FL 32747

RE: Workers Compensation,
Amerisure Insurance Company
Experience Modification History

To Whom It May Concern:

This letter confirms the experience modification history for the above captioned contractor:

Year	Experience Modification
2017	0.93
2016	0.94
2015	0.91
2014	0.83
2013	0.81

Best Regards,

Paul Ram, PIAM
Account Manager
Bouchard Insurance

CMQS 7

BUILDING COMMISSIONING

Commissioning procedures require a collaborative team effort. The added bonus of an additional LEED credit for Enhanced Commissioning is also a consideration.

A preconstruction meeting with all parties - design team, construction management team, and subcontractors, sets the canvas for expectations. WSI will review their indoor air quality procedure that requires a verification and check-in for every piece of HVAC equipment, in addition to verifying that the equipment is wrapped and protected. The project team will review specifications, installation and startup procedures, as well as setting the ground work for testing procedures prior to any installation occurring. This meeting assures that collectively, we can verify systems installation, location and functionality for future maintenance and proper operation.

After construction is complete, and the building has been operational for 10 months, the entire team reunites. This is a critical component of the commissioning process and allows us to verify and document total system performance and maintainability. Since any modifications to the system are made prior to the end of the warranty period, we can together verify that the systems are performing to achieve the full potential of the design intent and owner requirements.

The implementation of this type of integrated commissioning approach, (including the entire team from start-up, through construction, and into operation and maintenance), provides a commitment to our owners and helps the owner achieve its intended life-cycle costs and energy efficiencies.

LEED



Our team embraces the importance of building sustainably. Strict Storm water Pollution Prevention, Indoor Air Quality, Construction Waste Management and Low Impact Construction are normal practices for our firm and are implemented like clockwork throughout our projects. Wharton-Smith's Sustainable Design & Construction (SD&C) Department oversees every sustainable project that we undertake. As a member of the U.S. Green Building Council, Wharton-Smith has experience on more than 20 LEED/Sustainable projects; seven have obtained LEED Gold certification.

Our team's integrated design approach on sustainable projects is one of collaboration and communication, inclusive of all parties involved. Our LEED Compliance Manager, Rachel Bouffard, LEED AP, will lead this effort. Rachel, in concert with the design team will review every submittal, not only for compliance with the construction documents, but also for maximum implementation of any certification requirements. In addition, Wharton-Smith works with our subcontractors to provide products that are local to the project site and high in recycled content. By working with the subcontractors and using the specification as a guide, the project can achieve the highest percentages without cost to the overall project budget. In addition, bi-weekly site visits will be made by Wharton-Smith's SD&C Department. This type of hands-on attention allows for close interaction and review, so that together the entire field team can verify that compliance is being achieved.

MY CREDENTIALS

CHRISTOPHER BARNETT (GBCI Number: 10236568)

Mailing Address:
35136 Deadfall Oaks Dr.
Zephyrhills, FL 33541
USA

Record Type: Credentialled
LEED AP: Certified since 6/25/2009
Enroll in the LEED AP with specialty credential:
[Enroll through testing](#)
[Enroll through prescriptive credential maintenance](#)

Enrollment Window
6/5/2009 - 6/4/2011



Primary Phone: 727-215-5546
Secondary Phone: 813-395-6296


Primary E-mail: chrisbarnett@rdconstruction.com
Secondary E-mail: c.barnett@unf.edu

GBCI Number: 10236568

Wharton-Smith employs 12 LEED Certified Professionals, 3 of which are on this team!

The image shows a certificate from the Green Building Initiative. At the top left is the logo, which consists of a green leaf icon and the text "GREEN BUILDING INITIATIVE". To the right of the logo is the text "Green Building Initiative" in a large, bold, black serif font. Further right is a circular seal with the words "GREEN BUILDING INITIATIVE" around the perimeter and a red square with a white "G" in the center. Below these elements is a thick red horizontal band with the words "CERTIFICATE OF COMPLETION" in large, white, bold, sans-serif capital letters. Below the red band, the text "This is to certify that" is in a small, italicized, black serif font, followed by "Larry Sease" in a larger, bold, black serif font. Below that, "participated in" is in a small, italicized, black serif font, followed by "Green Globes Professional Training" in a bold, black serif font. Below this, the text "AIA Course Number: GBG07/NOV13", "Completion Date: 4/14/14", and "Location: Online Course" are in a small, black serif font. Below that, "Earning" is in a bold, black serif font, followed by "5 AIA CES LSWH" in a bold, black serif font. At the bottom left, there is a signature in blue ink that reads "Janet Elliott". Below the signature is a horizontal line, and below that is the text "jane@tncbi.org (877) 424-4241". At the bottom right, there is a horizontal line, and below that is the text "5410 SW Macadam Ave., Ste. 150 Portland, OR 97239". Below that is another horizontal line, and below that is the text "Janina McLaughlin, AIA POC: jmc@tncbi.org". At the very bottom, centered, is the text "Provided Number: G478".

	<p>GREEN BUSINESS CERTIFICATION INC. CERTIFIES THAT</p> <p>Carolyn Bonaventura</p> <p>HAS ATTAINED THE DESIGNATION OF</p> <p>LEED AP® Building Design + Construction</p> <p>by demonstrating the knowledge and understanding of green building practices and principles needed to support the use of the LEED green building program.</p>
<p>10030101-AP-BD-C</p>	
<p>CONFIDENTIAL BY</p>	
<p>12 JAN 2010</p>	
<p>ISSUED</p>	
<p>10 JAN 2010</p>	
<p>VALID THROUGH</p>	
	<p></p> <p>PREPARED BY: LEE, L.P. GREEN BUSINESS CERTIFICATION INC. PREPARED BY: LEE, L.P. GREEN BUSINESS CERTIFICATION INC.</p>



100% GREEN AP-BD+C

CERTIFICATE BY

15 JUN 2011

ISSUED TO

13 JUN 2010

NOTE: THIS IS A PRELIMINARY CERTIFICATION.


GREEN BUSINESS CERTIFICATION INC. CERTIFIES THAT

Rachel Bouffard

HAS ATTAINED THE DESIGNATION OF

LEED AP® Building Design + Construction

by demonstrating the knowledge and understanding of green building practices and principles needed to support the use of the LEED green building program.





PURPOSE: A.E.D., U.S. GREEN BUILDING COUNCIL
PROGRAM & TOOL: GREEN BUILDING CERTIFICATION INC.

General Contracting License

STATE OF FLORIDA DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION CONSTRUCTION INDUSTRY LICENSING BOARD	
LICENSE NUMBER	
CGC1511243	
The GENERAL CONTRACTOR Named below IS CERTIFIED Under the provisions of Chapter 489 FS. Expiration date: AUG 31, 2018	
SMITH, TIMOTHY SCOT WHARTON-SMITH INC PO BOX 471028 LAKE MONROE FL 32747	
ISSUED: 08/28/2016	SEQ # L1608280003769

DISPLAY AS REQUIRED BY LAW

Corporate Charter

State of Florida Department of State

I certify from the records of this office that WHARTON-SMITH, INC. is a corporation organized under the laws of the State of Florida, filed on April 3, 1984, effective April 2, 1984.

The document number of this corporation is G94383.

I further certify that said corporation has paid all fees due this office through December 31, 2017, that its most recent annual report/uniform business report was filed on January 3, 2017, and that its status is active.

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

Bonding Letter

CNA SURETY

500 Colonial Center Parkway, Lake Mary FL 32746

Elio E. Sanchez, CPA, AFSB

Telephone 407-804-5931
Internet elio.sanchez@cna surety.com

October 23, 2017

City of Gainesville
Purchasing Division
P.O. Box 490, Mail Station 32
Gainesville, FL 32627

**RE: Wharton-Smith, Inc.,
750 Monroe Road, Sanford, FL 32771
Project: Continuing Construction Management Professional Services for
Minor Projects, RFQ No. FPUR-180009-GD**

We are providing this information at the request of our principal.

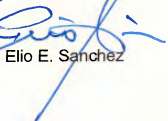
We have been providing surety bonds for Wharton-Smith, Inc., since 1986. We have approved bonds for them covering jobs up to \$125,000,000 and potential work programs of \$600,000,000.

We understand that Wharton-Smith, Inc. has or is about to submit documents regarding Continuing Construction Management Professional Services for Minor Project, RFQ No. FPUR-180009-GD. We further acknowledge that Wharton-Smith, Inc. may be bonded for multiple projects, with a potential maximum construction cost of \$2,000,000 each. If a contract is awarded to Wharton-Smith, Inc. and based on present circumstances, CNA Surety will be willing to provide bid, performance and payment bonds for the applicant in connection with the Project.

Wharton-Smith, Inc. has surety credit established with Western Surety Company, a wholly-owned subsidiary of CNA Surety. An admitted surety in the State of Florida, Western Surety Company is an A.M. Best "A" (Excellent) rated company with a financial size category of XIII (\$1.25 Billion to \$1.5 Billion). Western Surety Company has been authorized to transact business in the State of Florida since 1965.

Any arrangement for bonds required by the contract is a matter between Wharton-Smith, Inc. and the surety and we assume no liability to you or third parties, if for any reason we do not execute these bonds.

Sincerely,



Elio E. Sanchez

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



Ken Detjen
Secretary of State

Tracking Number: CC8892326279

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

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

Drug Free Workplace Form

DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that

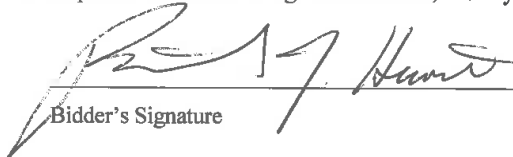
Wharton-Smith, Inc.

does:

(Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty of nolo contendere to, any violation of Chapter 893, Florida Statutes, or of any controlled substance law of the United State 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.


Bidder's Signature

10/23/17

Date



Wharton-Smith, Inc.
CONSTRUCTION GROUP

750 Monroe Road • Sanford, FL 32771
Tel: 407.321.8410 • Fax: 407.829.4453
www.whartonsmith.com