



The Replacement of Okeechobee High School

RFQ #: 21/22-01



Wharton-Smith, Inc.
CONSTRUCTION GROUP



LETTER OF INTRODUCTION

August 18, 2021

Okeechobee County School Board
 Attn: Ken Kenworthy
 700 SW 2nd Avenue, Okeechobee, FL 34974

RE: RFQ #21/22-01 Construction Manager at Risk for the Replacement of Okeechobee High School Project

Dear Mr. Kenworthy and Members of the Selection Committee:

It is an honor and a privilege to present our qualifications on this vital project to the School District. It has also been a personal privilege for each of our team members who have served the District to have been engaged with Okeechobee County Schools over the past two and a half years. The time we have spent with your staff and leadership has helped us to truly understand how to best serve you in the future, we have no learning curve. Having served the District on your special projects through the hard times has brought the District close to us both personally and professionally.

WHY WHARTON-SMITH?

As you review and go deep into our proposal, you will see the true strengths of Wharton-Smith and the team we have assembled and how relevant those strengths will be for the success of your project.

- **Wharton-Smith is currently ranked by ENR as the #2 school builder in the entire Southeast United States.**
- **Wharton-Smith's high school building experience and history is second to none.**
- Wharton-Smith and our partners are all **experts at Construction Management At Risk.**
- Our Team has experience with **Florida's Special Facility Construction Account funding mechanism.**
- Our Team has experience building **344+ occupied school sites.**
- Our Team is focused on the **success of local subcontractors.**
- Our team has built multiple projects and has an excellent relationship **with your chosen architect, CRA.**

Wharton-Smith will operate out of our Jupiter office

Our Jupiter office is literally three turns of the steering wheel away from the location of the high school and has already proven to be an excellent location in support of our work for the District. We have already identified subcontractors with the capability to carry this project through to completion. We know that one of the most significant challenges will be raising the elevation of the entire site during construction by over three feet to alleviate drainage issues that have plagued the site, so we have already done the work to locate an appropriate quantity of suitable fill. We look forward to further discussing this situation at the presentation.

The Team

It is clear from your RFQ that you want a firm with experience with special facilities construction account projects. For this reason we have teamed with Perry-McCall. Perry-McCall has built over twelve projects with CRA and will bring familiarity with their customary design elements and that significant experience to both our preconstruction phase and construction phase efforts. Their **current experience building CRA prototypes** gives us recent cost data and constructability analysis of typical CRA design details, and will give our team a jump start on the preconstruction process. Wharton-Smith and Perry-McCall also have years of experience building phased projects and projects under the **State of Florida Special Facilities Construction Account funding mechanism.**

Wharton-Smith Staff

The staff we are assigning to the Okeechobee High School project have significant experience on high school projects and on multiple phased occupied school campuses. Please refer to our organizational chart to review our qualified proposed team with project-specific experience best suited to manage and support your project. Our project staff also knows the importance of placing the safety of the students and staff of Okeechobee High School first on the priority list. Please note that Wharton-Smith **has never had a safety incident involving the Students or Staff on a school campus while building a project.**



LETTER OF INTRODUCTION

HIGH SCHOOL EXPERIENCE

As the #2 school builder in the Southeast United States, Wharton-Smith has worked on over 350 projects in the last 15 years for K-12 Districts throughout Florida. Our project staff members have relevant high school experience that includes projects such as Jensen Beach High School and Jupiter High School. Both of these projects were phased projects with many similarities to Okeechobee High School.

FOSTERING LOCAL BUSINESS

We have excellent relationships with subcontractors and vendors in Okeechobee County and throughout the Region. To increase our local subcontractor participation, we intend to lean on our membership and seek the help of the Okeechobee Chamber of Commerce to conduct several outreach events to the construction community through use of local event spaces like **The Downtown Venue and the Brown Cow Sweetery**. We will utilize social networks, local papers, and local advertising to bring as much positive economic impact to the Okeechobee area as possible. We will additionally hold conferences and foster relationships between Wharton-Smith and interested local subcontractors to get them prequalified for their particular scope of work.

The Wharton-Smith team is committed to providing the School District of Okeechobee County with the highest level of service, and we look forward to continuing our successful working relationship on the Replacement of Okeechobee High School project.

Sincerely,
WHARTON-SMITH, INC


Darin Crafton
Executive Vice President


Gerry Kelly
Director of Operations

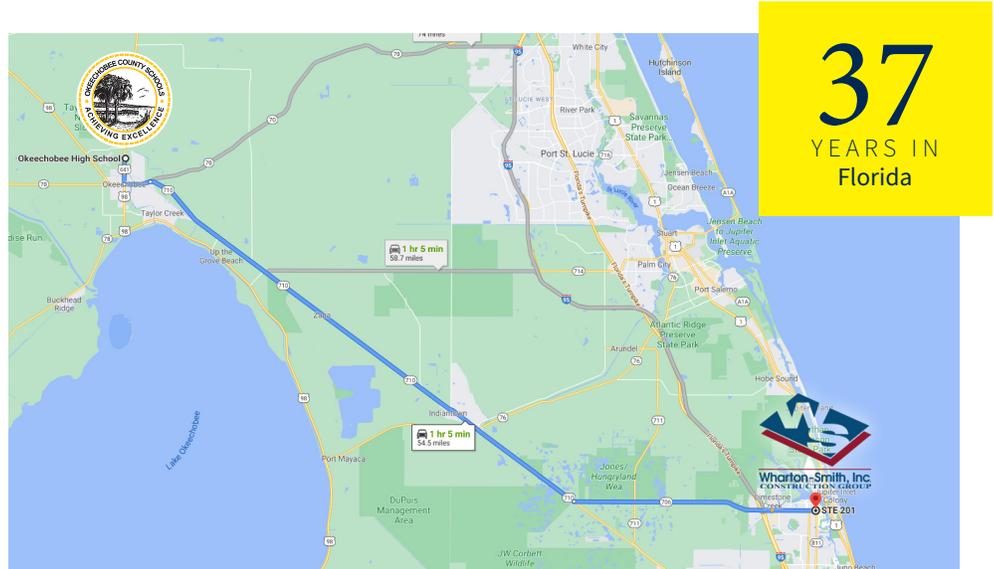


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TAB 1: LENGTH OF TIME IN BUSINESS



TAB 1: LENGTH OF TIME IN BUSINESS

Wharton-Smith has been in business for 37 years!

WE BUILD SCHOOLS

Wharton-Smith was recently recognized by Engineering News-Record (ENR) as the **#2 school builder in the Southeast United States**. As the leading construction management at risk school builder in the Southeast, Wharton-Smith is enthusiastic to present our qualifications to deliver top notch preconstruction and construction management services to our clients. It is our goal to exceed your expectations on this project. **We know this school will serve the students of Okeechobee High School as well as the community, for many years to come.**

FIRM PROFILE AND HISTORY

Founded by George Smith and Bill Wharton in 1984, Wharton-Smith is a privately held corporation founded on strong work ethics and the vision to create a positive impact within the communities we serve. We continue to uphold these founding ideals under the current leadership of Ron Davoli, President/CEO, and as a result, the firm has built a solid reputation throughout Central South Florida and the Southeastern United States. Locally located in Jupiter, Florida, Wharton-Smith is a 37-year-old construction management firm with Florida offices in Jupiter, Sanford, Rockledge, Tampa, Fort Myers, Punta Gorda, and Pensacola. Our company now employs 686 qualified personnel consisting of construction managers, project estimators, project superintendents, engineers, construction specialists, and administrative personnel.

CORPORATE SPECIALTIES

Wharton-Smith specializes in providing Construction Management at Risk (CMAR) services for education construction projects and a multitude of different market segments. As the construction manager (CM), Wharton-Smith will lead the project, providing single-source responsibility to Okeechobee County School District. We know that as the CM, we will be responsible for providing technical expertise and professional services for all management aspects of the project.

LOCATION

Wharton-Smith has been working in the South Florida area for 25 years and will manage the high school project with our on site team with executive support out of our Jupiter office located at 125 W. Indiantown Rd, Jupiter, FL 33458.

WHARTON-SMITH STATS AT A GLANCE



Ranked #2
EDUCATION
BUILDER IN THE
SOUTHEAST
UNITED STATES
Engineering News-Record

\$1 BILLION+
IN K-12 WORK COMPLETED

355
K-12 PROJECTS

334
K-12 PROJECTS ON
OCCUPIED CAMPUSES

5
HIGH SCHOOLS IN THE
LAST 10 YEARS

PROVEN
RELATIONSHIP WITH OCSD



TAB 2: COMPANY LOCATION



SEMINOLE COUNTY PUBLIC SCHOOLS
MILLENNIUM MIDDLE SCHOOL SANFORD, FLORIDA

TAB 2: COMPANY LOCATION

LOCATION

Wharton-Smith is currently working with the Okeechobee County School District on the Okeechobee High School campus and others. This project will be managed from our Jupiter office located 55 miles from the campus at **125 W. Indiantown Road, Suite 201, Jupiter, FL 33458.**

37

YEARS IN
Florida

Chamber of Commerce
of Okeechobee County

Okeechobee
Chamber
of Commerce

MEMBER

Local
LOCAL
Local

Staff by Discipline	Firm-wide	Jupiter
Superintendents	107	7
Foreman	57	5
Safety	18	2
Project Managers	87	6
Project Engineers	55	8
Trade / Craft	139	12
Preconstruction / Estimating	27	1
Executive / Management	51	3
CADD	4	0
Accounting	21	0
Administration	75	5
Interns	45	3
	686	52

Surrounding
you with support



TAB 3: MINORITY, WOMEN & VETERAN OWNED



TAB 3: MINORITY, WOMEN & VETERAN OWNED

Although Wharton-Smith is not a Certified Minority Business Enterprise, our firm recognizes the importance of diversity programs in achieving economic vitality throughout our region. Business certification programs, such as Minority and Women Owned Business Enterprises and Service Disabled Veteran-Owned Small Businesses, help bring inclusion to the procurement process allowing these smaller companies to grow, create more local jobs, and ultimately, promote economic investment into our local communities. It's the American way and a win-win for all. In addition to securing the maximum minority participation from subcontractors and suppliers, Wharton-Smith has a proactive diversity program for our employees.

In addition to securing MBE participation for subcontractors and suppliers, Wharton-Smith has a proactive diversity program for our employees. Our company culture is one of inclusion with 47% diversity in our workplace.

Our team has maintained a presence in and around Okeechobee County for the past three decades and is currently working with the School District on a Continuing CM Services contract. These established relationships are essential to our ability to build the Okeechobee High School project with labor, materials, equipment, and suppliers from Okeechobee County-based businesses. We can secure the best pricing for your project and deliver dollars back to the local economy. It is not only important to get participation from local businesses, but those businesses must be competitive too. We utilize local businesses, not only at the first-tier subcontract level, but as far down the chain as vendors to third-tier subcontractors.



THE WHARTON-SMITH STRATEGY

Just as we have on all of our OCSD projects, we will locate and encourage local subcontractors based in Okeechobee County to buy their materials, equipment, and supplies from Okeechobee County-based businesses. We get this commitment from our subcontractors and then secure it into their contracts. This provides the absolute maximum participation downstream, as well as the initial contract amount.

Bid packages are tailored to specific trade groups that make sense for the project. For example, on the Osceola County Harmony Fire Station #54 project, we divided the site work bid package into three separate smaller scopes—earthwork, underground utilities, and hardscape. This allowed more participation from small, local, and developing businesses, as well as larger firms (which could have the capacity to bid all three scopes). On the Okeechobee High School project we will ensure similar packages are developed to give local companies opportunities to participate. As an example, bid packages can be split for trades like site, concrete, painting, and flooring in order to give more opportunities for smaller local businesses to participate.

We will specifically invite local businesses that would benefit from participation in the Okeechobee High School project. This team will work with the Okeechobee Chamber of Commerce to conduct several outreach events to the construction community through use of local event spaces like **The Downtown Venue and the Brown Cow Sweetery**. We will utilize social networks, local papers, and local advertising to bring as much positive economic impact to the Okeechobee area as possible. In these seminars, we explain and help these businesses get prequalified with our firm to bid projects. We also review insurance, bonding requirements, and help provide avenues for them to meet those requirements. These efforts always result in successfully incorporating qualified local and small businesses into our projects.

In addition to outreach programs and seminars, Wharton-Smith has also gone to great lengths getting the word out and following up with local trades by personally delivering bid documents to the businesses.



TAB 3: MINORITY, WOMEN & VETERAN OWNED

MENTORSHIP & APPRENTICESHIP

Our efforts do not stop with outreach in the current local sub-contracting community. We also want to ensure there is a next generation of skilled workers in Okeechobee County. Thus, Wharton-Smith has partnered with several **Education Foundations** and is actively involved in the **ACE** and ACT Mentorship Programs.

ACT (Academy of Construction Technology) is the trade-oriented program for high school students where participants can receive on-the-job training in specific trades. We have several employees contributing to the ACT program, our Project Executive Tom Widener sits on the board, and we typically hire two to five high school students to work on our projects every summer. **On the Osceola Business Academy project, we hired a Poinciana High School student through the ACT program as an intern and active part of the construction team.** We have also permanently hired hard-working students from the ACT program after graduation.

Another program our company supports is Pre-Apprenticeship Construction Training. Wharton-Smith, along with Orange Technical College and Career Connections, have made workforce development a top priority. Together, our organizations have developed an 82.5-hour course geared towards basic construction training and job placement in the construction industry. Graduates receive a 10-Hour OSHA Certification, Certificate of Completion from Orange Technical College, and employment assistance. This program was developed in collaboration with Orange County Public Schools Facilities. To date, the program has produced 26 graduates. **Our team feels there is exceptional benefit in all of these programs to stimulate local skilled trade and construction workers in Okeechobee County and throughout Central South Florida. We see opportunities to involve OCSD and the students in Okeechobee County-based high schools in our construction efforts on the Okeechobee High School project.**



ACT STUDENTS TOUR WHARTON-SMITH'S OSCEOLA BUSINESS ACADEMY PROJECT



ACT SCHOLARSHIP AWARDS

LOCAL SUBCONTRACTORS

Wharton-Smith has extensive experience working with local Okeechobee County subcontractors. We have over 6,000 subcontractors in our database with whom we can successfully complete projects under this contract. Listed on the following page are some of the local prequalified subcontractors who we would invite to bid the Okeechobee High School project. Our team has established working relationships with all of the subcontractors. **This team will utilize Okeechobee County-based subcontractors as much as possible on the Replacement of Okeechobee High School.**

300+

OKEECHOBEE-BASED
Preferred Vendors



Okeechobee
Chamber
of Commerce
MEMBER

6000+

SUBCONTRACTORS
In Florida database



TAB 3: MINORITY, LOCAL, WOMEN & VETERAN OWNED

REGIONAL AREA SUBCONTRACTORS

A & M Mechanical Insulation	Crown Electric	Gibson Electric	Los Dos Amigos Landscaping	Semco Construction, Inc.
A Step Above Plumbing, Inc.	Curb Man, Inc.	Gibson Electric	LPC Scaffold Services Inc	Septic Assurance, LLC
A. Gately Enterprises, Inc.	Curren Electric Co. Inc.	Global Ride, LLC	LSA Drywall, Inc.	Skylight Solutions
A1 Safari Glass, Inc.	Curry Controls Company	GLT Office Supply, Inc	Madrid Engineering Group, Inc	Solares Florida Corp.
AAA Blinds	Cyber Electric of Central Fla	GMF Steel Group	Mark Palmer Electric & AC	SOLUTIONS BY MAGNOLIA
Acme Glass	Cypress Signs	Godwin Pumps a Xylem Brand	Martin Paving	Southeastern Construction
Acoustical Services Inc	D&N Cabinetry, Inc.	Grace Pest Control	Masonry Systems	Southern Glass Products Co.
Acu-Temp Heating & Cooling	D&W Neat and Discreet Clean	Grade-A-Way	Mazzella Lifting Technologies	Southern Stucco
Adams Building Materials	Daniel Walker Inc.	Ground Level Inc	Metromont Corporation	Southern Truss
Advanced Overhead Systems	Davis and Sons Construction	GT Grandstands	Mid Florida Electric	Southwest Stainless & Alloy
AFI Construction, Inc	Davis Grading	Guinn Electric	Mid-South Lumber Co.	Spahn Construction LLC
Air & Electrical Services	Davis Grading LLC.	Gulf State Signs	Mid-State Dewatering	Spancrete fna Florida Precast
AKM Plumbing, LLC	DBA AIR NOW	H & R Steel & Son, Inc.	Millenium Rebar	Spensieri Diversified Ilc
Alfred Conhagen, Inc. of FL	DCR Engineering	Hart Welding, Inc.	Miller Electric Company	Springer Construction
All Earth Landscaping	DcR Engineering Services, Inc.	Haynes Steel Erectors	Millers Central Air	Springer Peterson Roofing and
Alpha General Services Inc	Demco Specialties, Inc.	HDI Mechanical	Mills & Nebraska	Sheet Metal, Inc.
Alpha Plumbing Inc	Dempsey Roofing	HDPE Inc	Mitchell's All-Pro Painting	Stainless Supply
American Pool Builders	Denson Construction	Henkelman Tile & Stone	Mobile Modular Management	Stanton Mobile Homes
AmTech Solutions, LLC	Digitech Graphics Group	Henthorne Precast	Modular Precast Systems	Steel Technology & Design
Aqua-Aerobic Systems, Inc.	Dixie Signs, Inc.	Heritage Product Resources	Monarch Plumbing, Inc.	Steve Bivens Contracting Inc.
Ard's Awning	Dixie Southern	Heyward Florida, Inc.	Montoya Electric Service, Inc	Stripe IT Rite LLC
Atlantic Scaffolding Company	Dixie Southern Industrial	HOUSE MASTERS	Moore Power Inc.	Sunbelt Supply Company
Audet Electric Inc.	Dixie Southern Industrial, Inc.	HUDSON PUMP & EQUIPMENT	Muddco Plumbing/Heating	Sunshine State Management
B & B Tankers, INC	DJ TRUSS	Iceberg AC and Heating	Nathan's Masonry Contractors	Surf Enterprise Painting, Inc.
Baker's Painting LLC	DJ Trusses	ICI Termite and Pest Control	Native American Construction	TEST THE BEST PAINTING
Barneys Pumps	Dowell Roofing Services, LLC	Imperial Cabinets & Millwork	New Millennium Building Sys.	The Budd Group
BCI Integrated Solutions	Downtown Underground	Imperial Drywall Systems	Nextgen Scaffold Services	Tiger Concrete and Screed
Best Fabrication, Inc	DSI Steel	Imperial Testing and Eng.	Nobility Homes Inc.	Tiger Contracting LLC
Best Fence Company	Dunkley Stucco, Inc.	Independence Recycling, Inc.	NuAir Air Conditioning Inc	TNT Combustion, Inc.
Bethel Farms	Earnest Electrical Contractors	Industrial Plastics	ORB Engineering, Inc.	TOM EVANS ENVIRONMENTAL
BL SMITH ELECTRIC, INC	EAST POLK, LLC	Innovated Industrial Services	OSH Environmental	Top Flight Electric, Inc
Bristol Environmental, Inc.	Echols Plumbing and AC	Insulfoam	Parker Glass	Total Landscape Management
Brock Industrial Electric, LLC	Eclipse Construction Company	International Flooring, Inc.	Parry's Lawn and Landscape	Travis Resmondo Sod, Inc.
BT BUILDERS	Ed Ducar, Inc.	Intrepid Precast	Patel, Greene, & Associates	Tri-City Glass Company
Building Envelope Consultant	Electrical Service & Supply LLC	J & M Sitework, LLC	PAYNE AIR COND & HTG INC	Tri-Tech Air Conditioning, Inc.
C J Bridges Railroad	Elevated Painting and Interiors	J Goss Structures, Inc.	PB of Central Florida, Inc.	TRIPPENSEE & CO.
Capital Land Management	ENVIRONMENTAL QUALITY AIR	Janco Enterprises	Peavey & Associates Surveying	Tucker Construction & Eng.
Carpenter Cont. of America	EnviroSales of Florida, Inc.	Jimmy Blackwell Framing, LLC	Polk Mechanical Inc.	Tucker Electric
Center State Framing	Executive Pools, Inc.	JRO TILES	Powell Concrete, LLC	Tucker Paving, Inc.
Central Fire & Safety	Fabrication Maintenance	Keith and Morgan, Inc.	PRECISION ELECTRIC	UNITED CONSTRUCTION
Central Florida Painting Co.	Falcon Contracting Co.	Kelco Striping & Excavating	Prince Land Services, Inc.	United Refrigeration & AC
Central Florida pest	Fassler Plumbing, Inc.	Kesco Inc.	Pro Industries	Universal Forest Products
Central Florida Truss	FHS, Inc	King Const. and Energy Mgmt.	Profab-Tech, Inc.	Universal Painting
Central Food Equipment, Inc.	Fine Line Custom Millwork	Kissimmee Iron Works	Progress Truss	Universal Timber Structures
Central Glass Company, Inc.	Fisher's Landscape	Kratzer Landscaping	Pyramidsteelinc	Unlimited Turf, LLC
Central Mobile Homes	FloraLawn, Inc	KT Fab Inc.	Q & Q, Inc.	US&V Concrete Construction
Central Sheet Metal and Steel	Flores Wall System Inc	Lakeland Paving Co	Quick Response Fire	Valiant Products Inc.
Central Window Sales, Inc.	Florida Architectural Precast	Lamp Metal Trusses	Protection, LLC	Valtex, LLC
Certified Foundations Inc.	Florida Comm. Landscape	Landmark Civil	R & S Construction	Vanguard Modular Building
Circuit Electric	Florida General Coatings, Inc.	Lane Construction	R.F. Lusa & Sons Sheet Metal	Vogel Bros. Building Co.
Citrus Air	FLORIDA SEALING PRODUCTS	Larry Turvin Painting Co. Inc.	RAWLS & RAWLS INC	Vulcan Materials Company
CivilSurv	Florida Track and Turf	Larson's Grading and Paving	Revere Control Systems, Inc.	W.H. Alderman Plumbing
CKB Cleaning Service	Fomerta, LLC	Laundry Pro of Florida	RF Lusa Roofing	Waller Pavers
Clari's Cleaning Crew, LLC	FTD Construction, Inc.	LEEDY ELECTRIC	Ridgdill & Son, Inc.	Warehouse Flooring
Clark Environmental, Inc.	Furr & Wegman Architects, PA	Legacy Roofing Services	Ring Roofing	Water Works Irrigation Corp.
Coast Construction, Inc.	GALVIS CONSTRUCTION	Lewman Electric Co.	Robert Binns Roofing	Wausau Tile Florida
Coastal Steel	Garrard Framing & Drywall	Liberty Concrete & Forming	Rogers Concrete Services LLC	WCM Roofing LLC
Collins Survey Consulting LLC	Garrison Land Development	Liberty Hauling, Inc.	ROGGEN ENTERPRISES	Weld Solutions Technology
Company Name	GATLIN LAWN MAINT.	Liberty Industrial Group	Rolling Oak Supply, Inc.	WFSM Sheet Metal
Complete Roofing and	Gator Pressure Cleaning	Liberty Steel Erectors Inc.	S & S Welding	Wyatt Fitzgibbons
Construction, LLC	Gator Tile & Marble Inc.	Lighting Partners	Sadler's Site Works LLC.	Ziegler Kitchens & Baths
Costello Brothers Marine	General Asphalt	Lira Sod, Inc.	Sandpoint Plumbing, Inc	
Construction	Gibson Air & Mechanical	LMR Construction Inc	Scosta Corp.	



TAB 4: AVAILABILITY TO START & MEET SCHEDULE



TAB 4: AVAILABILITY TO START & MEET SCHEDULE

TEAM MEMBER COMMITMENTS

The team proposed on this project have the expertise to start and completed the project on time and all are **100% available and committed** to the success of Okeechobee High School from beginning to end.

CURRENT WORKLOAD

Below please find Wharton-Smith's current and projected workload for our Jupiter and Sanford Commercial offices, the offices that will support the Okeechobee High School project.

Wharton-Smith has an extensive depth of bench, which allows us to put together the most qualified teams to best meet the criteria of each specified task order. The chart to the right indicates our current employee count by discipline, both firm-wide and at our Jupiter, FL location.

Staff by Discipline	Firm-wide	Jupiter
Superintendents	107	7
Foreman	57	5
Safety	18	2
Project Managers	87	6
Project Engineers	55	8
Trade / Craft	139	12
Precon / Estimating	27	1
Executive / Management	51	3
CADD	4	0
Accounting	21	0
Administration	75	5
Interns	45	3
	686	52

JUPITER OFFICE | COMMERCIAL DIVISION

PROJECT NAME / OWNER	AMOUNT	COMPLETION DATE
Ahfachkee Lower School Addition	\$15M	8/2023
Highlands Fire Station	\$4M	5/2023
OCSD Continuing Contract for CM Services	<\$4M per project	4/2022
FAU CM Continuing Services Minor Projects	<\$4M per project	1/2022
PBC Animal Care & Control Facility Renewal	\$17.1M	11/2023

SANFORD OFFICE | COMMERCIAL DIVISION

PROJECT NAME / OWNER	AMOUNT	COMPLETION DATE
OCPS Wolf Lake Middle School HVAC 2	\$1.7 M	08/2021
SDOC Admin 2000 Fire Protection System	\$374K	10/2021
Brightline Trains Vehicle Maintenance Facility	\$50.6M	02/2022
Brevard Public Schools District School Security	\$12M	02/2022
City of Ocoee City Hall	\$18.5M	03/2022
Seminole County Juvenile Assessment Center Design-Build	\$4.9M	04/2022
OCPS Site 90 K-8	\$28.5M	05/2022
City of Mount Dora Fire Stations #34 & #35	\$11.5M	10/2022
Volusia County Medical Examiner's Office	\$11.1M	04/2023
Seminole County Criminal Justice Center Annex Design-Build	\$65.6M	05/2023
Lake County Schools Aurelia Cole Academy K-8	\$35.5M	06/2023
City of Casselberry Public Works	\$12.5M	09/2023
OCPS Orange Technical College Westside Campus	\$42M	12/2023
City of Casselberry Parks	\$21.2M	01/2024



TAB 5: INSURANCE, BONDING, LITIGATION & SETTLEMENTS



SEMINOLE COUNTY PUBLIC SCHOOLS
MILLENNIUM MIDDLE SCHOOL SANFORD, FLORIDA

TAB 5: INSURANCE, BONDING, LITIGATION & SETTLEMENTS

INSURANCE CERTIFICATE

Client#: 706782

WHARTINC

ACORDTM

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
08/04/2021

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.

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).

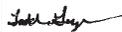
PRODUCER Marsh & McLennan Agency Bouchard Region 1 N. Dale Mabry Hwy, Suite #450 Tampa, FL 33609	CONTACT NAME: PHONE (A/C, No, Ext): 727 447-6481 FAX (A/C, No): E-MAIL ADDRESS: certificates@bouchardinsurance.com													
	<table border="1"> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> <tr> <td>INSURER A : Amerisure Insurance Company</td> <td>19488</td> </tr> <tr> <td>INSURER B : Starr Indemnity & Liability Company</td> <td>38318</td> </tr> <tr> <td>INSURER C : Amerisure Mutual Insurance Company</td> <td>23396</td> </tr> <tr> <td>INSURER D : Amerisure Partners Insurance Company</td> <td>11050</td> </tr> <tr> <td>INSURER E : Berkley Assurance Company</td> <td>39462</td> </tr> <tr> <td>INSURER F : Great American Assurance Co</td> <td>26344</td> </tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : Amerisure Insurance Company	19488	INSURER B : Starr Indemnity & Liability Company	38318	INSURER C : Amerisure Mutual Insurance Company	23396	INSURER D : Amerisure Partners Insurance Company	11050	INSURER E : Berkley Assurance Company	39462	INSURER F : Great American Assurance Co
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INSURER F : Great American Assurance Co	26344													
INSURED Wharton-Smith, Inc. 125 W. Indiantown Road, Suite 201 Jupiter, FL 33458														

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

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.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR 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"/> PROJECT <input type="checkbox"/> LOC OTHER:	Y	Y	GL20361081601	04/01/2021	04/01/2022	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 MED EXP (Any one person) \$10,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000
D	<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	Y	Y	CA20361071601	04/01/2021	04/01/2022	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE	Y	Y	CU21171470001	04/01/2021	04/01/2022	EACH OCCURRENCE \$20,000,000
B	<input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE	Y	Y	1000585014211	04/01/2021	04/01/2022	AGGREGATE \$20,000,000
F	<input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$0	Y	Y	EXC3284641	04/01/2021	04/01/2022	\$
C	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	WC203610915	04/01/2021	04/01/2022	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
G	Rented Equipment	Y		UM00024961MA21A	04/01/2021	04/01/2022	2,500,000
E	Pollution Liab	Y		PCADB50141490421	04/01/2021	04/01/2022	5,000,000
E	Professional Liab			PCADB50141490421	04/01/2021	04/01/2022	5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
PROJECT: The Replacement of Okeechobee High School RFQ #21/22-01
COMPLETE CERTIFICATE HOLDER(S) & ADDITIONAL INSURED(S): Okeechobee County School Board and any other person(s), organization(s) or entity(ies) as required by written contract and subject to the terms, conditions and exclusions as specified in the policies.
 (See Attached Descriptions)

CERTIFICATE HOLDER Okeechobee County School Board 700 SW 2nd Avenue Okeechobee, FL 34974	CANCELLATION 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 
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ACORD 25 (2016/03) 1 of 2 #S8575441/M8146161

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RCJTF

DESCRIPTIONS (Continued from Page 1)
 Description of Operations, Locations, Vehicles, etc. (ACORD 101)
 Description of Additional Insureds (ACORD 102)
 Description of Endorsements (ACORD 103)

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.
CONTRACTOR'S BLANKET ADDITIONAL INSURED ENDORSEMENT - FORM A
 This endorsement modifies coverage provided under the following:
 Description of Operations, Locations, Vehicles, etc. (ACORD 101)
 Description of Additional Insureds (ACORD 102)
 Description of Endorsements (ACORD 103)

ACORD 101 - Description of Operations, Locations, Vehicles, etc.
 ACORD 102 - Description of Additional Insureds
 ACORD 103 - Description of Endorsements

ACORD 104 - Description of Operations, Locations, Vehicles, etc.
 ACORD 105 - Description of Additional Insureds
 ACORD 106 - Description of Endorsements

ACORD 107 - Description of Operations, Locations, Vehicles, etc.
 ACORD 108 - Description of Additional Insureds
 ACORD 109 - Description of Endorsements

TAB 5: INSURANCE, BONDING, LITIGATION & SETTLEMENTS

BONDING LETTER



August 5, 2021

Ken Kenworthy
Okeechobee County School Board
Superintendent's Office
700 SW 2nd Avenue
Okeechobee, FL 34974

Re: **Wharton-Smith, Inc.**
The Replacement of Okeechobee High School RFQ #21/22-01
Amount: Approximately \$66 million

Dear Mr. Kenworthy,

Guignard Company is the agency handling the bond requirements of Wharton-Smith, Inc. Bonds have been placed with Western Surety Company since 1986. Western Surety Company is a member of the CNA Surety Group, and has an AM Best's Rating of A, XIV, is included in the 2021 U.S. Treasury Listing of approved sureties, and is qualified to provide bonds in the State of Florida.

Based on our knowledge of and experience with Wharton-Smith, Inc., we give this firm our highest recommendation. They have a reputation for excellent quality workmanship, prompt payment of bills and for completing projects on or before scheduled completion dates.

Although each request is evaluated on its own merit and maximum limits have not been established, we would consider their bonding capacity pertaining to bid, payment, performance, and other bonds to be in the area of \$150,000,000 for a single job with an aggregate program of approximately \$1,000,000,000.

If you have any questions or require additional information, please contact me at (407) 834-0022 or via email at bryce@guignardcompany.com

Best regards,

GUIGNARD COMPANY

Bryce R. Guignard
President

1904 Boothe Circle | Longwood, FL 32750



TAB 5: INSURANCE, BONDING, LITIGATION & SETTLEMENTS

LITIGATION & SETTLEMENTS

Wharton-Smith believes potential conflicts can easily be avoided by developing trustworthy relationships early on with all parties involved on a project and by encouraging open communications. The successes we have had on our projects are due in large part to our commitment to partnering and conflict prevention and resolution. Occasionally, a situation arises where a third-party mediation is needed, despite all efforts to avoid it. Our litigation record for the past five years is as follows:

OWNER/CLIENTS

UCF Stadium Corporation f/k/a Golden Knights Corporation, et al. vs. Dant Clayton Corporation, Wharton-Smith, Inc., et al. (Case No. 2017-CA-008259-O, The Circuit Court, Ninth Judicial Circuit, Orange County, Florida): *In September 2017, UCF filed suit against Dant Clayton Corporation, Wharton-Smith, and others over alleged breach of contract regarding the design-build contracts for the construction of their stadium. Wharton-Smith was then dismissed from the suit with a Tolling Agreement that they could be brought back in before April 1, 2019. In December 2018, Wharton-Smith was brought back into the lawsuit. **The suit was settled at mediation in January 2020.***

SUBCONTRACTORS/SUBCONSULTANTS:

Wharton-Smith, Inc. vs. Sitek Corp. and Allegheny Casualty Co. (Case No. 2015-CA-002785-15-G, The Circuit Court of the 18th Judicial Circuit for Seminole County, Florida): *In November 2015, Wharton-Smith filed suit against Sitek for breach of contract. They had been terminated from the Cypress Creek High School project for their failure to complete their subcontract work. **This case was settled during mediation in January 2018.***

**Wharton-Smith
has ZERO
pending claims
or litigation**



TAB 6: QUALIFICATIONS OF STAFF ASSIGNED TO PROJECT



TAB 6: QUALIFICATIONS OF STAFF ASSIGNED TO PROJECT

KEY PERSONNEL

We have proposed a highly qualified team of professional education facility specialists to manage the Replacement of Okeechobee High School project for The Okeechobee County School District. **You will recognize several team members from recently completed renovation projects on the Okeechobee High School campus and at other schools within the District.** Key staff members have been chosen based on distinct qualifications that best meet the needs of the project and fully satisfy the requirements of the evaluation criteria. Each individual has significant experience in completing educational facilities on occupied campuses on projects utilizing the construction management at risk delivery method. All of our team members have worked together successfully on other projects.



* Actual project staffing arrangement will depend on phasing and scheduling requirements





TAB 6: QUALIFICATIONS OF STAFF ASSIGNED TO PROJECT



GERRY KELLY CGC

DIRECTOR OF OPERATIONS – SOUTH FLORIDA

Gerry works alongside the project team during all aspects of the project to provide guidance and planning advice. He will assist with preconstruction services to ensure an organized and systematic approach for a smooth transition into the construction phase. Gerry will continue to work alongside the project team through construction in an effort to ensure our team meets all of the project's established goals for cost, quality, safety, schedule, and satisfaction for all stakeholders.

RELATED PROJECT EXPERIENCE

SDPBC Jupiter High School Replacement—\$47.3 M (Jupiter, FL) *Occupied Campus*

Gerry served as VP of Operations for the complete replacement of the Jupiter High School. This include the new construction of a 340,000 sf school consisting of 7 two-story buildings while 100% of the students remained on site and in continuous operation throughout construction. Upon completion the old school was demolished and ball fields were constructed in its place.

MCSO Jensen Beach High School—\$47.7 M (Jensen Beach, FL)

Gerry served as VP of Operations for the construction of a new 301,728 sf high school which included classrooms, labs, administrative spaces, auditorium, cafeteria, gymnasium and ball fields.

SDPBC Dreyfoos High School of the Arts - \$54.3M (West Palm Beach, FL)

Gerry served as Project Manager for the 227,435 sf historic campus conversion from the old 1920's Palm Beach High School into the Dreyfoos High School of the Arts.

SDPBC Lake Worth High School —\$17.2 M (Lake Worth, FL) *Occupied Campus*

Gerry served as Director of Preconstruction on this phased school addition/renovation which included erecting a new for the 140,000sf 2-story classroom building and renovations to the existing buildings.

SLPS Sam Gaines Academy—\$37.7 M (Ft. Pierce, FL)

Gerry served as VP of Operations for the construction of a new 320,000 sf K-8 campus was comprised of multiple academic classrooms, administration areas, music suites, art rooms, science labs, gymnasium, auditorium and athletic fields.

EDUCATION

B.S., Building Const. -
Auburn University, AL

YEARS

- 3—WS
- 36—Total

REGISTRATIONS / LICENSES / CERTIFICATIONS

Certified General
Contractor, License No.
CGC050879
Certified Florida Home
Inspector, License No.
H16698
OSHA 10-Hour
Construction Safety
Certified

ADDITIONAL RELATED PROJECT EXPERIENCE

	VALUE
SDPBC South Tech Academy Demolition and Addition (Boynton Beach, FL)	\$15.3M
OCSD District-wide Continuing CM Services (Okeechobee, FL) <i>Occupied Campus</i>	\$4M
SLPS Lincoln Park Academy Addition/Renovation (Ft. Pierce, FL) <i>Occupied Campus</i>	\$20.3M
SLPS JD Parker Elementary School Addition/Renovation (Ft. Pierce, FL) <i>Occupied Campus</i>	\$16.4M
OCPS Sadler Elementary School Comprehensive Replacement (Orlando, FL) <i>Occupied Campus</i>	\$14.1 M
OCPS Palm Lake Elementary School Comprehensive Replacement (Orlando, FL) <i>Occupied Campus</i>	\$14.6 M
MCSO Murray Middle School Phased Replacement (Stuart, FL) <i>Occupied Campus</i>	\$16.6 M



TAB 6: QUALIFICATIONS OF STAFF ASSIGNED TO PROJECT



WAYNE MCCALL

“SPECIAL FACILITIES” SPECIALIST

Wayne and Perry-McCall Construction bring a substantial portfolio of education experience to this project, including the construction of 51 NEW K-12 projects. **Wayne has been involved with every education project Perry-McCall has ever completed, including nine (9) Special Facility Funded projects**, and will be especially valuable on this project as he brings his years of leadership experience not only on projects from K-12 and Higher Education but in every other construction aspect.

RELATED PROJECT EXPERIENCE

Vernon High School, Washington County School District—\$14.0 M (St. Augustine, FL) *Occupied Campus*

Wayne led the team in for this 115,000 square foot high school. The project was a replacement of an aging high school. The construction was block with brick veneer and standing seam metal roof. This was a **Special Facility Funded** project.

Chiefland Middle-High School Replacement, Levy County School District—\$36.0 M (Chiefland, FL) *Occupied Campus*

Wayne is currently spearheading this project which consists of a three year phased, occupied rebuild of Chiefland Middle School and Chiefland High School into one unified campus. The scope includes new classrooms, vocational space, gymnasium, and cafeteria. The structure is single story block and brick construction with standing seam metal roofing. A few existing buildings remain but most will be demolished and systematically replaced. The Building used High Performance materials for longevity and it will be designated as a EHPA Hurricane Shelter. The project includes 140,000 s.f. of demolition and 121,000 s.f. of new construction. This was a **Special Facility Funded** project.

Kate Smith Elementary School, Washington County School District—\$24.7 M (ChIPLEY, FL) *Occupied Campus*

Construction of a new Elementary School, K-6, to replace existing campus with the same name on a 50 Acre site. This 62 classroom facility consisted of a 150,433 s.f. one-story building divided into 8 sections including Administration, Media, Cafeteria/Kitchen, and 5 Classroom Wings. Also included a standalone 3,600 s.f. Enclosed Play Area. Project included site improvements to local roads and the re-alignment of nearest intersection to match up with school entrance. This was a **Special Facility Funded** project.

ADDITIONAL RELATED PROJECT EXPERIENCE

ADDITIONAL RELATED PROJECT EXPERIENCE	VALUE
Pedro Menendez High School, St. Johns County School District (St. Augustine, FL) <i>Occupied Campus</i>	\$26.4 M
Duncun U. Fletcher Middle School Addition, Duval County Public Schools (Jacksonville, FL) <i>Occupied Campus</i>	\$11.0 M
Glynn Middle School, Glynn County School District (Brunswick, GA) <i>Occupied Campus</i>	\$21.0 M
New Berlin Elementary School, Duval County Public Schools (Jacksonville, FL) <i>Occupied Campus</i>	\$12.2 M

EDUCATION

BS, Building Construction, University of Florida

CERTIFICATIONS

- Florida Certified General Contractor - CGC 017574

YEARS

- 32—PMC
- 41—Total





TAB 6: QUALIFICATIONS OF STAFF ASSIGNED TO PROJECT



TOM WIDENER EDUCATIONAL FACILITIES EXECUTIVE

Tom will provide educational construction oversight for the project team. He provides continuity from preconstruction through the entire construction phase and ensures the appropriate resources are available for the project. Tom has solely worked on K-12 projects since beginning with Wharton-Smith in 1997 and has successfully completed numerous campus replacement projects.

RELATED PROJECT EXPERIENCE

EDUCATION

BS, Business Marketing,
University of Central
Florida

CERTIFICATIONS

- OSHA 30 Hr
- FMI PM Certification

YEARS

- 24—WS
- 28—Total

OCPS Oak Ridge High School Replacement—\$54 M (Orlando, FL) *Occupied Campus*

Tom served as Sr. Project Manager and Wharton-Smith provided construction management services on the complete replacement of the fully occupied 50-year old Oak Ridge High School campus. The new 315,000sf campus includes a new administration building, gymnasium, three new three-story classroom buildings, a media center, cafeteria, auditorium, art/music building, field house, and concessions building.

OCPS Cypress Creek High School Comprehensive Renovations—\$42 M (Orlando, FL) *Occupied Campus*

Tom served as Sr. Project Manager and Project Executive and Wharton-Smith provided construction management services on the seven-phased, 390,000sf comprehensive renovation of Cypress Creek High School. The project consisted of a new two-story classroom building, a new central energy plant, new concession building, and expansion of the main lobby and reception area. Extensive renovations/remodeling were made to the rest of the occupied campus.

OCPS Windermere High School—\$69 M (Orlando, FL)

Tom served as Project Executive and Wharton-Smith provided construction management services on this 340,399sf, multi-story prototype high school that sits on a 66.4-acre greenfield site in West Orange County. The new campus consists of a new three-story classroom building, labs, art, band, vocal, orchestra, piano, dance, EHPA gymnasium, vocational labs, media center, administration, guidance, dining room, kitchen/cafeteria, and athletic facilities.

ADDITIONAL RELATED PROJECT EXPERIENCE	VALUE
OCPS Horizon High School (Orlando, FL)	\$92M
SCPS Millennium Middle School (Sanford, FL) <i>Occupied Campus</i>	\$42 M
OCPS Lakeview Middle School (Orlando, FL) <i>Occupied Campus</i>	\$30M
OCPS Meadow Wood Middle School (Orlando, FL) <i>Occupied Campus</i>	\$16M
VCS Galaxy Middle School (Volusia, FL) <i>Occupied Campus</i>	\$12.5M
SDPBC South Tech Academy (Boynton Beach, FL)	\$15.3 M
OCPS Corner Lake Middle School Comprehensive Project (Orlando, FL) <i>Occupied Campus</i>	\$11.6 M
SDOC Osceola Business Academy at Poinciana High School (Poinciana, FL) <i>Occupied Campus</i>	\$7.1 M
OCPS Lake Gem Elementary School Comprehensive Project (Orlando, FL) <i>Occupied Campus</i>	\$11.5 M



TAB 6: QUALIFICATIONS OF STAFF ASSIGNED TO PROJECT



JIM AULD CBC CLIENT ADVOCACY

Jim has spent nearly the past four decades focused on delivering K-12 construction excellence across the state Florida. As Client Advocate, Jim works to ensure the client's needs are being met while working with the team to fosters a one-team atmosphere.

RELATED PROJECT EXPERIENCE

SDPBC Jupiter High School Replacement—\$47.3 M (Jupiter, FL) *Occupied Campus*

Jim served as VP of Development for the complete replacement of the Jupiter High School. This include the new construction of a 340,000 sf school consisting of 7 two-story buildings while 100% of the students remained on site and in continuous operation throughout construction. Upon completion the old school was demolished and ball fields were constructed in its place.

MCSD Jensen Beach High School—\$47.7 M (Jensen Beach, FL)

Jim served as VP of Development for the construction of a new 301,728 sf high school which included classrooms, labs, admin. spaces, auditorium, cafeteria, gymnasium and ball fields.

SDPBC Lake Worth High School —\$17.2 M (Lake Worth, FL) *Occupied Campus*

Gerry served as Director of Operations on this phased school addition/renovation which included erecting a new for the 140,000sf 2-story classroom building and renovations to the existing buildings.

MCSD JD Parker Elementary School —\$16.4 M (Stuart, FL) *Occupied Campus*

Jim served as VP of Development for this phased school replacement which included erecting a new for the 127,828 sf 2-story replacement elementary school, demolition of existing buildings and conversion of the old school into new School Board Facilities offices.

Jim was the license holder on this project.

EDUCATION

Bachelor of Technology
in Construction Mgmt -
University of North
Florida

YEARS

- 1—WS
- 38—Total

REGISTRATIONS / LICENSES / CERTIFICATIONS

Licensed Building
Contractor State of
Florida #CBC047611

ADDITIONAL RELATED PROJECT EXPERIENCE	VALUE
SLPS Lincoln Park Academy Addition/Renovation (Ft. Pierce, FL) <i>Occupied Campus</i>	\$20.3M
OCSD District-wide Continuing CM Services (Okeechobee, FL) <i>Occupied Campus</i>	\$4M
OCPS Lancaster Elementary School Comprehensive Replacement (Orlando, FL) <i>Occupied Campus</i>	\$14.5 M
MCSD Murray Middle School Phased Replacement (Stuart, FL) <i>Occupied Campus</i>	\$16.6 M
OCPS Palm Lake Elementary School Comprehensive Replacement (Orlando, FL) <i>Occupied Campus</i>	\$14.7 M
MCSD Indiantown Middle School Renovation (Indiantown, FL) <i>Occupied Campus</i>	\$13.8 M
OCPS Sadler Elementary School Comprehensive Replacement (Orlando, FL) <i>Occupied Campus</i>	\$14.2 M
OCPS MetroWest Elementary School Replacement (Orlando, FL) <i>Occupied Campus</i>	\$16.7 M
SDPBC Forest Hill Elementary School Replacement (West Palm Beach, FL) <i>Occupied Campus</i>	\$10.8 M





TAB 6: QUALIFICATIONS OF STAFF ASSIGNED TO PROJECT



JEFF HORTON SENIOR PROJECT MANAGER

Jeff will serve as the Sr. Project Manager and brings with him 20 years of experience and has a vast array of educational projects in his portfolio. Jeff is wrapping up the \$92 M Polk County AAA High School and will be a wonderful asset to this team. Jeff will be responsible for providing daily leadership to the team and for the successful completion of all preconstruction and construction phases. He will also be responsible for scheduling, constructability reviews, value engineering, and site logistics during preconstruction. During construction, he will manage all construction activities, including scheduling, quality control, cost control, change orders, and close-out.

EDUCATION

Building Construction
Coursework
University of Florida

YEARS

- 3—WS
- 20—Total

REGISTRATIONS / LICENSES / CERTIFICATIONS

OSHA 30-Hour
CPR & First Aid
MOT

RELATED PROJECT EXPERIENCE

Polk County Public Schools AAA High School—\$92 M (Davenport, FL)

Jeff served as Sr. Project Manager for the new 355,000 sf state-of-the-art prototype school which included connected classroom buildings, administration offices, 800-person capacity auditorium, media center, gymnasium, cafeteria, culinary arts kitchen/classroom, band, chorus and fine arts classrooms, central courtyard with elevated walkways, sports fields with stadium amenities for football, baseball and softball.

CCPS Lemon Bay High School Replacement—\$85 M (Englewood, FL) **Occupied Campus**

Jeff served as Sr. Project Manager for the five-phased replacement of an active 47-acre campus to modernize and increase student capacity. This included demolition of existing buildings, construction of a three-story classroom building, gymnasium, central energy plant, cafeteria, performing arts center, and relocation of modular classrooms.

ADDITIONAL RELATED PROJECT EXPERIENCE	VALUE
Jesuit High School Admin & Chapel Occupied Campus	\$22M
Manatee County Government, Manatee County Judicial Center (Bradenton, FL) Occupied Campus	\$73 M
University of South Florida, Natural and Environmental Sciences Building (Tampa, FL) Occupied Campus	\$20 M
Manatee County School District, Lakewood Ranch High School (Bradenton, FL)	\$48 M
Manatee County School District, Lee Middle School (Bradenton, FL) Occupied Campus	\$16 M
Hernando County Public Schools, Nature Coast Technical High School (Brooksville, FL)	\$44 M
Manatee County School District, Lincoln Memorial Middle School (Palmetto, FL)	\$18 M
Pinellas County Schools, Dunedin High School Renovation (Dunedin, FL) Occupied Campus	\$18 M
Universal Studios Orlando, Sapphire Falls Loews Resorts (Orlando, FL)	\$125 M



TAB 6: QUALIFICATIONS OF STAFF ASSIGNED TO PROJECT



MICHAEL O'NEILL PROJECT MANAGER



As Project Manager Michael takes an active role in key milestone events in the preconstruction phase to include the partnering session, GMP development, value engineering, constructability and schedule review. Tom oversees construction and leverages his experience and expertise to ensure the project remains on schedule and within budget.

EDUCATION

BS in Construction Engineering, UCF

YEARS

7—WS / 7—Total

CERTIFICATIONS

- Engineering in Training
- Planning & Scheduling

RELATED PROJECT EXPERIENCE

RELATED PROJECT EXPERIENCE	VALUE
SDPBC South Tech Academy (Boynton Beach, FL)	\$15.3 M
Valencia College Accelerated Training Center (Kissimmee, FL) Occupied Campus	\$4.8 M
SCPS Millennium Middle School (Sanford, FL) Occupied Campus	\$42 M
Volusia Smyrna Dunes Park Boardwalk (New Smyrna Beach, FL) Occupied Campus	\$5 M
VOW Utilities Central Operations Facility (Wellington, FL) Occupied Campus	\$7.8 M
UCF Bennett Building Renovations (Orlando, FL) Occupied Campus	\$4.4 M



MARK WILKINS ASSISTANT PROJECT MANAGER



Mark has worked in commercial construction his entire career. Mark started working in the field and is now a valuable member of our project management team for K-12 facilities. Mark excels with his commitment to detail and ensuring procurement is handled thoroughly and quickly.

RELATED PROJECT EXPERIENCE

RELATED PROJECT EXPERIENCE	VALUE
WCSD Kate Smith Elementary School (Chipley, FL) Occupied Campus Special Facility Funded	\$24.7 M
HCSD Hamilton County Elementary School (Jasper, FL) Occupied Campus Special Facility Funded	\$19.6 M
ACPS Meadowbrook Elementary School (Gainesville, FL) Occupied Campus Special Facility Funded	\$16.5 M
CCDS Discovery Oaks Elementary School (Orange Park, FL) Occupied Campus	\$20.8 M
CCDS Oakleaf High School (Orange Park, FL) Occupied Campus	\$50.5 M
PCPS Ridge Community High School (Davenport, FL) Occupied Campus	\$7.4 M
PCPS Tenoroc High School (Lakeland, FL) Occupied Campus	\$57.4 M

CERTIFICATIONS

OSHA Certified

YEARS

- 16—PMC
- 16—Total





TAB 6: QUALIFICATIONS OF STAFF ASSIGNED TO PROJECT



BRAD NEWTON SENIOR SUPERINTENDENT

As Sr. Superintendent, Brad will oversee all other superintendents and their work forces. He will be responsible for maintaining a well-trained and qualified work force and for maximizing allocation of manpower, tools, and equipment. Brad assists with monitoring safety, quality, and production planning.

RELATED PROJECT EXPERIENCE

OCPS Oak Ridge High School Replacement—\$54 M (Orlando, FL) *Occupied Campus*
Brad served as Sr. Superintendent for the 325,000 sf new campus including a new administration building, gymnasium, three new three-story classroom buildings, a media center, cafeteria, auditorium, art/music building, field house, and new athletic fields.

OCPS Windermere High School—\$70.2 M (Windermere, FL)

As Sr. Superintendent, Brad constructed the 340,399 sf, multi-story, prototype campus to accommodate nearly 2,776 students. The campus consists of a 3-story classroom building, labs, gymnasium, media center, administration, kitchen, auditorium, and support facilities. The project was completed in a total of 18 months with the main building package completed in 16 months. Two tilt-up subcontractors (East/West) were contracted to do the work concurrently in order to meet the aggressive schedule. The owner added offsite utility work to the contract during the project.

OCPS Comprehensive Needs at Cypress Creek High School—\$42 M (Orlando, FL) *Occupied Campus*

Brad served as Sr. Superintendent for the construction of a new tilt-up 2-story classroom building, ESE lab, Culinary kitchen lab, a new chiller CEP plant, a new concession building, the renovation of the gymnasium, auditorium, classroom, art labs, science labs, media center, cafeteria, kitchen and administration building. Renovation scope included fire protection sprinkler system, fire alarm system, intercom, theatrical sound, video, audio-visual, data systems, locker rooms and restrooms.

EDUCATION

A.S. in Construction Technology - Joliet College

YEARS

- 33—WS
- 43—Total

REGISTRATIONS / LICENSES / CERTIFICATIONS

- OSHA 10 Hr.
- SWPPP Certified
- Scaffolding, Confined Space, Trenching/Excavating, Stormwater, MOT, Respirable Crystalline Silica Certified
- First Aid/AED/CPR Certified

ADDITIONAL RELATED PROJECT EXPERIENCE

	VALUE
OCPS Hillcrest Elementary School Comprehensive Needs Project (Orlando, FL) <i>Occupied Campus</i>	\$16.4M
Lake Gem Elementary Comprehensive Project, Orange County Public Schools (Orlando, FL) <i>Occupied Campus</i>	\$11.5 M
BPS Viera Elementary School (Melbourne, FL) <i>Occupied Campus</i>	\$22M
OCPS Windy Ridge K-8 School Addition & Renovation (Orlando, FL) <i>Occupied Campus</i>	\$23M
OCPS Lakemont Elementary School (Winter Park, FL) <i>Occupied Campus</i>	\$15.3M



TAB 6: QUALIFICATIONS OF STAFF ASSIGNED TO PROJECT



JOHN SMITH LEED® GA PROJECT SUPERINTENDENT



As Superintendent, John is responsible for the supervision and coordination of the day-to-day activities of the subcontractors and Wharton-Smith employees, including safety inspections, daily reports, three-week look ahead schedules, delivery coordination, production planning, weekly subcontractor coordination meetings, storage and installation requirements, quality control, labor and equipment resources, project final quality, and start-up, testing, and final

YEARS

3—WS / 32—Total

CERTIFICATIONS

- LEED Green Assoc.
- OSHA Certified
- Certified Structural Masonry Inspector
- Certificate in Construction Management

RELATED PROJECT EXPERIENCE	VALUE
SDPBC South Tech Academy (Boynton Beach, FL)	\$15.3 M
PBC Department of Health Admin. Building (West Palm Beach, FL)	\$26 M
Broward County Government Center West (Fort Lauderdale, FL) <i>Occupied Campus</i>	\$21 M
Lake Worth Casino Building Renovation (Lake Worth, FL) <i>Occupied Campus</i>	\$12.2 M
SDPBC Indian Ridge Middle School (West Palm Beach, FL)	\$28 M



KEVIN ERBRICK PROJECT SUPERINTENDENT



As Superintendent, Kevin is responsible for the supervision and coordination of the day-to-day activities of the subcontractors and Wharton-Smith employees, including safety inspections, daily reports, three-week look ahead schedules, delivery coordination, production planning, weekly subcontractor coordination meetings, storage and installation requirements, quality control, labor and equipment resources, project final quality, and start-up, testing, and final

YEARS

2—WS / 43—Total

CERTIFICATIONS

- OSHA 30-Hour
- OSHA 10-Hour

RELATED PROJECT EXPERIENCE	VALUE
SDPBC Polo Park Middle School (Wellington, FL)	\$16.8 M
MCSD Jensen Beach High School (Jensen Beach, FL)	\$47.7 M
SDPBC Lake Worth High School (Lake Worth, FL) <i>Occupied Campus</i>	\$17.2 M
SDPBC Forest Hill Elementary School (West Palm Beach, FL) <i>Occupied Campus</i>	\$10.8 M
SDPBC West Gate Elementary School (West Palm Beach, FL) <i>Occupied Campus</i>	\$10.6 M
SDPBC Glades Central High School (Belle Glade, FL)	\$27.7 M
SLPS Lincoln Park Academy (Fort Pierce, FL) <i>Occupied Campus</i>	\$20 M



TAB 6: QUALIFICATIONS OF STAFF ASSIGNED TO PROJECT



O'NEIL MITCHELL

QUALITY CONTROL COORDINATOR

O'Neil Mitchell, or Mitchell as he goes by, has worked on dozens of projects, starting as a carpenter and assistant on the Perry-McCall's first project, the Health Science Center at UF Health/Shands to his current role as a senior-level superintendent charged with managing some of the company's most challenging projects.

Mitchell has overseen many projects located within an **occupied campus**, including his current project, Baker County Elementary School. Thanks to his approach and organization, Mitchell always delivers a project on-time, in budget and without incident.

EDUCATION

ABC General Contractors
Association Commercial
Construction Training

CERTIFICATIONS

OSHA – 10 Hr

YEARS

- 32—PMC
- 36—Total

RELATED PROJECT EXPERIENCE

Baker County Elementary School, Baker County School District—\$34.5 M (Macclenny, FL) *Occupied Campus*

Mitchell is currently on-site as lead superintendent on this project. This new campus will feature a cafeteria, administration, media center and four distinct classroom wings, all connected by a central corridor. The load-bearing masonry structure will feature full height brick and architectural precast. A mechanical mezzanine is included, leaving more room for instructional and support space. The roof system is bar joists with metal deck, insulation and a standing seam metal roof. Inside, the school has state-of-the-art, technology rich classrooms, bright, colorful finishes and certainly provides a tremendous learning environment. High Efficiency materials will be used throughout the building to ensure that this Multigenerational Building will last for years to come. This was a **Special Facility Funded** project.

Kate Smith Elementary School, Washington County School District—\$16.7 M (Chipley, FL) *Occupied Campus*

Construction of a new Elementary School, K-6, to replace existing campus with the same name on a 50 Acre site. This 62 classroom facility consisted of a 150,433 s.f. one-story building divided into 8 sections including Administration, Media, Cafeteria/Kitchen, and 5 Classroom Wings. Also included a standalone 3,600 s.f. Enclosed Play Area. Project included site improvements to local roads and the re-alignment of nearest intersection to match up with school entrance. This was a **Special Facility Funded** project.

ADDITIONAL RELATED PROJECT EXPERIENCE	VALUE
Discovery Oaks Elementary School, Clay County School District (Orange Park, FL) <i>Occupied Campus</i>	\$20.8 M
Hamilton County Elementary School, Hamilton County School District (Jasper, FL) <i>Occupied Campus</i>	\$19.6 M
Pedro Menendez High School, St. Johns County School District (St. Augustine, FL) <i>Occupied Campus</i>	\$26.4 M
New Berlin Elementary School, Duval County School District (Jacksonville, FL) <i>Occupied Campus</i>	\$12.5 M





TAB 6: QUALIFICATIONS OF STAFF ASSIGNED TO PROJECT



JOHN LYONS LEED® AP BD+C VP OF PRECONSTRUCTION

John and Wharton-Smith's Preconstruction Team will provide preconstruction services on the Okeechobee High School project for the Okeechobee County School District. John has 34 years of experience overseeing Wharton-Smith's Commercial Division Preconstruction Services Department. His responsibilities include review of contract documents, estimating the preliminary pricing of projects, and preparing GMP packages. **John has provided preconstruction services on every education project Wharton-Smith has ever completed**, and will be especially valuable on these projects as he brings his years of experience in working on countless other higher education projects to the team to ensure a quick and accurate budget.

EDUCATION

BS, Civil Engineering,
University of Central
Florida

CERTIFICATIONS

LEED BD+C Accredited
Professional

YEARS

- 34—WS
- 44—Total

RELATED PROJECT EXPERIENCE

OCPS Cypress Creek High School Renovations—\$42 M (Orlando, FL) *Occupied Campus*

John provided preconstruction services and Wharton-Smith provided construction management services on the seven-phased, 390,000 SF comprehensive renovation of Cypress Creek High School. The project consisted of a new two-story classroom building, a new CEP, new concession building, and expansion of the main lobby and reception area. Extensive renovations/remodeling were made to the rest of the occupied campus.

OCPS Oak Ridge High School Replace—\$54 M (Orlando, FL) *Occupied Campus*

John provided preconstruction services and Wharton-Smith provided construction management services on the complete replacement of the fully occupied 50-year old Oak Ridge High School campus. The new 315,000 SF campus includes a new administration building, gymnasium, three new three-story classroom buildings, a media center, cafeteria, auditorium, art/music building, field house, and concessions building.

SDOC Osceola Business Academy at Poinciana High School—\$7.1 M (Poinciana, FL) *Occupied Campus*

John provided preconstruction services and Wharton-Smith is serving and construction manager on the SDOC Poinciana High School Business Academy project. This project includes, but is not limited to, construction of a new, two-story, 500-student station, 20-classroom building with administration spaces, required restrooms, and mechanical and electrical spaces.

ADDITIONAL RELATED PROJECT EXPERIENCE	VALUE
Poinciana High School Building Addition, School District of Osceola County (Poinciana, FL) <i>Occupied Campus</i>	\$5.9 M
Lake Gem Elementary Comprehensive Project, Orange County Public Schools (Orlando, FL) <i>Occupied Campus</i>	\$11.5 M
Holly Hill K-8 Conversion, Volusia County Schools (Holly Hill, FL) <i>Occupied Campus</i>	\$10.6 M
Corner Lake Middle Comprehensive Project, Orange County Public Schools (Orlando, FL) <i>Occupied Campus</i>	\$11.6 M





TAB 6: QUALIFICATIONS OF STAFF ASSIGNED TO PROJECT



PAUL FULKS PE, GGP SENIOR PRECONSTRUCTION MANAGER

As Senior Preconstruction Services Manager, Paul engages early in the project working with the Owner, user groups, and the design team to develop a cost model that aligns with the budget and schedule constraints. Paul will be responsible for the review of contract documents, project estimating, the preliminary pricing of the projects, and preparing the Guaranteed Maximum Price (GMP) package.

RELATED PROJECT EXPERIENCE

EDUCATION

BS in Civil Engineering -
University of Tennessee

LICENSES/ CERTIFICATIONS

Professional Engineer -
State of Florida (Civil)
Certified General
Contractor - Florida
(inactive)
Green Globes
Professional
OSHA 30 / 10-Hour

YEARS

- 6—WS
- 30—Total

VCPS George Marks Elementary School —\$19.4M (Deland, FL) *Occupied Campus*

As Preconstruction Manager, Paul worked with the team to construct this complex multi-phased temporary relocation, demolition, sitework, building construction and renovation project. The existing playfields were converted into a portable campus then existing campus was demolished. A new 100,403 sf two-story tilt building was constructed on the newly-cleared campus.

OCPS Windermere High School—\$70.2 M (Windermere, FL)

As Preconstruction Manager, Paul worked with the team to construct the 340,399 sf, multi-story, prototype campus to accommodate nearly 2,776 students. The campus consists of a 3-story classroom building, labs, gymnasium, media center, administration, kitchen, auditorium, and support facilities. The project was completed in a total of 18 months with the main building package completed in 16 months. Two tilt-up subcontractors (East/West) were contracted to do the work concurrently in order to meet the aggressive schedule. The owner added offsite utility work to the contract during the project.

SCPS New Millennium Middle School—\$44.3 M (Sanford, FL)

As Preconstruction Manager, Paul worked with the team to construct a new 222,400 sf Millennium Middle School campus. The projects consisted of a new three-story classroom building, administration/media building, cafeteria, gymnasium, and 800-seat performing arts center in support of the school's Fine Arts & Communication curriculum. Outdoor athletic facilities include a multi-purpose field and track, tennis, and basketball courts.

ADDITIONAL RELATED PROJECT EXPERIENCE

	VALUE
SCPS Pine Crest Elementary School of Innovation (Sanford, FL) <i>Occupied Campus</i>	\$19.1 M
VCPS Galaxy Middle School Renovations (Deltona, FL) <i>Occupied Campus</i>	\$12 M
VCPS Ormond Beach Middle School Master Plan Redevelopment (Ormond Beach, FL) <i>Occupied Campus</i>	\$40 M
BPS Merritt Island High School Renovations and Additions (Merritt Island, FL) <i>Occupied Campus</i>	\$28.4M



TAB 6: QUALIFICATIONS OF STAFF ASSIGNED TO PROJECT



CARSON MCCALL LEED® AP SFCA FUNDING COORDINATOR / CONSTRUCTABILITY

Carson brings a close relationship with CRA and years of pre-construction knowledge. Carson has a ability to steer the project towards meeting the budget, as proven on helping bring other **Special Facility projects** in budget.

RELATED PROJECT EXPERIENCE

EDUCATION

BS, Building Construction,
University of Florida

Juris Doctor
Florida Coastal School of Law

CERTIFICATIONS

- LEED BD+C Accredited Professional

YEARS

- 18—PMC
- 18—Total

Chiefland Middle-High School Replacement, Levy County School District—\$36.0 M (Chiefland, FL) **Occupied Campus**

Three year phased, occupied rebuild of Chiefland Middle School and Chiefland High School into one unified campus. The scope includes new classrooms, vocational space, gymnasium, and cafeteria. The structure is single story block and brick construction with standing seam metal roofing. A few existing buildings remain but most will be demolished and systematically replaced. The Building used High Performance materials for longevity and it will be designated as a EHPA Hurricane Shelter. The project includes 140,000 s.f of demolition and 121,000 s.f. of new construction. This was a **Special Facility Funded** project.

Kate Smith Elementary School, Washington County School District—\$24.7 M (ChIPLEY, FL) **Occupied Campus**

Construction of a new Elementary School, K-6, to replace existing campus with the samename on a 50 Acre site. This 62 classroom facility consisted of a 150,433 s.f. one-story building divided into 8 sections including Administration, Media, Cafeteria/Kitchen, and 5 Classroom Wings. Also included a standalone 3,600 s.f. Enclosed Play Area. Project included site improvements to local roads and the re-alignment of nearest intersection to match up with school entrance. This was a **Special Facility Funded** project.

Baker County Elementary School, Baker County School District—\$34.5 M (Macclenny, FL) **Occupied Campus**

This new campus will feature a cafetorium, administration, media center and four distinct classroom wings, all connected by a central corridor. The load-bearing masonry structure will feature full height brick and architectural precast. A mechanical mezzanine is included, leaving more room for instructional and support space. The roof system is metal trusses with metal deck, insulation and a standing seam metal roof. Inside, the school has state-of-the-art, technology rich classrooms, bright, colorful finishes and certainly provides a tremendous learning environment. This was a **Special Facility Funded** project.

ADDITIONAL RELATED PROJECT EXPERIENCE

ADDITIONAL RELATED PROJECT EXPERIENCE	VALUE
New Berlin Elementary School, Duval County Public Schools (Jacksonville, FL) Occupied Campus	\$12.2 M
Hamilton Elementary School, Hamilton County School District (Jasper, FL) Occupied Campus	\$19.6 M
Discovery Oaks Elementary School, Clay County School District (Orange Park, FL) Occupied Campus	\$20.8 M
Glynn Academy, Glynn County Board of Education (Brunswick, GA) Occupied Campus	\$10.0 M



TAB 6: QUALIFICATIONS OF STAFF ASSIGNED TO PROJECT



DAN LEE, LEED AP ESTIMATOR

With 42 years of extensive experience in all phases of the construction industry, Dan's construction management expertise ranks among the best in the industry. A firm proponent of the Team Construction approach, he has successfully completed many construction management and design build projects in addition to traditional construction delivery on bid projects. Project types cover the spectrum from class 'A' office buildings, to warehouse/distribution facilities, retail facilities, medical, apartments and condos, as well as Higher Education and K-12. Dan will serve in a management capacity leading the Team during pre-construction with his primary focus on effectively executing the critical elements of project quality parameters, cost control and completion scheduling. Dan will provide experienced leadership and will be the primary source of information on cost during the pre-construction phase.

EDUCATION

BS, Production Management, University of Evansville

CERTIFICATIONS

- LEED BD+C Accredited Professional

YEARS

- 23—PMC
- 42—Total

RELATED PROJECT EXPERIENCE

Ponte Vedra High School High School, St. Johns County School District—\$60.3 M (Ponte Vedra Beach, FL) *Occupied Campus*

Ponte Vedra High School is a new 250,000 s.f. high school that houses 1,500 students in Grades 9-12. The campus has athletic fields, an auditorium and gymnasium. The project consisted of athletic fields with outbuildings and four main buildings including an auditorium, gymnasium, cafeteria, classroom buildings, and support space. Classrooms are on two floors and outdoor walkways that run along three wings of upper-level rooms overlook a spacious courtyard and athletic playing fields beyond. Classroom areas accommodate multi-disciplinary teaching teams, as well as more traditional same-subject groupings. Movable walls opening to a common work area allow for flexible-sized spaces in this "house" design concept. This feature enables teachers and paraprofessionals to work cooperatively to facilitate learning for students through a variety of activities. The facility also includes state-of-the-art instructional technology and electrical spaces.

Brunswick High School, Glynn County School District—\$49.7 M (Brunswick, GA) *Occupied Campus*

Dan led the pre-construction efforts on this 350,000 s.f. Construction of the new Brunswick High School to house 3,000 students on same site as the previously existing facility. The project included the demolition of the existing structure in phases as well as the demolition of Jane Macon Middle School on the adjoining lot. The project also included new facilities for the football, baseball and softball programs.

ADDITIONAL RELATED PROJECT EXPERIENCE	VALUE
Glynn Academy, Glynn County School District (Brunswick, GA) <i>Occupied Campus</i>	\$10.0 M
Pinevale Elementary School, Valdosta City Schools (Valdosta, GA) <i>Occupied Campus</i>	\$18.5 M
Pulaski Elementary School, Savannah-Chatham County Public School System (Savannah, FL) <i>Occupied Campus</i>	\$13.7 M
Baker County Elementary School, Baker County School District (Macclenny, FL) <i>Occupied Campus</i>	\$34.5 M



TAB 6: QUALIFICATIONS OF STAFF ASSIGNED TO PROJECT



PATRICK GARCIA PRECONSTRUCTION MANAGER

During the preconstruction phase, Patrick 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.

CERTIFICATIONS

Certified Project Manager (CPM) Certificate
First Aid/CPR Certified
CAM Certificate

YEARS

2—WS
39—Total

RELATED PROJECT EXPERIENCE

	VALUE
OCSD Remodel/Renovation Administration Building, Okeechobee Central Elementary School (Okeechobee, FL) <i>Occupied Campus</i>	\$215K
OCSD Concrete Restoration, Okeechobee Central Elementary School (Okeechobee, FL) <i>Occupied Campus</i>	\$60 K
OCSD Roof Repair/Replacement, Okeechobee Central Elementary School (Okeechobee, FL) <i>Occupied Campus</i>	\$280K
OCSD Roof Repair/Replacement, Okeechobee High School (Okeechobee, FL) <i>Occupied Campus</i>	\$218K

Okeechobee High School Roof Repair



TAB 7: PAST PERFORMANCE



ORANGE COUNTY PUBLIC SCHOOLS
WINDERMERE HIGH SCHOOL WINDERMERE, FLORIDA

TAB 7: PAST PERFORMANCE

ARCHITECT - ENGINEER QUALIFICATIONS

PART I - CONTRACT-SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

1. TITLE AND LOCATION (City and State)

The Replacement of Okeechobee High School

2. PUBLIC NOTICE DATE

July 28, 2021

3. SOLICITATION OR PROJECT NUMBER

21/22-01

B. CONSTRUCTION MANAGER ARCHITECT-ENGINEER POINT OF CONTACT

4. NAME AND TITLE

Gerry Kelly - Director of Operations

5. NAME OF FIRM

Wharton-Smith Inc.

6. TELEPHONE NUMBER

(561) 748-5956

7. FAX NUMBER

(561) 748-5958

8. E-MAIL ADDRESS

gkelly@whartonsmith.com

C. PROPOSED TEAM (Complete this section for the prime contractor and all key subcontractors.)

(Check)				9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT
PRIME	J-V PARTNER	SUBCONTRACTOR	CHECK IF BRANCH OFFICE			
a	X		<input type="checkbox"/>	Wharton-Smith, Inc.	125 W. Indiantown Road, Suite 201 Jupiter, FL 33458	Construction Manager 
b		X	<input type="checkbox"/>	Perry McCall Construction, Inc.	420 North Halifax Avenue, Suite 140 Daytona Beach, FL 32118	CM Partner 
c			<input type="checkbox"/>			
d			<input type="checkbox"/>			
e			<input type="checkbox"/>			

D. ORGANIZATIONAL CHART OF PROPOSED TEAM

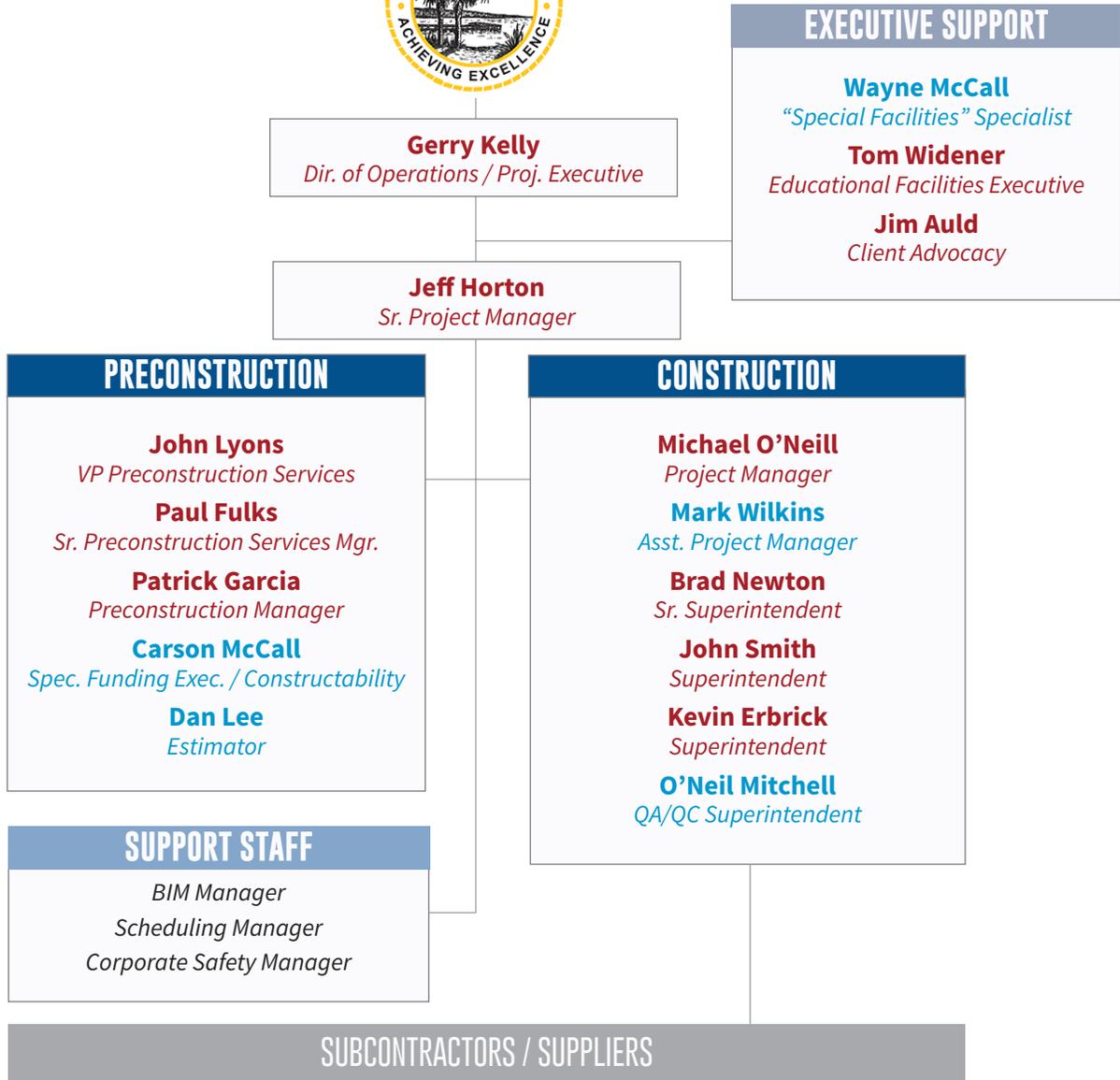
(Attached)

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TAB 7: PAST PERFORMANCE

D. ORGANIZATIONAL CHART



* Actual project staff will depend on phasing and scheduling requirements





TAB 7: PAST PERFORMANCE

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Gerry Kelly	Director of Operations	a. TOTAL 36	b. WITH CURRENT FIRM 3
15. FIRM NAME AND LOCATION (City and State)			
Wharton-Smith - Jupiter, FL			
16. EDUCATION (Degree and Specialization)		17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline)	
BS, Building Construction, Auburn University		Certified General Contractor, Florida License No. CGC050879	
18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)			
OSHA 10-Hour Construction Safety Certified			

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED	
a	PROJECT NAME:	MCSJ Jensen Beach High School	PROFESSIONAL SERVICES
	PROJECT LOCATION:	Jensen Beach, FL	CONSTRUCTION (If Applicable)
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		N/A
\$47.8 M 301,728 SF New High School Campus		Check if project performed with current firm	
b	PROJECT NAME:	SDPBC Lake Worth High School Renovation and Addition Phase 2 & 3	PROFESSIONAL SERVICES
	PROJECT LOCATION:	Lake Worth, FL	CONSTRUCTION (If Applicable)
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		N/A
\$17.2 M 140,000 SF Historic Renovation/Addition to a 1910 campus Occupied Site		Check if project performed with current firm	
c	PROJECT NAME:	SDPBC Jupiter High School Replacement	PROFESSIONAL SERVICES
	PROJECT LOCATION:	Jupiter, FL	CONSTRUCTION (If Applicable)
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		N/A
\$47.3 M 340,000 SF Complete School Replacement on Active Campus Occupied Site		Check if project performed with current firm	
d	PROJECT NAME:	SDPBC Dreyfoos High School of the Arts	PROFESSIONAL SERVICES
	PROJECT LOCATION:	West Palm Beach, FL	CONSTRUCTION (If Applicable)
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		N/A
\$54.4 M 227,435 SF Historic Renovation/Addition to a 1920's campus		Check if project performed with current firm	

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TAB 7: PAST PERFORMANCE

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Wayne McCall	“Special Facilities” Specialist	a. TOTAL 41	b. WITH CURRENT FIRM 32

15. FIRM NAME AND LOCATION (City and State)
Perry McCall

16. EDUCATION (Degree and Specialization) 17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline)
BS, Building Construction, University of Florida Florida Certified General Contractor - CGC 017574

18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)

19. RELEVANT PROJECTS

a	(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED	
	PROJECT NAME:	WCSD Vernon High School	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
	PROJECT LOCATION:	St. Augustine, FL	N/A	N/A
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		X	Check if project performed with current firm
<p>\$14M 115,000 sf Occupied Site High school replacement of an aging high school. The construction was block with brick veneer and standing seam metal roof. This was a Special Facility Funded project.</p>				
b	(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED	
	PROJECT NAME:	LCSD Chiefland Middle-High School Replacement	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
	PROJECT LOCATION:	Chiefland, FL	N/A	N/A
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		X	Check if project performed with current firm
<p>\$36.0 M Occupied Site The project includes 140,000 s.f of demolition and 121,000 s.f. of new construction. This was a Special Facility Funded project.</p>				
c	(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED	
	PROJECT NAME:	WCSD Kate Smith Elementary School	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
	PROJECT LOCATION:	Chipley, FL	N/A	N/A
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		X	Check if project performed with current firm
<p>\$24.7 M Construction of a new Elementary School, K-6, to replace existing campus with the samename on a 50 Acre site. This 62 classroom facility consisted of a 150,433 s.f. one-story building divided into 8 sections including Administration, Media, Cafeteria/Kitchen, and 5 Classroom Wings. Also included a standalone 3,600 s.f. Enclosed Play Area. Project included site improvements to local roads and the re-alignment of nearest intersection to match up with school entrance. This was a Special Facility Funded project.</p>				

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TAB 7: PAST PERFORMANCE

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Tom Widener	Educational Facilities Executive	a. TOTAL 28	b. WITH CURRENT FIRM 23

15. FIRM NAME AND LOCATION (City and State)
Wharton-Smith - Sanford, FL

16. EDUCATION (Degree and Specialization)
BS, Business Marketing, UCF

17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline)

18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED		
a	PROJECT NAME:	OCPS Cypress Creek High School Comprehensive Renovations	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
	PROJECT LOCATION:	Orlando, FL	N/A	2013
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		X	Check if project performed with current firm	
\$42 M 390,000 SF Occupied Site comprehensive renovation of Cypress Creek High School				
b	PROJECT NAME:	OCPS Replacement at Oak Ridge High School	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
	PROJECT LOCATION:	Orlando, FL	N/A	2016
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		X	Check if project performed with current firm	
\$54 M 315,000 SF Occupied Site new administration building, gymnasium, three new three-story classroom buildings, a media center, cafeteria, auditorium, art/music building, field house, and concessions building.				
c	PROJECT NAME:	OCPS Windermere High School	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
	PROJECT LOCATION:	Orlando, FL	N/A	2017
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		X	Check if project performed with current firm	
\$70.2M 340,399 SF multi-story prototype high school three-story classroom building, skill labs, resource rooms, science labs, art, band, vocal, orchestra, piano, dance, EHPA gymnasium, vocational labs, media center, administration, guidance, dining room, kitchen/cafeteria, and athletic facilities.				
d	PROJECT NAME:	OCPS Lake Gem Elementary School Comprehensive Project	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
	PROJECT LOCATION:	Orlando, FL	N/A	2019
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		X	Check if project performed with current firm	
\$11.5 M Occupied Campus 12.998 SF New Classroom Building Addition				

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TAB 7: PAST PERFORMANCE

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Jim Auld	Client Advocacy	a. TOTAL 38	b. WITH CURRENT FIRM 2
15. FIRM NAME AND LOCATION (City and State) Wharton-Smith - Jupiter, FL			
16. EDUCATION (Degree and Specialization) BS, Technology and Construction Management, University of North Florida		17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline) Licensed Building Contractor -State of Florida #CBC047611	
18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)			
19. RELEVANT PROJECTS			
a	(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED
	PROJECT NAME:	MCS D Jensen Beach High School	PROFESSIONAL SERVICES
	PROJECT LOCATION:	Jensen Beach, FL	CONSTRUCTION (If Applicable)
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		Check if project performed with current firm
\$47.8 M 301,728 SF New High School Campus			
b	(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED
	PROJECT NAME:	SDPBC Jupiter High School Replacement	PROFESSIONAL SERVICES
	PROJECT LOCATION:	Jupiter, FL	CONSTRUCTION (If Applicable)
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		Check if project performed with current firm
\$47.3 M 340,000 SF Complete School Replacement on Active Campus			
c	(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED
	PROJECT NAME:	SDPBC Lake Worth High School Renovations	PROFESSIONAL SERVICES
	PROJECT LOCATION:	Lake Worth, FL	CONSTRUCTION (If Applicable)
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		Check if project performed with current firm
\$17.2 M 140,000 SF Historic Renovation/Addition to a 1910 campus Occupied Site			
d	(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED
	PROJECT NAME:	MCS D JD Parker Elementary School	PROFESSIONAL SERVICES
	PROJECT LOCATION:	Stuart, FL	CONSTRUCTION (If Applicable)
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		Check if project performed with current firm
\$16.3 M 127,000 SF Multiple Building Demolition and Replacement on Active Campus			

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TAB 7: PAST PERFORMANCE

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Michael O'Neill	Project Manager	a. TOTAL 7	b. WITH CURRENT FIRM 7

15. FIRM NAME AND LOCATION (City and State)
Wharton-Smith - Sanford, FL

16. EDUCATION (Degree and Specialization)
BS, Construction Engineering, UCF

17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline)

18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)
Engineering in Training | Planning & Scheduling

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED	
PROJECT NAME:	SDPBC South Tech Academy	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
PROJECT LOCATION:	Boynton Beach, FL	N/A	2020
a (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		X	Check if project performed with current firm
<p>\$15 M 37,000 SF vocational training building with automotive and marine service bays, storage, and instructional spaces and the renovation of the 180,000 sf existing facility into the new home of South Tech Academy. Demolition of the existing South Tech Academy campus at a remote location was required after the new construction was complete.</p>			
(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED	
PROJECT NAME:	SCPS Millennium Middle School	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
PROJECT LOCATION:	Sanford, FL	N/A	2018
b (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		X	Check if project performed with current firm
<p>\$42 M 222,400 SF The new campus consists of a three-story classroom building, administration/media building, performing arts center, cafeteria building, and a gymnasium building. Outdoor athletic facilities include a multi-purpose field and track. All work was performed next to the fully occupied Midway Elementary School.</p>			
(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED	
PROJECT NAME:	VOW Utilities Central Operations Facility	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
PROJECT LOCATION:	Wellington, FL	N/A	6/2021
c (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE			Check if project performed with current firm
<p>\$7.8 M</p>			
(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED	
PROJECT NAME:	UCF Bennett Building Renovations	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
PROJECT LOCATION:	Orlando, FL	N/A	
d (3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE			Check if project performed with current firm
<p>\$4.4 M</p>			

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TAB 7: PAST PERFORMANCE

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Brad Newtown	Senior Superintendent	a. TOTAL 43	b. WITH CURRENT FIRM 33

15. FIRM NAME AND LOCATION (City and State)

Wharton-Smith - Sanford, FL

16. EDUCATION (Degree and Specialization)

A.S. Construction Technology

17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline)

18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED		
a	PROJECT NAME:	OCPS Cypress Creek High School Comprehensive Renovations	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
	PROJECT LOCATION:	Orlando, FL	N/A	2013
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		X	Check if project performed with current firm	
\$42 M 390,000 SF Occupied Site comprehensive renovation of Cypress Creek High School				
(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED		
b	PROJECT NAME:	OCPS Replacement at Oak Ridge High School	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
	PROJECT LOCATION:	Orlando, FL	N/A	2016
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		X	Check if project performed with current firm	
\$54 M 315,000 SF Occupied Site new administration building, gymnasium, three new three-story classroom buildings, a media center, cafeteria, auditorium, art/music building, field house, and concessions building.				
(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED		
c	PROJECT NAME:	OCPS Windermere High School	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
	PROJECT LOCATION:	Orlando, FL	N/A	2017
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		X	Check if project performed with current firm	
\$70.2 M 340,399 SF multi-story prototype high school three-story classroom building, skill labs, resource rooms, science labs, art, band, vocal, orchestra, piano, dance, EHPA gymnasium, vocational labs, media center, administration, guidance, dining room, kitchen/cafeteria, and athletic facilities.				

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TAB 7: PAST PERFORMANCE

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
John Smith	Superintendent	a. TOTAL 32	b. WITH CURRENT FIRM 3

15. FIRM NAME AND LOCATION (City and State)

Wharton-Smith - Jupiter, FL

16. EDUCATION (Degree and Specialization)

17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline)

LEED Green Assoc.

18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)

OSHA Certified | Certified Structural Masonry Inspector | Certificate in Construction Management

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED	
PROJECT NAME:	SDPBC South Tech Academy	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
PROJECT LOCATION:	Boynton Beach, FL	N/A	2020
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		X	Check if project performed with current firm
<p>a</p> <p>\$15 M 37,000 SF vocational training building with automotive and marine service bays, storage, and instructional spaces and the renovation of the 180,000 sf existing facility into the new home of South Tech Academy. Demolition of the existing South Tech Academy campus at a remote location was required after the new construction was complete.</p>			
(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED	
PROJECT NAME:	SDPBC Indian Ridge Academy	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
PROJECT LOCATION:	West Palm Beach, FL	N/A	2007
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE			Check if project performed with current firm
<p>b</p> <p>\$23.6 M 147,000 SF Demolition of existing school and replacement with new 6-12 Academy</p>			
(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED	
PROJECT NAME:	Lake Worth Casino Building Replacement	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
PROJECT LOCATION:	Lake Worth, FL	N/A	2013
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE			Check if project performed with current firm
<p>c</p> <p>\$12.7 M 36,500 SF Occupied Site Historic renovation of an 1920's City Boardwalk Casino Building</p>			
(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED	
PROJECT NAME:	PBC Health Department Administration Bldg,	PROFESSIONAL SERVICES	CONSTRUCTION (If Applicable)
PROJECT LOCATION:	West Palm Beach, FL	N/A	2009
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE			Check if project performed with current firm
<p>d</p> <p>\$20.5 M 92,000 SF New construction of a five-story administration building in the heart of downtown West Palm Beach.</p>			

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TAB 7: PAST PERFORMANCE

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person.)

12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
Kevin Erbrick	Project Superintendent	a. TOTAL 43	b. WITH CURRENT FIRM 2

15. FIRM NAME AND LOCATION (City and State)

Wharton-Smith - Jupiter, FL

16. EDUCATION (Degree and Specialization)

17. CURRENT PROFESSIONAL REGISTRATION (State and Discipline)

18. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)

OSHA 30 and OSHA Hazardous Materials

19. RELEVANT PROJECTS

(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED	
a	PROJECT NAME:	SLPS Lincoln Park Academy	PROFESSIONAL SERVICES
	PROJECT LOCATION:	Fort Pierce, FL	CONSTRUCTION (If Applicable)
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		N/A	2012
		Check if project performed with current firm	
\$20.3 M 100,064 SF Multiple Building Demolition and Replacement on Active Campus			
(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED	
b	PROJECT NAME:	MCSD Jensen Beach High School	PROFESSIONAL SERVICES
	PROJECT LOCATION:	Jensen Beach, FL	CONSTRUCTION (If Applicable)
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		N/A	2005
		Check if project performed with current firm	
\$47.7 M 301,728 SF New construction of a complete high school campus			
(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED	
c	PROJECT NAME:	SDPBC Forest Hill Elementary School Replacement	PROFESSIONAL SERVICES
	PROJECT LOCATION:	West Palm Beach, FL	CONSTRUCTION (If Applicable)
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		N/A	2002
		Check if project performed with current firm	
\$10.8 M 93,000 SF Occupied Site Phased replacement of an occupied elementary school			
(1) TITLE AND LOCATION (City and State)		(2) YEAR COMPLETED	
d	PROJECT NAME:	SDPBC West Gate Elementary School	PROFESSIONAL SERVICES
	PROJECT LOCATION:	West Palm Beach, FL	CONSTRUCTION (If Applicable)
(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE		N/A	2002
		Check if project performed with current firm	
\$10.6 M 112,000 SF Occupied Site Phased replacement of an occupied elementary school			

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TAB 7: PAST PERFORMANCE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

1

21. TITLE AND LOCATION (City and State)

OCPS Oak Ridge High School Replacement - Orlando, FL

22. YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION
N/A	2014

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

Orange County Public Schools

b. POINT OF CONTACT

Cass Hurst, Project Manager

c. POINT OF CONTACT TELEPHONE NUMBER

407.317.3700

24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

Wharton-Smith provided construction management services for the multi-phased replacement of the 50-year-old Oak Ridge High School campus which was completed with more than 2,200 students and faculty occupying the campus every day. With the school constructed in stages to allow for demolition and staging to occur, the project required a tremendous amount of pre-planning and coordination to successfully transform the campus into the modern facility it is today. Designed with a specialized foundation system with over 280 concrete piles to combat poor soil conditions, this 315,000 SF campus includes a new administration building, gymnasium, three new three-story classroom buildings, a media center, cafeteria, auditorium, art/music building, field house, and concession building. Site work included new athletic fields (including baseball, football and a competition track), three-acre retention pond, a sheet pile retaining wall, and underground utility systems.



PROJECT COSTS

CONSTRUCTION COST	\$54,000,000
DESIGN FEE	N/A

SERVICES PROVIDED

Construction Management at Risk

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	Wharton-Smith	Sanford, FL	CMAR
b.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE

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TAB 7: PAST PERFORMANCE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

2

21. TITLE AND LOCATION (City and State)

OCPS Cypress Creek High School Comprehensive Renovations - Orlando, FL

22. YEAR COMPLETED

PROFESSIONAL SERVICES
N/A

CONSTRUCTION
2016

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

Orange County Public Schools

b. POINT OF CONTACT

Cass Hurst, Project Manager

c. POINT OF CONTACT TELEPHONE NUMBER

407.317.3700

24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

Wharton-Smith provided construction management services for a comprehensive needs project totaling over 390,000 SF at Cypress Creek High School. Completed in seven phases within an occupied campus, the project consists of a new two-story classroom building with a professional culinary kitchen and lab space, a new central energy plant, new concession building, new group restroom addition, an orchestra classroom addition, and expansion of the main lobby and reception area. Extensive renovations/remodeling were made to the existing facilities including administration, multi-purpose/dining, classrooms, laboratories, art/ music suite, media center, gymnasium, performing arts center and football stadium. Extensive site work includes the installation of a new 16" fire main, new parking areas, bus loop, construction of a utility corridor, landscaping, irrigation and site lighting. This complex project was constructed on an occupied campus with over 3,300 students and staff.



PROJECT COSTS

CONSTRUCTION COST \$42,093,886

DESIGN FEE N/A

SERVICES PROVIDED

Construction Management at Risk

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	Wharton-Smith	Sanford, FL	CMAR
b.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE

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TAB 7: PAST PERFORMANCE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

3

21. TITLE AND LOCATION (City and State)

OCPS Windermere High School - Orlando, FL

22. YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION
N/A	2017

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

Orange County Public Schools

b. POINT OF CONTACT

Cass Hurst, Project Manager

c. POINT OF CONTACT TELEPHONE NUMBER

407.317.3700

24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

Wharton-Smith provided construction management services for Windermere High School, a 340,399 SF, multi-story prototype high school that sits on a 66.4-acre greenfield site in West Orange County. Designed to accommodate nearly 2,776 students, the school was built to alleviate overcrowding at the nearby West Orange High School. As construction manager, Wharton-Smith began the project by clearing the 66.4-acre citrus grove to make way for construction. The new campus consists of a new three-story classroom building, skill labs, resource rooms, science labs, art, band, vocal, orchestra, piano, dance, EHPA gymnasium, vocational labs, media center, administration, guidance, dining room, kitchen, auditorium, and various support spaces. Outdoor athletic facilities include a practice football field, track, field house, baseball/ softball fields, concession booth, basketball courts, tennis/volleyball courts, shot put pit, pole vault lane, high jump pad, long jump lanes, and practice fields.



PROJECT COSTS

CONSTRUCTION COST \$69,427,344

DESIGN FEE N/A

SERVICES PROVIDED

Construction Management at Risk

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	Wharton-Smith	Sanford, FL	CMAR
b.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE

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TAB 7: PAST PERFORMANCE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

4

21. TITLE AND LOCATION (City and State) 22. YEAR COMPLETED

SDPBC South Tech Academy - Boynton Beach, FL

PROFESSIONAL SERVICES
N/A

CONSTRUCTION
2020

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

School District of Palm Beach County

b. POINT OF CONTACT

Gary French, Sr. Project Manager

c. POINT OF CONTACT TELEPHONE NUMBER

(561) 684-3375

24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

Wharton-Smith provided construction management services for the South Tech Academy Renovations and Addition project consisting of the conversion of former Odyssey Middle School into the new South Tech Academy. The work included the addition of a new concrete tilt-wall 37,000 SF vocational training building constructed adjacent to a full operational campus. The project also includes the renovation of the 180,000 SF existing facility to accommodate the remaining specialty programs including music and sound production, culinary arts, cosmetology, medical, veterinary clinic, information technology, digital film and broadcast, and business management. Other work on site included upgraded security and communication systems, upgrading power and water supply, rerouting drainage patterns, expanding parking areas, and adding a new marquee sign. Demolition of the existing South Tech Academy campus at a remote location is also included after the new construction is complete.



PROJECT COSTS

CONSTRUCTION COST \$15,298,021

DESIGN FEE N/A

SERVICES PROVIDED

Construction Management at Risk

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	Wharton-Smith	Jupiter, FL	CMAR
b.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE

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TAB 7: PAST PERFORMANCE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

5

21. TITLE AND LOCATION (City and State) 22. YEAR COMPLETED

SCPS Millennium Middle School - Sanford, FL

PROFESSIONAL SERVICES
N/A

CONSTRUCTION
2018

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

Seminole County Public Schools

b. POINT OF CONTACT

Tim Gough, Project Manager

c. POINT OF CONTACT TELEPHONE NUMBER

(407) 320-0071

24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

Wharton-Smith provided construction management services on the new Millennium Middle School for Seminole County Public Schools. The school is a 222,400 SF, five-building, multi-story prototype that sits on a greenfield site in Sanford, Florida. Designed to accommodate nearly 2,066 students, the school was built to replace the outdated middle school and provide an 800-seat performing arts center in support of the school's Fine Arts & Communication curriculum. The new campus consists of a three-story classroom building, administration/media building, performing arts center, cafeteria building, and a gymnasium building. Outdoor athletic facilities include a multi-purpose field and track. All work was performed next to the fully occupied Midway Elementary School and coordination was required. The new campus opened on schedule for the 2018–2019 school year.



PROJECT COSTS

CONSTRUCTION COST \$44,375,632

DESIGN FEE N/A

SERVICES PROVIDED

Construction Management at Risk

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	Wharton-Smith	Sanford, FL	CMAR
b.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE

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TAB 7: PAST PERFORMANCE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

6

21. TITLE AND LOCATION (City and State)

OPCS Lake Gem Elementary Comprehensive Project - Orlando, FL

22. YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION
N/A	2019

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

Orange County Public Schools

b. POINT OF CONTACT

Susan Deal, Project Manager

c. POINT OF CONTACT TELEPHONE NUMBER

407.317.3700 ext 2025511

24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

Wharton-Smith provided construction management services for the Comprehensive Renovations at Lake Gem Elementary School. The project was a seven-phase project planned to take 14 months to complete. Phase 1 included a new 13,000 SF classroom building, site utilities, and a Central Energy Plant expansion including two new chillers. The first phase was anticipated to take seven months to complete or approximately half of the project duration. Phase 2 improved the existing Building 5 with mechanical, electrical, and finishes. Phases 3, 4, and 5 are all similar to Phase 2 involving existing Buildings 6, 3, and 2 (in that order). Phase 6 involved the renovation of existing Building 4 Cafeteria and Building 1 Administration building and was completed the summer of 2019. A Phase 7 was added to the project to provide installation of a DAS emergency radio system during the final stages of the project. The existing building renovations total 94,796 SF



PROJECT COSTS

CONSTRUCTION COST	\$11,510,098
DESIGN FEE	N/A

SERVICES PROVIDED

Construction Management at Risk

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	Wharton-Smith	Sanford, FL	CMAR
b.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE

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TAB 7: PAST PERFORMANCE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

7

21. TITLE AND LOCATION (City and State) **22. YEAR COMPLETED**

OCSB Continuing CM Services - Okeechobee, FL

PROFESSIONAL SERVICES
N/A

CONSTRUCTION
2022

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

Okeechobee County School District

b. POINT OF CONTACT

Jeff Diefendorf

c. POINT OF CONTACT TELEPHONE NUMBER

(863) 462-5083

24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

Wharton-Smith is current working for OCSB under an continuing construction management services contract. This award includes the delivery of renovation and addition services on any and all school facilities across the district. To date this contract has included:

20-075 OCSB Central ES Admin Renovation - Interior renovations of existing Administration building | \$195,820 | 900 SF | Completed: Summer 2021

20-076 OCSB Central ES Walkway Roof & Beam Repair - Concrete Beam Repairs and Roof Coatings | \$260,800 | 11,508 SF | Completed: Winter 2021

20-122 OCSB Okeechobee High School ReRoof - Roof Coatings over Cafeteria, Vocational, and Administrative buildings Reroofing at Agriculture buildings | \$400,171 | 41,010 SF | Completed: Winter 2021



PROJECT COSTS

CONSTRUCTION COST \$856,791 To Date

DESIGN FEE N/A

SERVICES PROVIDED

Construction Management at Risk

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	Wharton-Smith	Jupiter, FL	CMAR
b.			
c.			
d.			
e.			

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TAB 7: PAST PERFORMANCE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

8

21. TITLE AND LOCATION (City and State)

PCPS AAA High School - Davenport, FL

22. YEAR COMPLETED

PROFESSIONAL SERVICES N/A	CONSTRUCTION 2021
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23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

Polk County Public Schools

b. POINT OF CONTACT

Peggy Banner

c. POINT OF CONTACT TELEPHONE NUMBER

(850) 225-7006

24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

Wharton-Smith is providing Preconstruction and Construction Management services to Polk County Public Schools on the new AAA High School project, located in Davenport, Florida. The new 355,000 SF school will be a state-of-the-art prototype which will include connected classroom buildings, administration offices, 800-person capacity auditorium, media center, gymnasium, cafeteria, culinary arts kitchen/classroom, band, chorus and fine arts classrooms, central courtyard with elevated walkways, sports fields with stadium amenities for football, baseball and softball, as well as all associated site work. The project site is 57-acres in northwest Polk County.



PROJECT COSTS

CONSTRUCTION COST \$85,000,000

DESIGN FEE N/A

SERVICES PROVIDED

Construction Management at Risk

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	Wharton-Smith	Sanford, FL	CMAR
b.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE

AUTHORIZED FOR LOCAL REPRODUCTION | STANDARD FORM 330





TAB 7: PAST PERFORMANCE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

9

21. TITLE AND LOCATION (City and State)

BCSD Baker County Elementary School - MacClenny, FL

22. YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION
N/A	2023

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

Baker County School District

b. POINT OF CONTACT

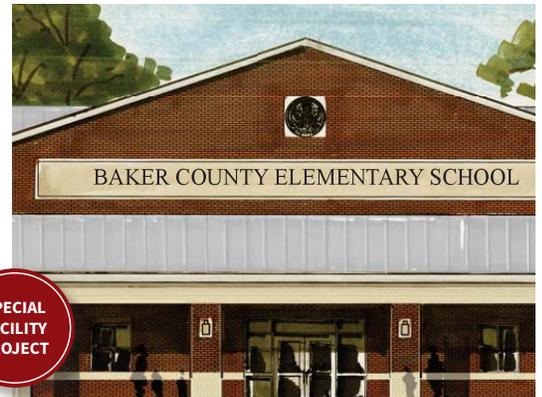
Sherrie Raulerson

c. POINT OF CONTACT TELEPHONE NUMBER

904.259.6251

24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

This new campus designed by CRA Architects will feature a cafetorium, administration, media center and four distinct classroom wings, all connected by a central corridor. The load-bearing masonry structure will feature full height brick and architectural precast. A mechanical mezzanine is included, leaving more room for instructional and support space. The roof system is metal trusses with metal deck, insulation and a standing seam metal roof. Inside, the school has state-of-the-art, technology rich classrooms, bright, colorful finishes and certainly provides a tremendous learning environment. High Efficiency materials will be used throughout the building to ensure that this Multigenerational Building will last for years to come.



PROJECT COSTS

CONSTRUCTION COST	\$34,500,000
DESIGN FEE	N/A

SERVICES PROVIDED

Construction Management at Risk

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	Perry McCall	Jacksonville, FL	CMAR
b.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE

AUTHORIZED FOR LOCAL REPRODUCTION | STANDARD FORM 330





TAB 7: PAST PERFORMANCE

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

(Present as many projects as requested by the agency, or 10 projects, if not specified. Complete one Section F for each project.)

20. EXAMPLE PROJECT KEY NUMBER

10

21. TITLE AND LOCATION (City and State)

LCSD Chiefland Middle/High School Replacement - Chiefland, FL

22. YEAR COMPLETED

PROFESSIONAL SERVICES	CONSTRUCTION
N/A	2024

23. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER

Levy County School District

b. POINT OF CONTACT

John Lott

c. POINT OF CONTACT TELEPHONE NUMBER

352.486.5231

24. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT (Include scope, size, and cost)

This project is currently in progress and consists of a three year phased, occupied rebuild of Chiefland Middle School and Chiefland High School into one unified campus. The scope includes new classrooms, vocational space, gymnasium, and cafeteria. The structure is single story block and brick construction with standing seam metal roofing. A few existing buildings remain but most will be demolished and systematically replaced. The Building used High Performance materials for longevity and it will be designated as a EHPA Hurricane Shelter.



PROJECT COSTS

CONSTRUCTION COST \$36,000,000

DESIGN FEE N/A

SERVICES PROVIDED

Construction Management at Risk

25. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
a.	Perry McCall	Jacksonville, FL	CMAR
b.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
c.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
d.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE
e.	(1) FIRM NAME	(2) FIRM LOCATION (City and State)	(3) ROLE

AUTHORIZED FOR LOCAL REPRODUCTION | STANDARD FORM 330



TAB 7: PAST PERFORMANCE

G. KEY PERSONNEL PARTICIPATION

26. NAMES OF KEY PERSONNEL (From Section E, Block 12)

27. ROLE IN THIS CONTRACT (From Section E, Block 13)

28. EXAMPLE PROJECTS LISTED IN SECTION F
 (Fill in "Example Projects Key" section below before completing table. Place "X" under project key number for participation in same or similar role)

		1	2	3	4	5	6	7	8	9	10
Gerry Kelly	Director of Operations				X			X			
Wayne McCall	Special Facilities Specialist									X	X
Tom Widener	Education Specialist	X	X	X	X	X	X		X		
Jim Auld	Client Advocate							X			
Jeff Horton	Sr. Project Manager								X		
Michael O'Neill	Project Manager				X						
Mark Wilkins	Assistant Project Manager									X	
Brad Newton	Sr. Superintendent	X	X	X		X			X		
Kevin Erbrick	Superintendent										
John Smith	Superintendent				X			X			
O'Neil Mitchell	QA/QC Manager									X	X
John Lyons	VP Preconstruction	X	X	X	X	X	X	X	X		
Paul Fulks	Preconstruction Director			X		X					
Carson McCall	Spec. Funding Exec. / Constructability									X	X
Dan Lee	Estimator									X	X
Patrick Garcia	Preconstruction Manager				X			X			

29. EXAMPLE KEY PROJECTS

No	TITLE OF EXAMPLE PROJECT (FROM SECTION F)
1	OCPS Oak Ridge High School Replacement
2	OCPS Cypress Creek High School Renovations
3	OCPS Windermere High School
4	SDPBC South Tech Academy
5	SCPS Millennium Middle School

No	TITLE OF EXAMPLE PROJECT (FROM SECTION F)
6	OCPS Lake Gem Elementary School
7	OCSD Continuing CM Services
8	PCSB High School AAA
9	BCSD Baker Elementary School
10	LCSD Chiefland Middle/High School Replacement

AUTHORIZED FOR LOCAL REPRODUCTION | STANDARD FORM 330



TAB 7: PAST PERFORMANCE

H. ADDITIONAL INFORMATION

30. PROVIDE ANY ADDITIONAL INFORMATION REQUESTED BY THE AGENCY. ATTACH ADDITIONAL SHEETS IF NECESSARY.

The team proposed for the Okeechobee High School replacement projects consists of proven K-12 construction professionals including Jim Auld and Gerry Kelly who have spent the last three decades working together on projects nearly identical to this one. These include the phased replacement of **Jupiter High School (below)**, additions and renovations to the historic Lake Worth High School and the new construction of Jensen Beach High School. Each of these projects were delivered on-time and within budget. Let this Wharton-Smith team provide you peace of mind to you.

Jupiter High School Replacement | Active Campus



Jupiter High School DELIVERED 8 MONTHS EARLY: Innovation and creativity on this project was necessary from day one. The existing high school had to remain occupied throughout the entire 29 months of construction. This required an entirely new campus to be constructed on the existing ball fields while school remained in session, then demolition of the old campus and finally the conversion of those areas into athletic fields.

To accomplish this, short-term look ahead schedules were reviewed weekly with the subcontractors for coordination and scheduling of manpower, long-lead items were evaluated and planning for overcoming delays became the focus. Because of this team's aggressive approach, **the high school was completed and available for occupation 8 months ahead of schedule, all without one incident involving the safety of students or staff.**

I. AUTHORIZED REPRESENTATIVE The foregoing is a statement of fact

31. Signature

32. Date August 18, 2021

33. Name and Title

Gerry Kelly - Director of Operations

AUTHORIZED FOR LOCAL REPRODUCTION | STANDARD FORM 330



TAB 7: PAST PERFORMANCE

ARCHITECT - ENGINEER QUALIFICATIONS

1. SOLICITATION NUMBER (if any)

21/22-01

PART II - General Qualifications

(If a firm has branch offices, complete for each specific branch office seeking work.)

2a. FIRM (OR BRANCH OFFICE) NAME

Wharton-Smith

3. YEAR ESTABLISHED

1984

4. DUNS #

N/A

2b. STREET

125 W. Indiantown Road, Suite 201

5. OWNERSHIP

a. TYPE Corporation

2c. CITY Jupiter

2d. STATE FL

2e. ZIP CODE 33458

b. SMALL BUSINESS STATUS

6a. POINT OF CONTACT NAME AND TITLE

Gerry Kelly - Director of Operations

7. NAME OF FIRM (If block 2a. is a branch office)

N/A

6b. TELEPHONE NUMBER

(561) 748-5956

6c. E-MAIL ADDRESS

gkelly@whartonsmith.com

9. EMPLOYEES BY DISCIPLINE

10. PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST 5 YEARS

a. Function Code	b. Discipline	c. No. of Employees		a. Profile Code	b. Experience	c. Revenue Index # (see below)
		(1) Firm	(2) Branch			
02	Administrative	75	5	E02	Educational	10
08	CADD Technician	4	0	C11	Commercial	10
16/48	CM/Project Manager	87	6	C15	Const. Mgmt.	10
18	Preconstruction/Estimator	27	1	D04	Design-Build	10
51	Safety	18	2	P14	Public Safety	8
53	Scheduler	1	1	S04	Sewage Collection	10
	Superintendents	107	7	R04	Recreational Fac.	8
	Foremen	57	5			
	Project Engineers	55	8			
	Trade/Craft	139	12			
	Executive/Management	51	3			
	Accounting	21	0			
	Interns	45	3			
Other Employees						
Total		686	52			

11. ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS (Insert revenue index number shown at right)

	2020	2019	2018
a. Federal Work	6	6	6
b. Non-Federal Work	10	10	10
c. Total Work	10	10	10

PROFESSIONAL SERVICES REVENUE INDEX NUMBER

1. Less than \$100,000
2. \$100,00 to less than \$250,000
3. \$250,000 to less than \$500,000
4. \$500,000 to less than \$1 million
5. \$1 million to less than \$2 million
6. \$2 million to less than \$5 million
7. \$5 million to less than \$10 million
8. \$10 million to less than \$25 million
9. \$25 million to less than \$50 million
10. \$50 million or greater

12. AUTHORIZED REPRESENTATIVE The foregoing is a statement of facts.

a. SIGNATURE



b. DATE

August 18, 2021

c. NAME AND TITLE

Gerry Kelly, Director of Operations

AUTHORIZED FOR LOCAL REPRODUCTION | STANDARD FORM 330



TAB 8: DESCRIPTION OF PREVIOUS EXPERIENCE



ORANGE COUNTY PUBLIC SCHOOLS
WINDERMERE HIGH SCHOOL WINDERMERE, FLORIDA

TAB 8: DESCRIPTION OF PREVIOUS EXPERIENCE

RELATED EXPERIENCE

The Wharton-Smith team has a long, successful history of completing very similar K-12 educational projects throughout Central South Florida. Depicted in the chart below is a sample of our most relevant projects to the Replacement of Okeechobee High School project. We have included additional relevant projects that were completed after the five year limit toward the end of this section to showcase our depth of experience.

SIMILAR PROJECT	 SAME TEAM	 OCCUPIED CAMPUS	 NEW CONSTRUCTION	 RENOVATIONS	 MULTI-PHASED	 SFCA FUNDING	 CENTRAL FLORIDA	 SUSTAINABLE FEATURES
Orange County Public Schools Oak Ridge High School Replacement	●	●	●	●	●		●	●
Orange County Public Schools Cypress Creek High School Comprehensive Renovations	●	●	●	●	●		●	●
Orange County Public Schools Windermere High School	●		●		●		●	●
Polk County Public Schools AAA High School	●		●				●	●
Baker County School District Baker Elementary School	●		●			●		●
Washington County Schools Kate Smith Elementary School	●	●	●	●	●	●		●
Levy County School District Chiefland Middle/High School Replacement	●	●	●	●	●	●		●
School District of Palm Beach County South Tech Academy	●		●	●	●			●
Seminole County Public Schools Millennium Middle School	●	●	●	●			●	●
Orange County Public Schools Lake Gem Elementary School Comprehensive Project	●	●	●	●	●		●	
Okeechobee County School Dist. Continuing Renovation/Additions	●	●	●	●	●		●	●
Volusia County Schools Holly Hill K-8 Conversion	●	●	●	●	●		●	●



TAB 8: DESCRIPTION OF PREVIOUS EXPERIENCE

CRA EXPERIENCE

Perry-McCall Construction and CRA Architects have a close working relationship having partnered on over a **DOZEN** past K-12 projects, several of which are featured below.





TAB 8: DESCRIPTION OF PREVIOUS EXPERIENCE



**ORANGE COUNTY PUBLIC SCHOOLS
OAK RIDGE HIGH SCHOOL REPLACEMENT
ORLANDO, FLORIDA**

PROJECT RELEVANCIES

	
OCCUPIED CAMPUS	MULTI-PHASED
	
NEW CONSTRUCTION	HIGH SCHOOL

Owner Representative
Orange County Public Schools
Cass Hurst, Project Manager
650 Magic Way, Bldg. 200
Orlando, FL 32809
P: 407.317.3700

Architect
SchenkelShultz Architecture

Size
315,000 SF / 11 Buildings

Contract Amounts
Owner's Budget: \$55,000,000
GMP: \$54,400,000
Final: \$54,000,000* | \$157.35/SF

Number of Change Orders
32 COs totaling (\$18,575,987)

**Change orders due to ODP and Owner requested scope additions*

Substantial Completion Dates
Contracted: 10/2013 | Actual: 10/2013

Final Completion Dates
Contracted: 1/2014 | Actual: 1/2014

Delivery Method
Construction Management at Risk

Project Description

Wharton-Smith provided construction management services for the multi-phased replacement of the 50-year-old Oak Ridge High School campus which was completed with more than 2,200 students and faculty occupying the campus every day. With the school constructed in stages to allow for demolition and staging to occur, the project required a tremendous amount of pre-planning and coordination to successfully transform the campus into the modern facility it is today. The 315,000 SF campus includes a new administration building, gymnasium, three new three-story classroom buildings, a media center, cafeteria, auditorium, art/music building, field house, and concession building. Site work included new athletic fields (including baseball, football and a competition track), three-acre retention pond, a sheet pile retaining wall, and underground utility systems.

Firm's key professionals assigned to the contract

Tom Widener, Project Executive; Mike Morton, General Superintendent; John Lyons, VP of Preconstruction; Brad Newton, Superintendent





TAB 8: DESCRIPTION OF PREVIOUS EXPERIENCE



PROJECT RELEVANCIES

-  OCCUPIED CAMPUS
-  SAME TEAM
-  RENOVATIONS
-  MULTI-PHASED
-  NEW CONSTRUCTION
-  HIGH SCHOOL
-  SUSTAINABLE FEATURES

Owner Representative
 Orange County Public Schools
 Cass Hurst, Program Manager
 6501 Magic Way, Orlando, FL 32809
 P: 407.317.3700 ext. 202 5442

Architect
 C.T. Hsu + Associates

Size
 50,907 SF new | 345,072 SF renovations

Contract Amounts
 Owner's Budget: \$58,900,000
 GMP: \$41,999,829
 Final: \$42,093,886* | \$106.44/SF
 ODP Tax Savings to Owner: \$489,731

Number of Change Orders
 24 COs totaling (\$9,385,657)

**Change orders due to ODP savings and Owner requested scope additions*

Substantial Completion Dates
 Contracted: 2/2016 | Actual: 2/2016

Final Completion Dates
 Contracted: 5/2016 | Actual: 5/2016

Delivery Method
 Construction Management at Risk

Project Description
 Wharton-Smith provided construction management services for a comprehensive needs project totaling over 390,000 SF at Cypress Creek High School. **Completed in seven phases within an occupied campus**, the project consists of a new two-story classroom building with a professional culinary kitchen and lab space, a new central energy plant, new concession building, new group restroom addition, an orchestra classroom addition, and expansion of the main lobby and reception area. Extensive renovations/remodeling were made to the existing facilities including administration, multi-purpose/dining, classrooms, laboratories, art/ music suite, media center, gymnasium, performing arts center and football stadium. Extensive site work includes the installation of a new 16" fire main, new parking areas, bus loop, construction of a utility corridor, landscaping, irrigation and site lighting. This complex project was constructed on an occupied campus with over 3,300 students and staff.

Firm's key professionals assigned to the contract
 Tom Widener, Project Executive; Brad Newton, Project Superintendent; Mike Morton, General Superintendent; John Lyons, VP of Preconstruction



TAB 8: DESCRIPTION OF PREVIOUS EXPERIENCE



ORANGE COUNTY PUBLIC SCHOOLS
WINDERMERE HIGH SCHOOL
 WINDERMERE, FLORIDA

PROJECT RELEVANCIES

	
NEW CONSTRUCTION	SAME TEAM
	
HIGH SCHOOL	MULTI-PHASED

Owner Representative
 Orange County Public Schools
 Cass Hurst, Program Manager
 6501 Magic Way, Orlando, FL 32809
 P: 407.317.3700 ext. 202 5442

Architect
 SchenkelShultz Architecture

Size
 340,399 SF

Contract Amounts
 Owner's Budget: \$71,450,000
 GMP: \$70,395,526
 Final: \$69,427,344* | \$203.96/SF
 ODP Tax Savings to Owner: \$1,043,638

Number of Change Orders
 21 COs totaling (\$19,579,319)
 *Change orders due to ODP savings and Owner requested scope additions

Substantial Completion Dates
 Contracted: 7/2017 | Actual: 7/2017

Final Completion Dates
 Contracted: 11/2017 | Actual: 11/2017

Delivery Method
 Construction Management at Risk

Project Description
 Wharton-Smith provided construction management services for Windermere High School, a 340,399 SF, multi-story prototype high school that sits on a 66.4-acre greenfield site in West Orange County. Designed to accommodate nearly 2,776 students, the school was built to alleviate overcrowding at the nearby West Orange High School. As construction manager, Wharton-Smith began the project by clearing the 66.4-acre citrus grove to make way for construction. The new campus consists of a new three-story classroom building, skill labs, resource rooms, science labs, art, band, vocal, orchestra, piano, dance, EHPA gymnasium, vocational labs, media center, administration, guidance, dining room, kitchen, auditorium, and various support spaces. Outdoor athletic facilities include a practice football field, track, field house, baseball/ softball fields, concession booth, basketball courts, tennis/volleyball courts, shot put pit, pole vault lane, high jump pad, long jump lanes, and practice fields.

Firm's key professionals assigned to the contract
 Tom Widener, Project Executive; Matt. Kugelmann, Sr. Superintendent; Mike Morton, General Superintendent; John Lyons, VP of Preconstruction





TAB 8: DESCRIPTION OF PREVIOUS EXPERIENCE



POLK COUNTY PUBLIC SCHOOLS
AAA HIGH SCHOOL
DAVENPORT, FLORIDA

PROJECT RELEVANCIES



NEW
CONSTRUCTION



SAME
TEAM



HIGH
SCHOOL



SUSTAINABLE
FEATURES

Owner Representative
Polk County Public Schools
Peggy Banner
(850) 225-7006

Architect
SchenkelShultz Architects

Size
345,000 sf

Contract Amounts
Owner's Budget: \$85,000,000
GMP: \$91,617,654
Final: \$91,617,654
ODP Tax Savings to Owner: \$304,586

Number of Change Orders
5 COs totaling (\$4,956,344)

**Change orders due to ODP and Owner requested scope additions*

Substantial Completion Dates
Contracted: 11/2019 | Actual: 9/2021

Final Completion Dates
Contracted: 1/2020 | Actual: TBD

Delivery Method
Construction Management at Risk

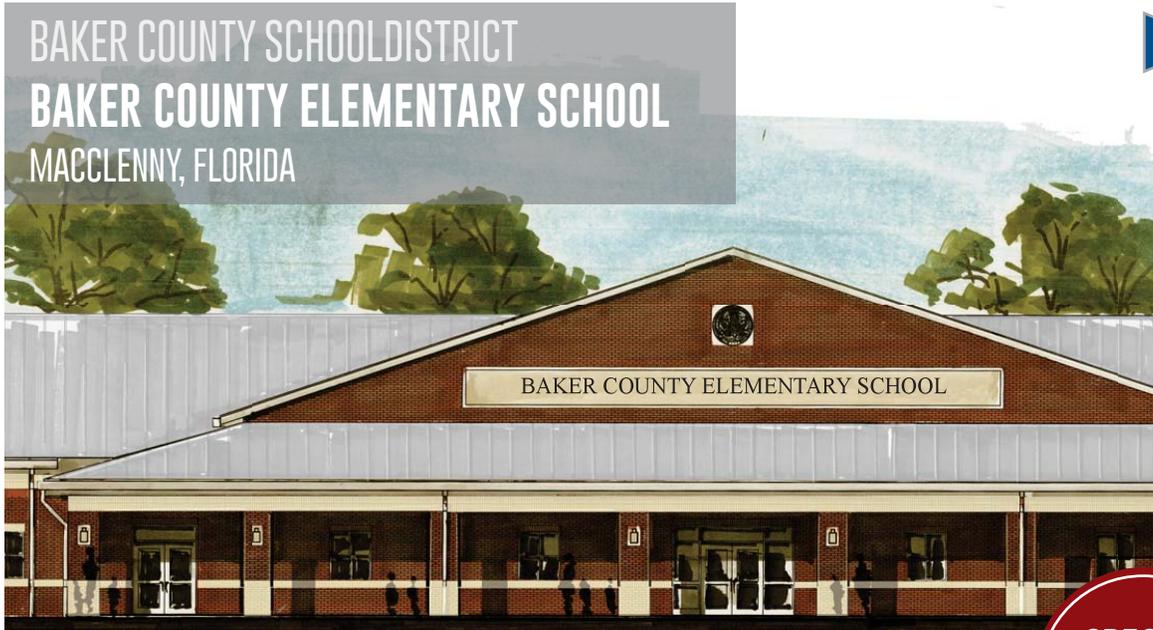
Project Description
Wharton-Smith is providing Preconstruction and Construction Management services to Polk County Public Schools on the new AAA High School project, located in Davenport, Florida. **The new 355,000 SF school will be a state-of-the-art prototype which will include connected classroom buildings, administration offices, 800-person capacity auditorium, media center, gymnasium, cafeteria, culinary arts kitchen/classroom, band, chorus and fine arts classrooms, central courtyard with elevated walkways, sports fields with stadium amenities for football, baseball and softball**, as well as all associated site work. The project site is 57-acres in northwest Polk County.

Firm's key professionals assigned to the contract
Mike Morton, General Superintendent; Jeff Horton, Project Manager; John Lyons, VP of Preconstruction; Tom Wildener, Project Executive





TAB 8: DESCRIPTION OF PREVIOUS EXPERIENCE



BAKER COUNTY SCHOOLDISTRICT
BAKER COUNTY ELEMENTARY SCHOOL
 MACCLENNY, FLORIDA

PROJECT RELEVANCIES

- SPECIAL FACILITY PROJECT
- SAME PROJECT TEAM MEMBERS
-  NEW CONSTRUCTION



Owner Representative
 Baker County School District
 Sherrie Raulerson, Superintendent
 392 South Blvd. East
 Macclenny, Florida 32063
 P: 904.259.6251

Architect
CRA Architects 

Size
 137,000 s.f.

Contract Amounts
 Owner's Budget: \$35,000,000
 GMP: \$34,500,000
 Final: TBD

Number of Change Orders
 TBD

Substantial Completion Dates
 Contracted: 11/2022 | Actual: TBD

Final Completion Dates
 Contracted: 12/2022 | Actual: TBD

Delivery Method
 Construction Management at Risk

Project Description
 This new campus will feature a cafetorium, administration, media center and four distinct classroom wings, all connected by a central corridor.

The load-bearing masonry structure will feature full height brick and architectural precast. A mechanical mezzanine is included, leaving more room for instructional and support space. The roof system is metal trusses with metal deck, insulation and a standing seam metal roof. Inside, the school has state-of-the-art, technology rich classrooms, bright, colorful finishes and certainly provides a tremendous learning environment.

High Efficiency materials will be used throughout the building to ensure that this Multigenerational Building will last for years to come. **Special Facility Construction Funds Project.**

Firm's key professionals assigned to the contract
 Wayne McCall, Principal; Carson McCall, Project Executive; Dan Lee, Director of Pre-Construction, O'Neil Mitchell, Superintendent





TAB 8: DESCRIPTION OF PREVIOUS EXPERIENCE



**WASHINGTON COUNTY SCHOOL DISTRICT
KATE SMITH ELEMENTARY
CHIPLEY, FLORIDA**

PROJECT RELEVANCIES

SPECIAL FACILITY PROJECT

SAME PROJECT TEAM MEMBERS



NEW CONSTRUCTION



Owner Representative
Washington County School District
Mike Park
652 3rd Street
Chipley, FL 32428
P: 850.638.6219

Architect
CRA Architects



Size
150,433 s.f.

Contract Amounts
Owner's Budget: \$25,000,000
GMP: \$24,600,000
Final: \$24,700,000* | \$164/s.f.

Number of Change Orders
2 COs
*Change orders due to ODP and Additional Canopies

Substantial Completion Dates
Contracted: 7/01/16 | Actual: 7/01/16

Final Completion Dates
Contracted: 7/20/16 | Actual: 7/15/16

Delivery Method
Construction Management at Risk

Project Description

In 2015, the Washington County School District received **Special Facility Construction Funds** to build a new K-6 elementary school in Chipley. The new Elementary School facility, housing grades K-6, replaced the existing campus with the same name on a 50 Acre site. The new facility had a Student capacity of 993 with 62 classrooms. It consisted of a one-story building divided into 8 sections including Administration, Media, Cafeteria/Kitchen, as well as 5 Classroom Wings. There was also a standalone 3,600 s.f. Enclosed Play Area. There is an elevated Mezzanine Level above all Classroom Wing corridors and above the Administration/Media areas for High Efficiency mechanical equipment that adds another 17,740 s.f. The project included site improvements to local roads and the re-alignment of the nearest intersection to match up with the school entrance to ease traffic.

Firm's key professionals assigned to the contract
Wayne McCall, Principal; Carson McCall, Preconstruction Manager; O'Neil Mitchell, Superintendent; Mark Wilkins, Assistant Project Manager





TAB 8: DESCRIPTION OF PREVIOUS EXPERIENCE



**LEVY COUNTY SCHOOL DISTRICT
CHIEFLAND MIDDLE-HIGH
SCHOOL REPLACEMENT
CHIEFLAND, FLORIDA**

**PROJECT
RELEVANCIES**

SPECIAL FACILITY
PROJECT

SAME PROJECT
TEAM MEMBERS



NEW
CONSTRUCTION



Owner Representative
Levy County School District
Mr. John Lott, Asst. Supt.
480 Marshburn Drive
Bronson, FL 32621
P: 352.486.5231

Architect
CRA Architects 

Size
121,000 s.f. NEW / 140,000 s.f. DEMO

Contract Amounts
Owner's Budget: \$36,500,000
GMP: \$36,000,000
Final: TBD

Number of Change Orders
TBD

Substantial Completion Dates
Contracted: 7/2023 | Actual: TBD

Final Completion Dates
Contracted: 8/2023 | Actual: TBD

Delivery Method
Construction Management at Risk

Project Description

This project is currently in progress and consists of a **three year phased, occupied rebuild** of Chiefland Middle School and Chiefland High School into one unified campus. The scope includes new classrooms, vocational space, gymnasium, and cafeteria. The structure is single story block and brick construction with standing seam metal roofing. A few existing buildings remain but most will be demolished and systematically replaced. The Building used High Performance materials for longevity and it will be designated as a EHPA Hurricane Shelter. **Special Facility Construction Funds Project.**

Firm's key professionals assigned to the contract
Wayne McCall, Principal; Carson McCall, Preconstruction Manager





TAB 8: DESCRIPTION OF PREVIOUS EXPERIENCE

SCHOOL DIST. OF PALM BEACH COUNTY SOUTH TECH ACADEMY BOYNTON BEACH, FLORIDA



PROJECT RELEVANCIES



HIGH SCHOOL



SAME TEAM



NEW CONSTRUCTION



SUSTAINABLE FEATURES

Owner Representative

Owner Representative
School District of Palm Beach County
Gary French, Sr. Project Manager
(561) 684-3375
gary.french.c@palmbeachschools.org
3300 Forest Hill Blvd.
West Palm Beach, FL 33406

Architect

Song & Associates, Inc.

Size

37,000 SF new / 180,000 SF renovation

Contract Amounts

Owner's Budget: \$15,298,021

GMP: \$15,298,021

Final: \$14,764,622

Number of Change Orders

3

Substantial Completion Dates

Contracted: 8/1/2019 | Actual: 7/31/2020

Final Completion Dates

Contracted: 8/1/2019 | Actual: 10/31/20

Delivery Method

Construction Management at Risk

Project Description

Wharton-Smith provided construction management services for the South Tech Academy **Renovations and Addition** project consisting of the conversion of former Odyssey Middle School into the new South Tech Academy. The work included the addition of a **new concrete tilt-wall 37,000 SF vocational training building constructed adjacent to a full operational campus.**

The project also includes the **renovation of the 180,000 SF existing facility to accommodate the remaining specialty programs including music and sound production, culinary arts, cosmetology, medical, veterinary clinic, information technology, digital film and broadcast, and business management. Other work on site included upgraded security and communication systems, upgrading power and water supply, rerouting drainage patterns, expanding parking areas, and adding a new marquee sign.**

Demolition of the existing South Tech Academy campus at a remote location is also included after the new construction is complete.

Firm's key professionals assigned to the contract

Gerry Kelly, Dir. of Operation; Michael O'Neill, Project Manager; John Smith, Superintendent; Tom Widener, Proj. Exec.; John Lyons, VP Preconstruction





TAB 8: DESCRIPTION OF PREVIOUS EXPERIENCE



**SEMINOLE COUNTY PUBLIC SCHOOLS
MILLENNIUM MIDDLE SCHOOL
SANFORD, FLORIDA**

PROJECT RELEVANCIES

- 
OCCUPIED CAMPUS
- 
SAME TEAM
- 
NEW CONSTRUCTION
- 
SUSTAINABLE FEATURES

Owner Representative
 Seminole County Public Schools
 Tim Gough, Project Manager
 400 E. Lake Mary Blvd.
 Sanford, FL 32773
 P: 407.320-0071

Architect
 SchenkelShultz Architects

Size
 222,400 SF

Contract Amounts
 Owner's Budget: \$41,500,000
 GMP: \$43,500,000
 Final: \$44,375,632* | \$199.53/SF
 ODP Tax Savings to Owner: \$714,945

Number of Change Orders
 10 COs totaling (\$12,298,397)
 *Change orders due to ODP and Owner requested scope additions

Substantial Completion Dates
 Contracted: 8/2018 | Actual: 7/2018

Final Completion Dates
 Contracted: 11/2018 | Actual: 11/2018

Delivery Method
 Construction Management at Risk

Project Description
 Wharton-Smith provided construction management services on the new Millennium Middle School for Seminole County Public Schools. The school is a 222,400 SF, five-building, multi-story prototype that sits on a greenfield site in Sanford, Florida. Designed to accommodate nearly 2,066 students, the school was built to replace the outdated middle school and provide an 800-seat performing arts center in support of the school's Fine Arts & Communication curriculum. The new campus consists of a three-story classroom building, administration/media building, performing arts center, cafeteria building, and a gymnasium building. Outdoor athletic facilities include a multi-purpose field and track. All work was performed next to the **fully occupied Midway Elementary School and coordination was required.** The new campus opened on schedule for the 2018–2019 school year.

Firm's key professionals assigned to the contract
 Tom Widener, Proj. Exec.; Matt Kugelmann, Sr. Superintendent; Mike Morton, Gen. Superintendent; John Lyons, VP of Preconstruction; Paul Fulks, Preconstruction





TAB 8: DESCRIPTION OF PREVIOUS EXPERIENCE



**ORANGE COUNTY PUBLIC SCHOOLS
LAKE GEM ELEMENTARY COMPREHENSIVE PROJECT
ORLANDO, FLORIDA**

PROJECT RELEVANCIES

	
OCCUPIED CAMPUS	MULTI-PHASED
	
NEW CONSTRUCTION	RENOVATIONS

Owner Representative
Orange County Public Schools
Susan Deal, Project Manager
650 Magic Way, Bldg. 200
Orlando, FL 32809
P: 407.317.3700 ext 2025511

Architect
HuntonBrady Architects

Size
13,000 SF new / 94,796 SF renovations

Contract Amounts
Owner's Budget: \$11,600,000
GMP: \$11,125,622
Final: \$11,510,098* | \$199.53/SF
ODP Tax Savings to Owner: \$108,877

Number of Change Orders
10 COs totaling (\$1,535,252)

**Change orders due to ODP and Owner requested scope additions*

Substantial Completion Dates
Contracted: 8/2019 | Actual: 11/2019

Final Completion Dates
Contracted: 8/2019 | Actual: 11/2019

Delivery Method
Construction Management at Risk

Project Description
Wharton-Smith provided construction management services for the Comprehensive Renovations at Lake Gem Elementary School. The project was a seven-phase project planned to take 14 months to complete. Phase 1 included a new 13,000 SF classroom building, site utilities, and a Central Energy Plant expansion including two new chillers. The first phase was anticipated to take seven months to complete or approximately half of the project duration. Phase 2 improved the existing Building 5 with mechanical, electrical, and finishes. Phases 3, 4, and 5 are all similar to Phase 2 involving existing Buildings 6, 3, and 2 (in that order). Phase 6 involved the renovation of existing Building 4 Cafeteria and Building 1 Administration building and was completed the summer of 2019. A Phase 7 was added to the project to provide installation of a DAS emergency radio system during the final stages of the project. The existing building renovations total 94,796 SF

Firm's key professionals assigned to the contract
Tom Widener, Project Executive; Mike Morton, Gen. Superintendent; Brad Newton, Superintendent; John Lyons, VP of Preconstruction





TAB 8: DESCRIPTION OF PREVIOUS EXPERIENCE

**OKEECHOBEE COUNTY SCHOOL DISTRICT
DISTRICT-WIDE CONTINUING CM SERVICES
OKEECHOBEE, FLORIDA**



PROJECT RELEVANCIES



OCCUPIED CAMPUS



MULTI-PHASED



NEW CONSTRUCTION



RENOVATIONS

Owner Representative
Okeechobee County School District
Jeff Diefendorf, Director of Operations
jeff.diefendorf@okee.k12.fl.us
(863) 462-5083

Architect
Clemons, Rutherford & Assoc.
TLC Engineering

Size
Various

Contract Amounts
up to \$4,000,000

Substantial Completion Dates
Contract Duration: 4/2022

Delivery Method
Construction Management at Risk

Project Description
Wharton-Smith is current working for OCSD under an continuing construction management services contract. This award includes the delivery of renovation and addition services on any and all school facilities across the district. To date this contract has included:

- **20-075 OCSB Central ES Admin Renovation** - Interior renovations of existing Administration building | \$195,820 | 900 SF | Completed: Summer 2021
- **20-076 OCSB Central ES Walkway Roof & Beam Repair** - Concrete Beam Repairs and Roof Coatings | \$260,800 | 11,508 SF | Completed: Winter 2021
- **20-122 OCSB Okeechobee High School ReRoof** - Roof Coatings over Cafeteria, Vocational, and Administrative buildings Reroofing at Agriculture buildings | \$400,171 | 41,010 SF | Completed: Winter 2021

Firm's key professionals assigned to the contract
Gerry Kelly; Jim Auld; Patrick Garcia; John Smith



TAB 9: EXPERIENCE WORKING ON OCCUPIED CAMPUSES



TAB 9: EXPERIENCE WORKING ON OCCUPIED CAMPUSES

OCCUPIED CAMPUS CONSIDERATIONS

The safety of the students and staff is our number one priority and guides our every thought when it comes to phasing and scheduling. Wharton-Smith will work together with Facilities and the Design Team to maintain the focus on the educational environment by providing detailed input regarding phasing and constructability requirements. We have worked on many large occupied campuses and can provide innovative solutions for keeping students separated from construction activities. All of our proposed team members are JLA Badged and are very familiar with the process. We will ensure that all construction security gates are closed and locked throughout the day and that there is no access to the campus through the construction areas.

Additionally, we understand the logistical concerns and sequencing required to keep the campus active and safe. Whether it's providing phasing plans that use temporary portable classrooms, relocating bus loops, providing safe sidewalks and canopies, or scheduling high-risk construction activities like tilt wall panel lifts while students are not on campus, our Wharton-Smith Team is committed to building safely and delivering each phase of the project on schedule.

Overall, Wharton-Smith's understanding of the various District requirements and methodologies will help ensure the Okeechobee High School project moves forward smoothly and without delay. Our team will use our extensive K-12 construction management experience and knowledge of OCSD's procedures to ensure the project schedule remains on track from early preconstruction activities through final close-out.



TAB 9: EXPERIENCE WORKING ON OCCUPIED CAMPUSES

PROJECT UNDERSTANDING

We know the Okeechobee County School District (OCSD) is looking to select a firm to provide exceptional construction management services for the comprehensive replacement of Okeechobee High School. We have thoroughly examined the scope of work and will partner with OCSD to bring the District's concept into reality.

Having performed numerous phased projects on occupied campuses, our entire team understands the challenges that come with making significant changes to a campus that was originally designed to accommodate only a small fraction of the student stations. We realize over the years, as new buildings were constructed, improvements to the core space size, campus utilities, parking, and security were not always possible. Keeping this in mind during the preconstruction phase of the project will be critical as we work closely with OCSD and CRA to develop the scope of work.

We will pay careful attention to how existing services are routed, knowing several services are interconnected through existing buildings that are scheduled to be demolished. We will develop a plan during preconstruction with OCSD and CRA to ensure there are no interruptions that would negatively impact the educational programs that need to remain operational during construction.

Besides the scope of work published in the RFQ, it is our understanding that OCSD wishes to incorporate the following features at Okeechobee High School:

SECURITY AND SAFETY FEATURES

- Providing a single point of entry
- Eliminating line of sight issues
- Establishing a central courtyard
- Providing pedestrian safe routes and features
- Providing curbside access to the new Cafeteria
- Constructing easy after hour access to public spaces

INCREASED FUNCTIONALITY FEATURES

- Constructing separate car and bus loops
- Clear access to the Central Energy Plant
- Eliminating portable and modular classrooms
- Correcting stormwater management issues

Our team has experience with all of these scopes of work and will assist with many more considerations that would take place on a large high school in an active community. Our team will specifically ensure construction does not impact the numerous educational programs you have at Okeechobee High School.



COMMUNICATION IS KEY



It has been our consistent experience that the most successful projects are a product of a close client and construction team relationship. Our goal is to create a strong partnership with the OCSD's staff. This starts in the design phase with each project, through permitting, construction, and throughout the warranty phase.

We will provide a school administrator with a radio for constant contact and communication throughout the project.

Our obligation is to coordinate the reviews with and for you! To ensure the level of quality, operation, and maintenance that the OCSD expects, this coordination is our first priority.

TAB 9: EXPERIENCE WORKING ON OCCUPIED CAMPUSES

JOB SITE SAFETY

The majority of the work that Wharton-Smith performs is for K-12 educational clients on occupied campuses. We intend to employ security and safety controls including detailed phasing plans, JLA badging, double chain-link fencing, pedestrian control signage, access control gates, security guards, and limited material delivery times.

Additionally, Wharton-Smith has a comprehensive safety program that includes written programs for Hazard Communication, Fall Protection, General Safety, and Drug/Alcohol Abuse. We also have an extensive Corporate Safety Manual, which contains 33 sections pertaining to all areas of jobsite safety. All field supervisory personnel, superintendents, assistant superintendents, and craft foremen are required to be and have been OSHA certified as competent persons in at least one of the following: trenching, scaffolding, confined space, and/or fall protection. In addition, each project is required to have at least one employee trained in CPR and First Aid. All employees are required to go through the company's basic safety orientation. This training covers the basics of general safety, housekeeping, HAZCOM, trenching, electrical, lockout/tag out, personal protective equipment, and confined space entry. All crane operators must complete 24 hours of classroom and skills training before allowed to operate any crane, and all equipment operators are required to complete our operator certification course. We actively pursue and encourage any specialized training that would benefit our employees.

Thorough jobsite safety inspections are conducted continuously throughout all of our projects by our on-site safety personnel. A pre-job safety planning meeting allows potentially hazardous tasks to be flagged in advance so the project staff can prepare as necessary. Each project is also inspected by our Safety Department staff on at least a monthly basis. The inspections cover every aspect of on-site safety and include an electronic report that addresses both hazardous conditions observed and assigns responsibility for corrective actions. Each inspection report is personally reviewed by our management team, including the president of the company.

Wharton-Smith has ZERO safety-related litigation claims.

WHARTON-SMITH'S COVID-19 GUIDELINES



Wharton-Smith is committed to the safety of your students and faculty as well as our employees, subcontractors, and clients during this COVID-19 pandemic. We have stringent safety protocols to keep our jobsites safe and healthy and carefully monitor state and local guidelines for operation. We believe in clear communication and are transparent about safety expectations, courses of action, and in keeping communications open with our owner, subcontractors, architects, suppliers, and employees.

With social distancing in mind, all meetings have the option of being held virtually, and documents are electronically available for OCSD at any time. We work continuously with supply-chain partners to make sure materials are available to mitigate impacts to the project schedule, and we also carefully evaluate and reduce workplace exposure where possible.

Our rigorous COVID-19 Guidelines are posted at all jobsites and every precaution is taken to assure a safe and healthy workplace. Our preventative measures on each site include requisite sanitation and cleaning protocols and personal protective equipment (PPE) inspection. We have partnered with Quality Labor Management (QLM) to execute a strict safety practice should a positive COVID-19 test impact our jobsite. At first notification, workers are removed from the site for the completion of a thorough cleaning. Returning employees will experience entrance and exit checkpoints, temperature taking, and health checks for 14 days. The infected employee may not return to the site without a negative test result and 14 days of quarantine. To date Wharton-Smith's COVID-19 protocols have resulted in zero impacts to project schedule or budget.



TAB 10: EXPERIENCE WITH SFCA & PHASED FUNDING

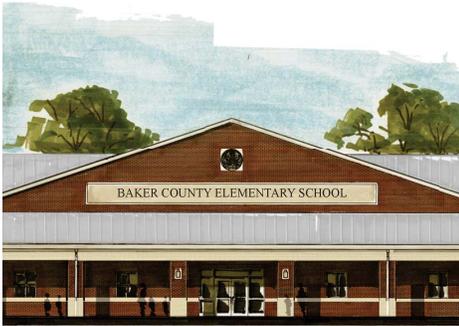


ORANGE COUNTY PUBLIC SCHOOLS
CYPRESS CREEK HIGH SCHOOL ORLANDO, FLORIDA

TAB 10: EXPERIENCE WITH SFCA & PHASED FUNDING

SFCA EXPERTISE

The team at Perry-McCall has worked on a number of projects funded through the state’s Special Facility Construction Fund; **nine in all totaling over \$190 Million.** Moreover, we have built dozens of projects for a number of north Florida’s rural school districts including Hamilton, Gilchrist, Levy, Dixie, Lafayette, Washington, Putnam, Bradford and Suwannee Counties and understand the importance of stretching these construction dollars to their fullest.



Baker County
Baker County Elementary School



Levy County
Chiefland High School



Hamilton County County
Hamilton County Elementary School



Washington County
Kate Smith Elementary School



Dixie County
Old Town Elementary School



Levy County
Bronson High School



Gilchrist County
Bell Elementary School



Washington County
Vernon High School



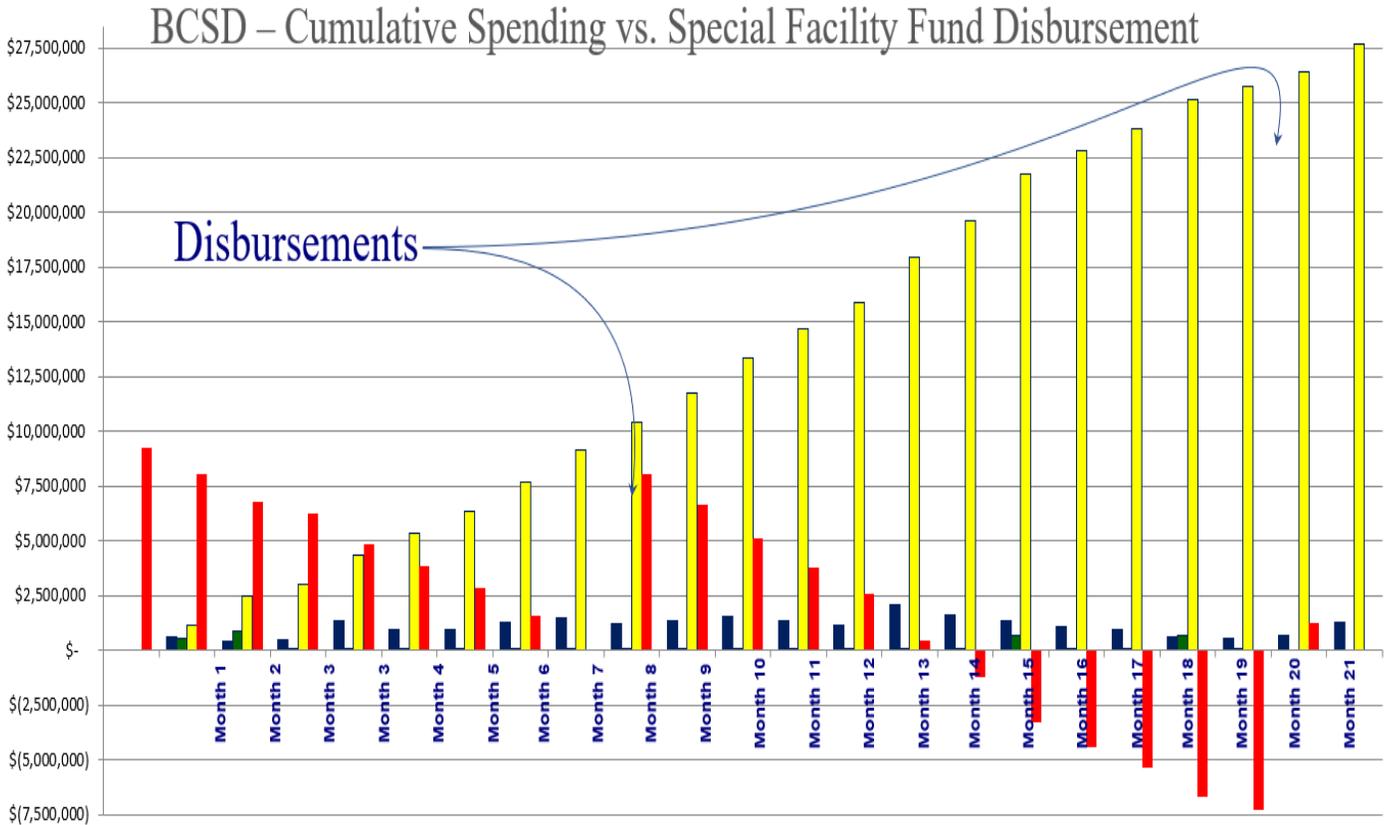
Gilchrist County
Bell High School



TAB 10: EXPERIENCE WITH SFCA & PHASED FUNDING

SFCA EXPERTISE

We understand the necessity to make sure your project runs in conjunction with the State’s funding. We will calculate all-in costs from Okeechobee County Schools and allocate the cost over a cost loaded schedule. We want Okeechobee County Schools to know what each month’s financial distributions will look like. Here is a preliminary funding outlay based on previously completed Specialty Funded school:



‘The Perry-McCall team tackled the project’s funding head on by building a schedule that factored in the cost of the work, insuring the project would not be impacted by cash flow.’

*William “Bill” Rutherford, Design Principal
CRA Architects (Bronson High School)*



TAB 10: EXPERIENCE WITH SFCA & PHASED FUNDING

SFCA CASE STUDY

NEW BRONSON MIDDLE/HIGH SCHOOL

Our partner **Perry McCall** was selected as Construction Manager at New Bronson, and the team immediately set to work at validating the program and budget, and also working with District staff to evaluate the funding schedule as it related to the construction schedule. The concern was simple; if the project was not approached correctly, District funds, which equated to 51% of the overall budget, would be exhausted before state funds were available.

**SPECIAL
FACILITY
PROJECTS**

7

BUILDING
CAMPUS

FUNDED

51%

BY DOE SPECIAL
FACILITY FUND

CONSTRUCTION OF

119,500

SQUARE FEET

To evaluate that concern, we built a cost-loaded schedule. The storm water permit was driving the project's start date, and using that as the project's early-start date, we built a schedule. We then took the detailed estimate and loaded that information into the schedule, which showed that the District's portion of the funding would be exhausted, two months ahead of the money from the state being encumbered.

At 16 months in duration, an October start, which coincided with receipt of the water management permit, would have put substantial completion in February, a full 6 months before the start of school, which would have been too early for the District. The team came to the conclusion that pushing back the start date by two months would have several benefits to the project. First, it would eliminate the funding gap, second it would afford the design team time to fine tune the documents, and last it would deliver the school three months before school started, leaving a comfortable window for the District to move in all furniture, fixtures & equipment and for faculty and staff to relocate from the existing school.

With a plan in place, we worked with CRA Architects as they completed the documents, which culminated with competitive subcontractor bidding. We then developed the Guaranteed Maximum Price (GMP) proposal, which was submitted to and subsequently approved by the School Board, allowing construction to break ground. Sixteen months later, we turned over the finished school to the district and thanks to proper planning; cash flow was never an issue.



TAB 11: EXPERIENCE DAVIS-BACON ACT COMPLIANCE



TAB 11: EXPERIENCE DAVIS-BACON ACT COMPLIANCE

DAVIS-BACON EXPERTISE

Wharton-Smith, our partners and our staff have cumulatively hundreds of years complying with the Davis-Bacon Act of 1931. The Davis-Bacon Act of 1931 is a federal law that requires all on-site employees be paid fair wages, benefits, and overtime (also known as the “prevailing wage”) weekly while working on government-funded construction, alteration, or repair projects at a minimum threshold. Any project that utilizes federal funding requires that every person working on the project be given a working wage.



Two main considerations must be familiar to any construction company doing business under the Davis-Bacon Act; 1. Certified Payroll – Certified payroll is essential for Davis-Bacon compliance (and avoiding costly Davis-Bacon violations) because they are mandatory on almost all government-funded construction, alteration, or repair projects. Certified payroll reports are submitted weekly on Federal WH-347 forms and include information about each on-site employee and a statement of compliance. 2. The Fair Labor Standards Act (FLSA) – Complying with the Davis-Bacon Act and submitting certified payroll reports are dependent on how employees are classified. Under the FLSA, the benefits and overtime a worker makes determine his or her classification. Classifying employees correctly will ensure employee information is recorded correctly on weekly certified payroll reports. Using the right construction time clock can help contractors keep adequate records for FLSA compliance. The Davis-Bacon Act is applicable to all on-site employees working on government-funded construction, alteration, and repair projects. According to the Davis-Bacon Act, “workers” are further defined by their trade and classification as not only “laborers” and “mechanics,” by also as carpenters, electricians, plumbers, ironworkers, flaggers, craftsmen, welders, concrete finishers, longshoremens, power equipment operators, and helpers.

This team knows how to best process and obtain from our subcontractors the weekly certified payroll that meets these requirements. Listed below are some of the recent jobs we have completed that had Davis-Bacon Act requirements:

- Fire Station #1 Headquarters, City of Orlando, FL
- Bethune Senior Center, City of Haines City, FL
- 8-Acre Park, City of Haines City, FL
- Streetscape, City of Haines City, FL
- Zander’s Park, City of Winter Garden, FL
- Diffused Aeration System, City of Key West, FL
- Hangar AE Revitalization, Kennedy Space Center, FL
- Lift Stations Modification, Patrick Air Force Base, FL
- Galveston Water Treatment Plant Expansion
- Ocean Enterprises Facility
- Rivers Edge Water Supply Plant
- Rayne Water Treatment Plant Improvements
- Marion County NW Regional WTPP
- Denham Springs Water Wells Rehab
- Rivers Edge Wastewater Treatment Plant
- Pearland SWTP Pre-Treatment
- SJRA Digester Rehab
- Sluice Gates / Flap Gates
- Fire Station #31, City of St. Cloud, FL
- 2010 Sanitary Sewer Rehabilitation, City of Morgan City, LA
- Applied Instruction Building, US Navy, Jacksonville, FL
- WT Facility Upgrade, US Navy, Jacksonville, FL
- Utility Support Operations, US Navy, La Maddalena, Italy
- Utilities Upgrade, US Navy, Guantanamo Bay, Cuba

Bethune Senior Center



Orlando Fire Station #1



Galveston WTP Expansion

