DEERING PARK STEWARDSHIP DISTRICT

July 9, 2024

BOARD OF SUPERVISORS

REGULAR MEETING AGENDA

DEERING PARK
STEWARDSHIP DISTRICT

AGENDA
LETTER

Deering Park Stewardship District

2300 Glades Road, Suite 410W●Boca Raton, Florida 33431
Phone: (561) 571-0010●Toll-free: (877) 276-0889●Fax: (561) 571-0013

July 2, 2024

ATTENDEES:
Please identify yourself each time you speak to facilitate accurate transcription of meeting minutes.

Board of Supervisors
Deering Park Stewardship District

NOTE: Meeting Time

Dear Board Members:

The Board of Supervisors of the Deering Park Stewardship District will hold a Regular Meeting on July 9, 2024 at 2:00 p.m., in-person at Storch Law Firm, located at 420 S. Nova Road, Daytona Beach, Florida 32114 and via Teams Meeting ID: 233 035 830 379 Passcode: F8HoXp (see link below). The agenda is as follows:

1. Call to Order/Roll Call
2. Public Comments
3. Consideration of Responses to Statement of Qualifications: RFQ for Design-Builder for Edgewater Wetland Park Project
   - A. Respondents
     - I. Phillips & Jordan, Inc. and Jacobs
     - II. Wharton-Smith, Inc. and Wright-Pierce
   - B. Evaluation Committee Ranking
   - C. Consideration of Resolution 2024-10, Adopting the Evaluation and Selecting Design-Build Firms' Statements of Qualifications for the Edgewater Wetland Park Project; Providing a Severability Clause; and Providing an Effective Date
4. Presentation of Audited Annual Financial Report for the Fiscal Year Ended September 30, 2023, Prepared by Berger, Toombs, Elam, Gaines & Frank
5. Consideration of Resolution 2024-09, Hereby Accepting the Audited Annual Financial Report for the Fiscal Year Ended September 30, 2023
6. Project Updates
   - A. SR 442/I-95
   - B. Deering Trail
7. Approval of June 25, 2024 Regular Meeting Minutes

8. Staff Reports
   A. District Counsel: *Kutak Rock LLP*
   B. District Engineer: *England-Thims & Miller, Inc.*
   C. District Manager: *Wrathell, Hunt and Associates, LLC*
      - NEXT MEETING DATE: August 13, 2024 at 2:00 PM [Adoption of FY2025 Budget]

SEAT 1	ROBBIE LEE	☐ IN PERSON	☐ PHONE	☐ NO
SEAT 2	WILLIAM FIFE	☐ IN PERSON	☐ PHONE	☐ NO
SEAT 3	GLENN STORCH	☐ IN PERSON	☐ PHONE	☐ NO
SEAT 4	JAMES BOYD	☐ IN PERSON	☐ PHONE	☐ NO
SEAT 5	JOEY POSEY	☐ IN PERSON	☐ PHONE	☐ NO

9. Board Members' Comments/Requests

10. Public Comments

11. Adjournment

Should have any questions or concerns, please do not hesitate to contact me directly at (561) 346-5294 or Andrew Kantarzhi at (415) 516-2161.

Sincerely,

Cindy Cerbone

Cindy Cerbone
District Manager

FOR BOARD MEMBERS AND STAFF TO ATTEND BY TELEPHONE
CALL-IN NUMBER: 1-888-354-0094
PARTICIPANT CODE: 867 327 4756

TEAMS MEETING ID: 233 035 830 379
PASSCODE: F8HoXp
LINK:
https://teams.microsoft.com/l/meetup-join/19%3ameeting_MGMyMzBmMzQtYjg2NS00ZDE1LWEwOTYtZmEzYmU1ZWU3NzE3%40thread.v2/0?context=%7b%22Tid%22%3a%2294348502-fda0-4a80-8edb-52bd87fa537b%22%2c%22Oid%22%3a%2250b37528-b730-4578-8935-dc90866a9569%22%7d

DEERING PARK
STEWARDSHIP DISTRICT

3AI

RFQ Response

EDGEWATER WETLAND PARK PROJECT

Deering Park Stewardship District

PHILLIPS & JORDAN, INC.

Matt Eidson
meidson@pandj.com
941.705.9558

30115 State Road 52
Suite 301
San Antonio, FL 33576
pandj.com

Photo: Pasco County Master Reuse System (4G+1 Ranch), Land O'Lakes, FL

Deering Park Stewardship District
2300 Glades Road, #410W
Boca Raton, FL 33431

Due June 25, 2025 @ Noon EST

30115 State Road 52, Ste. 300
San Antonio, FL 33576
Office 813.780.4300
PANDJ.COM

June 25, 2024

Deering Park Stewardship District
2300 Glades Road, #410W
Boca Raton, FL 33431

RE: RFQ Response for Design-Builder for the Edgewater Wetland Park Project

Phillips & Jordan, Inc. (P&J) and Jacobs ("Project Team") thank you for the opportunity to present our qualifications for the Deering Park Stewardship District (DPSD): Design-Build Services for the Edgewater Wetland Park Project. It is an honor for the P&J family to have Jacobs, a leader in the industry, as our partner to exceed your expectations for the Design-Build Services for the Project. Our project history, varying roles, and strong, aligned corporate values provide an exceptional project team that works toward a common goal.

P&J, a Phillips Infrastructure Holdings, Inc. company, is a certified woman-owned, heavy civil and power infrastructure contractor established in 1952. We build, maintain, and modernize resilient critical infrastructure that matters across the country in five key markets: Water, Mining, Industrial & Commercial, Power (Transmission & Distribution, Renewables, and Generation), and Disaster Response. As a People First company, we prioritize our team, the environment, and our communities throughout our organization, and our Core Values of Integrity, Safety, Quality, and Production guide our daily business practices. The projects we pursue support critical initiatives in water management and restoration, energy transition, infrastructure resiliency, and extreme weather sectors. Addressing these drivers provides tangible, lasting value and lays the groundwork for stronger, more resilient communities, which is our primary goal as we strive to lead infrastructure development through innovation and flawless execution.

The P&J and Jacobs team brings a proven partnership and unrivaled expertise in developing successful design-build projects, particularly in treatment wetlands planning, design, and commissioning. Jacobs, with its Global Center of Excellence in Treatment Wetlands based in Florida, has unmatched experience in constructed wetland ecological parks such as Wakodahatchee (1996), Green Cay Wetlands (2006), Village of Wellington Peaceful Water (2008), Thomas B. Mack Park (2006), Freedom Park (2010), City of Ocala Wetland Recharge Park (2020), and Longs Pond (2022).

Our team has recent experience with projects very similar to the Edgewater Wetland Park, including the 4G Ranch Wetlands and Ocala Wetland Recharge Park. With over 40 years of experience in treatment wetlands in Florida and pioneering contributions to treatment wetlands technology globally, Jacobs authored the first edition of the Treatment Wetlands textbook. **This extensive expertise uniquely positions our team to deliver exceptional results for the Edgewater Wetland Park project.**

30115 State Road 52, Ste. 300
San Antonio, FL 33576
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PANDJ.COM

After you have reviewed it, we would like to meet with you to discuss the various components of our proposal, including approach and risk. Please feel free to contact me at 407-509-8563 or aphelps@pandj.com if you have any questions or need additional information.

Sincerely,

Art Phelps, Sr. Vice President
Phillips & Jordan

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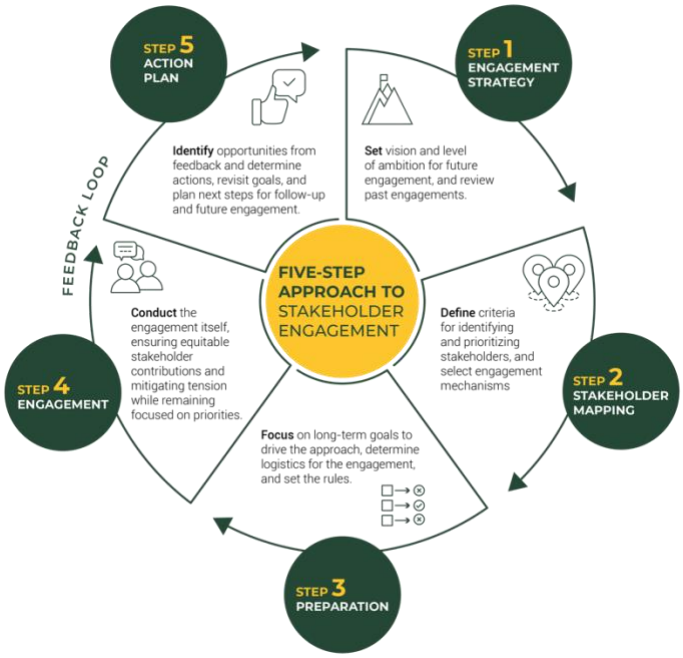
1 QUALIFICATIONS OF THE TEAM (MAX PAGES 15)

1.1 Stakeholder Engagement & Public Outreach Qualifications

Stakeholder engagement is important in any construction project, but it has a unique significance for design-build construction projects. With the close involvement of multiple project partners, government regulators, internal DPSD stakeholders, and the public, clear and effective communication will be key to mapping out the needs of the community, ensuring project execution meets those goals, and resolving any issues that might arise during construction.

A strong local presence is another key aspect of any successful public outreach program. Our team believes that to understand the needs and concerns of key stakeholders and the public, the single point of contact must be a member of the Project Team. For the DPSD project, the Team will utilize our internal publications, marketing, and outreach staff. Emily Torgerson, Senior Vice President of Strategic Communications, and the support of the highly advanced media team within P&J ensure all needs will be met with the highest level of knowledge and professionalism.

The Project Team is committed to fostering and maintaining engagement from the planning stages all the way through execution, beginning with a clear determination of with whom we need to engage and the best method of doing so. This includes mapping out their specific needs and interests related to the project and prioritizing when to engage them on goals and concerns. In addition to identifying and prioritizing key stakeholders, the Project Team will create a simple project website that will allow anyone to sign up to receive project updates and information via email. The website's homepage will have a dedicated phone line for questions and concerns. Callers will receive a response within 24 hours.



After identifying stakeholders and determining the engagement plan, it is critical to understand these logistics and expectations moving forward. The Project Team will prepare for success by ensuring that all parties understand what forms of communication (e.g., in-person meetings, phone calls, emails, etc.) are expected and the response timeline and designated points of contact. Actual engagement will be conducted following this established pattern throughout the project, allowing for equitable contributions from all stakeholders. Regular, thoughtfully organized communication keeps all stakeholders informed about progress, enabling everyone involved to stay focused on the project's main priorities.

Throughout the project, the Project Team will utilize information gathered through stakeholder engagement to identify opportunities to improve upon operations and reassess shared goals. Input from both internal and external stakeholders will be analyzed for areas of agreement and disagreement, and we will work with DPSD to outline the next steps to incorporate the feedback into new plans, including clear action items and timelines for implementation.

Engagement is a cyclical process, and part of each debrief session with internal and external stakeholders will be assessing the current engagement methods and improving upon them for the future. Follow-up engagement will also occur simultaneously to ensure that action items are completed and working to satisfy all stakeholders. The Project Team is committed to developing successful, productive relationships to provide the best outcome for DPSD, the project, and the community it serves.

1.2 Design & Permitting Qualifications

Jacobs will apply its over 40 years of successful constructed wetland design experience in Florida to design a groundwater recharge wetland that mimics natural wetlands in both appearance and functionality. Nearly all our team members are experienced in wetland design, which will optimize the Edgewater Wetland Park project in the following ways:

- Strategic grading plan that varies wetland water depths, promotes wetland vegetation diversity and health and provides a seasonal hydrologic regime that maximizes infiltration capacity, ecological diversity and value, and visitor experience
- Field investigations and hydrogeologic analysis that will provide reliable and accurate infiltration rates to guide the basis of design for groundwater recharge wetlands
- Automated water level fluctuations to manage seasonal flows while maintaining natural hydroperiods that sustain healthy wetland vegetation and maximizing driving head for recharge
- Integration of existing and planned trails with public amenities that enhance educational value and the visitor experience, such as trails, boardwalks, and lookouts placed strategically near deep open-water zones and marsh zones to create picturesque, panoramic views of the wetland communities

The boardwalks at The Ocala Wetland Recharge Park are a novel product consisting of a fiberglass pilings and framing and composite decking, providing a long-lasting product that requires little to no maintenance.

Working in tandem with DPSD and its representatives, England Thims & Miller and Wetland Solutions, Inc., we will apply our knowledge and resources as the No. 1 Design Company (ENR, 2023) to develop a beautiful yet cost-effective wetland that is treasured by all.

Jacobs brings a long history of successful wetland permitting to the Edgewater Wetland Park project, including knowledge of the regulatory drivers associated with the Mosquito Lagoon and the Indian River system and solid relationships with the Florida Department of Environmental Protection (FDEP) and the St John's River Water Management District (SJRWMD).

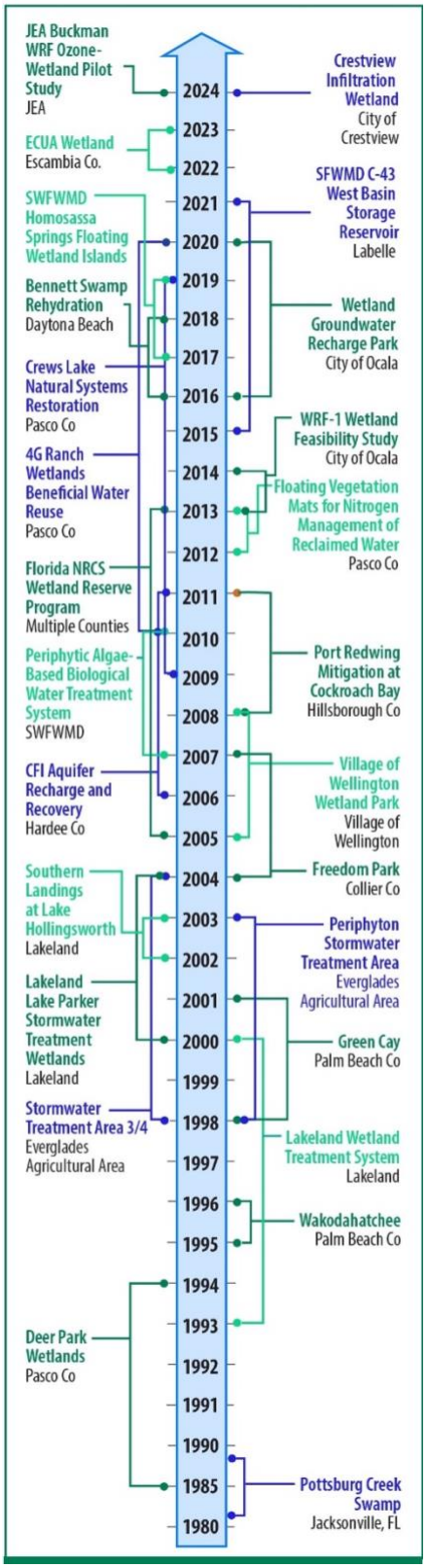
Our collaborative permitting approach engages regulatory agencies early in the project, from pre-application meetings to permit application preparation and submittal. Our recent success in permitting the 4G Ranch Wetlands without the need for a Request for Additional Information (RAI) demonstrates our ability to gain regulatory acceptance of the Edgewater Wetland Park project. We pride ourselves on providing robust analysis and results to the regulatory team for comments and questions well before permit applications are submitted. This streamlines the agency review process, avoids costly RAIs, and allows the construction phase to begin on an expedited time schedule.

Our core design team is made up of world-class experts in treatment wetlands, including:

Rafael Vazquez-Burney, PE is a global treatment wetlands expert with 18 years of experience focused on designing, permitting, and constructing natural treatment systems both locally and abroad. Rafael was the project manager for award-winning natural systems projects such as the 4G Ranch Wetlands and Ocala Wetland Recharge Park and brings both the local knowledge and extensive experience required to design the Edgewater Wetland Park so that it's successful and productive long-term.

Allison Lewis, PE has dedicated her entire career to delivering natural systems projects and has 12 years of experience in modeling, designing, permitting, monitoring, operations optimization, and providing services during construction and public involvement for treatment wetland projects. Allison provided critical engineering support for the 4G Ranch Wetlands and the Ocala Wetland Recharge Park. She is a technical lead for many other treatment wetlands projects, such as the popular new

JACOBS HAS MORE THAN 40 YEARS OF CONSTRUCTED WETLANDS EXPERIENCE IN FLORIDA



Longs Pond Ecological Park in Lancaster, PA. She understands the importance of developing solutions to maximize environmental resource benefits.

Amanda Berens, PE, PG has 25 years of experience in local and regional groundwater modeling, surface water modeling, integrated modeling, and hydrogeologic site characterization. She was the lead hydrogeologist and modeler for 4G Ranch Wetlands and Ocala Wetland Groundwater Recharge Park, both proving to provide the exact infiltration rates she developed during design. Amanda's expertise is of upmost importance to the appropriate design of the Edgewater Wetland Park, as the infiltration rate is the sole basis of design for groundwater recharge wetlands, and it must be correct.

Richard Morrison, PE, has over 20 years of experience in the design of water facilities, focusing on large civil infrastructure such as constructed wetlands and reservoirs. Seasoned in every site/civil design component, including site layout, grading, road design, stormwater conveyance and management, and water and wastewater utility design, he was the lead designer of the 4G Ranch Wetlands and the Ocala Wetland Recharge Park, among other treatment wetland projects across the country.

This core team will apply the lessons learned from all the treatment wetland projects that Jacobs has implemented throughout our history to ensure the success of the Edgewater Wetland Park Project.

1.3 Construction Qualifications

The Project Team comprises the industry's most talented and respected individuals within the water resource market space. Our group not only brings top engineers and managers together but also decades of experience on the construction front. For more than 70 years, P&J has provided top clients nationwide with the highest performance and project delivery standards.

For almost four decades in the Florida utility market, the Project Team has provided oversight, designed, and executed both large- and small-scale utility, water resource, distribution, and reclaimed water projects throughout the state. P&J's Heavy Civil group has led and partnered with leaders in the industry to design and construct award-winning projects throughout the state. With our vast equipment resources and manpower locally positioned within the state of Florida, we can provide DPSD with an exceptional concept and design team and maintain that same team through construction, implementation, and operational testing. The Project Team's top priority for the District is to maintain continuity throughout the entire process from design to construction, which can only be achieved if the construction team is engaged early in the design phase of services and executes the project.

P&J's ability to interpret design drawings and implement technology is evident in the detailed construction of the wetland cells at the 4G Ranch.

As the project moves from design to construction phases, our team maintains consistent continuity throughout this process by integrating staff from design and engineering into the construction group. Our construction staff reviews all historical data brought forth from design and engineering, prepares the preconstruction development documents, organizes our data management system for construction phase services, and begins mobilizing key construction management staff to the site. Our field leadership will begin mobilizing the necessary staff for construction.

As our management team selects key field personnel for the Edgewater Wetland Park Project, pulling from our highly trained and detail-oriented staff of over 1,300 employees, crews will begin to arrive on site. Utilizing our company-owned equipment group, National Fleet Services, housing nearly 3,000 pieces of the industry's most up-to-date and technologically advanced equipment, our crews can begin work immediately on or ahead of schedule. Each piece of equipment utilizes the latest GPS machine control technology, ensuring the most accurate and efficient construction operation, leading to an on-time and on-budget project.

The 4G Ranch Wetland cells were constructed using GPS-mounted bulldozers to flawlessly construct the complex organic shapes included in the design designed.

Matt Eidson, DBIA, ENV SP, was selected as the Project Design-Build Manager for this project because of his experience in the underground utility and, specifically, the water, wastewater, and water resource market. Mr. Eidson is accredited through the Design-Build Institute as a Design-Build Professional. He has over 25 years of experience in design and construction management for prestigious clients such as the United States Army Corp of Engineers, the Florida Keys Aqueduct Authority, Cobb – Marrietta Water Authority, and over 20 additional municipal clients. His early engagement will give the team valuable engineering suggestions for the construction phases and lessons from some of the state's most prestigious projects.

1.4 Commissioning Qualifications

The P&J Team understands the importance of successful commissioning of the DPSD Project and the intent to have a project-specific commissioning phase to support project success. A key to that success is a reliable, well-designed system that can meet the project's needs and provide for the unknowns.

Commissioning of groundwater recharge wetlands involves careful water level control, the ability to predict initial infiltration, the timing for plantings, and an understanding of erosion potential during the first fill. Jacobs has supported the commissioning of dozens of constructed wetlands in Florida and has recent experience commissioning the 4G Ranch Wetlands and the Ocala Wetland Groundwater Recharge Park, both of which provided invaluable lessons learned.

The design of the Ocala Wetland Recharge Park took advantage of existing ponds to provide open water habitats on the downstream ends of each wetland cells.

Full demonstration of water level control is imperative to establishing wetland vegetation since young plant species are very sensitive to over or under inundation. Jacobs staff provides field support to document water levels at different planting depths to ensure that the investments made on plants are not wasted due to inadequate inundation levels. As vegetation matures, water levels are increased until seasonal fluctuations on water levels can self-maintain the built ecosystem. The calibrated models prepared during design and permitting are used to predict how much water is needed to provide the planned levels of establishment depths based on initial infiltration rates. System design will consider the potential for erosion during first fill. Site grading and cell design will be done in a way that erosion is avoided and that all planting zones are provided with the hydropatterns for which those species are adapted to. A detailed commissioning plan will be prepared prior to first fill that will detail how to gain complete water level control, recommend timing for plant establishment based on water availability and rainfall, and detail a process by which planting and inundation should be maintained during the first growing season.

Effective stockpiling and re-spreading of topsoil from the site was used during the construction of the 4G Ranch Wetlands to support establishment of erosion protection grasses.

To gain water delivery and water level control, all control components must be installed and tested. All PLC and HMI developed programs go through multiple layers of testing before they are deployed in the field. All software is tested internally and then, if appropriate, go through a client witnessed Factory Acceptance Test (FAT). Once on site, all I/O and network wiring is checked point-to-point against the drawings and the software. Only after all wiring and components pass this testing will the field testing of the system begin. The field testing involves the electrical contractor, general contractor, vendors, and our staff to ensure a thorough test. All signals are tested independently to insure proper instrument and equipment operation. Once accepted, the system will be placed in manual mode and tested. After manual tests, the system will be placed in automatic mode and tested. During all

of these tests, Jacobs' personnel will be present to direct, witness, record, and troubleshoot the tests. The Client's operations and maintenance staff are encouraged to witness and be part of the testing to best learn the system. We will provide informal training for team members during startup to develop familiarity with the system so they may support it without delay.

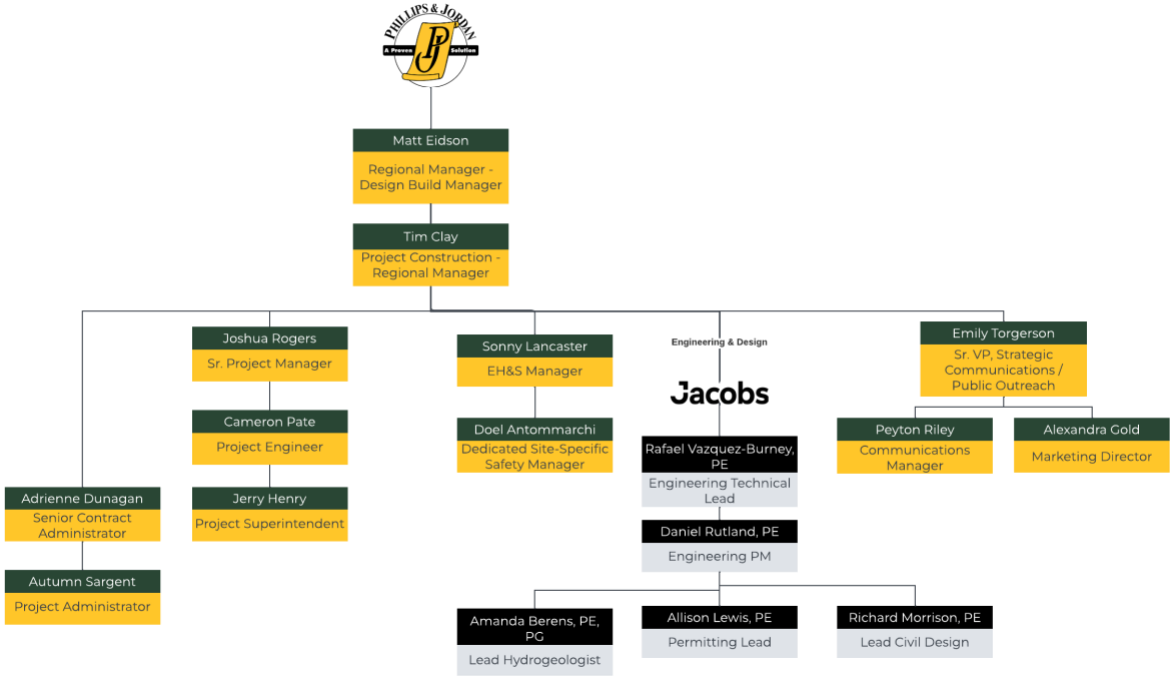
After substantial completion, formal training will be provided. Final documentation such as record drawings, O&M Manuals, and copies of the programs will be delivered, and the project I/C Comms will then be completed.

The manifold at the 4G Ranch Wetlands provides remote and automatic control with the ability to adjust cell water levels and flowrates and was constructed for easy access of equipment for maintenance.

1.5 Project Team Qualifications

With almost 200 years of collective experience among the team members listed below, we are pleased to introduce the Edgewater Wetland Park Design-Build Services (Project Team) to the Deering Park Stewardship District. From Engineers, Biologists, Scientists, Ph.D.s, Executives, Project Managers, and Superintendents, our goal is to deliver a safe, high-quality project to the community. Together with our team of subcontractors, we welcome the DPSD staff as a valued team member and partner through the life of this project.

1.5.1 Org Chart



1.5.2 Key Personnel

MATT EIDSON, DBIA, ENV SP: REGIONAL MANAGER, ALTERNATIVE DELIVERY

Project Role: Project Design Build Manager

Matt Eidson has 25 years of construction experience, including construction management, safety, and infrastructure development. He has constructed and managed numerous field operations with various types of contract disciplines from CMAR, PDB, DB, DBB, and DBO. In addition, Mr. Eidson has installed nearly two million linear feet of underground utility throughout the southeast and has expertise in several underground utility techniques and technology. Nearly half of Mr. Eidson's career has been spent in the water quality and conservation market. In his current role as Regional Manager with P&J, Mr. Eidson provides coordination of various engineering firms and disciplines, coordination of stakeholders and subcontractors, preparation of estimates and budgets, maintenance of the project schedule, monthly review of project costs, development of project-specific document control processes and procedures for our Heavy Civil division. His experience in project controls, including scheduling, cost tracking, and recovery planning, aids in successfully completing his duties.

RAFAEL VÁZQUEZ-BURNEY, PE, TECHNOLOGY FELLOW

Project Role: Engineering Technical Lead

Rafael Vázquez-Burney, PE, specializes in Treatment Wetlands with extensive experience leading large technical teams in innovative and award-winning projects. He holds an M.C.E. and a B.S. in Environmental Engineering from North Carolina State University and is a registered Professional Engineer in Florida (No. 70768). Rafael is a globally recognized expert in treatment wetlands, focusing on testing and implementing wetlands for both private and public clients. His work includes in-depth technical knowledge of natural treatment technologies targeting specific compounds, including emergent contaminants, and a deep understanding of regulatory requirements in Florida.

Notable projects include the 4G Ranch Wetlands in Pasco County, FL, where Rafael developed the project concept, led hydrogeological testing, secured permits, and managed the construction of a 176-acre wetland system. He also managed the Wetland Groundwater Recharge Park in Ocala, FL, aimed at offsetting consumptive use impacts through a 35-acre groundwater recharge wetland park. Additionally, Rafael has worked on the Central WRF Effluent Management Wetland in Pensacola, FL, where he led the design and implementation of a 40-acre wetland to manage effluent and reduce nutrients. His international experience includes the United Utilities Bolton WWTP Effluent Wetland in the UK, where he assessed the feasibility of converting a legacy sewage farm into a treatment wetland, and the Waukegan Harbor Infiltration Treatment Wetland in Waukegan, IL, where he designed an infiltration wetland system for remediation groundwater treatment.

DANIEL RUTLAND, PE, SENIOR WATER RESOURCES PROJECT MANAGER

Project Role: Engineering Project Manager

Daniel Rutland, PE, has over 15 years of experience in stormwater design, watershed planning, groundwater modeling, state water policy development, and environmental permitting. He holds an M.S. and a B.S. in Agricultural and Biological Engineering with a focus on Land and Water Resources from the University of Florida. As a Professional Engineer in Florida (PE 77035), Dan has led numerous projects involving stormwater retention, water quality improvements, and groundwater gradient control. In addition to his extensive water resources design and permitting projects experience he has managed construction projects, completed value engineering, developed multi-million dollar cost estimates, and oversaw construction planning for Enviro-Tech Systems, including the Brighton Valley Dispersed Water Management Project, Nubbins Slough Stormwater Treatment Area Rehabilitation, and the C-43 Reservoir Site Preparation Project.. Dan's work spans various large-scale projects such as the design and construction of the L-73 Reservoir in Osceola County, the design and permitting of the Istokpoga Marsh Watershed Improvement District, and the construction of the Lake Down Sub-Basin 15 Stormwater Treatment Project. His expertise has been pivotal in reducing nutrient loads in the Lake Okeechobee Watershed and restoring ecosystems at the Bob Janes Preserve.

ALLISON LEWIS, PE, SENIOR TECHNOLOGIST

Project Role: Permitting Lead

Allison Lewis, PE, specializes in Natural Treatment Systems with 12 years of professional experience at Jacobs. She holds an M.E. and a B.S. in Environmental Engineering from the University of Florida and is a registered Professional Engineer in Florida (No. 85332). Allison has led feasibility studies, field investigations, modeling, design, construction services, and permitting for large-scale treatment wetlands, storage facilities, and land application systems. Her notable projects include the Long's Park Water Quality Improvement Project in Lancaster, PA, where she designed a natural treatment system for stormwater management, the Wetland Groundwater Recharge Park in Ocala, FL, where she led the design and permitting of a 35-acre treatment wetland system, and the 4G Ranch Wetlands in Pasco County, FL, where she supported the permitting, design, and construction of a 175-acre groundwater recharge treatment wetland. Additionally, she worked on the Waukegan Harbor Infiltration Treatment Wetland in Waukegan, IL, providing design services for an infiltration wetland system to treat remediation groundwater. Allison is known for her strong public involvement and stakeholder engagement skills, contributing to several award-winning projects.

RICHARD MORRISON, PE, SITE/CIVIL LEAD

Project Role: Lead Civil Design

Richard Morrison, PE, has expertise in the design of water and wastewater treatment facilities, water distribution, wastewater collection and transmission systems, and large civil infrastructure such as constructed wetlands and reservoirs. He holds a BS in Civil Engineering from the University of Florida and is a registered Professional Engineer in Florida (#67713), GA, SC, NC, and TX. Rich's comprehensive site/civil design experience includes site layout, grading, road design, stormwater conveyance and management, and utility design.

Notable projects include leading the design of the 4G Ranch Wetlands in Pasco County, FL, where he managed the design of a reclaimed water treatment and infiltration wetland system, and the Ocala Wetland Groundwater Recharge Park in Ocala, FL, focusing on site layout and yard piping. He also led the engineering for the Pasco County Master Reuse System Boyette Road Reservoir, and managed the emergency replacement of a 42-inch forcemain in Innisbrook, Pinellas County, FL. Additionally, Rich has been involved in significant upgrade projects like the Southwest WRF in St. Petersburg, FL, and the Greenland WRF in Jacksonville, FL, where he provided design and construction management for advanced treatment facilities.

AMANDA BERENS, PE, PG, PRINCIPAL TECHNOLOGIST

Project Role: Lead Hydrogeologist

Amanda Berens, PE, PG, is the Principal Technologist for Hydrogeology and Groundwater Modeling at Jacobs Southeast Water Resources Group. She leads a team focused on innovative groundwater and surface water solutions, integrating modeling and hydrogeologic data collection. With a background in both engineering and geology, Amanda holds an MS in Civil Engineering with a Water Resources emphasis from the University of California - Irvine and a BS in Geological Engineering from the Missouri University of Science and Technology. She is a registered Professional Engineer and Professional Geologist in Florida.

Amanda's expertise includes surface water, groundwater, and integrated modeling, as well as hydraulic, hydrologic, and hydrogeologic fieldwork and data analysis. She has worked on significant projects such as the 4G Ranch Wetlands Project in Land O' Lakes, FL, where she developed design criteria for groundwater recharge, conducted site investigations, and utilized groundwater flow models to optimize aquifer recharge rates. In Ocala, FL, she contributed to the Wetland Groundwater Recharge Park by designing field studies and calibrating groundwater flow models to benefit the upper Floridan aquifer and Silver Springs. Additionally, she has experience with the Central WRF Effluent Management Wetland in Pensacola, FL, where she implemented field investigations and developed site-specific groundwater flow models to optimize recharge solutions.

1.6 Team Qualifications in Design Build

P&J and Jacobs have selected project team members based on experience and qualifications within the collaborative delivery market. The selected project leads, Matt Eidson with P&J and Daniel Rutland with Jacobs, have decades of experience within the design and construction scope of services. Subject Matter Expert in treatment wetlands, Rafael Vazquez-Burney of Jacobs worked very closely and collaboratively with P&J on the 4G Ranch Wetlands in Pasco County, where Jacobs provided engineering services and P&J was the Construction Manager at Risk on a large-scale and successful groundwater recharge wetland.

Vegetation establishment at the 4G Ranch Wetlands after only one growing season is proof of robust design and construction.

Matt Eidson with P&J holds the Designated Design Build-Professional (2019) certification and will hold the role as Project Design Build Manager. Mr. Eidson has successfully completed nearly one billion dollars of work in place under various forms of alternative delivery principles. From the beginning of the Design-Build delivery model, Mr. Eidson has held many levels of responsibility from the ground up. Matt initially worked in project management under USACE in the early 2000s for nearly five years on various military installation infrastructure upgrades utilizing the Design Build model and moving forward as Senior Project Manager for various infrastructure installation and improvement projects throughout South Florida, working as Design Build Manager, Operations Manager, and executive-level management. Mr. Eidson has successfully completed projects under the Progressive Design Build, Design Build, Design Build Operate, and Construction Manager at Risk models. Working knowledge of collaborative delivery allows Mr. Eidson to provide the best value possible to the client and key stakeholders.

As a Design Build Contractor, Jacobs' proposed engineering staff are very familiar with the Design Build model and understand the importance of collaborative delivery. All staff proposed by Jacobs to provide engineering services for this project have worked on Design Build projects for Florida clients and understand how to benefit from this delivery model to provide the most cost effective and timely delivery while providing the required performance. Daniel Rutland and Rafael Vazquez-Burney will coordinate with P&J staff continuously during design and permitting and participate in key coordination with the owner, its representatives, and other stakeholders, providing a seamless team of engineering and construction to deliver this important project.

1.7 Funding Support Qualifications

The teaming efforts of P&J and Jacobs will work to identify and navigate potential funding opportunities for the DPSD. Their extensive knowledge of Federal and State grant funding opportunities and the ability to successfully navigate the grant process and applications provide an invaluable resource to the Project Team. Providing additional funding to the project allows the Project Team to complete portions of the project under the current delivery contracts that may not have been previously possible. The Project Team will continue to work diligently to explore all available opportunities.

Not only does the team understand how to successfully navigate the State and Federal grant application and acceptance process, but we also have in-depth knowledge of the legal parameters of funding acceptance and project application as pertains to audit compliance requirements of Section 215.97(8) Florida Statute. Project

reporting practices, labor reporting, interagency communication, and accurate financial forecasting and reporting in compliance with Section 215.97(2) State Statute are only a few of the many tasks that our team is well versed in.

Our collective experience supporting communities to secure funding for these types of projects is showcased in the delivery of the 4G Ranch Wetlands, where we supported Pasco County to secure funding from SWFWMD by providing defensible quantifiable benefits and by providing sealed engineer's cost estimates from Jacobs and contractor cost estimates from P&J in parallel. More recently, Jacobs has been successful in securing grant funding from FDEP for treatment wetland projects, such as the Ocala Wetland Recharge Park, which was granted $3M in Springs Funding, and for an ongoing project with JEA that just received $3M from SJRWMD and $1M from FDEP's Innovative Technologies Grant.

Our team understands how to support communities in securing funding and comply with grant requirements and meet funding deadlines. We are familiar with FDEP grants like the Indian River Lagoon Grant already secured for this project, and we will work to ensure that all requirements are met and that deadlines are satisfied to maximize the value of the grant.

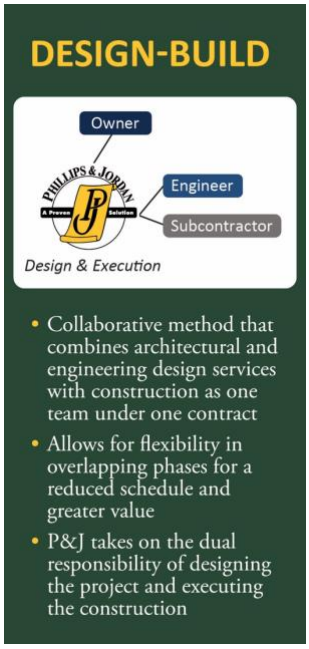
1.8 Recent, Current, and Projected Workloads

P&J		
2023	**Current though April**	**Projected**
$737MM	$244MM	$802MM

2 COLLABORATIVE DELIVERY APPROACH (MAX PAGES 15)

2.1 Collaborative Approach Philosophy to Design Build

Design Build (DB) has long been a delivery model standard that allows for true early project collaboration. From project concept through the SOQ process to award, the flexibility of a DB allows the owner to make changes in design, allows for variants in cost and schedule, and even provides an off-ramp for the project if necessary. DB teams for projects must understand and have an inherent knowledge of the processes and procedures to initiate and complete the project successfully. Our Project Team is exceptionally knowledgeable in this delivery model and shares the common goal with the Owner, DPSD.



The Design-Build project process consists of two key phases. Phase I, Pre-Construction Services, is indeed the most vital to project success. During Phase I, the "basis of design" collaboration between the Owner and Project Team allows the Owner to convey their needs and expectations on a high level. This early collaboration advances the design of the project, and the decision-making process can begin. The Owner must be heavily engaged in this process. The common goals of the project are developed, Phase I cost estimates, risk analysis, and scheduling can begin.

The Project Team will provide DPSD with several cost and schedule estimates throughout collaborative benchmarks. Typically, these estimates will be provided at the 30%, 60%, and 90% design milestones, with a contingency set aside in each budget that narrows as the design progresses. These early cost estimates will allow DPSD insight into project cost and completion expectations and enable variable input and value engineering to occur. The project's goal is to provide the best value of service and achieve the highest level of project standards per dollar expended.

At this critical phase, moving from pre-construction to construction, the DPSD can move forward into construction or exercise an "off-ramp" and look to deliver the project using a different procurement method. Perhaps the most notable DB option is this delivery method, which allows for differing contract models. The project can be completed with a two-part contract, Phase I and II, or a single contract. These contract models could be agreed upon to allow early work, permitting, and procurement to begin for certain scopes, thus saving valuable schedule time. Through early collaboration, these delivery options exercised by the District can potentially add exponential value to the project. If all terms are acceptable, we will move into Phase II.

Phase II services, Final Design and Construction, move the team into a final schedule and pricing evaluation, all construction standards are complete and agreed upon; the Project Team provides the final schedule of values. The DPSD/Project Team will move forward, and construction will proceed. With the collaborative efforts of DPSD and the Project Team, the project will move from construction into operations and eventually turn over to the Owner.

A truly DB collaborative delivery approach is defined as ***Collaborative***. The Team, including the Owner, Design Engineer, and Construction Contractor, must share common goals, work ethic, and standards. The critical component is not one entity but a collaborative team effort working toward a common goal.

2.2 Design Builder Staffing Utilization

P&J staffs each project awarded to our firm with a dedicated Project Manager, Project Engineer, and Field Superintendent. This commitment ensures management is present and on-site dedicated to quality management, on-time resources, and cost control. The management team has 100% focus on their appointed projects, allowing for timely and accurate decision-making, providing additional oversight of all fieldwork, and allowing for direct points of contact on the project site.

This approach to project management also applies to safety management. Our dedicated safety managers assist in constructability review, project planning, and staffing during the design and engineering phase. The Edgewater Wetland Park project will always have a designated safety manager on site during any operations, overseen by our regional safety manager.

Field crews are initiated as needed to complete specific tasks that align with our project schedule and integrated work plans.

2.3 Owner Integration

Owner integration for the Edgewater Wetland Park Project comprises several key elements. Early on, in the Phase I component of the project, the "basis of design" is developed. This critical step in the DB process brings the Owner's concepts and pre-determined design criteria to the DB team and allows the engineering and design staff to further develop the essential criteria into the full-scale design. The basis of design collaboration meetings is an opportunity for each department sector of the Owner's team to achieve project "buy-in". Project Management, maintenance staff, operations, communications, and any additional key stakeholders the Owner deems necessary will all have time to review and provide further input to the project design and development team.

The design of The Ocala Wetland Recharge Park included a very detailed planting plan to create habitat mosaics and enhance biodiversity.

As the Project Team works through the design, develops key specifications, and forms the operational criteria, pricing and schedule will begin to develop. At this stage in the design-to-construction phase process, DPSD will have significant, impactful tasks that will be critic al to moving the project forward. As with any municipality, pre-approved materials listings, pre-selected vendors, and preferred subcontractors exist. These items are typically

based on price, the best value, and availability in today's challenging supply chain market. All decisions at this milestone are important in determining the overall scope and schedule. The Owners "buy-in" to this process is critical.

Owner integration within the DB process is essential to the overall project success. Collaboration, open dialogue, and goal-oriented problem-solving are invaluable. The Project Team is excited to collaborate with DPSD and, after this project's success, many other projects in the future.

2.4 Communication Plan

The Project Team has outlined the collaborative approach to our communication strategy. The strategy is critical for clear, consistent, and open dialogue between all project stakeholders. It also outlines the basis for early document control and recordkeeping throughout the project's lifecycle. As with any collaborative delivery model, this plan allows for modification to best suit the project, the client, its stakeholders, and the public needs.

2.4.1 Communications

INTERNAL STATUS MEETINGS

The Project Team has a minimum of one weekly status meeting and any additional task-focused meetings as required. The meetings are to be chaired by the Design-Build Manager to support the proper direction of the design, estimating, and construction team. Upon accepted and permitted design moving into the construction phase, the project manager will chair the meeting to direct the work's execution. Meetings are previewed with an agenda, previously documented meeting minutes, and an action item log provided 24 hours before the meeting.

INTERNAL E-MAILS

E-mail communications between team members will be extensive. E-mails should be used to transmit, request, or clarify information. All e-mails should have the prefix "(Edgewater Wetland Park Project)" in the subject line with the task and topic to follow.

VIRTUAL COMMUNICATIONS

Virtual communications may be necessary for both the internal project team and owner-involved project meetings. When applicable, these meetings shall be recorded and electronically filed by folder on the SharePoint site.

INTERNAL WRITTEN COMMUNICATIONS

Internal written communications include letters, memorandums, calculations, reports, etc., that are not major deliverables but will be provided to the Owner under this contract. All written communications should be distributed to the proper team members with the subject line, including the "Edgewater Wetland Park Project"

title, the related subtask(s), and the file name. The Design-Build Manager, EOR, and Project Manager will be copied on internal and external written communications.

DATA COLLECTION AND MANAGEMENT PLAN

A Data Collection and Management Plan (DCMP) describes data sharing and transfer protocols for the project's duration. DPSD and the project team will agree upon it under separate cover as acceptable. The project team will set up a secure SharePoint site and provide access to key stakeholders at DPSD for access, collaboration, and file sharing.

2.4.2 Design Build Entity and DPSD Communications

BI-WEEKLY AND MONTHLY PROGRESS MEETINGS

Bi-weekly and monthly progress meetings will be held with the Owner, the build Team, and eventually, the Construction Team. Initially, the team will hold bi-weekly meetings for design review and discussion. During the construction phase of operations, it will be at the mutually agreed-upon frequency. Special task meetings can also be called 48 hours before significant issues arise. Meeting minutes and an action items/issues log will be used to document meeting issues, decisions, and required follow-up actions.

COMMUNICATIONS WITH THE DISTRICT

All written communications to the Owner and Owner's representatives will be directed through the Design Build Manager and supported by Jacobs' Project Manager. However, it is expected that some direct communication will occur between the Jacobs Project Manager and Owner staff throughout the project. All action items from those conversations are also expected to be documented and provided to the Design Build Manager. In addition, informal emails and correspondence to the Owner will occur with the proper cc's (Project Manager, Pre-Construction Manager, and Design Manager). All emails should have the prefix, "Edgewater Wetland Park Project (example)," and the subtask in the subject line with the following topic. All deliverables will be sent to the Owner's Project Manager at a previously provided email address and other Owner staff as designated by the Owner Project Manager.

MONTHLY PROGRESS REPORTING

A bi-weekly progress report will be prepared and emailed to the Owner's Project Manager on or before the progress meeting date. The report will document project progress by task. Issues relative to budget and schedule will be tracked and identified in this report. A tentative two-week "look ahead" will also be provided.

2.5 Risks and Risk Management

P&J's risk management process is integrated into every significant project across three phases: Design, Preconstruction, and Construction. Risk assessment is a continuous consideration from the project's inception through its completion.

Design Phase: During the design phase, the Project Team identifies risks based on project specifications, environmental regulations, permits, site visits, and past experience with similar projects. These risks are recorded in a risk management log, which is then evaluated and mitigated as much as possible through Q&A sessions and constructability methodologies. The Project Manager is responsible for obtaining approval for all risk-related assumptions and mitigations. The risk management log is shared with everyone involved in the design phase to ensure comprehensive awareness and action.

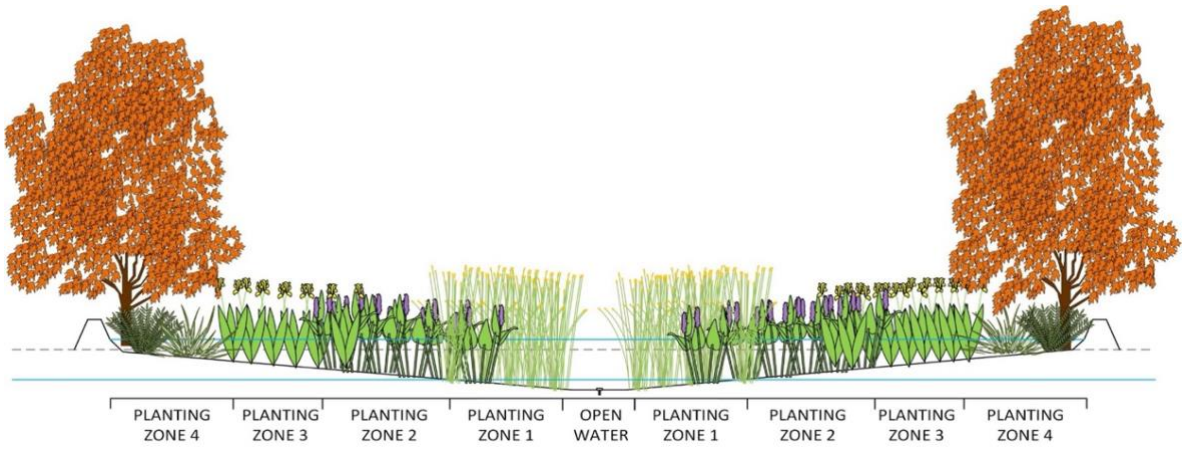
Preconstruction Phase: The project manager hands off the risk management log to the Design Build Manager, who evaluates all assumptions and risks to ensure proper initial assessment. Risk management is discussed and updated monthly with the entire team and during every constructability review, incorporating mitigation strategies into the design. New risks identified during these reviews are added to the list, and mitigation options are discussed.

Construction Phase: Risk management and mitigation are assigned to site personnel under the Senior Project Manager, detailed within a responsibility matrix. Identified risks are incorporated into the project Inspection and Testing Plan (ITP), with mitigation measures and control forms established. A communication plan defines the representatives to receive information and the timelines for reporting.

Continuous Risk Management: The Project Team employs dedicated Risk Management personnel, including Contract Managers, Safety Managers, Project Managers, and Superintendents, who identify, assess, and mitigate risks throughout all project phases. Risk manifests in various forms, from workforce issues and supply chain delays to construction conflicts and public opposition. These risks are continually analyzed and mitigated as the project progresses through milestones.

Risk analysis involves early design milestones, price evaluations, and collaborative meetings. Risks are identified, logged, and mitigated with transparent cost, schedule, and project impact assessments. The tailored risk management approach ensures that no two projects are treated alike, addressing each project's unique scope and complexity. The Project Team's responsibility is to identify, prepare for, and mitigate these risks throughout the project lifecycle.

For example, it is already evident that reclaimed water from the City of Edgewater may not be available during parts of the year. This may risk the timing and success of plant establishment during commissioning. As a mitigation strategy, the design may involve wetland cell configurations that mimic Florida depressional wetlands, where the deepest parts of the wetland intercept groundwater, and seasonal water levels may range between 3 and 4 feet. This would allow for the establishment of deep marsh species in deeper areas with transitional species established to drier conditions along shallow slopes from the deep zone to create habitat mosaics or ecotones ranging from open water to prairies that are only inundated parts of the year. Also, since water is applied at the deepest point with gentle slopes from moving away from it, the risk of erosion during first fill is eliminated. A depiction of this design concept is presented below.



Depressional-type wetland design incorporates a wide range of wetland habitat mosaics. The habitats range from open water deep zones, where reclaimed water is applied, to deep marshes (Planting Zone 1) planted with sawgrass, to shallow marshes (Planting Zone 2) established with pickerelweed and spikerush, to intermittently inundated zones (Planting Zone 3) colonized with iris and golden canna, and finally to areas that may be inundated as infrequent as one moth per year (Planting Zone 4), where bay trees, sycamores, maples, and understory ferns thrive.

2.6 Health & Safety

The Project Team upholds the highest industry standards in Health & Safety to protect our most valuable asset: our employees. Through advanced hiring practices, comprehensive pre-employment screenings, and extensive training that includes mandatory classroom time and OTJ, the P&J safety culture stands as a benchmark in the industry. Safety is ingrained in our company culture from the top down, and every employee is committed to living this culture daily. We encourage all team members to provide feedback through our open-door policy and ensure timely and accurate reporting. Our robust safety practices enable P&J companies to confidently propose and execute projects with esteemed clients such as the South Florida Water Management District, FPL, and Blue Origin.

As our safety mission, we are committed to having a world-class safety program driven by our desire to put the safety and health of our people first on every project we undertake and every decision the company makes. The following key principles guide our program:

- Strong, committed leadership
- Individual accountability
- Employee involvement and feedback
- Continuous improvement

Please find P&J's Environmental, Health & Safety Overview below. The full manual may be accessed here.

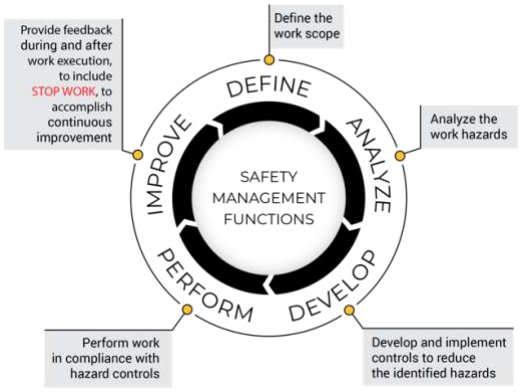
2.6.1 EH&S Program Overview

Safety – A Core Value

As a People First company guided by a commitment to actively care, we believe a safe workplace and workforce are the only acceptable way to do business - and the only way to take care of the people, the environment, and the communities where we work. This commitment is a fundamental cornerstone of our business and is shared by all P&J employees, from executive to craft, as we pursue challenging projects. We embrace individual accountability at all levels, starting with our leadership and extending out to our people and our subcontract employees. The purpose of our Environmental, Health, & Safety (EH&S) Program is to protect the safety and health of our employees, subcontractors, Clients, and the general public.

Our program is based on our core values. It is implemented by personal accountability to our series of policies, protocols, and processes developed from best practices and lessons learned over our decades of experience. As we strive for a world-class safety program, we pride ourselves on exceeding regulatory requirements and always calibrating our efforts.

A Systematic Approach to Safety



We systematically integrate safety into management and work practices at all levels, inclusive of all subcontractors. The backbone of our safety approach is comprised of five core safety management functions: 1) Define, 2) Analyze, 3) Develop, 4) Perform, and 5) Improve.

This systematic approach is accomplished by instituting multiple dynamic controls that have proven effective over numerous construction projects in the past. We also encourage employee feedback and routinely engage our employees in safety education, job planning, and preparation. Ongoing programmatic monitoring is conducted to ensure the implementation of all program elements.

P&J's morning meeting includes a review of the Job Safety Analysis (JSA), a discussion of the day's work plan, and confirmation of daily expectations.

Core Safety Concepts

You See It; You Own It

All employees at P&J are both responsible and accountable for safety, so we embrace the concept of "You See It; You Own It." This concept promotes the fact that everyone plays an important role in the implementation of our EH&S Program. Each employee is empowered with the knowledge necessary to seek out hazards in their work environment. Once identified, they are expected to "Own It" by taking the initiative to control the hazard by whatever means necessary, to include correcting it themselves or, if unable, reporting it to supervision.

Take 2

An employee should take 2 minutes to think through the task and ask themselves: Do I need help? Do I have the knowledge and training to perform this task safely? Have I evaluated all the hazards and implemented all the controls? Do I have the right equipment? Once evaluated, if there are any concerns, the employee must immediately stop and contact supervision for further direction.

Stop Work

All employees have both the right and the authority to "Stop Work" at any time they believe there is an unsafe condition, behavior, or hazard that puts themselves or others at risk or poses a threat to the environment. Stop Work is not only a right but a responsibility. Employees are expected to exercise their authority and immediately act if they identify a problem. Work should not proceed until concerns have been resolved.

3-Way Communication

Clear, effective communication is key to a safe work environment. The concept of "3-Way Communication" requires that when someone communicates a message, the individual receiving that message repeats the message back. By doing so, both individuals can confirm that the intended message was clearly communicated and received.

Actively Caring

From executive management to field employees, we believe in caring about the work that we do and the people with whom we do it. Our leaders are personally involved and accountable for the safety and health of the employees they lead and strive always to put our people first. We actively care for our employees by having a dynamic safety program in which all employees are engaged and care about their work, their fellow employees, and the company. A real commitment to the safety and health of our employees requires that actions speak louder than words.

2.6.2 Safety Statistics

	2023	2022	2021	2020
OSHA Incident Rate	.54	.66	.73	.74
DART	.08	.52	.80	.25
EMR	.62	.56	.62	.52

2.7 Meet Time & Budget Requirements

The Project Team has a proven track record of working together to meet time and budget requirements.

3 PAST PERFORMANCE (MAX PAGES 10)

3.1 4G Pasco County Master Reuse Project

Project Overview: The Central Pasco Beneficial Water Reuse Project, known as the 4G Wetlands, is an innovative public-private partnership located in Land O' Lakes, Florida. This project involves the Pasco County Utilities Service Branch (PCUSB), the Southwest Florida Water Management District (SWFWMD), and the 4G+1

Ranch. The project addresses long-standing groundwater drawdown issues in Southwest Florida, adding significant capability to the Pasco County Master Reuse System by creating a first-of-its-kind groundwater recharge wetland system.

Project Features: The 4G Wetlands consist of a 176-acre groundwater recharge wetland system constructed on upland pastures, designed to work in tandem with a new 500-million-gallon reclaimed water reservoir. This system receives 5 million gallons of advanced secondary reclaimed water per day, passively recharging the Surficial and Floridian Aquifer Systems while protecting water quality. The wetlands, comprising 15 non-linear independent cells, feature unique design aspects such as wetland delineation and buffers, deep zone layout and sizing, flow control paths, specific planting/seeding species, and constructed berms and islands. These features create 133 wetted acres, aiding in regional aquifer recharge and ecological restoration.

The Team's Role and Contributions: P&J was the Construction Manager at Risk (CMAR), collaborating with PCUSB, SWFWMD, 4G+1 Ranch, and CH2M (now Jacobs) throughout the design and construction phases. This role facilitated successful cooperation in permitting, funding, estimating, contract negotiations, value engineering, operations and maintenance, landowner coordination, QA/QC, and construction services. Using GPS-enabled equipment and Trimble Access-compatible survey instruments, P&J efficiently managed earthwork operations, including excavation, embankment, topsoil placement, and piping network installation.

Project Highlights and Awards: The project involved extensive earthwork with 260,000 CY of embankment, 90,000 CY of topsoil placement, and 40,000 LF of piping network installation. The 4G Wetlands have received multiple accolades, including

TEAM
Phillips & Jordan and Jacobs

CLIENT REFERENCE
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PAST PERFORMANCE CRITERIA MET
- ✓ Performance on similar types of projects
- ✓ Engineer/design performance on similar type projects
- ✓ Contractor/construction performance on similar types of projects
- ✓ Design Build Entity performance on Design Build Projects

RELEVANCE TO DPSD PROJECT
- Groundwater Recharge Wetland
- Seasonality in reclaimed water flows
- Shallow groundwater on site
- Designed for ecological value
- Grant funded

COMPLETED ON TIME & ON BUDGET

Engineering News-Record Southeast's 2019 Award of Merit in the water/environment category, the Tampa Bay Association of Environmental Professionals Environmental Excellence Award (2017), the International Green Apple Award for Environmental Best Practice (2017), and the Water Environment Federation Project Excellence Award (2018), among others.

Challenges and Teamwork: The project faced challenges such as material shortages for berm construction. However, through continuous collaboration and open communication, the team efficiently addressed these issues without importing materials, ensuring cost-effectiveness and avoiding change orders. The teamwork fostered a positive relationship, encouraging proactive problem-solving and alignment throughout the project's lifecycle.

Innovation and Industry Contribution: The project's innovative design includes a new model for forecasting water quality performance through wetland subsoils, which is now a standard for Jacobs. Detailed groundwater modeling coupled with surface infiltration from constructed wetlands achieved the project's goal of 5 mgd recharge, setting a precedent for future systems. The design features are scalable and replicable, showcasing a sustainable water management approach.

Construction Quality and Craftsmanship: P&J's early involvement and use of advanced GPS grade control equipment ensured precise construction that was completed without change orders. The unique project approach and ownership structure resulted in lifecycle costs of approximately half of the conventional systems, highlighting the project's cost-effectiveness and superior craftsmanship.

Function and Aesthetic Quality: The 4G Wetlands project restores ecological functions, creating diverse habitats for flora and fauna and blending seamlessly into the surrounding environment. The wetland cells' natural design and strategic planting plans promote biological diversity and long-term sustainability, enhancing wildlife populations and recreational opportunities in Central Pasco County.

3.2 Wetland Groundwater Recharge Park

Project Overview: The City of Ocala, with the cooperative funding support of the St John's River Water Management District (SJRWMD), constructed a 32-acre infiltration wetland system by using reclaimed water and stormwater to recharge the aquifer; protect water quality; recover and enhance flows to Silver Springs; and create a public park with walking paths, boardwalks, and interpretive signage related to wetland ecology, hydrogeology, and its connectivity to Florida springs.

Award-Winning Wetland Design: The wetland was divided into three cells to receive up to 5 mgd of reclaimed water and stormwater on a 60-acre site. The design includes organically shaped cells graded in place, without the need for the import or export of material to construct berms and create wetland areas. The natural site topography, combined with a detailed planting plan, was implemented to maximize wetland habitat diversity within each cell by creating different ecotones across the cells.

Flow control systems were designed to achieve seasonal hydroperiods in each cell, which mimic the natural behavior of regional wetlands. The design includes remote level monitoring, which communicates to a central valve system programmed to maintain seasonal water level setpoints.

Demonstrating the quality of Jacobs' design, the City's Wetland Groundwater Recharge Park received a National Recreation and Park Association (NRPA) National Innovation in Conservation Award in June 2021, and in September 2021, won a Best in Innovation Award from NRPA in the Health, Park Design, and Social Equity categories.

Popular Travel Destination: The system was planted and put into operation in July 2020. The park opened to the public in September 2020 and has quickly become a popular destination for residents and visitors, with 200 to 400 visitors per day.

TEAM
Jacobs

CLIENT REFERENCE
The City of Ocala
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PAST PERFORMANCE CRITERIA MET
- ✓ Performance on similar types of projects
- ✓ Engineer/design performance on similar type projects

RELEVANCE TO DPSD PROJECT
- Groundwater Recharge Wetland
- Seasonality in reclaimed water flows
- Designed for ecological value
- Designed as a public park
- Grant funded

COMPLETED ON TIME & ON BUDGET

3.3 C-51 Reservoir, Phase I

Project Description: The C-51 Reservoir is a regional alternative water supply project for Southeast Florida designed to capture excess stormwater currently wasted to tide and causing harm to the Lake Worth Lagoon. The stored water will replenish the surficial and Biscayne Aquifers throughout the region for public water supply. Construction of Phase I is the result of regional collaboration beginning in 2006 between public water utilities located in Palm Beach, Broward, and Miami-Dade Counties and the South Florida Water Management

District (SFWMD); the Florida Department of Environmental Protection (FDEP); Lake Worth Drainage District (LWDD); Palm Beach Aggregates (PBA); local governments; and other interested parties.

The project site has unique geology for South Florida because it holds water independent of the surrounding water table, allowing deep-water storage primarily below ground. Located in Western Palm Beach County, the C-51 Reservoir is at the intersection of primary drainage canals and water management infrastructure. It is immediately adjacent to the SFWMD L-8 Flow Equalization Basin (FEB), a critical component of Restoration Strategies to meet water quality targets for the Everglades ecosystem. The C-51 Reservoir will connect to the L-8 FEB and be operated by SFWMD in a coordinated fashion to benefit the water supply and the environment.

TEAM
Phillips & Jordan, Inc.

CLIENT REFERENCE
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PAST PERFORMANCE CRITERIA MET
- ✓ Performance on similar types of projects
- ✓ Contractor/construction performance on similar types of projects

RELEVANCE TO DPSD PROJECT
- Controlled water elevations and conveyance systems
- Collaboration with multiple water management Districts

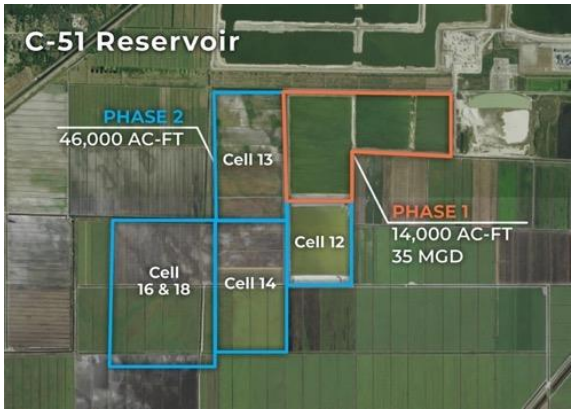
COMPLETED ON TIME & ON BUDGET

Phase I can provide 14,000 acre-feet of storage and is approximately 36 feet deep, with most of the storage below ground. It includes engineered levees, a roller-compacted concrete spillway and armoring, a soil bentonite wall, water control structures, tunnels, and other facilities. Phase I will provide sustainable recharge of the Biscayne Aquifer through the existing South Florida regional canal network, allowing for the withdrawal of 35 million gallons per day of water by the eight (8) participating utilities - Broward County, Sunrise, Hallandale Beach, Dania Beach, Margate, Pompano Beach, Ft. Lauderdale, and Miami-Dade County. Construction of Phase I will take two years, and the reservoir is operational as of October 2023.

Role and Contribution: P&J operated as the Construction Manager at Risk (CMAR) for the C-51 Reservoir project. P&J

completed various activities associated with the Pre-Construction Services Phase of the project, which included the following:

- Review of the project design for completeness and value engineering,
- Development of Guaranteed Maximum Price (GMP) estimates,
- Development of a Site Safety & Emergency Response Plan,
- Development of a Quality Management Plan,
- Development of an Environmental Management Plan that details programs for stormwater pollution prevention and other environmental issues that require compliance with permits and regulations,
- Establishment of a project Cost and schedule Control Plan,
- Pre-qualification and selection of subcontractors,
- Development of a Procurement Plan,
- Development of a Project Execution Plan for the management and control of work activities, and
- Development of a Site Mobilization Plan.



P&J mobilized to construct the C-51 Reservoir in early 2021. The reservoir embankment consists of material located on site and is protected on the inside by Roller Compacted Concrete (RCC) plating. The embankment incorporates a soil-bentonite slurry wall that was installed to a depth of 48'. The embankment also contains a perforated toe drain located in the upstream toe of the embankment to capture any water trapped behind the RCC plating during drawdown operations. P&J constructed a 6,500 LF RCC spillway dam section that is 27' in height. The water conveyance system for the project starts in the existing L-8 reservoir, where crews will install a riprap-lined channel to get water into a newly constructed gated control structure. Crews installed two 96" tunnels utilizing a TBM to connect the structure to the C-51 Reservoir.

Project Highlights:

- 500,000 CY of Embankment Fill
- 20,000 LF (890,974 SF) of Soil-Bentonite Slurry Wall
- 200 LF (6,150 SF) of Soil Cement Bentonite Wall
- 170,000 CY of Roller Compacted Concrete
- 2,200 LF of 96" TBM Tunneling
- 40' Tall Gated Water Control Structure
- 1,800,000 CY of Cell Excavation
- 15,000 CY of Riprap & Bedding Material

3.4 Lower Kissimmee Basin Stormwater Treatment Area

Project Description: The Lower Kissimmee Basin Stormwater Treatment Area (STA) will be the largest functioning water quality area north of Lake Okeechobee. This project encompasses 3,420 AC of wetted treatment, manmade marsh, and water quality technologies. The STA is projected to remove 20 to 22 metric tons of total phosphorus per year and improve the health of the Kissimmee River and Lake Okeechobee. Removing the phosphorus from the water will prevent toxic algal blooms, mitigating damage to the ecosystem and creating cleaner water for drinking water, irrigation, and recreational use.

Role and Contribution: This project is a public/private partnership between the South Florida Water Management District (SFWMD), Ecosystem Investment Partners (EID), and P&J. P&J began the design process in January 2021 and construction in March 2024. P&J will design and construct 6 cell water quality treatment areas north of Lake Okeechobee within the Kissimmee River Basin.

Project Highlights

- Over 6M CY of excavation and placement
- 550CFS pump station
- SFWMD and USACE Permitting
- Sixteen 300CFS control structures
- Two 1050CFS control structures
- Complete relocation of the L-62 canal system with relocated discharge through the Herbert Hoover Dike

TEAM
Phillips & Jordan

CLIENT REFERENCE
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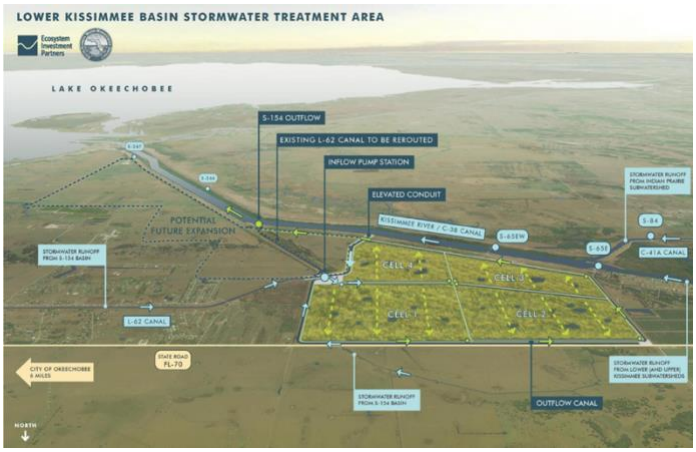
PAST PERFORMANCE CRITERIA MET

- ✓ Performance on similar types of projects
- ✓ Contractor/construction performance on similar types of projects
- ✓ Design Build Entity performance on Design Build Projects

RELEVANCE TO DPSD PROJECT

- Water quality value, STA
- Shallow water STA conveyance system
- Designed with public park and access features
- Plantings and vegetation management

ON SCHEDULE



3.5 Wakodahatchee and Green Cay Wetlands

Project Description: The Palm Beach County Water Utilities Department hired Jacobs to design the Conversion of an existing percolation pond system into a 40-acre, multi-purpose, constructed wetlands to demonstrate beneficial effluent reuse. The project, and the related 100-acre Green Cay Wetlands, is a critical component of the County's 15-mgd expansion plans for the Southern Region Wastewater Treatment Facility (SRWTF).

Long-Term Success: The Wakodahatchee (Seminole for "created waters") wetlands are a flow-through marsh system representing the complete ecotone of South Florida, ranging from deep-water sloughs of spatterdock to mixed emergent marshes, forested wetlands, and associated transitional lands. The system treats and infiltrates up to 2 mgd of reclaimed water. The facility features public access and educational features, including a three-quarter mile wheelchair-accessible boardwalk, shade gazebos, and interpretive signs. Since operation of the wetlands began in 1996, the Wakodahatchee Wetlands have become well-regarded as a birding "hot spot," and the spacious boardwalks support the public use of the wetlands, which has exceeded expectations. The wetland won Money Magazine's Best Florida Wetland. Almost 30 years old now, this project is the living proof of the long-term success or our team's approach to wetland design.

TEAM
Jacobs

CLIENT REFERENCE
Palm Beach County Water Utilities
David Dalton, Plants Operations & Maintenance Manager
561.493.6080
ddalton@pbcwud.org

PAST PERFORMANCE CRITERIA MET

- ✓ Performance on similar types of projects
- ✓ Design Build Entity performance on Design Build Projects

RELEVANCE TO DPSD PROJECT

- Groundwater Recharge Wetland
- Shallow groundwater on site
- Designed for ecological value
- Designed as a public park

COMPLETED ON TIME & ON BUDGET

Green Cay Wetlands: The Green Cay Wetlands opened in 2004 and is modeled after the Wakodahatchee Wetlands. Our team—which includes team member Wetland Solutions for both wetlands—designed, permitted, and provided construction services to transform 100 acres of previous farmland to a vibrant functional wetland. Green Cay includes two large, constructed treatment wetlands designed to infiltrate 2 to 3 mgd of reclaimed water treated at the adjacent SRWTF. The wetlands were designed to restore functional native South Florida wetlands, upland forest, and representative South Florida habitats using treated reclaimed water. Today, a full-service public interpretative center greets visitors with detailed information on the ecology of South Florida's wetlands and the use of wetlands for wastewater polishing.

3.6 C-51 Reservoir, Phase II

Project Description: The C-51 reservoir is a design/build project that consists of the construction of a 14,800 AC storage reservoir with a pump station for storage. The reservoir itself is an alternative water supply project that will capture excess stormwater that is wasted to tide and causes harm to the Lake Worth Lagoon. The water stored here will replenish the Biscayne Aquifers. P&J completed the first phase of the project in October 2023 and began the second phase in August of 2023.

Role and Contribution: For Phase II of the C-51 reservoir project, P&J was selected as the progressive design builder for the project. Through an open procurement process, P&J selected and subcontracted with a design engineer with the project. Throughout the preconstruction phase of the project P&J's team worked with the design engineer to optimize the previous Phase 1 embankment design. Multiple iterations of the pump station were reviewed and improved upon to ultimately provide the Owner a cost-effective project. Once construction commenced, P&J began completing cell excavation, dewatering, embankment construction, RCC plating, and canal construction, while managing subcontractor personnel for the slurry wall and concrete structures. The pump station for the project will be in excess of 35' tall, require multiple gates and an enclosed building.

Project Highlights:

- Full Design and Construction Responsibility
- 900,000 CY of Embankment Placement
- 1.7M CY of Cell Excavation
- 80,000 CY of RCC Plating
- 900,000 VSF of Soil Bentonite Slurry Wall
- 300 CFS Pump Station

TEAM
Phillips & Jordan

CLIENT REFERENCE
Palm Beach Aggregates
Albert Moragues
561.718.0768
albertm@palmbeachag.com

PAST PERFORMANCE CRITERIA MET

- ✓ Performance on similar types of projects
- ✓ Contractor/construction performance on similar types of projects
- ✓ Design Build Entity performance on Design Build Projects

RELEVANCE TO DPSD PROJECT

- Designed for ecological and water quality value
- Controlled water elevations and conveyance systems
- In conjunction with a water management District
- Grant funded State / Federal

ON SCHEDULE

4 BASIC RESPONSE SUBMITTALS – NOT INCLUDED IN PAGE COUNT

The following are the basic response submittal requirements and are not considered part of the response page count per the RFP.

4.1 Respondent's Certification Form – Attachment A

ATTACHMENT A

DEERING PARK STEWARDSHIP DISTRICT
PROCUREMENT

SOLICITATION NUMBER **2024-001** FOR **EDGEWATER WETLAND PARK PROJECT**

RESPONDENT'S CERTIFICATION

NAME OF CORPORATION, PARTNERSHIP, OR INDIVIDUAL: Phillips and Jordan, Incorporated

PHYSICAL ADDRESS: 10142 Parkside Dr., Ste. 500, Knoxville, TN 37922

FEDERAL IDENTIFICATION #: 56-0694573 STATE OF INCORPORATION: NC (Seal)

I have carefully reviewed this Solicitation including the scope, submission requirements, general information, and the evaluation and award process.

I further acknowledge that:

- ☒ Response is in full compliance with the Specifications; or
- ☐ Response is in full compliance with the Specifications **except** as specifically stated and explained in detail on sheets attached hereto and labeled "Clarifications and Exceptions".

I certify that all information contained in this Response is truthful to the best of my knowledge and belief. I further certify that I am duly authorized to execute and submit this Response on behalf of the organization as its agent and that the organization is ready, willing and able to perform if awarded.

I further certify that this Response is made without prior understanding, agreement, connection, discussion, or collusion with any other person, company or corporation submitting an offer for the same product or service; no officer, employee or agent of DPSD owns or will benefit more than 5% from award of this Solicitation; and the undersigned executed this Respondent's Certification with full knowledge and understanding of the matters therein contained.

AUTHORIZED SIGNATURE	DATE: 6-21-24
Art Phelps	SVP
PRINT NAME	TITLE
813.780.4300	813.715.1820
TELEPHONE NUMBER	FAX NUMBER
aphelps@pandj.com	
E-MAIL ADDRESS	
www.pandj.com	
WEBSITE	

RESPONDENT'S CONTACT
(for additional information)

Matt Eidson
NAME
Regional Manager
TITLE
941.705.9558
PHONE
meidson@pandj.com
E-MAIL ADDRESS

If Respondent is not an individual, include authorization for the above individual to sign on behalf of the organization

UNANIMOUS WRITTEN CONSENT
OF THE BOARD OF DIRECTORS

July 10, 2023

The undersigned, being all of the members of the Board of Directors (the "Board") of Phillips and Jordan, Incorporated, a North Carolina corporation (the "Corporation"), acting by written consent without a meeting pursuant to Section 55-8-21 of the North Carolina Business Corporation Act, do hereby take the following actions on behalf of the Corporation:

Appointment of Officers

The Board of Directors hereby appoint the following individuals to serve as Officers of the Corporation in the positions set forth beside their respective names below to hold office until his or her successor shall have been duly elected and shall have qualified, or until the death or resignation of any such officer, or until any such officer shall have been removed in the manner provided in the Bylaws of the Corporation:

Avis A. Phillips	Chairman
William T. Phillips, Jr.	Vice Chairman and Chief Executive Officer
J. Patrick McMullen	President
Bryan McIsaac	Chief Financial Officer
Morgan Pierce	President, Power
Gerry Arvidson	President, Heavy Civil
Art Phelps	Senior Vice President
Eric Hedrick	Senior Vice President of Operations
Pat Williams	Senior Vice President of Operations
Robert Ertle	Senior Vice President of Operations
Scotty Orr	Vice President of Operations
Mario Vir	Vice President of Operations
Wesley Compo	Vice President of Operations
Russell Page Riley	Vice President
Michael P. Hoke	Vice President
Matthew Wagley	Vice President
Jason Garner	Vice President, Controller and Treasurer
James F. Rose	Secretary
Christina M. Eddings	Assistant Secretary

Officers Authorized to Execute Contracts on Behalf of the Corporation

The Board of Directors hereby directs that the Officers listed below are the Officers authorized by the Corporation to sign, execute and deliver construction proposals, construction contracts and other contracts related to the business of the Corporation, and any and all documents related thereto, on behalf of the Corporation:

Avis A. Phillips	Chairman
William T. Phillips, Jr.	Vice Chairman and Chief Executive Officer
J. Patrick McMullen	President
Morgan Pierce	President, Power
Gerry Arvidson	President, Heavy Civil
Art Phelps	Senior Vice President
Matt Wagley	Vice President

The Board hereby directs that an executed copy of this Unanimous Written Consent shall be filed with the minutes of the proceedings of the Board.

This Unanimous Written Consent may be signed in two or more counterparts, each of which shall be deemed an original, and all of which shall be deemed one instrument.

IN WITNESS WHEREOF, the undersigned Directors have duly executed this Unanimous Written Consent as of the date first written above.

Avis A. Phillips

William T. Phillips, Jr.

J. Patrick McMullen

Lesa P. Whitson

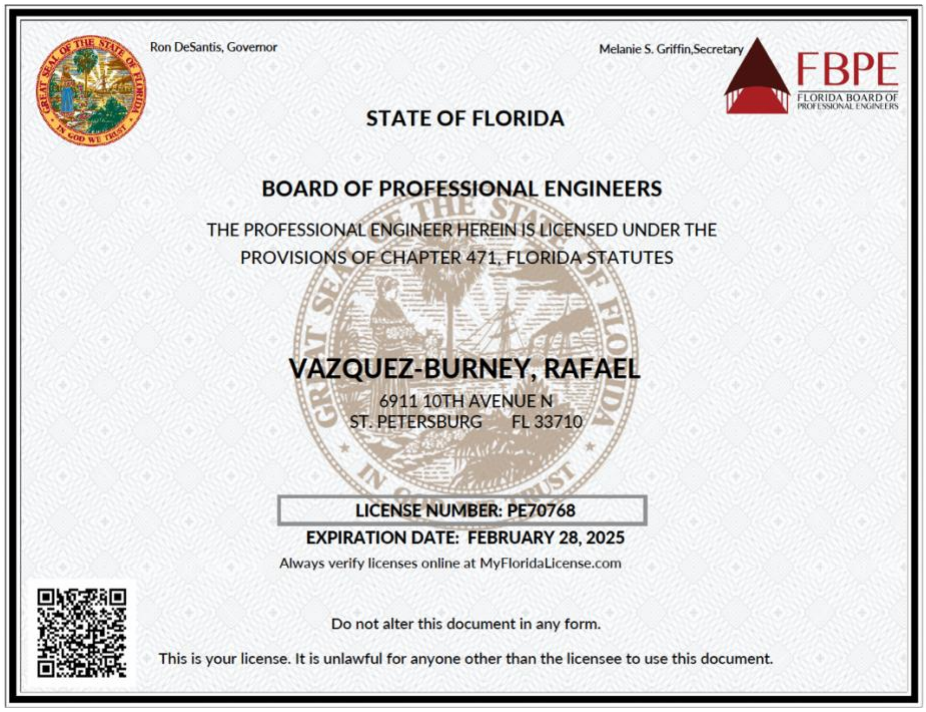
C. Lamar Shuler, Jr.

James F. Rose

Morgan Pierce

Gerry Arvidson

4.2 Engineer's Registry License Number or Certificate of Authorization



Ron DeSantis, Governor

Melanie S. Griffin,Secretary

FBPE
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

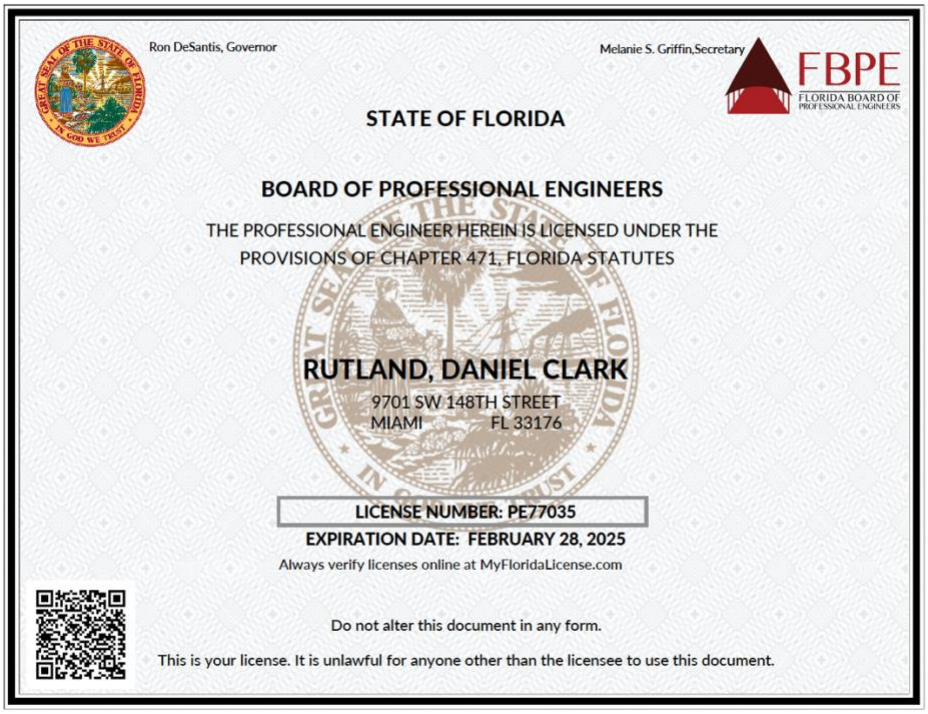
THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

VAZQUEZ-BURNEY, RAFAEL
6911 10TH AVENUE N
ST. PETERSBURG FL 33710

LICENSE NUMBER: PE70768
EXPIRATION DATE: FEBRUARY 28, 2025
Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.

This is your license. It is unlawful for anyone other than the licensee to use this document.



Ron DeSantis, Governor

Melanie S. Griffin,Secretary

FBPE
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

RUTLAND, DANIEL CLARK
9701 SW 148TH STREET
MIAMI FL 33176

LICENSE NUMBER: PE77035
EXPIRATION DATE: FEBRUARY 28, 2025
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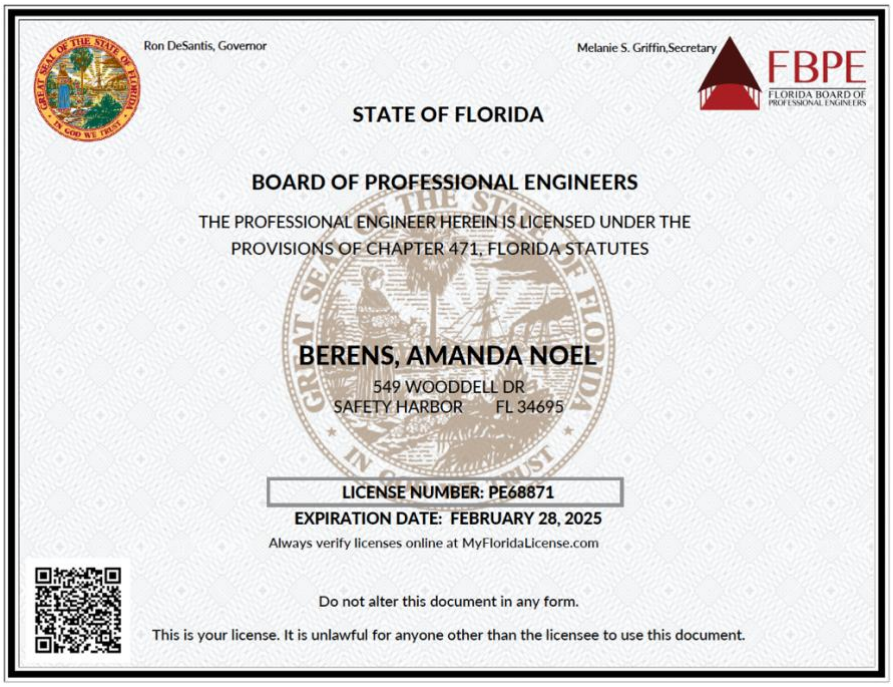

Ron DeSantis, Governor

Melanie S. Griffin,Secretary

FBPE
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE
PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

BERENS, AMANDA NOEL
549 WOODDELL DR
SAFETY HARBOR FL 34695

LICENSE NUMBER: PE68871
EXPIRATION DATE: FEBRUARY 28, 2025
Always verify licenses online at MyFloridaLicense.com

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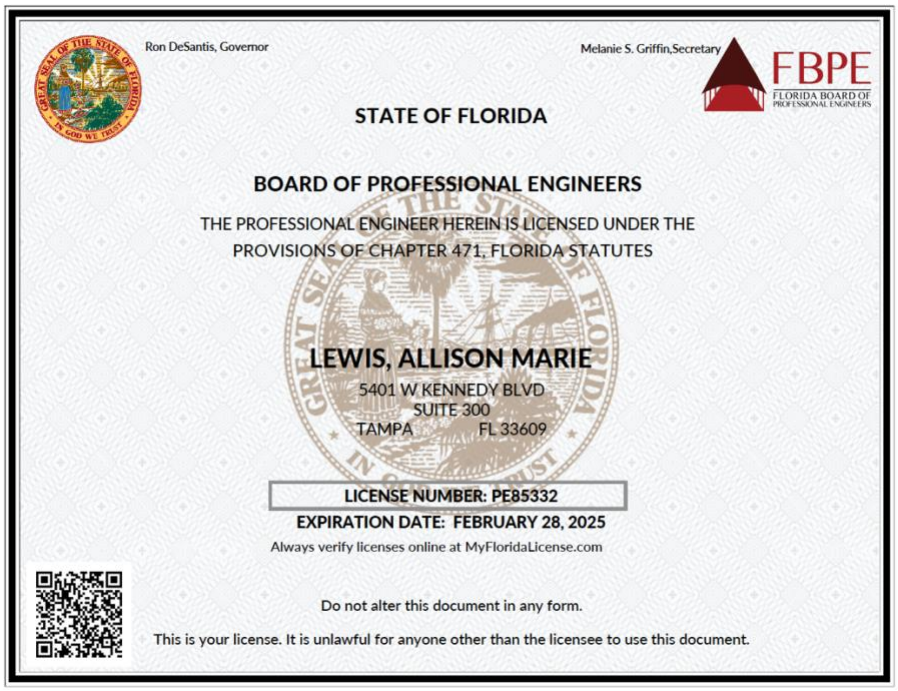

Ron DeSantis, Governor

Melanie S. Griffin,Secretary

FBPE
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE
PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

LEWIS, ALLISON MARIE
5401 W KENNEDY BLVD
SUITE 300
TAMPA FL 33609

LICENSE NUMBER: PE85332
EXPIRATION DATE: FEBRUARY 28, 2025
Always verify licenses online at MyFloridaLicense.com

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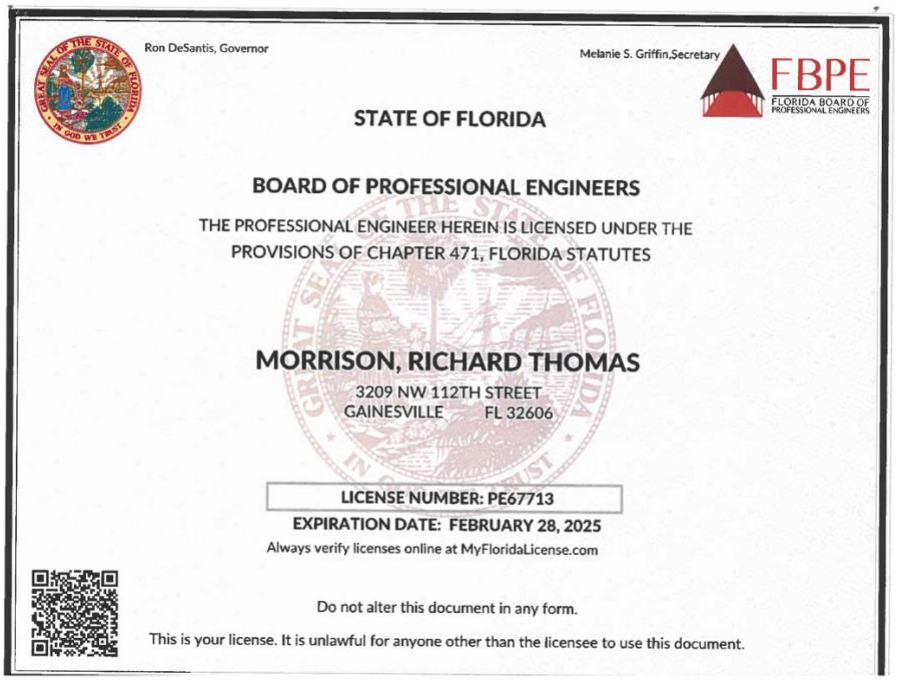

Ron DeSantis, Governor

Melanie S. Griffin,Secretary

FBPE
FLORIDA BOARD OF PROFESSIONAL ENGINEERS

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE
PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

MORRISON, RICHARD THOMAS

3209 NW 112TH STREET
GAINESVILLE FL 32606

LICENSE NUMBER: PE67713

EXPIRATION DATE: FEBRUARY 28, 2025

Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.

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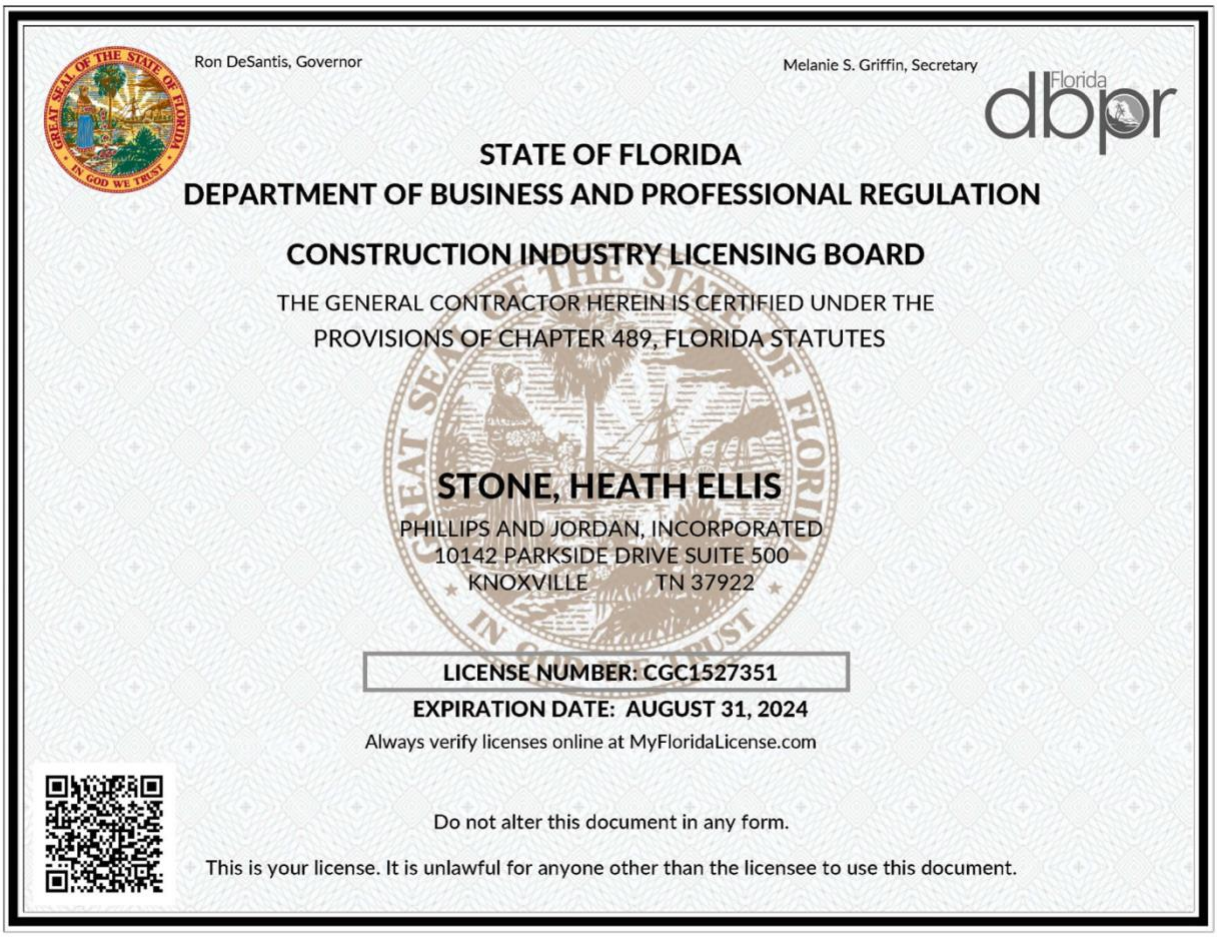
4.3 Contractor's license for the Design Build Entity

P&J's Florida Contractor's License



Ron DeSantis, Governor

Melanie S. Griffin, Secretary

Florida dbpr

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

CONSTRUCTION INDUSTRY LICENSING BOARD

THE GENERAL CONTRACTOR HEREIN IS CERTIFIED UNDER THE
PROVISIONS OF CHAPTER 489, FLORIDA STATUTES

STONE, HEATH ELLIS

PHILLIPS AND JORDAN, INCORPORATED
10142 PARKSIDE DRIVE SUITE 500
KNOXVILLE TN 37922

LICENSE NUMBER: CGC1527351
EXPIRATION DATE: AUGUST 31, 2024
Always verify licenses online at MyFloridaLicense.com

Do not alter this document in any form.

This is your license. It is unlawful for anyone other than the licensee to use this document.

4.4 Apprentice and Disadvantaged Worker Program Documentation

Not applicable per Addendum #1 issued on June 7, 2024.

4.5 Small, or Service-Disabled Veteran Business Documentation

Not applicable.

4.6 DBIA Certificate

THE DESIGN-BUILD INSTITUTE OF AMERICA

DBIA DESIGN-BUILD PROFESSIONAL™

has conferred upon

MATTHEW EIDSON

the designation of

DBIA™

for fulfilling the program requirements of the
Designated Design-Build Professional™ program.

awarded on

AUGUST 16, 2019

by

THE DESIGN-BUILD CERTIFICATION BOARD

Martin R. Hedlund, PE, DBIA
2019 Chairman
Design-Build Institute of America

DBIA DESIGN-BUILD

Denise M. Ramsey, PE, LEED AP BD+C, DBIA
2019 Chairman
Design-Build Certification Board

4.7 MBE Status

WBENC
WOMEN'S BUSINESS ENTERPRISE NATIONAL COUNCIL
JOIN FORCES. SUCCEED TOGETHER.

hereby grants

National Women's Business Enterprise Certification

to

Phillips Infrastructure Holdings, Inc. DBA Phillips and Jordan, Inc., Rowcon, LLC, P&J Environmental Services, LLC

who has successfully met WBENC's standards as a Women's Business Enterprise (WBE).
This certification affirms the business is woman-owned, operated and controlled and is valid through the date herein.

Certification Granted: February 28, 2019
Expiration Date: February 28, 2025
WBENC National Certification Number: WBE1900471

WBENC National WBE Certification was processed and validated by Women's Business Enterprise Council - South, a WBENC Regional Partner Organization.

Authorized by Phala Mire, President Women's Business Enterprise Council - South

WBECSOUTH
WOMEN'S BUSINESS ENTERPRISE COUNCIL

NAICS: 237990, 237110, 237120, 237210, 238910, 561730, 562119
UNSPSC: 72140000

4.8 Corporate Structure Form

Corporate Structure Questionnaire

SOLICITATION NUMBER **2024-001** FOR **EDGEWATER WETLAND PARK PROJECT**

1. Respondents shall complete the following information for the proposed Design-Builder and all proposed Design Build Team Members:

Legal Name	Phillips and Jordan, Incorporated
Street Address	10142 Parkside Dr., Ste. 500, Knoxville, TN 37922
Mailing Address	10142 Parkside Dr., Ste. 500, Knoxville, TN 37922
Point of Contact	Matt Eidson
Position	Regional Manager
Email	meidson@pandj.com
Telephone Number	(865) 688-8342
Fax Number	(865) 392-3090
Type of Business	Privately-held NC Corporation
D-U-N-S Number	003845336
Federal Tax Identification Number	56-0694573
State Contractor's Registration Number (if applicable)	CGC1527351
State Business License Number (if applicable)	

2. If the Design-Builder is a Joint Venture, Respondent must submit the above information the Joint Venture as well as for each member of the Joint Venture.

END OF SECTION

Corporate Structure Questionnaire

SOLICITATION NUMBER **2024-001** FOR **EDGEWATER WETLAND PARK PROJECT**

1. Respondents shall complete the following information for the proposed Design-Builder and all proposed Design Build Team Members:

Legal Name	Jacobs Engineering Group
Street Address	200 South Orange Ave, Suite 900 Orlando, FL 32801 5401 W Kenndy Blvd. Suite 300 Tampa FL 33609
Mailing Address	200 South Orange Ave. Suite 900 Orlando FL 32801 5401 W Kennedy Blvd, Suite 300 Tampa FL 33609
Point of Contact	Rafael Vazquez-Burney
Position	Project/Operations Manager
Email	Rafael.Vazquez-Burney@jacobs.com
Telephone Number	727 366 3301 407-903-5001 (Orlando Office)
Fax Number	
Type of Business	Corporation
D-U-N-S Number	150796662
Federal Tax Identification Number	95-4081636
State Contractor's Registration Number (if applicable)	
State Business License Number (if applicable)	P13217

2. If the Design-Builder is a Joint Venture, Respondent must submit the above information the Joint Venture as well as for each member of the Joint Venture.

4.9 Bonding Capacity

MARSH & McLENNAN AGENCY
LOCALLY KNOWN AS J. SMITH LANIER & CO.

Marsh & McLennan Agency LLC
413 Northshore Dr., SW, Suite E
Knoxville, TN 37919
865-588-7200
www.marshmma.com

January 4, 2023

Re: Phillips and Jordan, Incorporated

To Whom It May Concern:

MMA - J. Smith Lanier & Co. and the Liberty Mutual Insurance Company, Boston, MA (Phone 617-357-9500) are proud to have handled the bonding needs of Phillips and Jordan, Incorporated the past 11 years. The Liberty Mutual Insurance Company is an **A** "Excellent" AM Best Rated Company and are US. Treasury Listed, licensed in all states.

We constantly monitor the manner in which Phillips and Jordan, Incorporated meets their construction and financial obligations to owners, subcontractors, suppliers and the credit community. We are pleased to report that Phillips and Jordan, Incorporated is an extremely strong and stable company in financial terms and handle these obligations in an exemplary manner.

While we would certainly give consideration to higher limits should specific conditions require doing so, we currently have in place for Phillips and Jordan, Incorporated a single program exceeding $500,000,000 with an aggregate exceeding $1,750,000,000 bonding line, with approximately $1,000,000,000 available capacity. We anticipate no problems in issuing 100% Performance and Payment Bonds for any project Phillips and Jordan, Incorporated chooses to pursue. Naturally, the execution of any final bonds will be subject to a mutually satisfactory review of the bonds, final contract terms, conditions and financing by our client and us.

Should you have questions or if we may be of assistance, please feel free to contact us.

Sincerely,

DocuSigned by:
Catherine L. McMillan
AADD4F8CA1C541C...

Catherine L. McMillan
Attorney-In-Fact

4.10 Business Registration

Department of State / Division of Corporations / Search Records / Search by Entity Name /

Previous On List Next On List Return to List Phillips and Jordan Search

No Events **No Name History**

Detail by Entity Name

Foreign Profit Corporation
PHILLIPS AND JORDAN, INCORPORATED

Filing Information

Document Number	832152
FEI/EIN Number	56-0694573
Date Filed	04/11/1974
State	NC
Status	ACTIVE

Principal Address

10142 Parkside Dr, Ste 500
Knoxville, TN 37922

Changed: 03/01/2023

Mailing Address

10142 Parkside Dr, Ste 500
Knoxville, TN 37922

Changed: 03/01/2023

Registered Agent Name & Address

CT CORPORATION SYSTEM
1200 S. PINE ISLAND ROAD
PLANTATION, FL 33324

Name Changed: 05/20/1992

Address Changed: 05/20/1992

State of Florida
Department of State

I certify from the records of this office that JACOBS ENGINEERING GROUP INC. is a Delaware corporation authorized to transact business in the State of Florida, qualified on February 12, 1987.

The document number of this corporation is P13217.

I further certify that said corporation has paid all fees due this office through December 31, 2024, that its most recent annual report/uniform business report was filed on February 20, 2024, and that its status is active.

I further certify that said corporation has not filed a Certificate of Withdrawal.

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Sixth day of June, 2024

Secretary of State

Tracking Number: 6158957378CU

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

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

4.11 Sworn Statements

SWORN STATEMENT PURSUANT TO SECTION 287.133(3)(A). FLORIDA STATUTES ON PUBLIC ENTITY CRIME

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to Deering Park Stewardship District

   By Art Phelps, Sr. Vice President

   (print this individual's name and title)

   for Phillips and Jordan, Incorporated

   (print name of entity submitting statements)

   whose business address is 30115 State Road 52, Suite 300, San Antonio, FL 33576

   and if applicable whose Federal Employer Identification Number (FEIN) is 56-0694573

   If the entity has no FEIN, include the Social Security Number of the individual signing this sworn Statement: _____

2. I understand that a "public entity crime" as defined in paragraph 287.133(1)(a), Florida Statutes, mean a violation of any state or federal law by a person with respect to and directly related to the transactions of business with any public entity or with an agency or political subdivision of any other state or with the United States including, but not limited to any bid or contract for goods or services to be provided to any public entity or any agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

3. I understand that "convicted" or "convection" as defined in Paragraph 287.133(1)(b), Florida Statutes means a finding of guilt or a conviction of a public entity crime, with or without adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a Jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that an "affiliate" as defined in paragraph 287.133(1)(a), Florida Statutes, means:

   1. A predecessor or successor of a person convicted of public entity crime; or
   2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

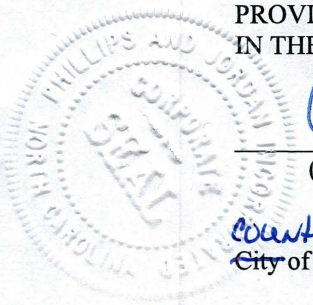
6. Based on information and belief, the statement which I have marked below is true in a relation to the entity submitting this sworn statement. (Please indicate which statement applies).

☑ Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or any affiliate of the entity has been charged with and convicted of a public entity crime within the past 36 months.

☐ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime within the past 36 months. AND (Please indicate which additional statement applies).

☐ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime within the past 36 months. However, there has been a subsequent proceeding before a Hearing Officers of the State of Florida, Division of Administrative Hearings and the Final Order by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. (Attached is a copy of the final order).

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THE PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED AND FOR THE PERIOD OF THE CONTRACT ENTERED INTO, WHICHEVER PERIOD IS LONGER. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES, FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.



_____
(Signature)

County
~~City~~ of PASCO

STATE OF FLORIDA

Sworn and subscribed before me this 24th day of June, 2024 by

ART PHELPS who is Personally known to me

Or who produced identification - _____
(Type of Identification)

_____
(Signature) Notary Public—State of Florida

CHRISTINA M. EDDINGS
(Printed, typed or stamped commissioned name of notary public)

My commission expires 10/19/2027 (SEAL)

CHRISTINA M. EDDINGS
Notary Public - State of Florida
Commission # HH 439418
My Comm. Expires Oct 19, 2027
Bonded through National Notary Assn.

SWORN STATEMENT PURSUANT TO SECTION 287.135(5), FLORIDA STATUTES, REGARDING SCRUTINIZED COMPANIES WITH ACTIVITIES IN SUDAN LIST OR SCRUTINIZED COMPANIES WITH ACTIVITIES IN THE IRAN PETROLEUM ENERGY SECTOR LIST

1. This sworn statement is submitted to Deering Park Stewardship District

By Art Phelps (print individual's name and title)

For Phillips and Jordan, Incorporated

whose business address is

30115 State Road 52, Suite 30 L, San Antonio, FL 33576

2. I understand that, subject to limited exemptions, section 287.135, Florida Statutes, provides that a company that at the time of bidding or submitting a Response for a new contract or renewal of an existing contract is on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to section 215.473, Florida Statutes, is ineligible for, and may not bid on, submit a Response for, or enter into or renew a contract with a local governmental entity for goods or services of$] million or more.

3. Based on information and belief, at the time the entity submitting this sworn statement submits its Response to the Creekview Community Development District, neither the entity, nor any of its officers, directors, executives, partners, shareholders, members, or agents, is listed on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

4. If awarded the contract, the entity will immediately notify the Creekview Community Development District in writing if either the entity, or any of its officers, directors, executives, partners, shareholders, members, or agents, is placed on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

The foregoing SWORN STATEMENT PURSUANT TO SECTION 287.135(5) is dated this 24th day of June 2024.

(Corporate Seal, if applicable)

Phillips & Jordan, Inc.

By: Art Phelps
Title: Senior Vice President

The foregoing SWORN STATEMENT PURSUANT TO SECTION 287.135(5) is dated this 24th day of June ~~2022.~~ 2024

STATE OF FLORIDA
COUNTY OF Pasco

Sworn and subscribed before me by means of X physical presence or ☐ online notarization, this 24th day of June, 2024 by Art Phelps of Phillips & Jordan, Inc. who is personally known to me or who has produced _____ as identification.

Print Name: Christina M. Eddings

Notary Public, State of Florida Commission

No.: GG 34868

CHRISTINA M. EDDINGS
Notary Public - State of Florida
Commission # HH 439418
My Comm. Expires Oct 19, 2027
Bonded through National Notary Assn.

4.12 Trench Safety Act Statements

TRENCH SAFETY AFFIDAVIT

Trench excavations on this Project are expected to be in excess of five feet (5') deep. The Occupational Safety and Health Administration excavation safety standards, 29 CFR 1926.650 Subpart P, trench safety standards will be in effect during the period of construction of the Project. Undersigned acknowledges that included in the various items of its Response are costs for complying with the Florida Trench Safety Act (90-96, Laws of FL) effective October 1, 1990, and hereby gives assurance that the Contractor or Subcontractor performing trench excavation work on the Project will comply with the applicable trench safety standards. The Respondent further identifies the costs as follows:

Trench Safety Item (Description)		Unit Quantity	Units of Measure (LF, SY)	Unit Cost	Extended Cost
A.	Trench Shield	1	EA	$10,000	$10,000
B.	Sheeting	1	EA	$10,000	$10,000
C.	Slide Rail	1	EA	$10,000	$10,000
				TOTAL$	$30,000

UNDER PENALTIES OF PERJURY, I DECLARE THAT I HAVE READ THE FOREGOING AFFIDAVIT AND THAT THE FACTS STATED IN IT ARE TRUE.

(Corporate Seal, if applicable)

Phillips & Jordan, Inc.

By: Art Phelps
Title: Senior Vice President

STATE OF FLORIDA
COUNTY OF

Sworn and subscribed before me by means of X physical presence or ☐ online notarization, this 24th day of June, 2024 by Art Phelps of Phillips and Jordan, Inc. who is personally known to me or who has produced _____ as identification.

Print Name: CHRISTINA M. EDDINGS

Notary Public, State of Florida
Commission No.: GG 348686

CHRISTINA M. EDDINGS
Notary Public - State of Florida
Commission # HH 439418
My Comm. Expires Oct 19, 2027
Bonded through National Notary Assn.

THANK YOU

info@pandj.com
P: 813.780.4300

30115 State Road 52
Suite 300
San Antonio, FL 33576
pandj.com

DEERING PARK
STEWARDSHIP DISTRICT

3AII

Deering Park Stewardship District

Request for Statement of Qualifications for Design-Builder for the Edgewater Wetland Park Project

RFQ 2024-001

Wharton-Smith, Inc.
CONSTRUCTION GROUP

WRIGHT-PIERCE
Engineering a Better Environment

Table of **Contents**

Storch Law Firm
Attn: Deering Park SD - RFQ Edgewater Wetland Park
420 S Nova Road
Daytona Beach, FL 32114

June 25, 2024

Dear Selection Committee Members:

For more than 100 years, the Miami Corporation has upheld the Deering family's vision of environmental stewardship. Practical land management has preserved your sensitive lands and wildlife habitat. While you plan to allow minimal development, you have wisely opted to make environmental preservation the focal point of that development. The wetland park to be constructed will serve as the centerpiece of your nature themed community. Your desire for conservation is precisely why it is so important that the District select the right team that can deliver your vision while protecting all the flora and fauna throughout your land.

The Wharton-Smith + Wright-Pierce team offers several key advantages that will directly benefit this project which include:

Fully Developed Team—The Wharton-Smith + Wright-Pierce team was strategically assembled to offer the District experience and expertise in all areas that matter on this project. Our team offers recent and local experience in park design and construction (Wright-Pierce and Wharton-Smith, respectively), wetland / vegetation design (Bio-tech), wetlands hydrology (Liquid Solutions Group), Edgewater wastewater effluent water quality (Mead & Hunt), and environmentally conscious construction practices (Eco-Build Strategies). These team members have worked together on similar projects for decades and most of our experience occurred in Volusia or a neighboring County.

Relationships that Matter—The Wharton-Smith brand and reputation was built on relationships. It is our philosophy that if you have mutual trust, any project obstacle can be overcome. Our team offers numerous relationships that will facilitate success on this project. Both Wharton-Smith and Mead & Hunt are currently working for the City of Edgewater public works department and maintain strong relationships with key decision makers. Nearly all our design team firm members maintain strong relationships with the LOCAL regulatory agencies that will be involved with your project including SJRWMD, FDEP, and USACOE. Lastly, Wharton-Smith and ETM are currently collaborating on a $100M+ project for First Coast Regional Utilities.

Dedicated Local Resources—Wharton-Smith has maintained a strong presence in Volusia County for 20+ years delivering projects for your neighbors such as Volusia County, the City of Port Orange, the City of DeLand, the City of Edgewater, Volusia County Schools, the City of Titusville, and the City of Daytona Beach. We encourage the District to ask your neighbors about the level of service we provide! More importantly, our proposed project manager, Duncan Graham, is a City of Edgewater resident living only eight minutes from the project site! Numerous other team members reside in neighboring towns including Titusville and New Smyrna Beach. Our team is local and has a vested interest in this project. This is where our people live, where they work, where they play, and where they pay their taxes.

Proven Design-build Team History—Wharton-Smith and Wright-Pierce have collaborated on numerous CMAR and Design-build projects including single projects as large as $180 million. This is not a marriage of convenience. We choose to work together on design-build projects. Our partnership works because we share a common vision of delivering a quality product and exceeding client expectations. The cohesion between our firms will be evident on day one.

Environmental Stewardship—Wharton-Smith was founded as and remains an environmental company. Whether it's preserving our precious natural resources like drinking water or protecting sensitive lands during construction projects, environmental stewardship is at the core of everything we do. Tab 4 will demonstrate numerous projects in which we left a piece of land better than we found it. Many of our projects win awards for quality and are the hearts of the communities where they exist. We look forward to building a beautiful wetland park that will serve as the centerpiece of Deering Park development for generations to come.

Since 1984, our mission has continued to be "to exceed our clients' expectations by performing with the highest quality, professionalism, and fairness, and by communicating with honesty and integrity at all times." Please allow this RFQ response to serve as our offer to serve as your community partner on this important and exciting project. The Wharton-Smith + Wright-Pierce team is ready to get started!

Wharton-Smith, Inc.

Nathan Hillard, DBIA
Design-Build Manager

Wright-Pierce

Walter Nickel, PE
Design Manager


Trail 1
Basic Response Submittals

Basic Response **Submittals**

ATTACHMENT A

DEERING PARK STEWARDSHIP DISTRICT
PROCUREMENT

SOLICITATION NUMBER **2024-001** FOR **EDGEWATER WETLAND PARK PROJECT**

RESPONDENT'S CERTIFICATION

NAME OF CORPORATION, PARTNERSHIP, OR INDIVIDUAL: Wharton-Smith, Inc.

PHYSICAL ADDRESS: 750 Monroe Road, Sanford, FL 32771

FEDERAL IDENTIFICATION #: 59-2392802 STATE OF INCORPORATION: FL

I have carefully reviewed this Solicitation including the scope, submission requirements, general information, and the evaluation and award process.

I further acknowledge that:

☑ Response is in full compliance with the Specifications; or

☐ Response is in full compliance with the Specifications **except** as specifically stated and explained in detail on sheets attached hereto and labeled "Clarifications and Exceptions".

I certify that all information contained in this Response is truthful to the best of my knowledge and belief. I further certify that I am duly authorized to execute and submit this Response on behalf of the organization as its agent and that the organization is ready, willing and able to perform if awarded.

I further certify that this Response is made without prior understanding, agreement, connection, discussion, or collusion with any other person, company or corporation submitting an offer for the same product or service; no officer, employee or agent of DPSD owns or will benefit more than 5% from award of this Solicitation; and the undersigned executed this Respondent's Certification with full knowledge and understanding of the matters therein contained.

Darin Crafton	6/25/2024	RESPONDENT'S CONTACT (for additional information)
AUTHORIZED SIGNATURE	DATE	
Darin Crafton	COO, Commercial	Nate Hillard
PRINT NAME	TITLE	NAME
407-321-8410	407-829-4453	Vice President Collaborative Delivery
TELEPHONE NUMBER	FAX NUMBER	TITLE
dcrafton@whartonsmith.com		407-402-0120
E-MAIL ADDRESS		PHONE
www.whartonsmith.com		nhillard@whartonsmith.com
WEBSITE		E-MAIL ADDRESS

If Respondent is not an individual, include authorization for the above individual to sign on behalf of the organization

RFQ **2024-001** Page | 15

Wharton-Smith, Inc.
CONSTRUCTION GROUP

CORPORATE RESOLUTION

I, the undersigned Secretary of Wharton Smith, Inc., a corporation organized and existing under the laws of the State of Florida, do hereby certify that a meeting of the Board of Directors of said corporation, duly held on February 29, 2024, a quorum being present, the following resolution was adopted and entered upon the regular minute book of said corporation, is in accordance with the by-laws and is now in full force and effect to-wit:

The current list of qualifiers to act for the business organization in all matters connected with its contracting business has now been amended to read:

Ronald F. Davoli
Timothy S. Smith
Stephanie L. Pompeo
Patrick J. Hewitt
Kenneth E. Marcell III
Darin A. Crafton
Todd H. O'Donnell
Gregory L. Williams
Andre P. Boagni

I HEREBY certify that the foregoing is a true and exact copy of the resolution adopted by the Board of Directors of this Corporation and that such resolution has not been amended, modified, or revoked and is still in force and effect.

Signed and sealed this 29th day of February 2024.
(Seal of Corporation)

WHARTON-SMITH, INC. CORPORATE SEAL April 2, 1964 FLORIDA

Timothy S. Smith, President CEO

Ronald F. Davoli, Chairman

Stephanie L. Pompeo, Secretary

Corporate Structure Questionnaire | Wharton-Smith, Inc.

Corporate Structure Questionnaire

SOLICITATION NUMBER **2024-001** FOR **EDGEWATER WETLAND PARK PROJECT**

1. Respondents shall complete the following information for the proposed Design-Builder and all proposed Design Build Team Members:

Legal Name	Wharton-Smith, Inc.
Street Address	750 Monroe Road Sanford, FL 32771
Mailing Address	750 Monroe Road Sanford, FL 32771
Point of Contact	Nate Hillard
Position	Vice President Collaborative Delivery
Email	nhillard@whartonsmith.com
Telephone Number	407-402-0120
Fax Number	407-829-4453
Type of Business	Corporation
D-U-N-S Number	N/A
Federal Tax Identification Number	59-2392802
State Contractor's Registration Number (if applicable)	CGC1511243
State Business License Number (if applicable)	G94383

2. If the Design-Builder is a Joint Venture, Respondent must submit the above information the Joint Venture as well as for each member of the Joint Venture.

END OF SECTION

Proof of Business Registration with the State of Florida | Wharton-Smith, Inc.

State of Florida
Department of State

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

The document number of this corporation is G94383.

I further certify that said corporation has paid all fees due this office through December 31, 2024, that its most recent annual report/uniform business report was filed on January 3, 2024, and that its status is active.

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

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Third day of January, 2024

GREAT SEAL OF THE STATE OF FLORIDA
IN GOD WE TRUST

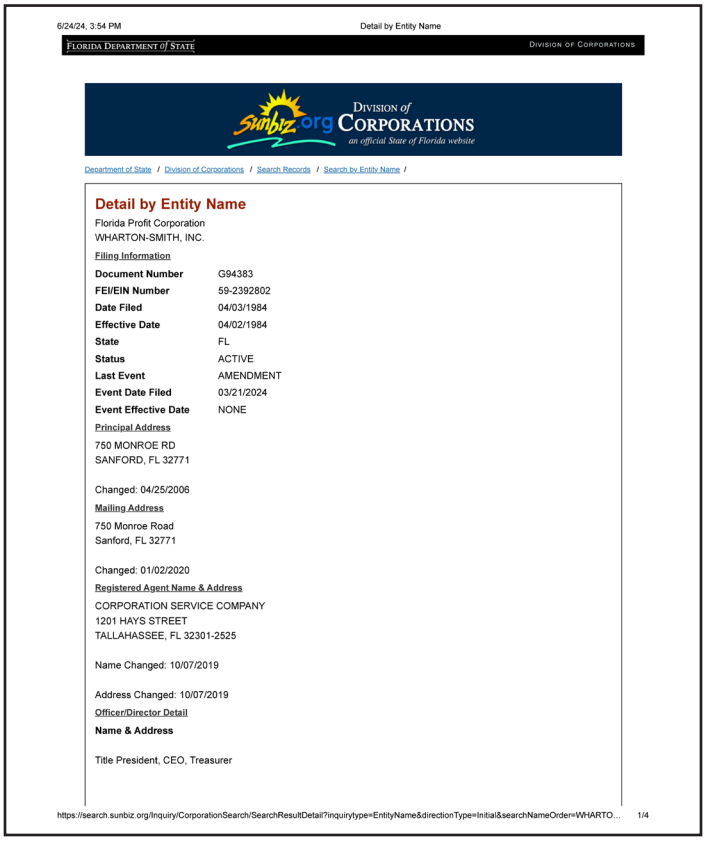
Secretary of State

Tracking Number: 4058037720CC

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

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

Sunbiz Verification | Wharton-Smith, Inc.



6/24/24, 3:54 PM Detail by Entity Name

FLORIDA DEPARTMENT of STATE DIVISION OF CORPORATIONS

Sunbiz.org DIVISION of CORPORATIONS an official State of Florida website

Department of State / Division of Corporations / Search Records / Search by Entity Name /

Detail by Entity Name

Florida Profit Corporation
WHARTON-SMITH, INC.

Filing Information

Document Number	G94383
FEI/EIN Number	59-2392802
Date Filed	04/03/1984
Effective Date	04/02/1984
State	FL
Status	ACTIVE
Last Event	AMENDMENT
Event Date Filed	03/21/2024
Event Effective Date	NONE

Principal Address

750 MONROE RD
SANFORD, FL 32771

Changed: 04/25/2006

Mailing Address

750 Monroe Road
Sanford, FL 32771

Changed: 01/02/2020

Registered Agent Name & Address

CORPORATION SERVICE COMPANY
1201 HAYS STREET
TALLAHASSEE, FL 32301-2525

Name Changed: 10/07/2019

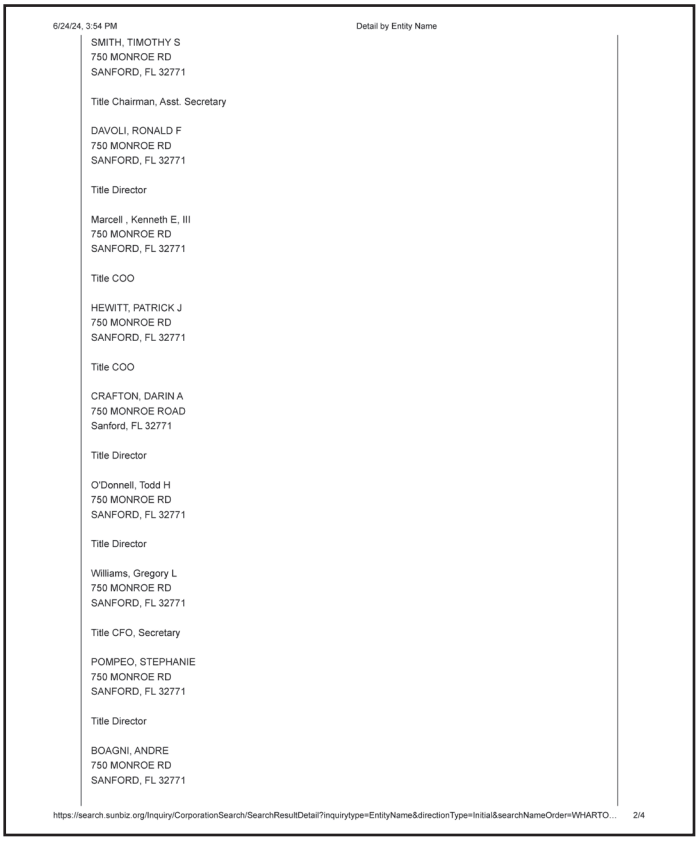
Address Changed: 10/07/2019

Officer/Director Detail

Name & Address

Title President, CEO, Treasurer

https://search.sunbiz.org/Inquiry/CorporationSearch/SearchResultDetail?inquirytype=EntityName&directionType=Initial&searchNameOrder=WHARTO... 1/4



6/24/24, 3:54 PM Detail by Entity Name

SMITH, TIMOTHY S
750 MONROE RD
SANFORD, FL 32771

Title Chairman, Asst. Secretary

DAVOLI, RONALD F
750 MONROE RD
SANFORD, FL 32771

Title Director

Marcell , Kenneth E, III
750 MONROE RD
SANFORD, FL 32771

Title COO

HEWITT, PATRICK J
750 MONROE RD
SANFORD, FL 32771

Title COO

CRAFTON, DARIN A
750 MONROE ROAD
Sanford, FL 32771

Title Director

O'Donnell, Todd H
750 MONROE RD
SANFORD, FL 32771

Title Director

Williams, Gregory L
750 MONROE RD
SANFORD, FL 32771

Title CFO, Secretary

POMPEO, STEPHANIE
750 MONROE RD
SANFORD, FL 32771

Title Director

BOAGNI, ANDRE
750 MONROE RD
SANFORD, FL 32771

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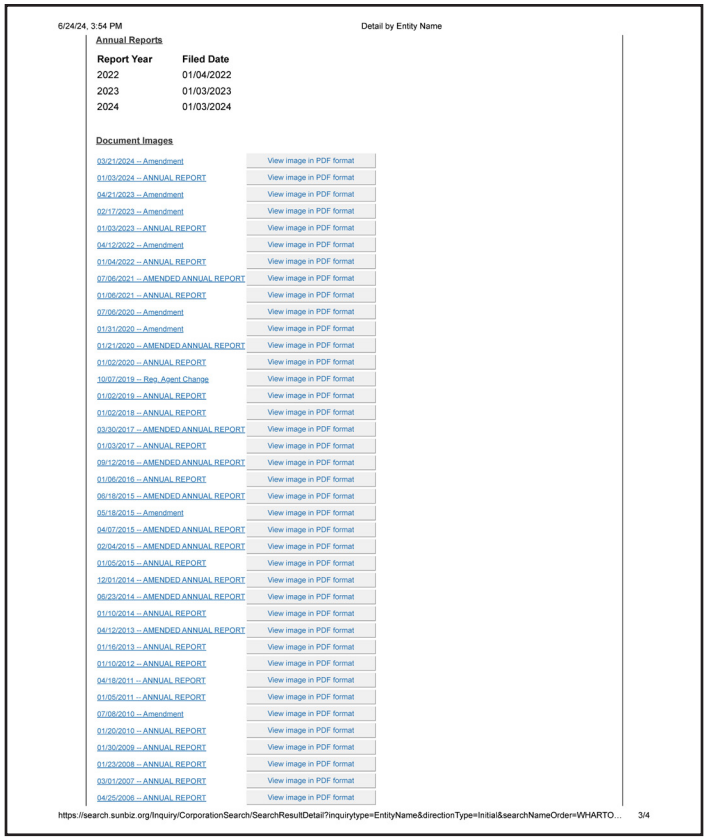

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Annual Reports

Report Year	Filed Date
2022	01/04/2022
2023	01/03/2023
2024	01/03/2024

Document Images

03/21/2024 -- Amendment	View image in PDF format
01/03/2024 -- ANNUAL REPORT	View image in PDF format
04/21/2023 -- Amendment	View image in PDF format
02/17/2023 -- Amendment	View image in PDF format
01/03/2023 -- ANNUAL REPORT	View image in PDF format
04/12/2022 -- Amendment	View image in PDF format
01/04/2022 -- ANNUAL REPORT	View image in PDF format
07/06/2021 -- AMENDED ANNUAL REPORT	View image in PDF format
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09/12/2016 -- AMENDED ANNUAL REPORT	View image in PDF format
01/06/2016 -- ANNUAL REPORT	View image in PDF format
06/18/2015 -- AMENDED ANNUAL REPORT	View image in PDF format
05/18/2015 -- Amendment	View image in PDF format
04/07/2015 -- AMENDED ANNUAL REPORT	View image in PDF format
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04/12/2013 -- AMENDED ANNUAL REPORT	View image in PDF format
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07/08/2010 -- Amendment	View image in PDF format
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01/30/2009 -- ANNUAL REPORT	View image in PDF format
01/23/2008 -- ANNUAL REPORT	View image in PDF format
03/01/2007 -- ANNUAL REPORT	View image in PDF format
04/25/2006 -- ANNUAL REPORT	View image in PDF format

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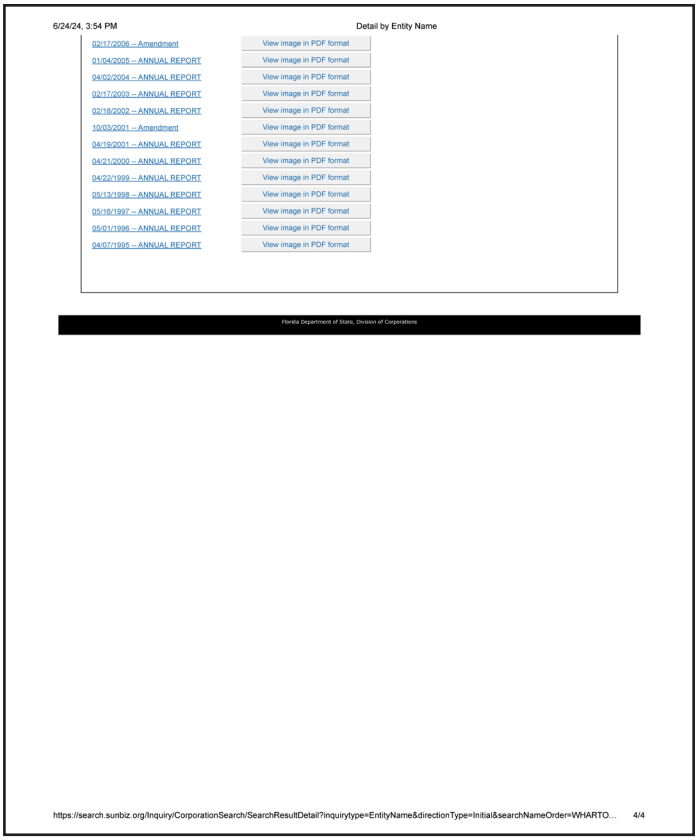

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04/02/2004 -- ANNUAL REPORT	View image in PDF format
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04/22/1999 -- ANNUAL REPORT	View image in PDF format
05/13/1998 -- ANNUAL REPORT	View image in PDF format
05/16/1997 -- ANNUAL REPORT	View image in PDF format
05/01/1996 -- ANNUAL REPORT	View image in PDF format
04/07/1995 -- ANNUAL REPORT	View image in PDF format

Florida Department of State, Division of Corporations

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Contractor's License For Design Build Entity
Wharton-Smith, Inc.

Ron DeSantis, Governor

Melanie S. Griffin, Secretary

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

CONSTRUCTION INDUSTRY LICENSING BOARD

THE GENERAL CONTRACTOR HEREIN IS CERTIFIED UNDER THE PROVISIONS OF CHAPTER 489, FLORIDA STATUTES

SMITH, TIMOTHY SCOT

WHARTON-SMITH INC
750 MONROE ROAD
SANFORD FL 32771

LICENSE NUMBER: CGC1511243
EXPIRATION DATE: AUGUST 31, 2024

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DBIA Certificate for Qualifying DBIA Professional
Nate Hillard, DBIA

THE DESIGN-BUILD INSTITUTE OF AMERICA

DBIA DESIGN-BUILD PROFESSIONAL™

has conferred upon

NATHAN HILLARD

the designation of

DBIA™

for fulfilling the program requirements of the
Designated Design-Build Professional™ program.

awarded on

JANUARY 9, 2023

by

THE DESIGN-BUILD CERTIFICATION BOARD

Deborah A. Sheehan, DBIA, ACHE, EDAC, LEED AP
2023 Chairman
Design-Build Institute of America

Jignesh Desai, DBIA, PE, LEED AP
2023 Chairman
Design-Build Certification Board

Corporate Structure Questionnaire | Wright-Pierce

Corporate Structure Questionnaire

SOLICITATION NUMBER **2024-001** FOR **EDGEWATER WETLAND PARK PROJECT**

1. Respondents shall complete the following information for the proposed Design-Builder and all proposed Design Build Team Members:

Legal Name	Wright-Pierce, Inc.
Street Address	601 South Lake Destiny Drive Maitland, FL 32751
Mailing Address	601 South Lake Destiny Drive Maitland, FL 32751
Point of Contact	Walter Nickel
Position	Sr. Project Manager
Email	walter.nickel@wright-pierce.com
Telephone Number	407.794.1734
Fax Number	978.267.1708
Type of Business	Civil Engineering Consultant
D-U-N-S Number	049286511
Federal Tax Identification Number	01-0228316
State Contractor's Registration Number (if applicable)	
State Business License Number (if applicable)	

2. If the Design-Builder is a Joint Venture, Respondent must submit the above information the Joint Venture as well as for each member of the Joint Venture.

END OF SECTION

Proof of Business Registration with the State of Florida | Wright-Pierce

State of Florida
Department of State

I certify from the records of this office that WRIGHT-PIERCE, INC. is a Maine corporation authorized to transact business in the State of Florida, qualified on August 31, 2010.

The document number of this corporation is F10000003928.

I further certify that said corporation has paid all fees due this office through December 31, 2024, that its most recent annual report/uniform business report was filed on March 13, 2024, and that its status is active.

I further certify that said corporation has not filed a Certificate of Withdrawal.

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Eighteenth day of April, 2024

Secretary of State

Tracking Number: 9135386714CU

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

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

Engineer's Registry License Number or Certificate of Authorization | Wright-Pierce

Ron DeSantis, Governor — Melanie S. Griffin, Secretary — FBPE Florida Board of Professional Engineers

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

NICKEL, WALTER ALBERT
1007 NW 87TH WAY
GAINESVILLE FL 32606

LICENSE NUMBER: PE68638
EXPIRATION DATE: FEBRUARY 28, 2025
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Ron DeSantis, Governor — Melanie S. Griffin, Secretary — FBPE Florida Board of Professional Engineers

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

DAVIS, DENNIS A.
17550 NE 2ND PLACE
WILLISTON FL 32696

LICENSE NUMBER: PE59299
EXPIRATION DATE: FEBRUARY 28, 2025
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Ron DeSantis, Governor — Melanie S. Griffin, Secretary — FBPE Florida Board of Professional Engineers

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

HOFFMAN, MICHAEL K.
766 ARBUTUS AVE SE
ROANOKE VA 24014

LICENSE NUMBER: PE91142
EXPIRATION DATE: FEBRUARY 28, 2025
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2/19/2021 DBPR - WRIGHT-PIERCE, INC., Registry

8:13:45 AM 2/19/2021

Licensee Details

Licensee Information

Name:	**WRIGHT-PIERCE, INC. (Primary Name)**
Main Address:	**11 BOWDOIN MILL ISLAND STE 140 TOPSHAM Maine 04086**
County:	**OUT OF STATE**
License Mailing:	**601 S. LAKE DESTINY ROAD SUITE 290 MAITLAND FL 32751**
County:	**ORANGE**
LicenseLocation:	

License Information

License Type:	**Registry**
Rank:	**Registry**
License Number:	**29336**
Status:	**Current**
Licensure Date:	**12/27/2010**
Expires:	

Special Qualifications **Qualification Effective**

Alternate Names

View Related License Information
View License Complaint

2601 Blair Stone Road, Tallahassee FL 32399 :: Email: Customer Contact Center :: Customer Contact Center: 850.487.1395

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https://www.myfloridalicense.com/LicenseDetail.asp?SID=&id=3D3F526B95AB8E987E12077B80F83CAD 1/1

Ron DeSantis, Governor — Melanie S. Griffin, Secretary — FBPE Florida Board of Professional Engineers

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

WEHNER, KELLY SUTTON
4032 LIGUSTRUM DRIVE
PALM HARBOR FL 34685

LICENSE NUMBER: PE60273
EXPIRATION DATE: FEBRUARY 28, 2025
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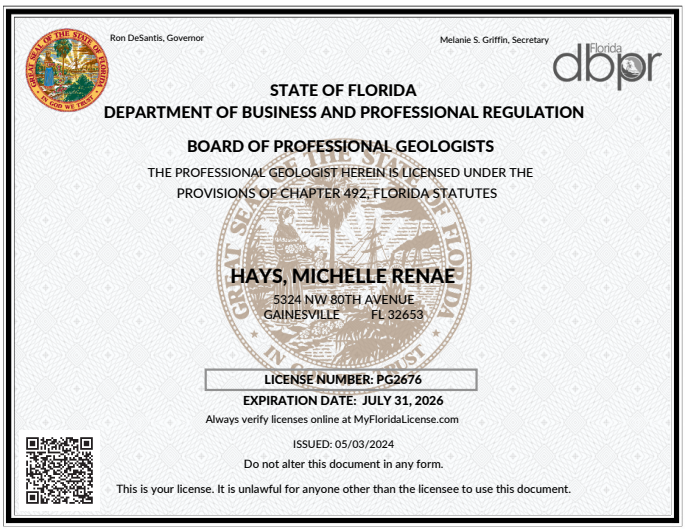

Ron DeSantis, Governor
Melanie S. Griffin, Secretary
Florida dbpr

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

BOARD OF PROFESSIONAL GEOLOGISTS

THE PROFESSIONAL GEOLOGIST HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 492, FLORIDA STATUTES

HAYS, MICHELLE RENAE
5324 NW 80TH AVENUE
GAINESVILLE FL 32653

LICENSE NUMBER: PG2676
EXPIRATION DATE: JULY 31, 2026
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ISSUED: 05/03/2024
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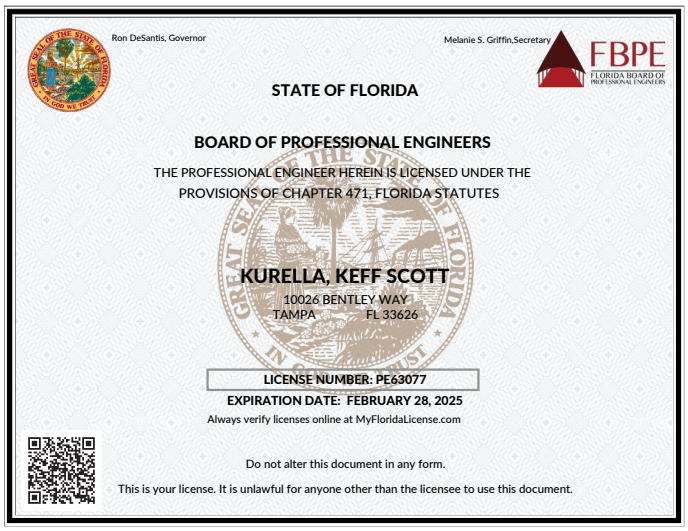
Proof of Business Registration with the State of Florida
Liquid Solutions Group, LLC



Ron DeSantis, Governor
Melanie S. Griffin,Secretary
FBPE FLORIDA BOARD OF PROFESSIONAL ENGINEERS

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

KURELLA, KEFF SCOTT
10026 BENTLEY WAY
TAMPA FL 33626

LICENSE NUMBER: PE63077
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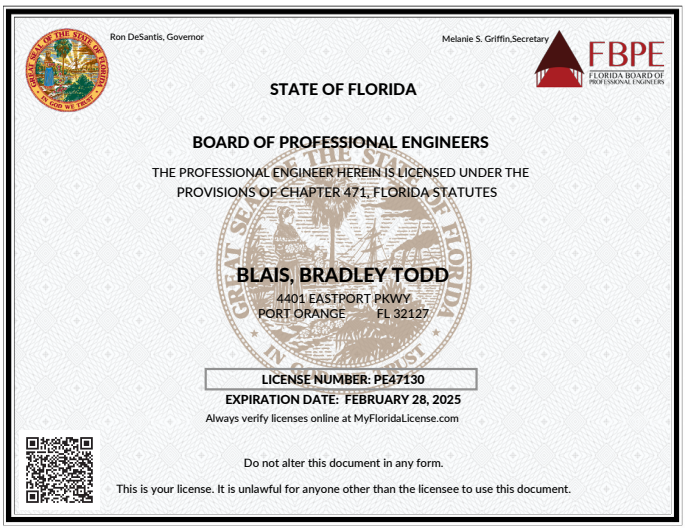
Mead & Hunt



Ron DeSantis, Governor
Melanie S. Griffin,Secretary
FBPE FLORIDA BOARD OF PROFESSIONAL ENGINEERS

STATE OF FLORIDA

BOARD OF PROFESSIONAL ENGINEERS

THE PROFESSIONAL ENGINEER HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

BLAIS, BRADLEY TODD
4401 EASTPORT PKWY
PORT ORANGE FL 32127

LICENSE NUMBER: PE47130
EXPIRATION DATE: FEBRUARY 28, 2025
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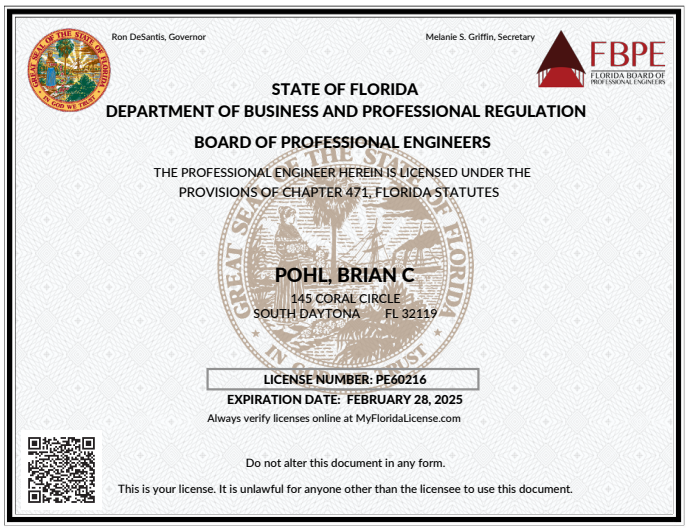
Proof of Business Registration with the State of Florida
Mead & Hunt



Ron DeSantis, Governor
Melanie S. Griffin, Secretary
FBPE FLORIDA BOARD OF PROFESSIONAL ENGINEERS

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

BOARD OF PROFESSIONAL ENGINEERS

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POHL, BRIAN C
145 CORAL CIRCLE
SOUTH DAYTONA FL 32119

LICENSE NUMBER: PE60216
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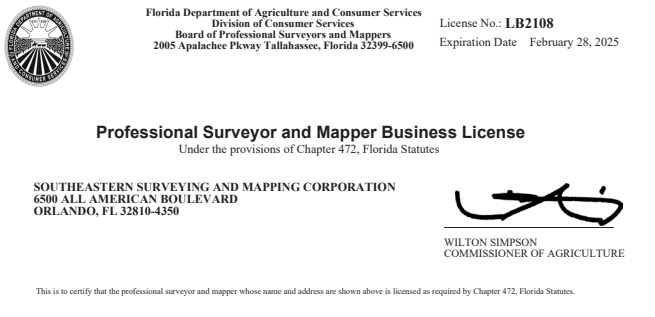
Proof of Business Registration with the State of Florida
Universal Engineering Sciences



Florida Department of Agriculture and Consumer Services
Division of Consumer Services
Board of Professional Surveyors and Mappers
2005 Apalachee Pkway Tallahassee, Florida 32399-6500

License No.: **LB2108**
Expiration Date February 28, 2025

Professional Surveyor and Mapper Business License
Under the provisions of Chapter 472, Florida Statutes

SOUTHEASTERN SURVEYING AND MAPPING CORPORATION
6500 ALL AMERICAN BOULEVARD
ORLANDO, FL 32810-4350

WILTON SIMPSON
COMMISSIONER OF AGRICULTURE

This is to certify that the professional surveyor and mapper whose name and address are shown above is licensed as required by Chapter 472, Florida Statutes.

Proof of Business Registration with the State of Florida
Southeastern Surveying

Bonding Capacity Evidence - Letter from Surety

GUIGNARD
AN UNCOMMON BOND

June 7, 2024

Deering Park Stewardship District
2300 Glades Road, #410W
Boca Raton, FL 33431

RE: **Wharton-Smith, Inc., 750 Monroe Road, Sanford, FL 32771**
Solicitation No. 2024-001, Request for Statement of Qualifications (RFQ) for Design- Builder for the Edgewater Wetland Park Project

Dear Selection Committee Members,

Guignard Company is the agency handling the bond requirements for Wharton-Smith, Inc. Bonds have been placed with Western Surety Company since 1986. Western Surety Company is a member of the CNA Surety Group, has an AM Best's Rating of A, XIV, is included in the 2023 U.S. Department of Treasury's Circular 570 and is licensed 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 $250,000,000 for a single job with an aggregate program of approximately $1,600,000,000. Should you award a contract to Wharton-Smith, Inc. we would be pleased to provide the required Design-Build Performance and Payment Bonds in connection with this project.

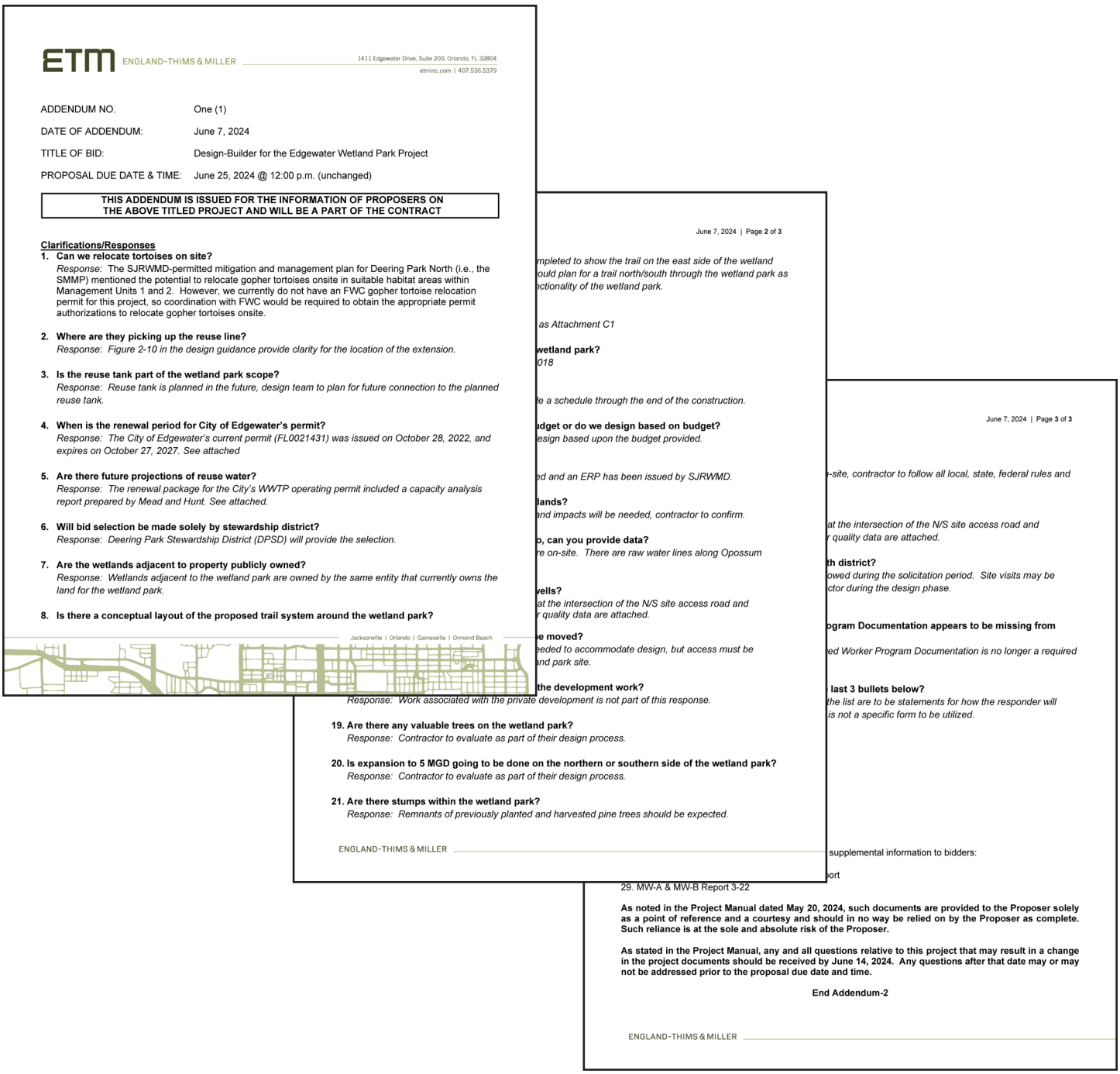
If you have any questions or require additional information, please contact me at (407) 834-0022 or via email at Bryce@guignardcompany.com.

Best regards
GUIGNARD COMPANY

Bryce R. Guignard
President

1904 Boothe Circle I Longwood, FL 32750

Addendum #1 Acknowledgment



ETM ENGLAND-THIMS & MILLER

1411 Edgewater Drive, Suite 200, Orlando, FL 32804
etminc.com | 407.536.5379

ADDENDUM NO. One (1)

DATE OF ADDENDUM: June 7, 2024

TITLE OF BID: Design-Builder for the Edgewater Wetland Park Project

PROPOSAL DUE DATE & TIME: June 25, 2024 @ 12:00 p.m. (unchanged)

THIS ADDENDUM IS ISSUED FOR THE INFORMATION OF PROPOSERS ON THE ABOVE TITLED PROJECT AND WILL BE A PART OF THE CONTRACT

Clarifications/Responses

1. **Can we relocate tortoises on site?**
   Response: The SJRWMD-permitted mitigation and management plan for Deering Park North (i.e., the SMMP) mentioned the potential to relocate gopher tortoises onsite in suitable habitat areas within Management Units 1 and 2. However, we currently do not have an FWC gopher tortoise relocation permit for this project, so coordination with FWC would be required to obtain the appropriate permit authorizations to relocate gopher tortoises onsite.
2. **Where are they picking up the reuse line?**
   Response: Figure 2-10 in the design guidance provide clarity for the location of the extension.
3. **Is the reuse tank part of the wetland park scope?**
   Response: Reuse tank is planned in the future, design team to plan for future connection to the planned reuse tank.
4. **When is the renewal period for City of Edgewater's permit?**
   Response: The City of Edgewater's current permit (FL0021431) was issued on October 28, 2022, and expires on October 27, 2027. See attached
5. **Are there future projections of reuse water?**
   Response: The renewal package for the City's WWTP operating permit included a capacity analysis report prepared by Mead and Hunt. See attached.
6. **Will bid selection be made solely by stewardship district?**
   Response: Deering Park Stewardship District (DPSD) will provide the selection.
7. **Are the wetlands adjacent to property publicly owned?**
   Response: Wetlands adjacent to the wetland park are owned by the same entity that currently owns the land for the wetland park.
8. **Is there a conceptual layout of the proposed trail system around the wetland park?**

Jacksonville | Orlando | Gainesville | Ormond Beach

June 7, 2024 | Page 2 of 3

mpleted to show the trail on the east side of the wetland
ould plan for a trail north/south through the wetland park as
nctionality of the wetland park.

as Attachment C1

wetland park?
018

e a schedule through the end of the construction.

dget or do we design based on budget?
esign based upon the budget provided.

ed and an ERP has been issued by SJRWMD.

lands?
and impacts will be needed, contractor to confirm.

o, can you provide data?
re on-site. There are raw water lines along Opossum

vells?
at the intersection of the N/S site access road and
r quality data are attached.

e moved?
eeded to accommodate design, but access must be
nd park site.

the development work?
Response: Work associated with the private development is not part of this response.

19. **Are there any valuable trees on the wetland park?**
    Response: Contractor to evaluate as part of their design process.
20. **Is expansion to 5 MGD going to be done on the northern or southern side of the wetland park?**
    Response: Contractor to evaluate as part of their design process.
21. **Are there stumps within the wetland park?**
    Response: Remnants of previously planted and harvested pine trees should be expected.

ENGLAND-THIMS & MILLER

June 7, 2024 | Page 3 of 3

-site, contractor to follow all local, state, federal rules and

at the intersection of the N/S site access road and
r quality data are attached.

th district?
owed during the solicitation period. Site visits may be
ctor during the design phase.

ogram Documentation appears to be missing from

ed Worker Program Documentation is no longer a required

last 3 bullets below?
the list are to be statements for how the responder will
is not a specific form to be utilized.

supplemental information to bidders:

ort

29. MW-A & MW-B Report 3-22

As noted in the Project Manual dated May 20, 2024, such documents are provided to the Proposer solely as a point of reference and a courtesy and should in no way be relied on by the Proposer as complete. Such reliance is at the sole and absolute risk of the Proposer.

As stated in the Project Manual, any and all questions relative to this project that may result in a change in the project documents should be received by June 14, 2024. Any questions after that date may or may not be addressed prior to the proposal due date and time.

End Addendum-2

ENGLAND-THIMS & MILLER

VENDORS ON SCRUTINIZED COMPANIES LISTS

By executing this Certificate Wharton-Smith, Inc., the proposer, certifies that it is not: (1) listed on the Scrutinized Companies that Boycott Israel List, created pursuant to section 215.4725, Florida Statutes, (2) engaged in a boycott of Israel, (3) listed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to section 215.473, Florida Statutes, or (4) engaged in business operations in Cuba or Syria. Pursuant to section 287.135(5), Florida Statutes, the District may disqualify the proposal proper immediately or immediately terminate any agreement entered into for cause if the proposer is found to have submitted a false certification as to the above or if the Contractor is placed on the Scrutinized Companies that Boycott Israel List, is engaged in a boycott of Israel, has been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or has been engaged in business operations in Cuba or Syria, during the term of the Agreement. If the District determines that the proposer has submitted a false certification, the District will provide written notice to the proposer. Unless the proposer demonstrates in writing, within 90 calendar days of receipt of the notice, that the District's determination of false certification was made in error, the District shall bring a civil action against the proposer. If the District's determination is upheld, a civil penalty shall apply, and the proposer will be ineligible to on any Agreement with a Florida agency or local governmental entity for three years after the date of District's determination of false certification by proposer.

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

DATE:	June 25, 2024	SIGNATURE:	
COMPANY:	Wharton-Smith, Inc.	NAME:	Darin A. Crafton
ADDRESS:	750 Monroe Road Sanford, FL 32771	TITLE:	COO - Commercial
PHONE NO.:	407.321.8410		

SWORN STATEMENT UNDER SECTION 287.133 (3) (a), FLORIDA STATUTES ON PUBLIC ENTITY CRIMES

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted for Deering Park Stewardship District

2. This sworn statement is submitted by Wharton-Smith, Inc. whose business address is: 750 Monroe Road, Sanford, FL and (if applicable) its Federal Employer Identification Number (FEIN) is (If entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: 59-2392802

3. My name is Darin A. Crafton and my relationship to the entity named above is COO - Commercial

4. I understand that a "public entity crime" as defined in Section 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

5. I understand that "convicted" or "conviction" as defined in Section 287.133 (1) (b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without adjudication of guilt, in any federal or state trial court of record, relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.

6. I understand that an "affiliate" as defined in Section 287.133(1) (a), Florida Statutes, means:

   (1) A predecessor or successor of a person convicted of a public entity crime; or
   (2) An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

7. I understand that a "person" as defined in Section 287.133(1) (e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

8. Based on information and belief, that statement which I have marked below is true in relation to the entity submitting this sworn statement. [Please indicate which statement applies.

__X__ Neither the entity submitting this sworn statement, nor one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity, has been charged with and convicted of public entity crime subsequent to July 1, 1989.

_____ There has been a proceeding concerning the conviction before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer did not place the person or affiliate on the convicted vendor list. [Please attach a copy of the Final Order.]

_____ The person or affiliate was placed on the convicted vendor list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in the public interest to remove the person or affiliate from the convicted vendor list. [Please attach a copy of the Final Order.]

_____ The person or affiliate has not been placed on the convicted vendor list. [Please describe any action taken by or pending with the Department of General Services.]

Date: June 25, 2024 Signature: Darin A. Crafton, COO / Commercial

STATE OF: Florida

COUNTY OF: Seminole

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who after first being sworn by me, affixed his/her signature in the space provided above on this 25 day of June, in the year 2024.

My commission expires:

Notary Public

DAWN K CRARY
Notary Public - State of Florida
Commission # HH 333684
My Comm. Expires Nov 17, 2026
Bonded through National Notary Assn.

Print, Type, or Stamp of Notary Public

Personally known to me, or Produced Identification:

Personally Known

Type of ID

FLORIDA TRENCH SAFETY ACT AFFIDAVIT

The undersigned hereby certifies, on behalf of Wharton-Smith, that Wharton-Smith will fully comply with the applicable trench safety standards and all requirements of the Occupational Safety and Health Administration's (OSHA) excavation safety standards as defined in 29 CFR 1926.650 Sub-Part P as required by the State of Florida Trench Safety Act, Section 553.63, Florida Statutes, and further that submittal of this Bid for the Project is full acknowledgment of the requirements and that the costs associated with said compliance have been included in the Bid.

EXECUTION OF ABOVE CERTIFICATIONS

The undersigned hereby represents that they: **(A)** make the above certification based upon personal knowledge; **(B)** are over the age of 18 years and otherwise competent to make the above certification; and **(C)** are authorized to legally bind and make the above certification on behalf of the Vendor.

Under penalties of perjury, the undersigned declares that they have read and understand the contents of the foregoing form. Pursuant to the authority granted to the undersigned by Vendor, the undersigned hereby acknowledges, affirms, and makes the certification provided above on behalf of Vendor.

By: _____
Authorized Representative on behalf of Wharton-Smith, Inc.
Printed Name: Darin A. Crafton
Official Title: COO - Commercial
Date: June 25, 2024

STATE OF Florida

COUNTY OF Seminole

The foregoing instrument was acknowledged before me by means of ☒ physical presence or ☐ online notarization, this 25 day of June, 20 24, by Darin A. Crafton, as COO - Commercial of Wharton-Smith, Inc., a Corporation authorized to do business in the State of Florida on behalf of the company/corporation. They ☒ are personally known to me or ☐ have produced _____ as identification.

(Seal)

DAWN K CRARY
Notary Public - State of Florida
Commission # HH 333684
My Comm. Expires Nov 17, 2026
Bonded through National Notary Assn.

Signature of Notary Public

Name of Notary Typed, Printed or Stamped


Trail 2
Qualifications of Team

Qualifications of Team

MEET YOUR DESIGN-BUILD TEAM

Wharton-Smith is the #1 water contractor and the #1 park builder in Florida and will serve as the lead design-build firm. Your project aligns perfectly with our core competencies. The team was assembled with purpose to provide the Deering Park Stewardship District with seasoned and competent wetland professionals to design and construct the Edgewater Wetland Park.

PRECONSTRUCTION

Erik Anderson, DBIA
Preconstruction Manager

Sean White, PE
Chief Estimator

Todd O'Donnell, DBIA
Value Engineering

Ryan Wingard, PE
QA/QC

Dennis Davis, PE, Assoc. DBIA
Design Phase DB Specialist

Lucas Anthony, PE
Civil Site Design

Mike Hoffman, PE
Hydrology & Hydraulics Modeling

Kalle Maggio, PLA
Trails Design

Kelly Wehner, PE
Pipeline Design

DESIGN

Walter Nickel, PE
Design Manager
Engineer of Record

Laura Coveney
Wetland Design Lead & Environmental Permitting

Michelle Hays, PG
Hydrogeologist

Brad Blais, PE
Effluent Water Quantity/Quality

Keff Kurella, PE
Electrical and I&C Engineer

Brian Pohl, PE
Geotechnical Engineer

Edwin Munoz, Jr., PSM
Surveying & Land Development

Sheryl Parsons
Funding Specialist

Shari Curley
Public Outreach

CONSTRUCTION

Duncan Graham
Construction Manager

Tim Moore
Senior Superintendent

Shane Smith
Project Engineer

Jordan Haak
Corporate Safety

Robyn Dowsey, LEED AP BD+C
Environmental Consultant

DESIGN-BUILD TEAM BUILT SPECIFICALLY FOR YOUR RECHARGE WETLAND PROJECT

The DPSD is embarking on a unique multi-decade development project that will develop thousands of new residences and millions of square feet of new commercial space. As part of this incredible project, the DPSD has already placed 10's of thousands of acres of land into conservation to help preserve the very nature of the area that it is developing. As part of this project and with an eye towards conservation the DPSD is working with the City of Edgewater to develop a recharge wetland that will be a key piece of its environmental stewardship plan.

With our understanding of the DPSD's focus on environmental stewardship and the overall importance of this project, it cannot be understated how important it is for the selection committee to select the right design build team to successfully implement your vision for this project. In this section our goal is to explain to you the makeup of our team, why each team member was selected, and what their role is in the team. After reading this section of our SOQ, we want you to understand that we are the most qualified team for this project.

KEY REASONS IN SELECTING PARTNERS FOR THIS DESIGN-BUILD TEAM

There were several reasons why we selected our teaming partners, they follow:

1. Similar project experience with wetlands projects, pipeline projects, City of Edgewater Master Planning, trails, hydrogeology, and H&H modeling.
2. Experience working together either as companies or as specific team members when they worked with previous companies.

DESIGN-BUILD TEAM

In this section our goal is to explain to you the makeup of our team, why each team member was selected, and what their role is in the team. Our organizational structure is presented on the organizational chart on the previous page.

Wharton-Smith | Lead Design-Builder
Local team, wetland and park experience, currently working with the City of Edgewater

Wright-Pierce | Lead Designer
Local engineering firm, experience working with Wharton Smith, similar project experience, water projects are our business

Bio-Tech Consulting | Wetland Design
Extensive experience designing and permitting wetlands, similar project experience, Experience working with WP's PM

Liquid Solutions Group | Hydrogeology Design
One of the most experienced hydrogeology firms in Florida, similar project experience, experience working with WS

Mead & Hunt | Water Supply & Quality Engineer, Electrical and I&C Design, Funding Assistance
Developed Edgewater's WW Master Plan that identified the need for this project, extensive local experience, $245 million in funding acquired, experience working with WS

Eco-Build Strategies | Sustainability Consulting
WMBE firm, provides design of SWPPP systems during construction, experience working with WS

Southeastern Surveying and Mapping | Survey
Local surveying company with bandwidth to handle all surveying needs

University Engineering | Geotechnical Testing
Local geotechnical firm, performed preliminary work on this site, similar project experience

Quest Corporation of America | Stakeholder Engagement & Public Outreach
Local communications firm, similar project experience, experience working with M&H

On the following pages you will find more information about our team and their staff.

9 WS + WP Projects Over $303M

Significant Team Relationships

Wharton-Smith, Inc. | Lead Design-Builder

Wharton-Smith, Inc. is a privately held corporation founded in 1984 and has been providing quality construction for more than 40 years. Our services include preconstruction, construction management, general contracting, and specifically design-build delivery for public sector clients. A Top 400 *ENR* Contractor with a strong financial backing, Wharton-Smith was founded by George Smith and Bill Wharton, who envisioned growing a company that would encompass strong work ethics and have a positive impact within the communities that we serve. Wharton-Smith continues to uphold those founding ideals under the leadership of Tim Smith, President/CEO.

With twelve DBIA-Certified employees, Wharton-Smith is also a proud member of the Design-Build Institute of America (DBIA) and has completed over $2 Billion in Design-Build projects.

What began in 1984 as a water/wastewater contractor, expanded into the commercial construction market in the 1990's. Our experience in both areas over the last four decades has allowed for unique opportunities for hybrid type projects, similar to the Edgewater Wetland Park Project.

DISCIPLINE	FIRM	EAST/CENTRAL FL
Project Managers	95	**47**
Project Engineers	53	**25**
Executive Mgmt.	62	**37**
Superintendents	127	**61**
Trade/Craft	195	**97**
Precon/Estimating	29	**13**
VDC/CADD	5	**5**
Safety	13	**10**
Accounting	22	**15**
Administration	173	**116**
TOTAL	774	**426**

Nathan Hillard, DBIA | Design-Build Project Manager

EDUCATION: BS, Civil Engineering, University of Central Florida

CERTIFICATIONS: Designated Design-Build Professional

EXPERIENCE: 22 Years

As Design-Build Project Manager Nate ensures that Wharton-Smith takes the lead in maintaining a collaborative working environment, including our owners and engineer partners, as we deliver your award winning project. He is also responsible for ensuring that Wharton-Smith maintains the highest levels of integrity, professionalism, and technical expertise to finish all Wharton-Smith projects on-time and under budget.

Todd O'Donnell, DBIA | Value Engineering

President of the Design Build Institute of America - Florida Region

EDUCATION: BS, Mechanical Engineering, Auburn University

CERTIFICATIONS: Designated Design-Build Professional

EXPERIENCE: 32 Years

As President of DBIA Florida, Todd serves as an advocate of design-build delivery. He is actively involved in educating owners, like DPSD, about the best practices for design-build delivery. Todd will provide value engineering ideas to the team and ensure we follow DBIA best practices. For this project, Todd will lead value engineering efforts.

Erik Anderson, PE, DBIA | Preconstruction Manager

EDUCATION: BS, Mechanical Engineering, University of Central Florida, MS, Industrial Engineering, University of Central Florida

CERTIFICATIONS: Professional Engineer, State of Florida, Designated Design-Build Professional

EXPERIENCE: 20 Years

As Preconstruction Manager, Erik oversees all tasks associated with pre-construction services. He provides design and constructability reviews on all drawing phases. Erik also oversees all cost estimates and ensures the project tracks toward the GMP.

Sean White, PE, CGC | Lead Estimator

EDUCATION: BS, Environmental Engineering, University of Central Florida

CERTIFICATIONS: Professional Engineer & Certified General Contractor, State of Florida

EXPERIENCE: 30 Years

As Lead Estimator, Sean will assist with the preparation and issuance of bid packages to perspective subcontractors and vendors, track and analyze data to reduce gaps between the estimates and actual costs, and obtain and track subcontractor bids to negotiate prices to lead to a best-value GMP. In addition, he will leverage his nearly 30 years of experience to contribute to constructability reviews and value engineering efforts throughout preconstruction.

Duncan Graham | Construction Manager

EDUCATION: BS, Building Construction Management, University of North Florida

CERTIFICATIONS: OSHA 30-Hour

EXPERIENCE: 6 Years

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

Tim Moore | Senior Superintendent

EDUCATION: AS, Business Management, Valencia College

CERTIFICATIONS: FDEP Qualified Stormwater Inspector, Confined Space, Fall Protection, Scaffolding, Trenching & Excavation, OSHA 10-Hour, Qualified Rigger, and HAZCOM

EXPERIENCE: 38 Years

As Sr. Superintendent, Tim is responsible for the supervision and coordination of the day-to-day activities of the subcontractors and WS 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 close-out. He is also responsible for keeping projects on schedule and within budget.

Shane Smith | Project Engineer

EDUCATION: BS, Construction Management - Seminole State College of Florida

EXPERIENCE: 4 Years

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

WRIGHT-PIERCE
Engineering a Better Environment

Wright-Pierce | Lead Designer

Placeholder an award-winning, multidiscipline engineering firm that has been providing drinking water, wastewater, parks, and civil infrastructure services since 1947. Employee-owned and operated, our firm is made up of more than 300 engineers and support professionals in offices throughout the Southeast and Northeast. We complete many projects with construction values ranging from less than $100,000 to more than $180 million. We provide full-service engineering from initial planning to design, bidding, construction administration, and operational support.

An Award-Winning Firm

Wright-Pierce has been recognized by several industry organizations for business performance and engineering excellence. We rank in Engineering News-Record (ENR) "Top" lists, including the Top 500 Design Firms and Top 200 Environmental Design Firms in the country. Many of our projects receive regional ACEC Engineering Excellence Awards.

In addition, Wright-Pierce is a multi-year winner of the PSMJ Resources, Inc. 'Circle of Excellence' Award. PSMJ is a firm dedicated to business practices of architectural and engineering (A/E) firms worldwide and bestows its Circle of Excellence award after assessing benchmarks for operations, management, and sustainability.

Responsive Service Focused on Your Success

The cornerstone of our business is to assist our clients with improving their communities while protecting public health and the environment. For every project, we focus on the following:

- Understanding the project issues and goals
- Stressing practical, operator-friendly solutions
- Identifying fiscal constraints and emphasizing value-based solutions
- Involving and collaborating with our clients throughout the project

Our mission is to deliver technical excellence and superior client service.

ACEC Award-Winning Projects
PSMJ Circle of Excellence
ENR Top 500 Design Firms
ENR Top 200 Environmental Firms
ENR Top 50 Sewer and Waste Engineering
ENR Top 25 Wastewater Treatment Plants
Top 50 Trenchless Engineering Firms

Walter Nickel, PE | Design Manager & Engineer of Record

EDUCATION: BSCE, Civil Engineering
CERTIFICATIONS: FDOT Work Group 3.1 Minor Highway Design, FDOT Work Group 3.2 Major Highway Design
EXPERIENCE: 39 Years

Walt will serve as Design Manager for this contract. In this role, he will be responsible for coordinating the technical efforts of the design team and for monitoring schedule and budget compliance. Walt is a seasoned Civil Engineer with over 39 years of success leading large-scale projects as a department executive, project manager, and lead design engineer within the consulting industry. His expertise lies in civil engineering design, created wetlands design, stormwater design, trails and parks design, force main design and pump station design.

Dennis Davis, PE, Assoc. DBIA | Design Phase Design-Build Specialist

EDUCATION: BS, Environmental Engineering
CERTIFICATIONS: Associate Design-Build Professional
EXPERIENCE: 26 Years

In this role, Dennis will lead the design team through the pre-construction/design phase of this design-build project. As a certified Associate DBIA Professional, he has learned the concepts of "Design-Build Done Right" as taught by the Design-Build Institute of America (DBIA). Dennis is an experienced engineer and Client Service Manager with over 26 years of experience. He has experience in water supply, utilities, stormwater design, water quality, natural systems, solid waste management, civil site design, and environmental permitting.

Ryan Wingard, PE | QA/QC

EDUCATION: MS & BS in Civil Engineering
CERTIFICATIONS: Certified Professional in Sediment & Erosion Control
EXPERIENCE: 28 Years

Ryan will serve as a QA/QC reviewer, providing technical advice to the project team and reviews of interim technical documents and final deliverables. Ryan has over 28 years of water resources-related experience, including stormwater system design, watershed characterization, wastewater system design, and project management. His specialties center on hydrology and hydraulics as they pertain to stormwater, watershed, wastewater, and CSO systems. His in-depth knowledge of hydrologic and hydraulic systems is an asset for any water resources related project.

Lucas Anthony, PE | Civil Site Design

EDUCATION: BS, Civil Engineering
EXPERIENCE: 25 Years

Lucas will serve as the Civil Site Design Engineer for this contract. He will assist the Project Manager and Lead Project Engineer with the execution of any civil aspects of design, including technical calculations and the development of plans and specifications. Lucas has over 25 years of land development-related experience with a demonstrated history of completing large-scale, complex projects. He has specialized experience in site design, cost estimating, utility design, drainage design, erosion control, project management, scheduling, and construction.

Michael Hoffman, PE | Hydrology & Hydraulics Modeling

EDUCATION: BS, Biological Engineering
CERTIFICATIONS: FDOT Work Group 3.1 Minor Highway Design
EXPERIENCE: 9 Years

Michael will serve as the Hydrology and Hydraulic Modeling Engineer for this contract. In this role, he will develop hydraulic models required to assess your utility systems. His engineering expertise includes civil and agricultural engineering. He has experience in topographical surveying; nutrient load modeling, including BMPTrains; hydraulic and hydrologic modeling, including ICPR, PONDS, and SSA; ArcGIS; PythonTM; AUTOCAD® Civil 3D; and construction stakeout.

Kalle Maggio, PLA | Trails Design

EDUCATION: BLA, Landscape Architecture
CERTIFICATIONS: CLARB Certified Landscape Architect
EXPERIENCE: 12 Years

In this role, Kalle will leverage training in landscape architecture and community planning to develop sustainable, context sensitive trails and landscape design. Kalle has over a decade of experience in landscape architecture, landscape design, and horticulture. Her experience includes master plans, urban landscape architecture, green infrastructure practices, park and recreational program elements, campus planning, bike and trailway design, traffic calming techniques, sustainable landscape design, signage and wayfinding design.

Kelly Wehner, PE | Pipeline Design

EDUCATION: MS, Environmental Engineering & Science, BS, Chemical Engineering
CERTIFICATIONS: PACP, MACP, and LACP Certified
EXPERIENCE: 25 Years

Kelly will serve as the Pipeline Design Engineer for this contract. She will assist the Design Manager by leading the execution of pipeline designs, including technical calculations and the development of plans and specifications. Kelly has over 25 years of experience in the planning, design, permitting, and construction management of water, wastewater, and reclaimed water projects. Kelly is an expert in linear infrastructure, having designed many miles of water, wastewater, and reclaimed water pipelines. Her experience also includes alternative delivery.

Bio-Tech Consulting
Environmental and Permitting

Bio-tech Consulting | Wetland Design Lead

Bio-Tech Consulting is a leading firm recognized for its expertise in wetland hydrology, structural design, vegetative suitability, and the planning, design, and implementation of wetland creation and enhancement projects. Established in 2003, the company has played a pivotal role in the success of large- and small-scale wetland creation projects in both the public and private sectors throughout Florida.

Our comprehensive services cover all stages of wetland creation design, including:

- Initial planning and design
- Hydroperiod analysis
- Vegetative adaptability for fluctuating water levels
- Wetland construction management
- Project team coordination
- Material installation scheduling
- As-built review
- Post-construction maintenance and monitoring

Our core strength lies in our team's extensive experience. Each member of our permitting staff has over 20 years of expertise in wetland review, design, and post-permitting compliance across various freshwater and estuarine systems in Florida. Notably, our proficiency extends to navigating the intricacies of designing wetland creation and enhancement projects. We collaborate closely with engineers to ensure that hydrological modeling aligns with the biological requirements for wetland success, long-term sustainability, and wildlife habitat support. We also excel in implementing a customized and automated water level data collection and analysis program, ensuring detailed and accurate assessments for hydrologic and vegetative success. This experience allows us to quickly and accurately identify and implement necessary improvements.

With a 21-year commitment to excellence and a holistic approach to wetland management, Bio-Tech Consulting continues to be an integral partner in achieving sustainable wetland ecosystems.

Laura Coveney

Environmental Scientist

EDUCATION: MS, Biology, BS, Zoology, University of Central Florida

CERTIFICATIONS: Authorized Gopher Tortoise Agent, Certified Stormwater Inspector

EXPERIENCE: 27 Years

Laura will provide expertise in comprehensive wildlife surveys; listed species monitoring, permitting, mitigation, and relocation; surface and groundwater quality sampling and assessments; jurisdictional wetland delineation, permitting, mitigation, monitoring, and maintenance, submerged aquatic vegetation surveying, and aerial photointerpretation. Laura will be responsible for wetland creation design assistance including plant species selection, water level analysis, pre-construction site surveys including wildlife relocation, if needed.

Blue Heron Wetland Treatment System, City of Titusville, FL. and West Regional Wetland Treatment System, Indian River County, FL

Laura conducted the water quality and biological monitoring of both on and offsite sampling stations, water level assessment and regulation, maintenance of exotic and nuisance plant species, and maintenance of the plant communities within the wetland.

NASA Kennedy Space Center, Wetland Mitigation Bank, Sites 35, 46, and 49

Laura conducted the preliminary field work, including vegetative mapping, establishing monitoring stations, deploying water quality DIVER data collectors, and collecting initial baseline monitoring vegetative and hydrological data for submittal to regulatory agencies.

LIQUID SOLUTIONS GROUP

Liquid Solutions Group, LLC | Hydrology

Liquid Solutions Group, LLC (LSG) was formed in 2007 to meet the water resources needs of both utilities and engineering firms. LSG's core expertise includes water resources and water supply engineering, hydrogeology, planning, permitting and modeling for a variety of applications. During the course of its operation, LSG has provided water resources services to a broad array of clients, including large public utilities, small private utilities, utility collaboratives, water management districts, and national engineering firms. LSG is also certified as a minority business enterprise (MBE) by the State of Florida, Hillsborough County, Orange County, Osceola County, Polk County and the City of Tampa.

LSG's staff are all licensed in the State of Florida as professional engineers or professional geologists. In addition, all staff have obtained graduate engineering degrees in water resources engineering or geology, and have over 15 years of experience as consulting engineers in Florida. Combined, our staff have over 100 years of combined water resources and hydrogeologic consulting experience in Florida. Furthermore, all LSG engineers are Board Certified Water Resources Engineers (BC.WRE) by the American Academy of Water Resources Engineers (AAWRE), a subsidiary of the American Society of Civil Engineers (ASCE).

LSG staff have performed in a wide variety of water resources projects throughout Florida, including design, permitting and modeling for water supply. **LSG is part of the Wharton-Smith Team for the Gainesville Regional Utilities Southwest Nature Park wetlands and recently completed technical analyses to evaluate travel time and potential for nutrients to reach downgradient springs.** Other recent groundwater modeling projects include variable density groundwater flow modeling for the City of Ft. Myers, variable density groundwater flow and geochemical modeling for the Hillsborough County SHARE Project, variable density groundwater flow modeling for the City of Tarpon Springs concentrate disposal well, and a geothermal modeling effort for a cooling system injection well in Miami-Dade County.

Michelle Hays, PG
Hydrogeologist

EDUCATION: BS, Environmental Studies, University of Nebraska, MS, Geological Sciences, University of Florida

CERTIFICATIONS: Professional Geologist No. 2676 (FL)

EXPERIENCE: 19 Years

Michelle will provide expertise in water supply and hydrogeology. Her experience includes geologic field investigations, field sampling, well construction and testing, water use permitting, and groundwater flow model development and calibration. She will be responsible for planning and analyzing geotechnical data for estimating recharge capacity and evaluating groundwater mounding.

Gainesville Regional Utilities (GRU) Sweetwater Wetlands Park | Paynes Prairie Sheetflow Restoration*

Michelle collected soil samples to evaluate disposal options for construction of excess soils from proposed wetland cells. **Individual Experience*

Gainesville Regional Utilities (GRU) Southwest Nature Park

Michelle assisted with development of the monitoring plan, a background sample plan, and a load test plan for infiltrating wetlands. She also performed particle tracking and analysis to evaluate travel time and potential site influence on downgradient springs.

Mead&Hunt

Mead & Hunt | Water Quality

We have provided professional engineering services since 1900 and have served Florida communities since 1964. Our Florida design center is located in Port Orange, FL, and is best positioned to support our project team. We have extensive experience with design-build projects in the municipal and private sectors. Our local FL team also includes three DBIA-certified staff.

For this project, we will leverage our extensive experience working with the City of Edgewater to develop their wastewater master plan, which will prove critical to the success of this wetland design, providing a comprehensive understanding of the effluent water that will be discharged and further treated within this new wetland area. Brad Blais, PE, has been assigned to this project to accomplish this. Brad has served this community for over 30 years.

Brad Blais, PE | Effluent Water Quality

EDUCATION: BS, Civil Engineering, North Carolina State University

CERTIFICATIONS: Licensed Professional Engineer in FL & SC

EXPERIENCE: 35 Years

Brad specializes in water treatment, advanced wastewater treatment process design, and reclaimed water system planning and implementation. In addition to serving as the Engineer-of-Record (EOR) for design of various water and utility related projects, he also manages construction and provides contract administration services for those projects. He has designed and supervised construction on a variety of wastewater collection, transmission, advanced wastewater treatment and an array of effluent disposal projects.

Sheryl Parsons | Funding Specialist

EDUCATION: MBA, Management, Georgia State University, BBA, Management, Georgia State University

EXPERIENCE: 31 Years

Having spent 29 years with the US EPA as a senior SRF program manager, Sheryl brings extensive funding knowledge and experience creating critical infrastructure finance plans for water and wastewater treatment facilities. She has acquired $245 million in funding with $187,859,699 in grants and $57,140,301 in loans. Sheryl has co-led national teams in the development of funding guidance documents and the review of SRF programs.

Keff Kurella, PE | Electrical/Instrumentation & Controls

EDUCATION: BS, Chemical Engineering, University of Florida

CERTIFICATIONS: Licensed Professional Engineer in FL

EXPERIENCE: 26 Years

Keff is a registered professional electrical engineer experienced in the design, specification and construction of electrical, instrumentation and controls systems. His responsibilities include project management, front-end engineering, detailed design, cost estimation, preparation of construction documents and construction administration. His design experience includes power distribution (low and medium voltage), power generation, lighting, control systems SCADA, PLCs, and DCS, hazardous area classification, fire alarm, lightning protection, grounding, communications and instrumentation.

Eco-Build Strategies | Sustainability Consulting

Eco-Build Strategies (EBS) is a local developing (LDB), women-owned (WMBE) business founded in 2014, headquartered in the Orlando area. Well known and respected for their depth of knowledge in all aspects of development (from design through construction and operations), EBS provides support and sustainability-consulting services throughout the Southeast. With 75% of EBS's clientele having projects/businesses in the Sunshine State, including the Greater Orlando Aviation Authority, the City of Gainesville, AECOM, Valencia Community College, and Starwood Element Hotels, the EBS team specializes in project certification, operational platform development, erosion and sediment control in high-risk project site conditions, material sourcing, and indoor air quality. EBS is able to provide the added resources, tools, and expertise necessary to maximize your project's results.

Robyn Dowsey, LEED AP BD+C | Environmental Consultant

Eco-Build Strategies founder, Robyn Dowsey, has over a decade of experience in environmental implementation and 18 years of experience in design-build construction. She is well known throughout the state of Florida as a leader in sustainability education, integrated project delivery, low impact building practices, and operational policy development. She is the Chair of the USGBC Regional Council for the state of Florida, a Green Globes Assessor, and an active supporter of the Florida educational community. As a pragmatic problem solver and a highly knowledgeable team member, Robyn has the ability to inspire and empower others to develop and achieve levels beyond their expectations. Robyn has over 28 years of experience in the general field of sustainability and completed the first LEED v4 project in the State of Florida.

Southeastern Surveying and Mapping Corp.

Founded in Orlando in 1972, Southeastern Surveying and Mapping Corporation (SSMC) is an independent, 100% employee-owned geomatics services firm providing professional surveying and mapping, subsurface utility engineering (SUE), and geographic information systems (GIS) services serving Florida and the Southeastern United States. To maintain our commitment to meeting our customers' needs, SSMC has worked tirelessly to develop highly innovative and needs-specific solutions for numerous municipal, public transportation, private development, and infrastructure improvements. At the forefront of technology, SSMC uses state-of-the-art equipment, leading-edge software, and cutting-edge processes to drive results. SSMC provides the personalized touch of a small company with the resources of a large firm and continually strives to live by our motto, ***"Proven commitment to our client's success."***

SSMC has experience with many wetland, and wastewater and stormwater design and construction projects in Volusia County, notably for the City of DeBary. SSMC has worked with Wharton-Smith, Inc. for 24 years.

Edwin Munoz, Jr., PSM | Surveying Land Development Director

Edwin has 13 years of Professional Surveying and Mapping Experience. His responsibilities include research, reconnaissance, project coordination, and scheduling field and office personnel for various private and public survey projects. Edwin has extensive experience in all aspects of surveying and mapping services, including topographic surveys, boundary surveys, right-of-way, mapping, control surveys, specific purpose surveys, hydrographic surveys, construction layout, program and budget development, presentations to public entities, and project management with embedded QA/QC and various other survey types, as well as producing plat maps and reports, setting monuments, marking boundary lines, and other duties related to surveying.

Universal Engineering Sciences, LLC | Geotechnical Engineering

UES is a privately held, rapidly growing engineering and consulting firm with expertise in the areas of environmental and earth sciences, sustainable infrastructure solutions, and geophysical technologies. With nearly 4,000 professionals across 85+ branches, UES provides personalized engineering, environmental, testing and inspection services to clients across the United States. UES consults on projects of all sizes in industries such as transportation, water and wastewater, data centers, energy, healthcare, education, residential, and more.

Services Include: Environmental, Geotechnical Engineering, Materials Testing, Field Inspections & Code Compliance, and Geophysical Technology.

Brian Pohl, PE | Branch Manager/Senior Geotechnical Engineer

Brian coordinates and directs geotechnical explorations and testing and inspection services for buildings, bridges, residential, and industrial facilities and small to large roadways. He has experience in shallow and deep foundation and testing services analysis, including spread footing and pile foundations. Brian has conducted geotechnical studies for roadway, airport and bridge projects, and land development. He has experience in design and monitoring of ground modification procedures for problematic soil conditions and in pond design recommendations, as well as experience with various pavements, rigid and flexible design. He has also provided earthwork recommendations for underground utilities within problematic soil conditions. Brian has performed WEAP analyses and pile driving analyses for Florida Department of Transportation (FDOT) and commercial projects.

Quest Corporation of America Inc. | Stakeholder Engagement & Public Outreach

Celebrating more than 28 years of service in the public and government industry, Quest Corporation of America Inc. (Quest) understands the business of communicating with people. Our firm provides full-service communications and public outreach services, including an award-winning creative design and innovative technologies team. Quest has spearheaded public involvement for hundreds of projects throughout the State of Florida, including stormwater, utilities, road and bridge planning, project development and environment studies, design, and construction projects in Volusia County. Our proposed project team members have worked in public information at the city, county and state government levels and have experience in the local community.

Shari Curley | Senior Communications Manager

With 25 years of experience, Shari is a superb communicator specializing in public outreach and involvement strategies for public sector infrastructure projects. She has extensive writing experience, crafting scripts and stories for on-air anchors, websites, and social media. Ms. Curley is known for her strong research, organizational, and customer service skills. Ms. Curley excels in creating Public Awareness Plans and drafting project correspondence and newsletters. She is adept at coordinating public meetings, handling everything from facility evaluation and logistics to preparing presentations and meeting summaries. Her attention to detail and ability to meet deadlines make her a valuable team member.

Samantha Scarp | Senior Communications Manager

Samantha is a seasoned communications professional with 12 years of experience in public engagement and communications strategy. As a Senior Communications Manager at Quest, she has successfully supported Central Florida infrastructure projects through all phases of construction, including Roadway Conceptual Analysis, PD&E, Design, and Construction. Her contributions to projects include project website development, public and group meeting coordination, and stakeholder list and database management. With eight years of news writing experience, Ms. Scarp excels in crafting press releases, newsletters, and social media content. She is a skilled writer and editor, adept at tailoring messages for diverse audiences. Her dedication and expertise make her an invaluable asset to any communications team.

CONSTRUCTED WETLANDS

Wharton-Smith, key design team members, and Wetlands Solutions, Inc. (WSI) worked on the Sweetwater Sheetflow Restoration project which is a relevant example that is very similar to this project. That award-winning project is a significant resource for the Gainesville community and the region for water quality and ecological benefits along with excellent recreation opportunities. Our team has strong ties and experience with the Sweetwater project that encompasses early conceptualization through design, permitting, construction, and operations.

Our team members worked closely together on the Sweetwater project, to adjust and refine our project components to improve the Sweetwater design and make it a very successful project. We continue to collaborate formally and informally on projects throughout Florida.

Our team members designed, constructed, and helped to manage treatment wetlands in a variety of sites and settings. While the Sweetwater project is in a different setting than the proposed recharge project, there are shared challenges for design and operations, such as controlling hydrology for wetland plant success, optimizing water quality treatment, and designing for ease of maintenance while considering visitor aesthetics and safety.

Some of the challenges with this project include:

Expected fluctuations in available reclaimed water throughout the year. This can be addressed by designing multiple wetland cells that are hydraulically independent and contain different plant species that tolerate the planned water depth and flow conditions for each cell. Wetland cells containing less drought-tolerant species would receive reclaimed water at a higher frequency over cells with more-drought-tolerant plants.

This can also be addressed by creating elevation differences within a cell to create elevation-specific planting zones with less drought-tolerant plants located in deeper zones.

Both methods can be effective, and each have advantages and disadvantages, with the first option resulting in a more monoculture planting scheme but with less complex flow management conditions. The second option providing opportunities for more diverse plant communities, but with less flexibility in setting water depths.

Controlling erosion at wetland cell inflow points. The reclaimed water inflow points within the wetland cells need particular attention. A design is needed to minimize erosion potential, be maintainable, and yet blend in with the intended look of a natural wetland system. Techniques to be considered and evaluated include:

- A manifolded discharge point in each cell with multiple outlets to reduce point-source velocities and flow rates. Each discharge point would be submerged below the normal water level of that cell.
- A single point submerged weirs within each cell with weir lengths designed to significantly reduce flow velocities to below expected scour velocities. Weir elevations would be set below the normal water level of that cell to further minimize erosion potential and visually obscure the discharge structure.
- Bubbler-type upflow structures within deep zones that concentrate the inflow to the upper strata of the water column.

Controlling erosion within wetland cells. As flow enters a wetland cell, flow distribution within the cell can also cause erosion, particularly before wetland vegetation is fully established or when plant density varies from either seasonal growth patterns or as available reclaimed water varies throughout the year. Introducing deep zones longitudinally through the cells arrest the formation of concentrated flow paths and aid in the redistribution of flows throughout the cell. Such features should be design in conjunction with the inflow points described above.

Controlling reclaimed water flows over extended periods. Although rainfall over the project area will affect the hydrology and hydraulics of the wetland system, the primary water source will be the inflow of reclaimed water. Extended period modeling simulations will consider both of these primary inflows (offsite flow contribution are possible but not expected and will be evaluated in design) and allow for bracketing the expected flow regimes from low-flow to high-flow situations. Knowing that these flow regimes are expected to vary greatly on an annual basis, mechanical and automated flow controls are recommended. SCADA controlled actuated values on the reclaimed water distribution system linked with water level gauges in each wetland cell will automate flows to established criteria to control flows into each cell to best balance available flows verse wetland plant water needs.

Earthwork cut and fill volumes. A significant cost that affects projects such as this is earthwork. Earthwork costs on a cubic yard basis can increase 3 to 5 times if soil is needed to be brought in or removed as it is highly dependent on trucking distances from/to acquisition or disposal sites. We will work closely with the DPSD owners/developers to coordinate earthwork needs with their proposed development to the east. If timing and project design timelines align, these projects can be complementary, and with proper planning, may be able to share some of their soil needs. Excess material from the wetlands project could be a source of fill material within

the Deering Part North development, or the wetland project fill needs could be obtained from the Deering Park North's proposed stormwater pond areas.

If project timelines don't align, our design will focus on minimizing the need to import or export earth; that is, create a balanced site. Wright-Pierce utilizes Civil 3D for its design efforts. It allows for comprehensive calculations for multiple grading scenarios to allow us to assess earthwork quantities throughout the design process.

Regardless of the options available for earthwork balancing, our design efforts will be coupled with additional geotechnical investigations to better quantify on-site soil types and determine their suitable for the various needs (support plant growth, needed permeability rates, berm construction, etc.)

Timing of Plantings During Construction. The scheduling of planting wetlands vegetation is critical and should be timed with the rainy season and the projected availability of reclaimed water to the site.

Lead times for plant material also need to be considered. Plant type and quantities should be determined early on to allow for local growers to produce or obtain the necessary numbers of plantings.

Obscuring the existing linear access path. The project site is rectangular in shape approximately, 4,800-ft long and, 800-ft wide with an access path/fire break running down its center. Although the access path provides a nice straight corridor for the construction of the reclaimed water force main to feed the constructed wetland cells on either side, it is less inviting from the perspective of creating a natural looking wetlands for public access and hiking trails. Conceptual designs for the layout of wetland cells, maintenance access, and trails will include options that relocate portions of the path along a more curvilinear route that breaks up sightline and offers a more pleasing visual experience to the public. The route will be influenced by site elevations, locations of existing trees that might be preserved, soils, and connections to the trail for the proposed developments to the east.

Enhancing the public experience. The architectural adage "form follows function" is applicable to this project. Although the big-picture objective of this project is to divert freshwater flows away from the Indian River Lagoon by creating treatment wetlands, it can also serve as a park-like public amenity while meeting its primary objective. With thoughtful planning a variety of amenities and features can be incorporated with little added expense.

These include:

- Access trails incorporated into the already needed wetland cell berms with little added expense.
- A more curvilinear access path mentioned above can greatly enhance the visual experience for the public.
- Site amenities like benches provide resting placing along the trail.
- Interpretive signage can educate the public as to the purposes, benefits, and objectives of the project, conservation efforts, as well as the history of the land spanning its uses by indigenous Americans to its current owners.
- Strategic preservation of existing trees, such as the groupings of wax myrtle and bay trees, can provide shade cover at rest areas along the trail.
- Boardwalks and/or peninsulas extending into the wetland cells from the main trails provide for a more immersive user experience and can serve as wildlife viewing areas; they can also be integrated with reclaimed water inflow points and provide locations for water level gauges and access for maintenance.
- Designing or preserving upland islands within wetland cells and providing littoral zones along wetland cell perimeters to enhance the human experience while creating new wildlife habitats and increasing biodiversity.

WASTEWATER DESIGN

Wright-Pierce staff have outstanding technical capabilities in the areas of treatment process design, hydraulic modeling, equipment selection, site selection, construction sequencing, stakeholder coordination, construction document preparation, and services during construction. They excel in helping clients in getting the most out of their water reclamation facilities while working within the constraints faced by all stakeholders.

Over the past three years, Wright-Pierce assisted Florida local governments design and administer construction for over $100 million worth of Water Treatment & Wastewater Reclamation Facilities and Pump Station Facilities. These projects range from small wastewater pump station rehabilitations ($500,000 construction costs) to large

wastewater plant expansions (estimated at more than $40 million construction costs).

STORMWATER DESIGN

We are experts in Florida stormwater. Our team provides innovative, practical, cost effective solutions to our stormwater designs. Our designs are informed through our staff's extensive experience in stormwater analysis, design, permitting, and construction. We tailor our stormwater designs to the unique needs of each project. We approach our design projects with the goal of preparing a complete set of construction documents and specifications that are accurate and thorough and provide a practical, sustainable design that contractors can readily understand and execute within budget and schedule.

We are adept and efficient in performing drainage basin studies and comfortable with hard and soft design elements including piping systems, pumps, open channels, and retention/detention pond designs for stormwater treatment, improved conveyance systems, and flood control.

PERMITTING

Permitting is a component of this project that can drive overall schedule, site layout, and DPSD operations in the future. Wright-Pierce is thoroughly familiar with permitting requirements throughout Florida, including requirements in Florida at the federal, state, and local levels.

Wright-Pierces' approach is based on our sound technical and professional reputation with members of the regulatory community. We have well-established relationships with SJRWMD, the USACE, and FDEP. We work with them regularly to provide our clients with engineering solutions while ensuring that the project meets local, state, and federal requirements. Wright-Pierce staff are experts in monitoring generally and have been closely involved with utilities and regulatory agencies in considering emerging contaminants.

In terms of environmental resources permitting, the wetlands project is part of the overall Deering Park North Master Plan which has recently obtained an ERP for mass grading. This ERP designates this wetland project as a borrow site for the overall project. Although the development of this project into a created wetlands is a departure from this permit, it is in general conformance with the intent of the ERP. Therefore, we expect that a modification to the EPR will be required. A preapplication meeting will be scheduled with the St Johns River Water Management District (SJRWMD) once conceptual site designs have been prepared and approved by the Owner. This preapplication meeting will allow the design team to confirm SJRWMD expectations and requirements for the project and head off any possible ambiguity surrounding permitting the final design of the wetlands project.

STAKEHOLDER AND PUBLIC OUTREACH

Quest welcomes the opportunity to support the public involvement efforts for the Edgewater Wetland Park Design-Build Project in Volusia County. We understand this important initiative and will develop a detailed Community Awareness/Outreach Plan tailored to the specifics of each task order. Through our comprehensive outreach, Quest will use traditional, grassroots, and innovative strategies to garner crucial public input and to help build consensus on design. Outreach initiatives will include: development of a stakeholder database; creation and dissemination of information collateral; a project hotline and dedicated email address to streamline collecting and responding to community concerns; and, design and development of a project website to serve as a portal for access to accurate and up-to-date project information. Quest will support the project with coordination and facilitation of public and small group meetings, media outreach initiatives, and ensuring compliance with ADA requirements. During construction, Quest will attend progress meetings, man the project hotline, provide the public with status updates. Quest will also maintain a citizen interactions database and assist in bringing issues to resolution.

Key stakeholders for this project include Volusia County, the City of Edgewater, the River to Sea TPO, and community and environment groups including: The Indian River Lagoon Council UF/IFAS Extension Volusia County, St. Johns River Water Management District, East Central Florida Regional Planning Council Marine Discovery Center, Lyonia Environmental Center, Be Floridian Now, Green Volusia, Project H2O, Blue Spring Alliance, Gemini Springs Alliance, and Volusia Water Alliance.

With more than one hundred associates statewide, Quest offers unmatched depth and breadth in serving public sector communications needs. Quest is well-positioned to conduct a broad reaching range of outreach activities to ensure voices are heard, trust is established, and information is shared. Stakeholders, including businesses, community services, residents, and visitors as well as community leaders, will be informed through such outreach elements as project update presentations, media relations support, a project website, a social media and digital campaign, and ongoing communications to stakeholders – all in coordination with the Deering Park Stewardship District.

FUNDING

Wright-Pierce provides professional support services to obtain funding from various federal and state agencies.

Our goal is to assist you in obtaining and maximizing any grant dollars that may be available for the groundwater recharge wetland project.

We have an established history of developing funding strategies for a broad range of projects. Our success starts with developing project concepts that are readily supported (i.e., they are cost effective, often achieve multiple goals, have broad stakeholder support) and integrating them into a needed infrastructure project. We also believe that we must "pre-sell" the idea to the funding agencies. Often various elements of a project are eligible for dollars from different sources of funds. Understanding the various agencies' goals and missions is key to the "pre-sell" concept. The first time a funding agency sees the project should not be when they receive the grant application. As we develop grant-fundable projects, we are mindful of the grant requirements and generate the required information as a part of our project work so that the needed information is readily available for the grant application. We also have extensive experience working on grant-funded projects and helping with grant-funding-reporting requirements. Because this work is routine for us, we have several staff trained specifically for this task.

Our success in obtaining grant funding is in part due to our ability to develop innovative, cost-effective designs. As part of our civil/environmental planning or preliminary engineering work, we are also mindful of which projects will be most favorable for grant funding and what information will be useful in helping demonstrate this in a grant application, which expedites the grant application efforts.

CONSTRUCTION

The Wharton-Smith construction team presented as part of this proposal, combined with the Wright-Pierce design team, allows for DPSD to experience the benefit of the ***full value of the Design-Build*** process. This team was not assembled for convenience, but was instead hand selected for the demands of this project. Our team members allocated daily to the project complement the needs of the project and ensure we have covered all components in our industry: preconstruction, permitting, safety, stormwater pollution projection, scheduling, construction, close-out, and local market experience.

Wharton-Smith began in 1984 as a water/wastewater contractor and expanded into the commercial construction market in the 1990's. Our experience in both areas over the last four decades has allowed for unique opportunities for hybrid type projects, similar to the Edgewater Wetland Park Project.

Our "one-stop shop" preconstruction department provides design assistance, budgeting, value engineering, value management, and constructability review activities which will all collectively provide the most efficient project for DPSD. While the permitting efforts with all environmental agencies are being coordinated through our design partner, Wright-Pierce, we have tasked **Construction Manager Duncan Graham** with all construction-related permitting. Duncan is a City of Edgewater resident living only eight minutes from the project site. While multiple scheduling techniques are utilized throughout the industry, Wharton Smith has been an industry leader in the implementation of utilizing production planning boards and pull planning. Providing support to the overall construction schedule, these shorter term schedules allow for the closer tracking of activities specific to approvals, availability, and procurement of materials. This process also supports buy-in from all subcontractors and provide a spirit of cooperation as all are working towards a common goal.

At Wharton-Smith, we strive to be the ***Construction Group of Choice*** and we want to leave DPSD with the satisfaction of not only a quality project, but also a level of comfort knowing that you were treated fairly and equitably by a true partner throughout the duration of this project. With this "cradle to grave" approach, the close-out phase of this project is of equal importance as the design, bidding, and construction phases are.

Because of this, we have put a special focus on developing a close-out plan that ensures you have the following items in hand at Substantial Completion:

- Final Site Survey
- Complete As-Built/Record Drawings
- Warranty Certificates for Equipment and Work in Place
- Equipment Start-Up and Installation Certificates
- Operation and Maintenance Manuals

Finally, by being able to offer DPSD the benefit of the full value of the Design-Build process, the Wharton-Smith + Wright-Pierce team is confident that we have assembled the most qualified team to partner with on this project.

Please see our team availability provided in the staffing utilization chart in Tab 3.


Trail 3
Collaborative Delivery Approach

Collaborative Delivery Approach

Collaborative Approach Philosophy for Design-Build

When your Design-Build contractor, designers, subcontractors, and you share a common vision for a project, it's amazing what we can accomplish together. Our collaborative approach philosophy for Progressive Design Build Projects is rooted in the belief that we are all on the same team working towards a common goal. We are committed to helping DPSD realize the full benefits of the Progressive Design Build approach to project delivery—a project that is built faster, at less cost, and with higher quality. For collaboration to be effective, it must be built around real interaction within our team. That interaction is achieved through owner integration with our team and an effective communication plan.

BEST PRACTICES SERVE AS THE FOUNDATION FOR OUR APPROACH PHILOSOPHY

DPSD has wisely selected Progressive Design-Build (PDB) delivery to give you the highest probability of success on this critical infrastructure project. PDB delivery gives us an opportunity to experience successes not always available with other project delivery models, such as innovation, cost savings, schedule acceleration, and an end product built with reliability and sustainability. The Wharton-Smith and Wright-Pierce team firmly believes and follows the best practices put forth by the Design-Build Institute of America (DBIA). Our design-build delivery plan for this project outlines how we intend to follow these best practices:

BEST PRACTICE

Design-build team members should be educated and trained in the design-build process.

How do we achieve this? Most of our team members have an abundance of design-build experience and many others have been professionally trained in design-build project delivery.

BEST PRACTICE

The project team should establish processes to facilitate communication, collaboration, and conflict resolution.

How do we achieve this? We have assembled a team of firms and individuals with a long history of collaboration on successful projects. We will operate as a truly integrated team including design, construction, subcontractors, and DPSD staff by having a clear organizational structure and open lines of communication between team members.

BEST PRACTICE

The project team should establish logistics and infrastructure to support integrated project delivery.

How do we achieve this? Our design and construction teams will co-locate at Wharton-Smith's Sanford office (during the design phases), and then at the Edgewater Wetland Park project site during the construction and commissioning phases.

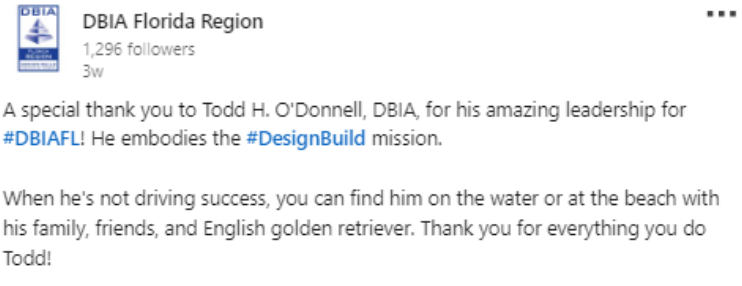
BEST PRACTICE

The project team should focus on design management and commissioning processes, and how to execute these processes.

How do we achieve this? As stated throughout our approach, we will design with the end in mind. Our flexible design approach will address key concerns with reliability, maintenance of operations, redundancy, and finished water quality.

Todd O'Donnell, DBIA
DBIA Florida Region President

"My favorite aspect of design-build is the teamwork it fosters. Performing design and construction with all stakeholders at the same table is a truly game changing experience in project delivery."



A DEDICATED PRECONSTRUCTION SERVICES DEPARTMENT

NATHAN HILLARD, DBIA	DWAYNE KREIDLER, PE	ERIK ANDERSON, PE	JOSH BURNS, PE
V.P. COLLABORATIVE DELIVERY	SR. PRECON. MANAGER	OUR DEDICATED PRECON. MANAGER	SR. PRECON. MANAGER
TOTAL EXPERIENCE 22 YEARS	TOTAL EXPERIENCE 27 YEARS	TOTAL EXPERIENCE 20 YEARS	TOTAL EXPERIENCE 16 YEARS

Wharton-Smith is one of the only firms that maintains a dedicated preconstruction services department. Our department consists of **6** seasoned professionals that work on only Design-Build and CMAR projects that are in the preconstruction services phase.

Your Preconstruction Services Manager is there for you during the design phase. Most firms will have the future project manager trying to balance the preconstruction work while finishing another project that's in construction.

Your preconstruction services manager performs the same tasks every day making them more skilled and efficient at design reviews, constructability reviews, value engineering, and coordinating cost estimates with our estimating department.

Your preconstruction service manager will leverage the combined experience of the department (104 years) as we strive to provide innovation to reduce cost, make construction easier, and increase the ease of maintenance.

Relevant Project Case Study

INNOVATIVE THINKING SAVES CITY MILLIONS!

TREELINE PUMP STATION, CITY OF FORT MYERS

OVERVIEW: Wharton-Smith was the selected CMAR for the City of Fort Myers's $11 million Treeline Pump Station project, which included a high service booster pump station, storage tank, and water mains.

CHALLENGE: The pump station was located in an affluent area, and the residents were prepared to fight in court rather than have a traditional ground storage tank in eyesight from their homes.

SOLUTION: Sr. Preconstruction Manager Nathan Hillard led value management efforts to modify the storage tank from a pre-stressed concrete tank to a cast-in-place, partially buried structure, which was aesthetically modified to look like a residence.

Nathan Hillard, DBIA
Design-Build Leader

Executive Design-Build Leader, Nathan Hillard, is DBIA-certified by the Design-Build Institute of America (DBIA). He will ensure DBIA Best Practices are utilized from project inception through commissioning and turnover to guarantee the DPSD experiences all the benefits of the Progressive Design-Build delivery. Nathan has served in this role on 20+ design-build projects over the past 22 years.

Our collaborative project management approach is successful because we consistently prioritize understanding the project and the client first. We can put a dynamic team together and create a successful project for the Edgewater Wetland Park, but it is only valuable to DPSD if it addresses your concerns in the manner in which you want them addressed. For that reason, our project management process relies heavily on the relationships between DPSD and **our design leaders, Walt Nickel, Lucas Anthony, Kelly Wehner, and Mike Hoffman, as well as the Design-Build Team Manager Nathan Hillard.**

FOCUSING ON YOU

Our approach to project management starts with focusing on our clients. This has and will continue to involve continually communicating with DPSD to understand your needs and what is important to you. We will provide frequent communication via telephone, virtual meetings, face-to-face meetings, and email throughout each project based on your specific needs and concerns.

PLANNING THE PROJECT

Since 1947, Wright-Pierce has worked on thousands of projects and developed a proven project approach that each of our project managers implements on every project, to the extent possible. A typical engineering project would follow the various phases of work and the Edgewater Wetlands Project is no different except that the Wharton-Smith + Wright-Pierce Design Team will work with you and to refine our approach and customize it to your project goals, budget, and desired schedule. We expect the project to follow these project phases:

Scope Refinement and Costing

- Fully understand goals, timeline, and critical success factors
- Develop workplan, scope of services, schedule, and design and construction budgets

Engineering and Design

- Investigate, document, and analyze data such as additional surveying, geotechnical investigations, and environmental/habitat investigations.
- Bi-weekly or Monthly progress meetings with Owner and Owner's representatives.
- Conceptual/30% Design Development including alternative layouts and preliminary opinions of cost.
  - » Design collaboration meetings with Wetland Solutions.
  - » ERP preapplication meeting with St. Johns River Water Management District.
  - » Constructability reviews with Wharton-Smith.
  - » Formal design review meeting with Owner.
- Develop 60% plans and specifications and ERP Modification application.
  - » Design collaboration meetings with Wetland Solutions.
  - » Constructability reviews with Wharton-Smith.
  - » Fromal design review meeting with Owner,
- If necessary, earthwork mass grading can begin to expedite the overall project schedule.
- Develop Final Plans and specifications.
  - » Design collaboration meetings with Wetland Solutions.
  - » Constructability reviews with Wharton-Smith.
  - » Fromal design review meeting with Owner.

Plan to Ensure Budget and Schedule

WE CONTROL THE PROJECT SCHEDULE BY ESTABLISHING A RELIABLE BASELINE SCHEDULE THAT ACCOUNTS FOR RISKS.

Wharton-Smith utilizes Primavera P6 software for computer-generated project CPM scheduling. Our proposed **Construction Manager, Duncan Graham**, has more than 6 years of experience creating P6 schedules.

Duncan is serving as the construction manager and scheduler for the City of Edgewater's new public works facility. With input from our project leadership, Duncan will create a full CPM schedule that is accurate with durations that are attainable and based on real world experience. We have proactively identified some of the schedule challenges for the Edgewater Wetland Park and provided our approach in mitigating those risks:

Design Schedule: Best practices of co-locating, constant and open communication, and integrating the design and construction schedule.

Adequate Time Allotted for Permitting: After our kickoff meeting, we will incorporate timeframes for FDEP and building permits into our baseline schedule.

Early Site Investigation: The project schedule will include detailed preconstruction activities to ensure that design efforts can be maintained without interruption.

Extended Commissioning Process: Our schedule will account for adequate testing time to confirm that our new facility meets functional expectations. Time will be included for extensive performance testing.

Electrical and Instrumentation Coordination: We will avoid delays through extensive planning with the DPSD team. Coordination with power company for new power feeds included.

WE PLAN THE PROJECT SCHEDULE TO THE HIGHEST LEVEL OF DETAIL POSSIBLE.

The project schedule development starts during preconstruction. It will be refined with every design milestone. The schedule will start out at a high level, focusing on the design milestones with construction tasks being fairly general in nature. It is during this phase that we will identify which procurement items are the critical path of the project and will utilize this information to make informed decisions about early procurement. These schedules will also be used to identify the project length for calculating GCs required for an accurate estimate. Once the project reaches the GMP stage, we will have detailed schedules from the vendors and subcontractors.

The detailed schedule that is presented with the GMP will include the following:

- Anticipated submittal and delivery lead times;
- Mobilization activities;
- Detailed breakdown by structure including site work, underground utilities, concrete (broken down by individual pours);
- Commissioning process;
- Electrical and instrumentation; and
- Project closeout.

The schedule, however, is not a static item. As the project evolves, the team will update it with the best possible information. In particular, as the project nears startup, the team will work with plant operations staff to take into account all relevant information and any new or changed plant constraints that need to be considered when scheduling startup. The startup schedule will also include information from vendors and their O&Ms, as well as any additional requirements from the regulatory agencies to ensure plant compliance is maintained at all times.

Scheduling Spotlight

SUBCONTRACTOR PRODUCTION PLANNING

Participation by our subcontractors in our production planning system facilitates their ability to plan their work, by confirming the specific order and durations of activities, and also gives them the ability to voice concerns or issues that may hold up their progress. They may need to present a new RFI, request an answer to a pending RFI, state they still need approval of their materials or even state there has been an issue to getting their materials delivered. Their participation gets these issues out in the open so they can be solved. Participation also allows subcontractors to see how the work is planned on a global level. They get to see how their work affects others as well as how others' work affects them.

Wharton-Smith typically self-performs 40-70% of the work on water and wastewater projects.

WE CONTROL COST BY ELIMINATING LAYERED SUBCONTRACTOR MARK-UP.

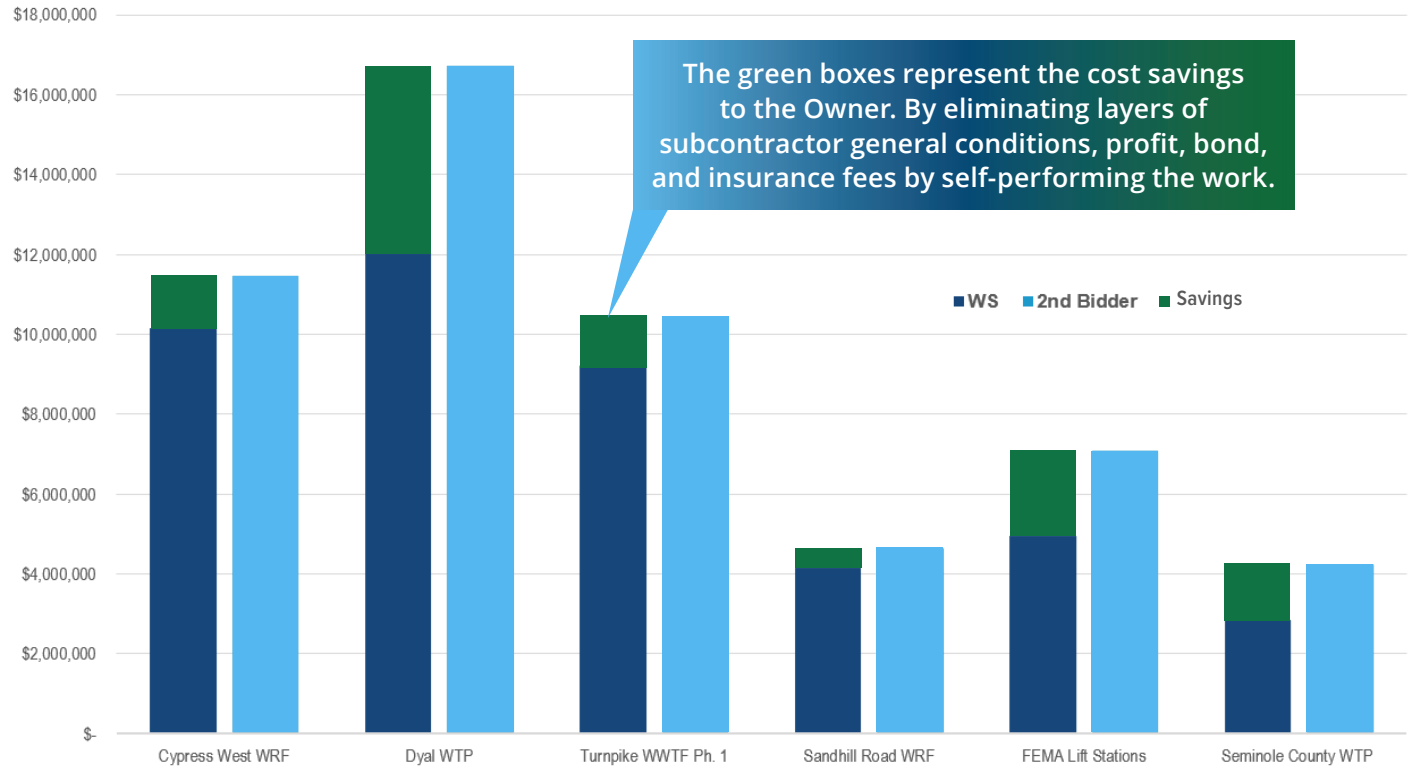
Wharton-Smith began in Central Florida in 1984 as a self-performing general contractor. We have maintained that focus in the 39 years since. Our approach provides value to our clients as we reduce subcontractor layers of markup, bond, supervision, and insurance. Wharton-Smith continues to "hard bid" water and wastewater plant work because we are capable of being the low bidder.

YOU CAN TRUST WE WILL PROVIDE THE LOWEST PRICING. OUR RECENT BIDDING SUCCESS THROUGHOUT FLORIDA PROVES IT.

We are capable of self-performing site work, concrete, mechanical and equipment installations. This typically equates to more than 50% of the job (see table to the left). Our bid price has provided an average savings of more than 20% on the work packages we bid. This leads to our self-performance reducing total project costs by 10% or more!

PROJECT	COST	SELF-PER-FORM %
Georgia-Pacific Foley WWTP & Effluent Disposal (Perry, FL) Design-Build	$120 M+	68%
Hillsborough County NW WRF Expansion (Tampa, FL) Design-Build	$193 M	51%
Orange County Hamlin WRF & Effluent Disposal (Orlando, FL)	$114 M	52%
Toho Water Authority South Bermuda WRF (Kissimmee, FL) CMAR	$23.3 M	62%
Toho Water Authority Cypress West WWTP (Kissimmee, FL) CMAR	$27.9 M	48%
Polk County Northeast Regional WRF Expansion (Davenport, FL) CMAR	$32.2 M	66%

Recent Examples of Cost Savings Through Self-Performance



GRAPH REPRESENTS SEVERAL RECENT WHARTON-SMITH SELF-PERFORM BID RESULTS VS. THE COMPETITION

WE WILL PROVIDE COST CERTAINTY SO THE DISTRICT CAN MAKE INFORMED DECISIONS.

Our team will continually update the cost model as we work through our technical memorandum and workshops and make decisions together that impact the price. Wharton-Smith still bids design-bid-build projects throughout the Southeastern United States, which gives us a unique ability to provide you with real-time cost data from the earliest design milestones. Our Lead Estimator, Sean White, has 30 years of experience including dozens of similar greenfield water projects. He will lead all of your estimating activities and provide our preconstruction team, led by Erik Anderson, with the cost estimates that will help to compile the GMP(s) for this project.

30% DESIGN COST ESTIMATE (PDR)

Our recent experience constructing greenfield wetland parks enables us to collaborate with our design partners to ensure the drawings incorporate all necessary elements and scope. Our in-house, experienced preconstruction staff will estimate all the mechanical, concrete, and site work based on the site layout determined by our design partners.

60% DESIGN COST ESTIMATE

Our estimators, led by Lead Estimator Sean White, will perform detailed takeoffs on all trades. Adequate contingencies and allowances will be carried for design items still unknown or needing clarification. General conditions are adjusted based on the project schedule. A partial GMP for long lead items, and early work activities will be suggested to provide schedule gains.

90% DESIGN COST ESTIMATE (GMP)

Wharton-Smith issues competitive bid packages to subcontractors and suppliers including detailed scopes of work, bid forms, and instructions to bidders. The bids are received, reviewed, and recommendations of award are made to DPSD to confirm. General conditions are finalized and all GMP bids and documents are provided to the County for full transparency.

We define cost certainty as knowing what your project will cost long before design is complete

Cost Certainty of Recent Wharton-Smith Design-Build Projects

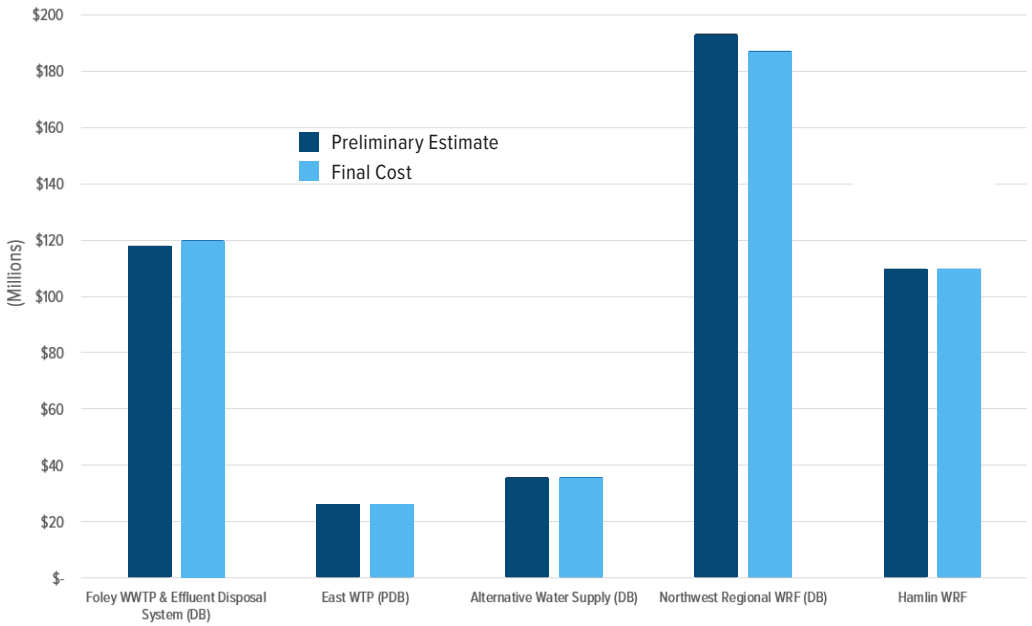
Foley WWTP & Effluent Disposal System, Georgia Pacific (2019)

East WTP, City of Miramar (2020)

Alternative Water Supply, City of Tarpon Springs (2015)

Northwest Regional WRF & Effluent Disposal, Hillsborough County (2020)

Hamlin WRF & Effluent Disposal, Orange County (2022)



COORDINATION OF CONSULTANTS AND SUBCONTRACTORS

Wright-Pierce – with our subconsultant partners BioTech Consulting, Liquid Solutions Group, Mead & Hunt, Eco-Build, Southeastern Surveying and Mapping, Universal Engineering, and Quest Corp of America have successfully partnered on a variety of projects. This collaborative partnership will continue to provide DPSD with a project that meets your goals and objectives in a timely and cost-effective manner. Our Design Manager Walt Nickel will direct and manage all of these design subconsultants, providing one local point of accountability. Under Walt's leadership, our team will work closely with DPSD and their representatives and consultants to ensure that the right technical resources are provided when needed. Walt has over 39 years of experience in engineering and project management and understands the challenges faced in project execution.

WE WILL UTILIZE COMPETITIVE BIDDING TO PROVIDE THE LOWEST PROJECT COST

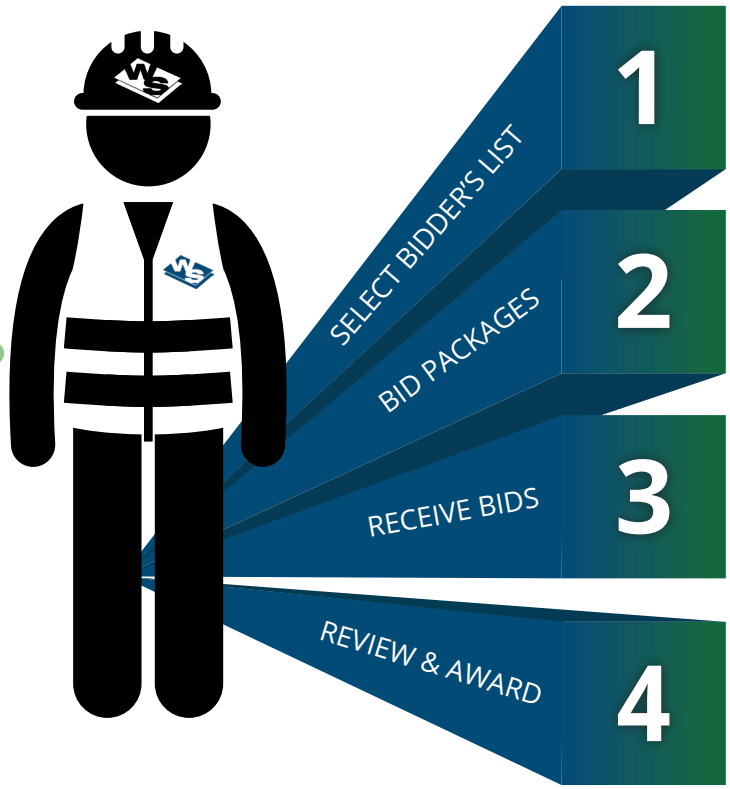
Over the past 28 years, we have refined our Design-Build Best Practices in order to provide the most transparent, cost-effective, and highest value projects for our clients. As a DBIA Best Practice, we utilize a fully transparent, open-book, competitive bidding approach during the development of the GMP, so DPSD is involved every step of the way.

Throughout the project, we will continually update the cost model as we collaborate with our design partners and the District to make informed decisions together that may impact price. Below is an outline of the GMP bidding process that we would propose to use for Edgewater Wetland Park project.

4 STEPS TO GMP

The bids that will eventually be received from qualified bidders will serve as the building blocks for the GMP; therefore, we prefer that the District be involved at every step of the way in the bidding process. The subcontracting bidders list is formed through collaboration with you.

Our Design-Build bidding process satisfies the requirement for competitive pricing while also completing the team with proven performers in regard to quality, safety, and performance. Our in-house, dedicated Preconstruction Services Department maintains a list of over 3,000 subcontractors in the state of Florida. This allows us to perform the bidding services in a timely manner while limiting the burden on DPSD.



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

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

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

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

INFORMATION MANAGEMENT - PROCESSING SUBMITTALS AND RFIS

Throughout the construction phase of the project, the Guaranteed Maximum Price (GMP) has to be managed with a pure open-book policy. This policy is one of the greatest progressive design-build best practices. Open and honest communication allows financial decisions to be made jointly. Equally as important, it allows financial records to be kept with complete transparency. This policy starts from the very first design cost estimate and is maintained all the way through close-out.

Tracking all expenditures is necessary to maintain transparency. It is important to keep the District properly informed of the project's financial status in a real-time manner. It is imperative that we continually update where every dollar is being spent. This allows us to identify any trends, good or bad, from a financial perspective. The construction transparency tools, outlined in the table below, will be utilized during construction and submitted in our Monthly Progress reports.

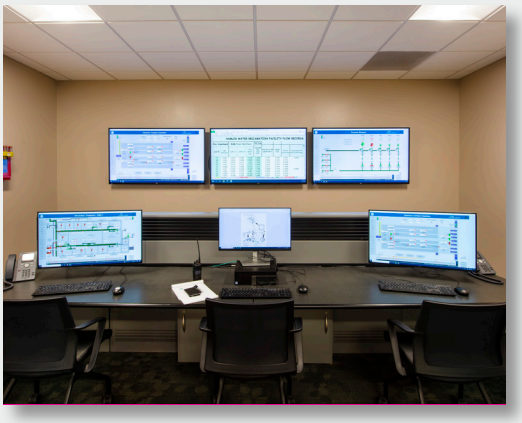
Wharton-Smith's project management software, RedTeam, is a one-stop-shop for plans, specifications, addenda, RFIs, submittals, contracts, and all other document control material for our projects. In addition to housing and organizing all of the project documentation, RedTeam provides the use of Plan Room for collaboration on contract documents.

WHARTON-SMITH PDB DELIVERABLES		
CONTROL	DELIVERABLE	FREQUENCY
Cost	Initial Schedule of Values	Once
Cost	Payment Application	Monthly
Cost	GMP Status Report	Monthly
Cost	Change Order Log	Monthly
Cost	Contingency Log	Monthly
Cost	Allowance Log	Monthly
Schedule	Master Schedule Updates	Monthly
Cost	Monthly Expenditure Updates	Monthly
Schedule	Daily Project Reports	Weekly
Risk	Safety Inspection Reports	Bi-Weekly
Risk	Risk Register Updates	Monthly
Risk	RFI Log	Monthly
Risk	Shop Drawing Log	Monthly
Records	As-Built Drawings	Monthly

RedTeam Highlight

IMPLEMENTING REDTEAM LEADS TO CONSISTENT DOCUMENT TRACKING

HAMLIN WRF & EFFLUENT DISPOSAL



REDTEAM®

OVERVIEW: Wharton-Smith was selected as the general contractor for Orange County's Hamlin WRF & Effluent Disposal, a $114 million greenfield water reclamation facility.

CHALLENGE: The design team was complex—consisting of a lead design firm and 13 design subconsultants; therefore, maintaining consistent design and construction standards across all disciplines was challenging.

SOLUTION: Implementation of our RedTeam project management software (see above) kept all RFIs organized and easily accessible for the entire project team.

RESULT: Design standard conflicts were avoided, which maintained consistency throughout design and construction allowing for all changes to be documented in one central location.

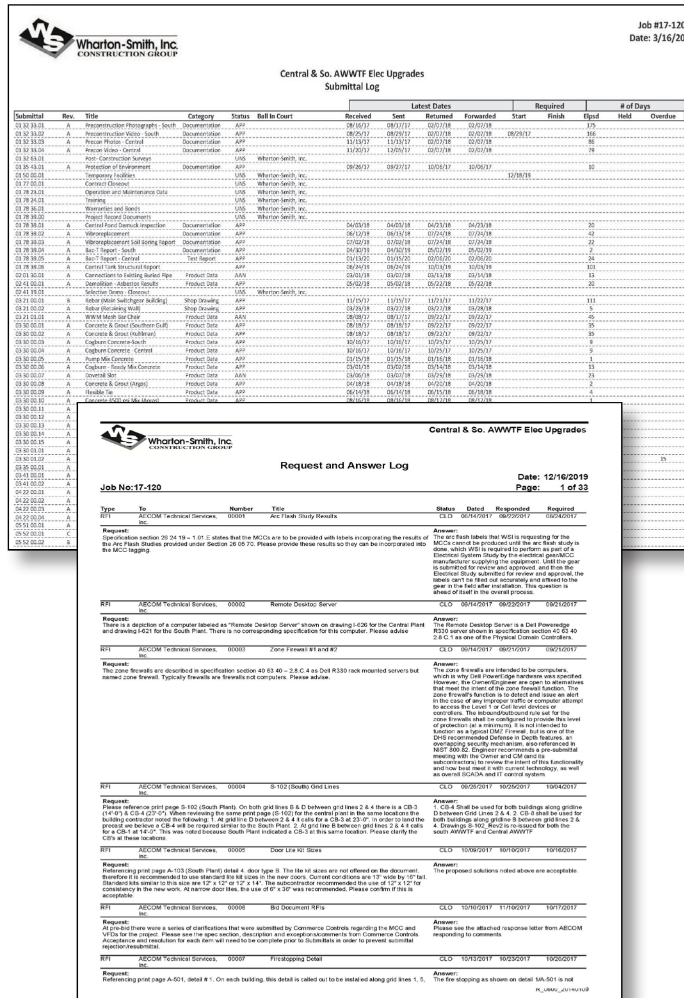
INFORMATION MANAGEMENT

One of the best ways to ensure a project is successful is to effectively administer and monitor the Shop Drawing and Request for Information (RFI) process, as well as to implement a clear process for drawing revisions, field directives, and as-builts. Efficiently tracking each of these items will ensure the project stays on schedule, and will also ensure that each component meets the quality standards set forth by the District and Wright-Pierce.

Shop Drawings and RFIs: It is our goal to first review all shop drawings for accuracy and completeness prior to processing. For RFIs, it is our policy to come up with solutions and analyze options prior to their processing. Both are tracked and monitored using our RedTeam cloud-based software system, allowing the user to see in real time which items are outstanding and who is working on it.

Engineer Field Directives and Drawing Revisions: Wharton-Smith uses PlanGrid to track and publish engineer field directives and drawing revisions. PlanGrid, available to all members of the team, allows drawing versions to automatically update and allows field directives to be "drawn" directly on the plans in real time in the field.

As-Builts: Adhering to a strict policy of updating as-built drawings is one of the best ways to ensure a timely and complete project close-out. We require all subcontractors to regularly update the as-built set of drawings located in the construction trailer and monitored by the **Senior Superintendent, Tim Moore**, as a condition to monthly payment.



Plangrid Highlight

USE OF PLANGRID SOFTWARE REDUCES IMPACTS TO THE FIELD

SANDHILL ROAD WRF & EFFLUENT DISPOSAL

OVERVIEW: Wharton-Smith was selected as the CMAR for the Toho Water Authority's (TWA) Sandhill Road WRF & Effluent Disposal $51 million, 1.5 MGD expansion project.

CHALLENGE: Complex value engineering options greatly reduced project cost (more than $1 million), but the changes also resulted in modifications to a majority of the drawings, including changes after permits had been issued

SOLUTION: Wharton-Smith maintained all documents with our PlanGrid software so that the most up-to-date drawings were in the field to ensure the project was constructed correctly and building inspectors had the most up-to-date drawings.

RESULT: Wharton-Smith's value engineering concepts were implemented without impact to the field.

WE CONTROL THE PROJECT SCHEDULE WITH A COMPREHENSIVE EXECUTION PLAN.

Wharton-Smith's production planning system serves as a backbone of our project delivery. It drives our schedule, quality, and safety on every task, every day. This system provided great benefits since its implementation at Wharton-Smith. We have never finished a project late! **Why does that matter to you?** We plan to implement the system on Day 1 of the Edgewater Wetland Park project.

PLAN THE WORK. WORK THE PLAN.

WHAT is production planning? The process of planning all work six weeks in advance to ensure all pre-requisite work is done and materials are on-site.

WHY is this system so important? It ensures every crew on every project effectively and efficiently completes their daily production goal free of incident and defects.

WHEN do we do it? Beginning and end of shift meetings happen every day. A weekly meeting is held to update production goals and six-week schedule.

WHERE is it done? Every Wharton-Smith jobsite has a dedicated production planning room in the construction trailer.

WHO participates? Wharton-Smith management staff, **subcontractors**, and District management & operations staff.

HOW it works? The work days are divided into columns. Every row represents a different work crew, including subcontractors. Each color of the sticky notes represents a different structure and the actual work activities are listed on the sticky notes. Activities missing preceding work or materials are turned at a 45 degree angle.

Relevant Project Case Study

EFFECTIVE PRODUCTION PLANNING LEADS TO ZERO DELAYS IN SCHEDULE
FOLEY WWTP & EFFLUENT DISPOSAL

OVERVIEW: Wharton-Smith was selected as the design-builder for the $120M+ improvement of the Foley WWTP and Effluent Disposal System for Georgia-Pacific in Perry, Florida.

CHALLENGE: The project was planned for over 20 years and no time extensions were to be granted.

SOLUTION: Upon award, Project Manager Michael Alexakis devised a staffing and project implementation plan that required an on-time finish. He decided to subcontract portions of work that would normally be self-performed by Wharton-Smith so that multiple work packages could be worked on concurrently. The on-site project team developed a Production Planning System that coordinated all work activities on the jobsite

RESULT: Our project team was able to complete $2.5 million worth of work in a five-day period that meticulously planned down to 15-minute increments. ***As a result, our team finished the project two months ahead of schedule!***

Design-Builder Staffing Utilization

The Wharton-Smith + Wright-Pierce team is committed to providing the resources necessary to complete this project within schedule. Our management team has a conservative approach of typically undertaking new assignments only when workload permits, which enables us to provide you with top-notch service. Should we be selected for this contract, we commit that the individuals identified on the organizational chart will serve on this project.

Should unforeseen circumstances occur and additional resources are necessary to support our team, we have the necessary support and backup staff at all levels with experience in all aspects of engineering and construction within our Florida offices. We are also committed to effectively integrating the cumulative resources of our subconsultant partners. Our key team members' anticipated availability are included below:

Key Team Member	Wharton-Smith	Wright-Pierce	Bio-Tech	Liquid Solutions	Mead & Hunt	Southeastern	Universal	Eco-Build	Quest	Design & Preconstruction	Construction
Nate Hillard, DBIA, Design-Build Project Manager	X									25%	25%
Erik Anderson, DBIA, Preconstruction Manager	X									30%	10%
Sean White, PE, Chief Estimator	X									30%	10%
Todd O'Donnell, DBIA, Value Engineering	X									10%	10%
Duncan Graham, Construction Manager	X									20%	100%
Tim Moore, Senior Superintendent	X									20%	100%
Shane Smith, Project Engineer	X									15%	50%
Jordan Haak, Corporate Safety	X									10%	30%
Robyn Dowsey, Environmental Consultant								X		15%	15%
Walt Nickel, PE, Design Manager/EOR		X								45%	50%
Kelly Wehner, PE, Pipeline Design		X								55%	65%
Ryan Wingard, PE, QA/QC		X								30%	40%
Dennis Davis, PE, Assoc. DBIA		X								40%	60%
Lucas Anthony, PE, Civil Design		X								85%	95%
Michael Hoffman, PE, Hydrology & Hydraulics		X								45%	65%
Kalle Maggio, PLS, Trails Design		X								60%	75%
Brad Blais, PE, Effluent Water Quality					X					25%	35%
Keff Kurella, PE, Electrical I & C Engineer					X					30%	30%
Sheryl Parsons, Funding Specialist					X					40%	50%
Edwin Munoz, Jr., PSM, Surveying						X				20%	20%
Laura Coveney, Wetland Design			X							40%	40%
Michelle Hays, PG, Hydrogeologist				X						40%	40%
Brian Pohl, PE, Geotechnical Engineer							X			30%	30%
Shari Curley, Public Outreach									X	20%	20%

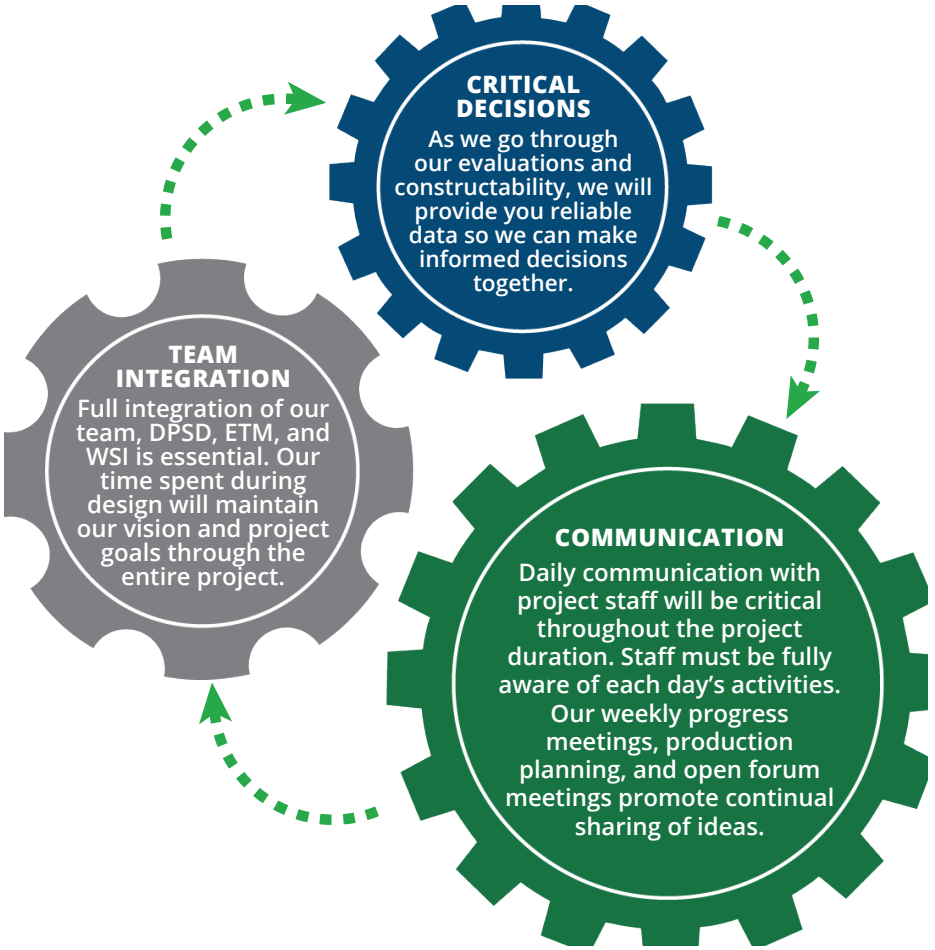
Owner Integration | Communication Plan

COLLABORATION IS THE CORNERSTONE OF OUR PROJECT APPROACH.

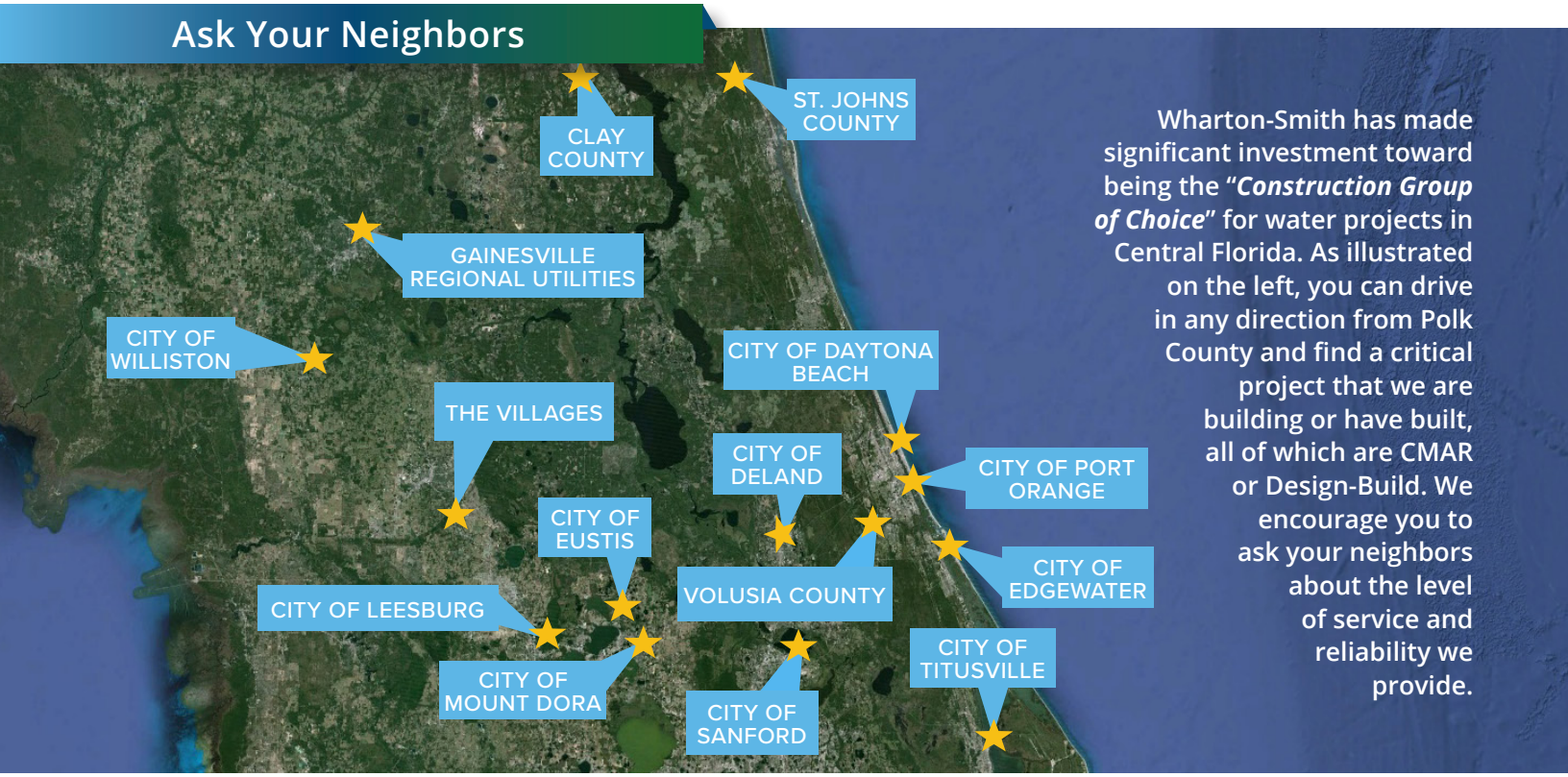
This is especially true with Design-Build delivery. When your Design-Build contractor, designers, subcontractors, and you share a common vision for a project, it's amazing what we can accomplish together as we work toward our mutual goals.

Our team-centered approach will serve as a model and influence a positive approach for our selected subcontractors and suppliers. All project contributors are then working in unison. We have seen the benefits of this approach on all of our reference projects provided in Tab 4.

For collaboration to be effective, we must have a plan that has more intention than simply every team member showing up to meetings. This project requires real interaction with our team. We have completed more than $2 Billion in Florida Water/Wastewater projects using the Design-Build delivery method and have refined our collaborative process with each successful project completion.



Ask Your Neighbors



Wharton-Smith has made significant investment toward being the "***Construction Group of Choice***" for water projects in Central Florida. As illustrated on the left, you can drive in any direction from Polk County and find a critical project that we are building or have built, all of which are CMAR or Design-Build. We encourage you to ask your neighbors about the level of service and reliability we provide.

Risks and Risk Management

WE PROACTIVELY MANAGE RISK.

What is a risk register and why is it so important to the Edgewater Wetland Park project? Risk management starts with effectively identifying potential areas of risk. A major differentiator of our team is the ability to properly assess and mitigate risk before it becomes a problem. We start by dissecting your project into critical areas, components, and schedule activities. For each identified item, we identify the potential cost and schedule impact, probability, and most importantly, the risk mitigation strategy. This helps to document how the team will work together to **mitigate potential risks long before** they are encountered. We have found that by identifying, discussing, and assigning responsibility to each item, we greatly reduce the frequency of occurrence. By creating allowances and contingencies to address the risk, and by retaining full control over the usage of the allowances and contingencies, only actual, realized risk becomes a project cost. Below is a sample preliminary risk register our team has developed specifically for the Edgewater Wetland Park project:

Risk Issue	Potential Cost Impact	Potential Schedule Impact	Probability (0-100%)	Risk Mitigation Strategy	Weighted Cost Exposure (Prob x PCI)
Weather Delays	TBD	20	100%	Provide for reasonable float in the project schedule / create an emergency response plan.	TBD
Permitting	TBD	0	5%	Submit permit applications immediately to gain feedback.	TBD
Design Delays	TBD	20	5%	Utilize action item lists to ensure accountability and minimize delays due to missing information or responses.	TBD
Subsurface Conditions	TBD	60	20%	Identify need for ground water control/ permitting and any soil stabilization ahead of GMP to avoid construction delays.	TBD
Critical Path Delays	TBD	30	20%	Owner representative must be responsible for timely decisions.	TBD
Unavoidable Supply Chain Issues / Delivery Delays	TBD	20	100%	Offset potential supply chain issues with contingency.	TBD
Wetland Performance Issues	TBD	10	20%	Adequate investigation during design phase to ensure wetland performance.	TBD
Unanticipated Design Requirements after GMP	TBD	10	50%	Limit scope to only those items identified in bid documents.	TBD
Endangered Species Conflict	TBD	90	50%	Early investigation by subject matter experts on team to identify endangered species if present and come up with action plan.	TBD
Unsuitable Soil Conditions	TBD	30	20%	Perform additional soils tests ahead of construction. Establish unit rates during the bidding phase for soil replacement.	TBD
Materials Escalation/ Supply Chain	TBD	0	25%	Expedite construction start for all projects, subcontracts and POs, early procurement.	TBD

Health & Safety Integration/Coordination

SAFETY IS THE #1 PRIORITY!

At Wharton-Smith, our first priority is to make sure all personnel get home safely to their families every night. We understand that this is not possible without making safety everyone's job! Our comprehensive safety program includes a site-specific safety plan, personal protective equipment (PPE), weekly inspections, meetings with all job site employees, as well as identification of the nearest emergency response personnel. All project management and field staff have been certified as competent persons in the following areas: trenching, scaffolding, confined space, fall protection, heat awareness, silica reduction, and CPR/First Aid.

Wharton-Smith employs 15 full-time safety personnel that visit job sites regularly and perform safety inspections as their full-time duties. Our highly-trained safety staff hold multiple certifications, including those issued by OSHA. The DPSD job site will be visited and checked for compliance with both OSHA and Wharton-Smith standards at least twice per month. Wharton-Smith is proud to be at the forefront of construction jobsite safety. Some of the various proactive methods we use to keep our jobsites safe include:

TRAINING— Our field personnel assigned to the Edgewater Wetland Park project are OSHA-certified as competent persons in several areas of jobsite safety. We also offer necessary training to subcontractors, when required.

SITE-SPECIFIC SAFETY PLAN— During preconstruction, our project team will submit a site-specific safety plan to DPSD for approval. This plan contains 33 subsections of jobsite safety.

INSPECTIONS— Our safety inspections are two-fold. Senior Superintendent Tim Moore will perform documented safety inspections for scaffolding, confined spaces, trenching, and more. Additionally, each jobsite will be inspected on a regular basis by dedicated in-house Safety Manager. For transparency, these safety reports are made available for all designated stakeholders via our KPA EHS software.

SAFETY METRICS

EMR: 0.57

With an Experience Modification Rate (EMR) well-below the industry average of 1.0, Wharton-Smith is proud to be at the forefront of construction safety with our industry-leading metrics. Our exceptional EMR showcases our commitment to the health and safety of our employees, subcontractors, and clients.

DAILY SAFETY MEETINGS— Our team of superintendents hold Safety Task Assignment (STA) meetings with our employees, subcontractors, and all on-site personnel every morning prior to work beginning. In these meetings, we review potential dangers of each task, review any necessary safety responses, conduct "Stretch-and-Flex" stretching routines, and ask for input from subcontractors.

WHARTON-SMITH IS AT THE FOREFRONT OF CONSTRUCTION SAFETY TECH

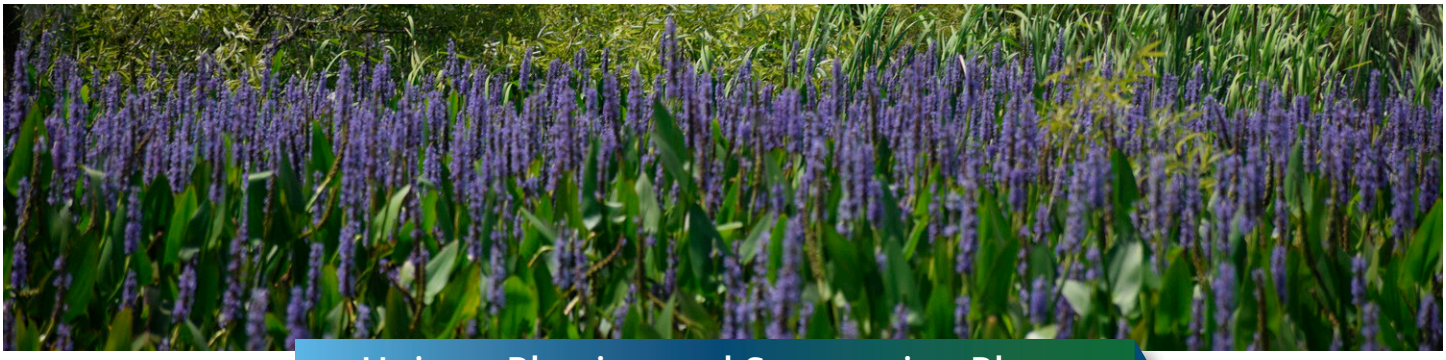
TRANSITIONING HARD HATS TO SAFETY HELMETS

MILWAUKEE® BOLT TYPE II HELMET

Safety Equipment Spotlight

Central to our vision statement, Wharton-Smith prioritizes employee safety. Transitioning from traditional hard hats to advanced safety helmets demonstrates our commitment to safeguarding our workforce and sets us apart from competitors. This proactive approach not only reduces potential claims cost but also showcases our safety consciousness, earning the trust of clients and appealing to younger generations considering the construction industry. By ensuring the well-being of our team, we aim to create an environment that inspires others to join us in shaping a safer future.

ADDITIONAL CASE STUDIES TO FUTHER SHOWCASE OUR TEAM EXPERIENCE



Unique Phasing and Sequencing Plans

Sweetwater Wetlands Park, Paynes Prairie Sheetflow Restoration

This project required unique phasing and sequencing plans due to the handling of the Sweetwater Branch daily water flow, wetland planting constraints (could only plant between March 15th and September 1st), and constraints on when the Sweetwater Branch could sheetflow onto the Prairie. The first phase of the project included temporarily diverting the Sweetwater branch into the future footprint of Cell #1 and the Forested Slough. This allowed for the construction areas of Cells #3 and #2, the Overflow Flow Channel, part of the Forebay and the Sediment Basin to dry out and be able to be constructed. Once these areas were completed the Sweetbranch was diverted into the completed Sediment Basin and Overflow Channel. At this stage in the project water was not allowed to sheetflow directly from our project site to the Prairie so this water had to be channeled in completed work zones, treated, and released through a temporary sediment basin. After the water was diverted through the sediment basin, the work area of Cell #1 and the Forested Slough was able to dry out for work to begin.

Quality Control

Sweetwater Wetlands Park, Paynes Prairie Sheetflow Restoration

The project required a detailed quality assurance plan to not only maintain a high standard of quality for all the project elements but also to comply with the requirements of the multiple grant funding agencies and agencies overseeing the project.

A comprehensive soil disposal and tracking plan for the 310,000 cubic yards of contaminated soil was created with Wharton-Smith and our site subcontractor. The contaminated soils were categorized into three standards: Residential Direct Exposure (unlimited use on site), Rails-to Trails Alternative and Industrial Direct Exposure (allowed to be used on site under two feet of cover or in wetland bottoms under water). The soil disposal plan included creating 100' x 100' grid system of the entire project footprint, GPS surveying for horizontal and vertical excavated soil data at the excavated location and deposited location, and weekly updating and reporting.

A detailed testing matrix and mapping system was also implemented by Wharton-Smith to track the soil classification and density testing of the three miles of constructed berms. Wharton-Smith's Quality Control Manager kept daily logs, checked and organized test reports on the berm map for each section of berm to assure that the berm construction was in compliance with the project requirements.


Trail 4
Past
Performance

Sweetwater Wetlands Park | Paynes Prairie Sheetflow Restoration

Location: Gainesville, FL

Firm's Role and Scope of Work:

The Sweetwater Wetlands Park / Paynes Prairie Sheetflow Restoration Project had a unique and innovative approach to achieving regulatory water quality improvements while providing additional wildlife habitat, wildlife viewing, and public recreation opportunities. The two primary goals of the project were to satisfy the nitrogen load reductions from the Main Street Water Reclamation Facility and urban stormwater to Sweetwater Branch and to restore the rehydration mechanisms of Paynes Prairie to their natural condition. A secondary benefit of the project is the public access element that includes a network of walking trails, pedestrian bridge, boardwalks, elevated berms, viewing structures, a visitor's center, welcome classroom, and entry building integrated throughout the stormwater treatment mechanisms.

Construction required earthwork of over one million cubic yards of combined excavation and embankment material and temporary diversion of the existing Sweetwater Branch (with a daily water flow of six million gallons), to allow for construction of the first two wetland cells.

The footprint of the project is 250 acres of environmentally sensitive marsh and swamp lands. One hundred twenty-five acres of the project was dedicated to the construction of three enhanced wetland treatment cells each containing an inlet and outlet water control structure, deep zones, viewing platforms / shade structures, and wetland plantings (147,000 plants per cells). Construction required earthwork of over one million cubic yards of combined excavation and embankment material and temporary diversion of the existing Sweetwater Branch that ran directly through the center of the project and has a daily water flow of six million gallons, to allow for construction of the first two cells.

Portions of the existing site soil were deemed to be contaminated by the EPA standards and had to either be removed from the site or relocated on site. Due to the cost to remove the contaminated soil from the project site, a soil disposal plan was created which involved excavating, relocating, and tracking 310,000 cubic yards of soil.

On this environmentally sensitive site, which is considered an Outstanding Florida Water Body, implementing a successful stormwater pollution prevention plan was paramount to the success of the project and protection of the environment. Since the project was constructed in an Outstanding Florida Water Body the maximum allowable turbidity discharge amount was 0 NTU's above background which is the most stringent turbidity discharge amount a project can have. Wharton-Smith and our site subcontractor's project team had to take turbidity and Ph samples at least two times a day and report these readings to the St. Johns River Water Management District (SJRWMD). To achieve this requirement, $2.5 million

dollars were dedicated to implementing and maintaining stormwater pollution best management practices throughout the duration of the project. These best management practices included silt fencing, turbidity barriers, jute curtains, stake turbidity barriers, flocculent treatment, and multiple systematic treatment trains. As the project evolved and conditions changed the Stormwater Pollution Prevention Plans were evaluated, modified, and submitted to the SJRWMD for approval.

The project involved over 10 different federal, state, and local agencies (US Army Core of Engineers, Florida Fish and Wildlife, Florida Parks Department, Florida Department of Transportation, Florida Department of Environmental Protection, St. Johns River Water Management District, Alachua County Public Works Department, Alachua County Growth Management, Alachua County Health Department, City of Gainesville, and Gainesville Regional Utilities) that were involved and reported to throughout the duration of construction.

Project Awards:

Florida Stormwater Association Outstanding Achievement Award for outstanding commitment to stormwater management practices benefiting the environment.

City of Gainesville, City Beautification Award for its excellence in originality, innovation, and creativity, as well as for sustainability, maintenance and use of serviceable materials. An award-winning site must exhibit appropriate land utilization, effective planning, compatibility with the area and screening of unsightly views. All projects must meet applicable building and landscaping codes. Each must result in the improvement of the area, property or neighborhood.

ABC Excellence in Construction Eagle Award for exceptional performance on the project. The Excellence in Construction Eagle Awards are among the highest accolades in the construction industry. Projects are judged on a variety of criteria such as safety, personnel management, quality control, scheduling and degree of difficulty.

Client:
City of Gainesville / GRU
405 Northwest 39th Avenue
Gainesville, FL 32627

Size:
256 Acres including 125 Acre Enhancement Wetland

Construction Cost:
$23,394,848

Completion Date:
September 2015

Type of Service and Contractual Relationship:
Construction Management at Risk

Client Reference:
Brett Goodman, PE
Water/Wastewater Treatment Operations Director
352-231-1837
GoodmanBP@gru.com


Nate Hillard
Precon. Manager


Tim Moore
Senior Superintendent


Robyn Dowsey
Environmental Consultant


Walter Nickel
Engineer of Record


Michelle Hays
Hydrogeologist

Wetland Solutions, Inc.

Blue Springs Nutrient Reduction Project

Location: Orange City, FL

Firm's Role and Scope of Work:
Wharton-Smith was the selected general contractor for this lake and park that was built to receive wastewater effluent flow. This project had park and wetland features. Our precise scope of work included clearing/grubbing of most site areas, excavation of soil to obtain pond volume, installation of storm water RCP and manholes, modifications to existing pump station, rough and final grading, seeding/sodding of slopes, installation of aquatic plants for nutrient removal, sidewalks/walkways, and cleanup.


Nate Hillard
Precon. Manager


Tim Moore
Superintendent


Tom Widener
Project Executive


Erik Anderson
Project Executive

Client:
City of Orange City
205 E. Graves Ave.
Orange City, FL 32763

Construction Cost:
$2,607,711

Completion Date:
May 2017

Type of Service and Contractual Relationship:
General Contracting

New Smyrna Dunes Park Boardwalk Renovations

Location: New Smyrna Beach, FL

Firm's Role and Scope of Work:
Wharton-Smith provided Design-Build services at the New Smyrna Dunes Park Boardwalk project for Volusia County, FL. The project was a design-build partnership with Nature Bridges and DMC for the demolition of the existing boardwalk and dune crossovers followed by the reconstruction of a modern boardwalk utilizing TREX manufactured wood and durable stainless-steel hardware that will extend the life and enjoyment for the Volusia County residents. The boardwalk is complemented by picnic pavilions, dune crossovers, and observation towers. The area is environmentally sensitive, and with that in mind, the team enacted top down construction techniques where in the demolition and reconstruction was completed from the boardwalk leaving no trace on the sand dunes. The team also provided protective measures to ensure the safety of the gopher tortoises, field mice, and indigo snakes. The work was also sequenced in a way that allowed the residents to continue to enjoy the park during construction. Finally, the existing boardwalk material was recycled by a local vendor.

Tom Widener
Project Executive

Client:
Volusia County
123 W. Indiana Ave.
DeLand, FL 32720

Construction Cost:
$5,052,040

Completion Date:
July 2018

Type of Service and Contractual Relationship:
Design-Build

Riverwalk | Phase I, II, and III

Location: Sanford, FL

Firm's Role and Scope of Work:
Wharton-Smith collaborated with the preliminary design presented by the City on this multi-phase project. The work included the demolition of the existing fixed docks at the existing marina boat ramp. These fixed docks were replaced with three aluminum floating tending piers, each 70-feet long and 6-feet wide. Concrete abutments were constructed on the land end, and three steel pipe piles per pier were used to secure lateral movement of the floating portions of the new piers. This work was completed without inhibiting public access to the ramp at all times.

Working with the City of Sanford and Ed Waters & Sons Contracting Co., Wharton-Smith construction crews embedded tons of corrugated steel into the bottom of Lake Monroe to create an 8-foot high seawall. The seawall acted as a dam to hold back the lake's water as large trucks then dumped thousands of tons of dirt to fill the space between the new seawall and the edge of the busy highway. Asphalt and concrete were later added to form the 10-foot-wide pathway. Decorative lights, landscaping, benches, and railings were added to complete the scenic riverwalk.

Wharton-Smith self-performed much of the work including the underground utility work, formation of the seawall, traffic signalization, and construction of pathways. The project also includes a Memorial Park designed as a passive recreation space with a cenotaph. The park encompasses a colonnade of palm trees and linear paths surrounding a central lawn and is used for quiet contemplation of as a green space to host small informal or formal gatherings.

Tom Widener
Project Executive

Nate Hillard
Project Manager
Phase II

Client:
City of Sanford
300 N. Park Avenue
Sanford, FL 32771

Construction Cost:
$28,172,682

Completion Date:
November 2019

Type of Service and Contractual Relationship:
General Contracting and Construction Management Services

Client Reference:
Christopher Smith
407-688-5144
smithc@sanfordfl.gov

Wharton-Smith, Inc. CONSTRUCTION GROUP
WRIGHT-PIERCE Engineering a Better Environment

Southwest Nature Park

Location: Gainesville, FL

Firm's Role and Scope of Work:
A 75-acre nature park with hiking trails surrounding constructed wetlands planned to open in spring 2026 on the west side of Parker Road, immediately north of Diamond Sports Park in Alachua County. The wetlands, spearheaded by GRU through a multi-agency partnership, will replenish the Floridian aquifer, beneficially reuse water, reduce the community's water footprint, increase the ecological diversity of the property and support flows at the Santa Fe & Ichetucknee Rivers and their springs.

The shallow wetlands will be surrounded by paths that can be used for passive recreation like walking, jogging, wildlife viewing, photography, environmental education and more. The FDEP and SRWMD are funding partners for the design and construction of the wetland system. Alachua County plans to partner with GRU to manage public access and, at a future date, plans to fund and construct amenities such as restrooms, a playground, and enhanced parking.

Tim Moore
Senior Superintendent

Robyn Dowsey
Environmental Consultant

Michelle Hays
Hydrogeologist

Client:
Gainesville Regional Utilities
405 Northwest 39th Avenue
Gainesville, FL 32627

Construction Cost:
$14,610,000

Completion Date:
Fall 2027

Type of Service and Contractual Relationship:
Progressive Design-Build

Client Reference:
Brett Goodman, PE
Water/Wastewater Treatment Operations Director
352-231-1837
GoodmanBP@gru.com

Blue Heron Wetland Treatment System

Location: Titusville, FL

Firm's Role and Scope of Work:
Wharton-Smith provided construction services on this new, advanced waste water treatment plant, including site development, 10,000 cubic yards of structural concrete and an 8,500 s.f. operations/laboratory building. The structures include a pretreatment building with self-cleaning influent screen, screen conveyer, grit removal system, pump station, odor control system, oxidation basins with mixers, aeration rotors, internal recycle pumps, clarifiers, RAS/WAS pumping and diffused aeration system, automati c backwash filters, chlorine contact chamber with effluent pump station, chlorine/alum storage and feed building, NPW pump station, electrical buildings with generator, and sludge processing facility utilizing ATAD digestors.

This plant includes a large laboratory facility which was constructed to provide testing capabilities for the treatment plant that insure day to day compliance with environmental regulations. All materials of construction withstand the environment necessary to complete laboratory testing needs.

Nate Hillard
Precon. Manager

Laura Coveney
Environmental Scientist

Client:
City of Titusville
555 S. Washington Ave.
Titusville, FL 32796

Construction Cost:
$13,400,000

Completion Date:
February 1996

Type of Service and Contractual Relationship:
General Contracting

Client Reference:
Matt Hixson
321-302-5387
mhixson@cityofedgewater.org

Edgewater Wastewater Master Plan 2015

Location: Edgewater, FL

Firm's Role and Scope of Work:
Mead & Hunt prepared a Clean Water State Revolving Fund (CWSRF) Facility Plan (PLAN) Update for the City's effluent disposal programs. The Plan identified capital projects for effluent management, including the projected capital needs for Reclaimed Water Extensions, Phases 1, 2, and 3, and established estimated costs and implementation schedules. The City anticipated using the State Revolving Fund (SRF) Program to construct the necessary improvements.

This project was needed to retrofit existing developments and reduce surface water discharge to the Indian River by expanding the reclaimed water distribution system. Additionally, the transmission main and western extension under I-95 enable the connection of new subdivisions and discharge to areas in the western portions of the City's service area. The proposed westward reclaimed water extension project would allow the connection of 'dry lined' subdivisions and land application of reclaimed water near the City's wellfield property. Upon completion of public/private partnership projects, reclaimed water and stormwater will be used to restore natural hydroperiods in areas west of I-95.

The NPDES-permitted outfall is located within the Indian River Lagoon, and reduced nutrient loading improves water quality. These improvements align with the goals of the City and SJRWMD to protect the water quality in the Indian River Lagoon basin. The City's SB 64 Compliance Plan also requires surface water discharge to the Lagoon to be reduced to <10% of the annual average daily flow (AADF).

Brad Blais
Effluent Water Quality

Client:
City of Edgewater
104 North Riverside Drive
Edgewater, FL 32132

Design Fee:
$80,000

Completion Date:
December 2015

Type of Service and Contractual Relationship:
Planning and Design Services

Client Reference:
Randy J. Coslow, P.E.,
Director of Environmental Services
386-316-0798
rcoslow@cityofedgewater.org

"[Mead & Hunt's] professional staff has been a beneficial service provider for many ventures, including water, wastewater, stormwater, and financial and capital planning. I would highly recommend them to other entities as a qualified, proficient, team player."

– Brenda Dewees
Retired Director of Environmental Services, City of Edgewater

John Henry Park Stormwater Improvements

Location: Williston, FL

Firm's Role and Scope of Work:
Due to recurring flooding in John Henry Park and the adjacent stormwater pond, the City retained Wright-Pierce to design stormwater improvements for the area. The conceptual plan depicted initial horizontal and vertical layouts of the proposed dry retention area, storm drain inlets, and piping. The design intends to minimize flooding of roads, parking areas, and structures, as well as treat runoff prior to infiltration into the Upper Floridan Aquifer (UFA), thus reducing nutrient concentrations and producing long-term water quality improvements in nearby Rainbow Springs.

The project included preparation of calculations and a report suitable for permitting purposes. The design of the stormwater management system included a new retention pond, swales, culverts, and other miscelaneous upgrades to reduce flooding. Wright-Pierce also helped prepare a grant application and obtained $1,556,400 in funding from the Southwest Florida Water Managment District and the Florida Department of Environmental Protection's Resiliency Grant Program.

Client:
City of Williston
50 North Main St.
Williston, FL 32696

Construction Cost:
$1,500,000

Completion Date:
August 2024

Type of Service and Contractual Relationship:
Design-Bid-Build


Walter Nickel
Design


Dennis Davis
Design


Lucas Anthony
Civil Design


Ryan Wingard
QA/QC


Michael Hoffman
Hydrology &
Hydraulics
Modeling

NASA - Kennedy Space Center Wetlands Mitigation

Location: Merritt Island, FL

Firm's Role and Scope of Work:
Walt Nickel served as senior design engineer and quality control reviewer for the design of three wetland mitigation bank sites referred to as Sites 35, 46, and 49. These projects encompassed 134 acres of degraded coastal and marsh wetlands and abandoned citrus groves to be converted to created and enhanced wetlands for NASA's future mitigation purposes. NASA's objective for these projects was to offset future development impacts planned for the space center and to improve fish and wildlife habitat within the land it shares with the Merritt Island National Wildlife Refuge and in the Indian River Lagoon watershed.

The project included topographical surveys; delineation of wetlands, degraded wetlands, and evasive vegetation; assessment of endangered or threatened species; geotechnical investigations to ascertain subsurface soil conditions; the design of multiple wetland cells segregated by natural topographical features and through site excavation and the construction of berms; planting of new wetland vegetation, and the design of control structures to control water levels. Design approvals were through NASA's environmental group and permitting was through the SJRWMD and the USACE. Designed in 2021.

Client:
NASA

Size:
134 Acres

Construction Cost:
TBD

Completion Date:
Design 2021
Construction 2024 (EST.)

Type of Service and Contractual Relationship:
Design-Bid-Build

Walter Nickel
Design

Laura Coveney
Environmental Scientist

"Ultimately, NASA's goal is to provide certainty to mitigation availability and the environmental resource permit process, with the end goal of securing NASA's access to space."

– Jeff Collins, NASA

Wharton-Smith, Inc.
CONSTRUCTION GROUP

40 CELEBRATING years
1984 2024

Wharton-Smith, Inc.
750 Monroe Road
Sanford, FL 32771

(407) 321-8410

www.whartonsmith.com

DEERING PARK
STEWARDSHIP DISTRICT

3B

Deering Park Stewardship District

Request for Qualifications – Design Builder for Edgewater Wetland Park Project

Competitive Selection Criteria

		Qualifications of Team	Collaborative Delivery Approach	Past Performance	Certified Minority Business Enterprise	TOTAL SCORE
	weight factor	**40**	**20**	**35**	**5**	**100**
	RESPONDENT					
1	**Phillips & Jordan, Inc. and Jacobs**					
2	**Wharton-Smith, Inc. and Wright-Pierce**					

_____ _____

Board Member's Signature Date

DEERING PARK
STEWARDSHIP DISTRICT

3C

RESOLUTION 2024-10

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE DEERING PARK STEWARDSHIP DISTRICT ADOPTING THE EVALUATION AND SELECTING DESIGN-BUILD FIRMS' STATEMENTS OF QUALIFICATIONS FOR THE EDGEWATER WETLAND PARK PROJECT; PROVIDING A SEVERABILITY CLAUSE; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Deering Park Stewardship District (the "District") is a local unit of special-purpose government established pursuant to Chapter 2020-197, *Laws of Florida*, as amended, to plan, construct, install, acquire, finance, manage and operate public improvements and community facilities within and without its boundaries; and

WHEREAS, the District has solicited qualifications from Design-Build firms interested in providing design-build services related to the District's Edgewater Wetland Park project (the "Project") in accordance with Section 287.055, *Florida Statutes*; and

WHEREAS, the District's Board of Supervisors (the "Board") has received and evaluated qualifications from two (2) respondents interested in providing design-build services relative to the Project; and

WHEREAS, the Board, after considering qualifications from all respondents, has awarded _____ points to Phillips & Jordan, Inc. and _____ points to Wharton-Smith, Inc., and has determined all respondents are qualified to perform the required services relative to the Project; and

WHEREAS, the Board has determined that it is in the best interests of the District and its residents and landowners to deem _____ the most highly qualified firm for design-build services for the Project and authorize negotiation of a contract with same

NOW THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE DEERING PARK STEWARDSHIP DISTRICT:

SECTION 1. All of the representations, findings and determinations contained within the recitals stated above are recognized as true and accurate and are expressly incorporated into this Resolution.

SECTION 2. The Board hereby determines that the qualifications submitted by _____ for the Project, is the response which best serves the interests of the District and accordingly the District's Board desires to negotiate the contract for the design-build services for the Project with such firm. Should the District be unable to negotiate a

satisfactory contract with _____ at a price the District determines to be fair, competitive, and reasonable, the District Manager, Chair or Vice Chair shall formally terminate the negotiations. The District shall then undertake negotiations with _____ _____.

SECTION 3. The Chair and District Staff are hereby authorized to give notice of this action to all respondents to the extent required by law and to proceed with the negotiation of a contract with the selected respondent as outlined above.

SECTION 4. If any provision of this Resolution is held to be illegal or invalid, the other provisions shall remain in full force and effect.

SECTION 5. This Resolution shall become effective upon its passage and shall remain in effect unless rescinded or repealed.

[SIGNATURES ON FOLLOING PAGE]

PASSED AND ADOPTED this 9th day of July, 2024.

ATTEST: **DEERING PARK STEWARDSHIP DISTRICT**

_____ _____

Secretary/Assistant Secretary Chair/Vice Chair, Board of Supervisors

DEERING PARK
STEWARDSHIP DISTRICT

4

Deering Park Stewardship District

ANNUAL FINANCIAL REPORT

September 30, 2023

Deering Park Stewardship District

ANNUAL FINANCIAL REPORT

September 30, 2023

TABLE OF CONTENTS

Berger, Toombs, Elam,
Gaines & Frank

Certified Public Accountants PL

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REPORT OF INDEPENDENT AUDITORS

To the Board of Supervisors
Deering Park Stewardship District
Brevard and Volusia Counties, Florida

Report on Audit of the Financial Statements

Opinion

We have audited the financial statements of the governmental activities and each major fund of Deering Park Stewardship District (the "District"), as of and for the year ended September 30, 2023, and the related notes to financial statements, which collectively comprise the District's basic financial statements as listed in the table of contents.

In our opinion, the accompanying financial statements present fairly, in all material respects, the respective financial position of the governmental activities and each major fund of Deering Park Stewardship District as of September 30, 2023, and the respective changes in financial position and the budgetary comparison for the General Fund for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America (GAAS), and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the District and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

To the Board of Supervisors
Deering Park Stewardship District

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the District's ability to continue as a going concern for one year beyond the financial statement date, including currently known information that may raise substantial doubt thereafter.

Auditor's Responsibility for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore, is not a guarantee that an audit conducted in accordance with GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS and *Government Auditing Standards*, we:

- Exercise professional judgement and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgement, there are conditions or events, considered in the aggregate, that raise substantial doubt about the District's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

Berger, Toombs, Elam,
Gaines & Frank
Certified Public Accountants PL

To the Board of Supervisors
Deering Park Stewardship District

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that Management's Discussion and Analysis be presented to supplement the basic financial statements. Such information is the responsibility of management and, although not a part of the basic financial statements, is required by the *Governmental Accounting Standards Board* who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued a report dated June 28, 2024 on our consideration of the District's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations and contracts.

The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the District's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Deering Park Stewardship District's internal control over financial reporting and compliance.

Berger Toombs Elam Gaines & Frank

Berger, Toombs, Elam, Gaines & Frank
Certified Public Accountants PL
Fort Pierce, Florida

June 28, 2024

Deering Park Stewardship District
MANAGEMENT'S DISCUSSION AND ANALYSIS
For the Year Ended September 30, 2023

Management's discussion and analysis of Deering Park Stewardship District (the "District") financial performance provides an analysis of the District's financial activities. The analysis provides summary financial information for the District and should be read in conjunction with the District's financial statements.

OVERVIEW OF THE FINANCIAL STATEMENTS

The District's basic financial statements comprise three components; 1) *Government-wide financial statements,* 2) *Fund financial statements,* and 3) *Notes to financial statements.* The *Government-wide financial statements* present an overall picture of the District's financial position and results of operations. The *Fund financial statements* present financial information for the District's major funds. The *Notes to financial statements* provide additional information concerning the District's finances.

The *Government-wide financial statements* include the **statement of net position** and the **statement of activities**. These statements use accounting methods similar to those used by private-sector companies. Emphasis is placed on the net position of governmental activities and the change in net position. Governmental activities are primarily supported by developer contributions.

The **statement of net position** presents information on all assets and liabilities of the District, with the difference between assets and liabilities reported as net position. Net position is reported in three categories; 1) net investment in capital assets 2) restricted, and 3) unrestricted. Assets, liabilities, and net position are reported for all Governmental activities.

The **statement of activities** presents information on all revenues and expenses of the District and the change in net position. Expenses are reported by major function and program revenues relating to those functions are reported, providing the net cost of all functions provided by the District. To assist in understanding the District's operations, expenses have been reported as governmental activities. Governmental activities funded by the District include general government.

Fund financial statements present financial information for governmental funds. These statements provide financial information for the major funds of the District. Governmental fund financial statements provide information on the current assets and liabilities of the funds, changes in current financial resources (revenues and expenditures), and current available resources.

OVERVIEW OF THE FINANCIAL STATEMENTS (CONTINUED)

Fund financial statements include a **balance sheet** and a **statement of revenues, expenditures and changes in fund balances** for all governmental funds. A **statement of revenues, expenditures, and changes in fund balances – budget and actual** is provided for the District's General Fund. *Fund financial statements* provide more detailed information about the District's activities. Individual funds are established by the District to track revenues that are restricted to certain uses or to comply with legal requirements.

The *government-wide financial statements* are designed to provide the reader with a broad overview of the District's finances, in a manner similar to a private sector business. In the government-wide **statement of net position**, the governmental activities column is presented on a consolidated basis and is reported on a full-accrual economic resource basis, which recognizes all noncurrent assets and receivables as well as all noncurrent debt and obligations. The effect of interfund activity has been eliminated from the *government-wide financial statements*. In contrast, the governmental fund financial statements are grouped into funds to account for and to maintain control over resources that have been segregated for specific activities or objectives. The *fund financial statements* are presented using the current financial resources measurement focus and the modified accrual basis where as revenues are recorded when collected in the current period or within 90 days of year-end and expenditures are recorded when a liability is incurred. The difference between the two statements arises primarily from the long-term economic focus of the *government-wide statements* versus the current financial resources focus of the *fund financial statements*. A reconciliation of the *government-wide* and the *fund financial statement* is provided to illustrate these differences.

Notes to financial statements provide additional detail concerning the financial activities and financial balances of the District. Additional information about the accounting practices of the District, investments of the District, capital assets and long-term debt are some of the items included in the *notes to financial statements.*

Financial Highlights

The following are the highlights of financial activity for the year ended September 30, 2023.

- The District's total assets were exceeded by total liabilities by $(9,532) (net position).
- Governmental activities revenues totaled $52,442 while governmental activities expenses totaled $59,200.

OVERVIEW OF THE FINANCIAL STATEMENTS (CONTINUED)

Financial Analysis of the District

The following schedule provides a summary of the assets, liabilities and net position of the District and is presented by category.

Net Position

	Governmental Activities	
	2023	**2022***
Current assets	$ 24,867	$ 13,200
Current liabilities	34,399	15,974
Net Position		
Unrestricted	$ (9,532)	$ (2,774)

*Unaudited

The increase in current assets is related to the increase in due from developer.

The increase in current liabilities is related to the increase in accounts payable and due to developer.

OVERVIEW OF THE FINANCIAL STATEMENTS (CONTINUED)

Financial Analysis of the District

The following schedule provides a summary of the assets, liabilities and net position of the District and is presented by category for comparison purposes.

Change In Net Position

	Governmental Activities	
	2023	2022*
Program Revenues		
Operating contributions	$ 52,442	$ 39,272
Expenses		
General government	50,882	47,073
Interest and other charges	8,318	-
Total Expenses	59,200	47,073
Change in Net Position	(6,758)	(7,801)
Net Position - Beginning of Year	(2,774)	5,027
Net Position - End of Year	$ (9,532)	$ (2,774)

*Unaudited

The increase in operating contributions and general government is related to the continued development of the District.

The increase in interest and other charges is related to the payment of certain costs in anticipation of issuing bonds.

OVERVIEW OF THE FINANCIAL STATEMENTS (CONTINUED)

General Fund Budgetary Highlights

The budget exceeded actual governmental expenditures primarily due to less supervisor fees and legal fees than were anticipated.

There were no amendments to the September 30, 2023 budget.

Economic Factors and Next Year's Budget

Deering Park Stewardship District does not anticipate any economic factors to have a significant effect on operations in 2024.

Request for Information

The financial report is designed to provide a general overview of Deering Park Stewardship District's finances for all those with an interest. Questions concerning any of the information provided in this report or requests for additional information should be addressed to the Deering Park Stewardship District's Finance Department at 2300 Glades Road, Suite 410W, Boca Raton, Florida 33431.

Deering Park Stewardship District
STATEMENT OF NET POSITION
September 30, 2023

	Governmental Activities
ASSETS	
Current Assets:	
Cash and cash equivalents	$ 8,976
Due from developer	15,891
Total Current Assets	24,867
LIABILITIES	
Current Liabilities:	
Accounts payable and accrued expenses	20,081
Due to developer	14,318
Total Liabilities	34,399
NET POSITION	
Unrestricted	$ (9,532)

See accompanying notes to financial statements.

Deering Park Stewardship District
STATEMENT OF ACTIVITIES
For the Year Ended September 30, 2023

Functions/Programs	Expenses	Program Revenues: Operating Grants and Contributions	Net (Expense) Revenues and Changes in Net Position: Governmental Activities
Governmental Activities:			
General government	$ (50,882)	$ 52,442	$ 1,560
Interest and other charges	(8,318)	-	(8,318)
Total Governmental Activities	$ (59,200)	$ 52,442	(6,758)
	Change in Net Position		(6,758)
	Net Position - October 1, 2022		(2,774)
	Net Position - September 30, 2023		$ (9,532)

See accompanying notes to financial statements.

Deering Park Stewardship District
BALANCE SHEET –
GOVERNMENTAL FUNDS
September 30, 2023

	General	Debt Service	Total Governmental Funds
ASSETS			
Cash and cash equivalents	$ 8,976	$ -	$ 8,976
Due from developer	7,573	8,318	15,891
Total Assets	$ 16,549	$ 8,318	$ 24,867
LIABILITIES, DEFERRED INFLOWS OF RESOURCES AND FUND BALANCES			
Liabilities			
Accounts payable and accrued expenses	$ 11,763	$ 8,318	$ 20,081
Due to developer	6,000	8,318	14,318
Total Liabilities	17,763	16,636	34,399
Deferred Inflows of Resources			
Unavailable revenues	4,786	-	4,786
Fund balances			
Unassigned	(6,000)	(8,318)	(14,318)
Total Liabilities, Deferred Inflows of Resources and Fund Balances	$ 16,549	$ 8,318	$ 24,867

Reconciliation of Total Governmental Funds Fund Balance to Governmental Activities Net Position:	
Total Governmental Funds Fund Balance	$ (14,318)
Unavailable revenues at the fund level are recognized when earned at the government-wide level.	4,786
Net Position of Governmental Activities	$ (9,532)

See accompanying notes to financial statements.

Deering Park Stewardship District
STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES – GOVERNMENTAL FUNDS
For the Year Ended September 30, 2023

	General	Debt Service	Total Governmental Funds
Revenues			
Developer contributions	$ 47,656	$ -	$ 47,656
Expenditures			
Current:			
General government	50,882	-	50,882
Debt service			
Other	-	8,318	8,318
Total Expenditures	50,882	8,318	59,200
Net change in fund balances	(3,226)	(8,318)	(11,544)
Fund Balances - October 1, 2022	(2,774)	-	(2,774)
Fund Balances - September 30, 2023	$ (6,000)	$ (8,318)	$ (14,318)

Reconciliation of Total Governmental Funds Changes in Fund Balance to the Change in net Position for Governmental Activities:	
Net Change in Fund Balances	$ (11,544)
Unavailable revenues are recognized as deferred inflows of resources at the fund level. Revenues are recognized when earned at the government-wide level. This is the current year change.	4,786
Change in Net Position	$ (6,758)

See accompanying notes to financial statements.

Deering Park Stewardship District
STATEMENT OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES – BUDGET AND ACTUAL – GENERAL FUND
For the Year Ended September 30, 2023

	Original Budget	Final Budget	Actual	Variance with Final Budget Positive (Negative)
Revenues				
Developer contributions	$ 98,490	$ 98,490	$ 47,656	$ (50,834)
Expenditures				
Current:				
General government	98,490	98,490	50,882	47,608
Net change in fund balances	-	-	(3,226)	(3,226)
Fund Balances - October 1, 2022	-	-	(2,774)	(2,774)
Fund Balances - September 30, 2023	$ -	$ -	$ (6,000)	$ (6,000)

See accompanying notes to financial statements.

NOTE A – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

The financial statements of Deering Park Stewardship District (the "District") have been prepared in conformity with generally accepted accounting principles (GAAP) as applied to governmental units. The Governmental Accounting Standards Board (GASB) is the accepted standard-setting body for establishing governmental accounting and financial reporting principles. The District's more significant accounting policies are described below.

1. Reporting Entity

The District was established on September 4, 2020 by Brevard and Volusia Counties, Florida pursuant to Florida House Bill #1303 and Chapter 2005-338, Laws of Florida, as amended (the "Act"), as a Stewardship District. The District was established for the purposes of financing and managing the acquisition, construction, maintenance and operation of the infrastructure necessary for development within its jurisdiction. The District is authorized to issue bonds for the purpose, among others, of financing, funding, planning, establishing, acquiring, constructing district roads, landscaping, and other basic infrastructure projects within or without the boundaries of the Deering Park Stewardship District. The District is governed by a five-member Board of Supervisors who are elected for two and four year terms.

In October 2021, two Districts, Deering Park Center Community Development District and Farmton-Brevard Community Development District located within the boundaries of Deering Park Stewardship District, merged with Deering Park Stewardship District, the surviving entity.

As required by GAAP, these financial statements present the Deering Park Stewardship District (the primary government) as a stand-alone government. The reporting entity for the District includes all functions of government in which the District's Board exercises oversight responsibility including, but not limited to, financial interdependency, selection of governing authority, designation of management, significant ability to influence operations and accountability for fiscal matters.

Based upon the application of the above-mentioned criteria as set forth by the Governmental Accounting Standards Board the District has identified no component units.

2. Measurement Focus and Basis of Accounting

The basic financial statements of the District are composed of the following:

- Government-wide financial statements
- Fund financial statements
- Notes to financial statements

a. Government-wide Financial Statements

The government-wide financial statements are reported using the economic resources measurement focus and the accrual basis of accounting. Government-wide financial statements report all non-fiduciary information about the reporting government as a whole. These statements include separate columns for the governmental and business-type activities of the primary government.

NOTE A – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

2. Measurement Focus and Basis of Accounting (Continued)

a. Government-wide Financial Statements (Continued)

Governmental activities normally are supported by operating contributions and interest. Program revenues include charges for services, and payments made by parties outside of the reporting government's citizenry if that money is restricted to a particular program. Program revenues are netted with program expenses in the statement of activities to present the net cost of each program.

b. Fund Financial Statements

The underlying accounting system of the District is organized and operated on the basis of separate funds, each of which is considered to be a separate accounting entity. The operations of each fund are accounted for with a separate set of self-balancing accounts that comprise its assets, liabilities, fund equity, revenues and expenditures or expenses, as appropriate. Governmental resources are allocated to and accounted for in individual funds based upon the purposes for which they are to be spent and the means by which spending activities are controlled.

Fund financial statements for the primary government's governmental funds are presented after the government-wide financial statements. These statements display information about major funds individually.

Governmental Funds

The District has various policies governing the fund balance classifications.

Nonspendable Fund Balance – This classification consists of amounts that cannot be spent because they are either not in spendable form or are legally or contractually required to be maintained intact.

Restricted Fund Balance – This classification includes amounts that can be spent only for specific purposes stipulated by constitution, external resource providers, or through enabling legislation.

Assigned Fund Balance – This classification consists of the Board of Supervisors' intent to be used for specific purposes, but are neither restricted nor committed. The assigned fund balances can also be assigned by the District's management company.

Unassigned Fund Balance – This classification is the residual classification for the government's general fund and includes all spendable amounts not contained in the other classifications. Unassigned fund balance is considered to be utilized first when an expenditure is incurred for purposes for which amounts in any of those unrestricted fund balance classifications could be used.

NOTE A – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

2. Measurement Focus and Basis of Accounting (Continued)

b. Fund Financial Statements (Continued)

Governmental Funds (Continued)

The District classifies fund balance according to Governmental Accounting Standards Board Statement 54 – Fund Balance Reporting and Governmental Fund Type Definitions. The Statement requires the fund balance for governmental funds to be reported in classifications that comprise a hierarchy based primarily on the extent to which the government is bound to honor constraints on the specific purposes for which amounts in those funds can be spent.

Fund Balance Spending Hierarchy – For all governmental funds except special revenue funds, when restricted, committed, assigned, and unassigned fund balances are combined in a fund, qualified expenditures are paid first from restricted or committed fund balance, as appropriate, then assigned and finally unassigned fund balances.

Governmental fund financial statements are reported using the current financial resources measurement focus and the modified accrual basis of accounting. Revenues are considered to be available when they are collected within the current period or soon thereafter to pay liabilities of the current period. For this purpose, the District considers revenues to be available if they are collected within 90 days of the end of the current fiscal period.

Expenditures generally are recorded when a liability is incurred, as under accrual accounting. Interest associated with the current fiscal period is considered to be an accrual item and so has been recognized as revenue of the current fiscal period.

Under the current financial resources measurement focus, only current assets and current liabilities are generally included on the balance sheet. The reported fund balance is considered to be a measure of “available spendable resources”. Governmental fund operating statements present increases (revenues and other financing sources) and decreases (expenditures and other financing uses) in net current assets. Accordingly, they are said to present a summary of sources and uses of “available spendable resources” during a period.

Because of their spending measurement focus, expenditure recognition for governmental fund types excludes amounts represented by non-current liabilities. Since they do not affect net current assets, such long-term amounts are not recognized as governmental fund type expenditures or fund liabilities.

NOTE A – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

3. Basis of Presentation

Governmental Major Funds

General Fund – The General Fund is the District's primary operating fund. It accounts for all financial resources of the general government, except those required to be accounted for in another fund.

Debt Service Fund – Accounts for debt service requirements to retire the special assessment revenue bonds which were used to finance the construction of District infrastructure improvements.

4. Assets, Liabilities, and Net Position or Equity

a. Cash and Investments

Florida Statutes require state and local governmental units to deposit monies with financial institutions classified as "Qualified Public Depositories," a multiple financial institution pool whereby groups of securities pledged by the various financial institutions provide common collateral from their deposits of public funds. This pool is provided as additional insurance to the federal depository insurance and allows for additional assessments against the member institutions, providing full insurance for public deposits.

The District is authorized to invest in those financial instruments as established by Section 218.415, Florida Statutes. The authorized investments consist of:

1. Direct obligations of the United States Treasury;
2. The Local Government Surplus Funds Trust or any intergovernmental investment pool authorized pursuant to the Florida Interlocal Cooperative Act of 1969;
3. Interest-bearing time deposits or savings accounts in authorized qualified public depositories;
4. Securities and Exchange Commission, registered money market funds with the highest credit quality rating from a nationally recognized rating agency.

Cash equivalents include time deposits, certificates of deposit and all highly liquid debt instruments with original maturities of three months or less.

b. Budgets

Budgets are prepared and adopted after public hearings for the governmental funds, pursuant to Chapter 190, Florida Statutes. The District utilizes the same basis of accounting for budgets as it does for revenues and expenditures in its general fund. The legal level of budgetary control is at the fund level. All budgeted appropriations lapse at year end. Formal budgets are adopted for the general fund. As a result, deficits in the budget variance columns of the accompanying financial statements may occur.

NOTE B – CASH

All deposits are held in qualified public depositories and are included on the accompanying balance sheet and statement of net position as cash.

Custodial Credit Risk – Deposits

Custodial credit risk is the risk that in the event of a bank failure, the District's deposits may not be returned. The District does not have a formal deposit policy for custodial credit risk. The District does, however, follow the provisions of Chapter 280, Florida Statutes regarding deposits and investments. As of September 30, 2023, the District's bank balance was $5,764 and the carrying value was $8,976. The District controls its exposure to custodial credit risk because it maintains all deposits in a qualified public depository in accordance with the provisions of Chapter 280, Florida Statutes, which means that all deposits are fully insured by Federal Depositors Insurance or collateralized under Chapter 280, Florida Statutes.

The District had no investments at September 30, 2023.

NOTE C – ECONOMIC DEPENDENCY

A significant portion of the District's activity is dependent upon the continued involvement of the Developer, the loss of which could have a material adverse effect on the District's operations. During the fiscal year, all voting members of the Board of Supervisors were employed by the Developer or a related entity. The District received $52,442 in operating contributions from the Developer for the year ended September 30, 2023. Additionally, the District has a net balance due from the Developer of $1,573 as of September 30, 2023.

NOTE D – RISK MANAGEMENT

The government is exposed to various risks of loss related to torts; theft of, damage to and destruction of assets; errors and omissions; and natural disasters for which the government carries commercial insurance. The District has not filed any claims under this commercial coverage.

Berger, Toombs, Elam,
Gaines & Frank

Certified Public Accountants PL

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INDEPENDENT AUDITORS' REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS*

To the Board of Supervisors
Deering Park Stewardship District
Brevard and Volusia Counties, Florida

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements, as listed in the table of contents, of Deering Park Stewardship District, as of and for the year ended September 30, 2023, and the related notes to the financial statements, which collectively comprise the basic financial statements and have issued our report thereon dated June 28, 2024.

Report on Internal Control Over Financial Reporting

In planning and performing our audit, we considered Deering Park Stewardship District's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of Deering Park Stewardship District's internal control. Accordingly, we do not express an opinion on the effectiveness of Deering Park Stewardship District's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency, or combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented or detected and corrected on a timely basis. A significant deficiency is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses or significant deficiencies may exist that have not been identified.

Berger, Toombs, Elam,
Gaines & Frank
Certified Public Accountants PL

To the Board of Supervisors
Deering Park Stewardship District

Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether Deering Park Stewardship District's financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Berger Toombs Elam
Gaines + Frank

Berger, Toombs, Elam, Gaines & Frank
Certified Public Accountants PL
Fort Pierce, Florida

June 28, 2024

Berger, Toombs, Elam,
Gaines & Frank

Certified Public Accountants PL

600 Citrus Avenue
Suite 200
Fort Pierce, Florida 34950

772/461-6120 // 461-1155
FAX: 772/468-9278

MANAGEMENT LETTER

To the Board of Supervisors
Deering Park Stewardship District
Brevard and Volusia Counties, Florida

Report on the Financial Statements

We have audited the financial statements of the Deering Park Stewardship District as of and for the fiscal year ended September 30, 2023, and have issued our report thereon dated June 28, 2024.

Auditor's Responsibility

We conducted our audit in accordance with auditing standards generally accepted in the United States; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States and Chapter 10.550, Rules of the Florida Auditor General.

Other Reporting Requirements

We have issued our Independent Auditor's Report on Internal Control over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with *Government Auditing Standards* and our Independent Auditor's Report on an examination conducted in accordance with *AICPA Professionals Standards*, AT-C Section 315, regarding compliance requirements in accordance with Chapter 10.550, Rules of the Auditor General. Disclosures in those reports, which are dated June 28, 2024, should be considered in conjunction with this management letter.

Prior Audit Findings

Section 10.554(1)(i)1., Rules of the Auditor General, requires that we determine whether or not corrective actions have been taken to address findings and recommendations made in the preceding financial audit report. There were no findings or recommendations in the prior financial audit report.

Financial Condition and Management

Section 10.554(1)(i)5.a. and 10.556(7), Rules of the Auditor General, require us to apply appropriate procedures and communicate the results of our determination as to whether or not Deering Park Stewardship District has met one or more of the conditions described in Section 218.503(1), Florida Statutes, and to identify the specific conditions met. In connection with our audit, we determined that Deering Park Stewardship District did not meet any of the conditions described in Section 218.503(1), Florida Statutes.

To the Board of Supervisors
Deering Park Stewardship District

Pursuant to Sections 10.554(1)(i)5.b. and 10.556(8), Rules of the Auditor General, we applied financial condition assessment procedures for Deering Park Stewardship District. It is management's responsibility to monitor the Deering Park Stewardship District's financial condition; our financial condition assessment was based in part on the representations made by management and the review of the financial information provided by the same as of September 30, 2023.

Section 10.554(1)(i)2., Rules of the Auditor General, requires that we communicate any recommendations to improve financial management. In connection with our audit, we did not have any such recommendations.

Specific Information

The information provided below was provided by management and has not been audited; therefore, we do not express an opinion or provide any assurance on the information.

As required by Section 218.39(3)(c), Florida Statutes, and Section 10.554(1)(i)6, Rules of the Auditor General, the Deering Park Stewardship District reported:

1) The total number of district employees compensated in the last pay period of the District's fiscal year: 0
2) The total number of independent contractors to whom nonemployee compensation was paid in the last month of the District's fiscal year: 3
3) All compensation earned by or awarded to employees, whether paid or accrued, regardless of contingency: $0
4) All compensation earned by or awarded to nonemployee independent contractors, whether paid or accrued, regardless of contingency: $30,584
5) Each construction project with a total cost of at least $65,000 approved by the District that is scheduled to begin on or after October 1, 2022, together with the total expenditures for such project: N/A.
6) A budget variance based on thebudget adopted under Section 189.016(4), Florida Statutes, before the beginning of the fiscal year being reported if the District amends a final adopted budget under Section 189.016(6), Florida Statutes: The budget was not amended.

As required by Section 218.39(3)(c), Florida Statutes, and Section 10.554(1)(i)8, Rules of the Auditor General, the Deering Park Stewardship District reported:

1) The rate or rates of non-ad valorem special assessments imposed by the District: Developer funded.
2) The amount of special assessments collected by or on behalf of the District: Total special assessments collected was N/A.
3) The total amount of outstanding bonds issued by the District and the terms of such bonds: No outstanding bonds as of September 30, 2023.

Berger, Toombs, Elam,
Gaines & Frank
Certified Public Accountants PL

To the Board of Supervisors
Deering Park Stewardship District

Additional Matters

Section 10.554(1)(i)3., Rules of the Auditor General, requires us to communicate noncompliance with provisions of contracts or grant agreements, or abuse, that have occurred, or are likely to have occurred, that have an effect on the financial statements that is less than material but warrants the attention of those charged with governance. In connection with our audit, we did not note any such findings.

Purpose of this Letter

Our management letter is intended solely for the information and use of the Legislative Auditing Committee, members of the Florida Senate and the Florida House of Representatives, the Florida Auditor General, Federal and other granting agencies, the Board of Supervisors, and applicable management, and is not intended to be and should not be used by anyone other than these specified parties.

Berger Toombs Elam
Gaines + Frank

Berger, Toombs, Elam, Gaines & Frank
Certified Public Accountants PL
Fort Pierce, Florida

June 28, 2024

DEERING PARK
STEWARDSHIP DISTRICT

5

RESOLUTION 2024-09

A RESOLUTION OF THE BOARD OF SUPERVISORS OF THE DEERING PARK STEWARDSHIP DISTRICT HEREBY ACCEPTING THE AUDITED ANNUAL FINANCIAL REPORT FOR THE FISCAL YEAR ENDED SEPTEMBER 30, 2023

WHEREAS, the District's Auditor, Berger, Toombs, Elam, Gaines & Frank has heretofore prepared and submitted to the Board, for accepting, the District's Audited Financial Report for Fiscal Year 2023;

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF THE DEERING PARK STEWARDSHIP DISTRICT;

1. The Audited Financial Report for Fiscal Year 2023, heretofore submitted to the Board, is hereby accepted for Fiscal Year 2023, for the period ending September 30, 2023; and

2. A verified copy of said Audited Financial Report for Fiscal Year 2023 shall be attached hereto as an exhibit to this Resolution, in the District's "Official Record of Proceedings".

PASSED AND ADOPTED this 9th day of July, 2024.

ATTEST: **DEERING PARK STEWARDSHIP DISTRICT**

Secretary/Assistant Secretary

Chair/Vice Chair, Board of Supervisors

DEERING PARK
STEWARDSHIP DISTRICT

MINUTES

DRAFT

MINUTES OF MEETING
DEERING PARK STEWARDSHIP DISTRICT

The Board of Supervisors of the Deering Park Stewardship District held a Regular Meeting on June 25, 2024 at 2:30 p.m., in-person at Storch Law Firm, located at 420 S. Nova Road, Daytona Beach, Florida 32114 and via Teams Meeting ID: 213 938 298 297 Passcode: h3jQc3.

Present were:

Glenn Storch	Chair
Robbie Lee	Vice Chair
Bill Fife	Assistant Secretary
Joey Posey	Assistant Secretary
James Boyd	Assistant Secretary

Also present:

Andrew Kantarzhi	District Manager
Cindy Cerbone (via telephone)	Wrathell, Hunt and Associates LLC (WHA)
Jonathan Johnson (via telephone)	District Counsel
Chris Warshaw (via telephone)	District Engineer
Helen Hutchens (via telephone)	Miami Corporation Management, LLC

FIRST ORDER OF BUSINESS **Call to Order/Roll Call**

Mr. Kantarzhi called the meeting to order at 2:30 p.m. All Supervisors were present.

SECOND ORDER OF BUSINESS **Public Comments**

No members of the public spoke.

THIRD ORDER OF BUSINESS **Consideration of Resolution 2024-08, Authorizing an Individual Designated by the Board of Supervisors to Act as the District's Purchasing Agent for the Purpose of Procuring, Accepting, and Maintaining Any and All Construction Materials**

Necessary for the Construction, Installation, Maintenance or Completion of the District's Infrastructure Improvements as Provided in the District's Adopted Improvement Plan; Providing for the Approval of a Work Authorization; Providing for Procedural Requirements for the Purchase of Materials; Approving the Form of a Purchase Requisition Request; Approving The Form of a Purchase Order; Approving the Form of a Certificate of Entitlement; Authorizing the Purchase of Insurance; Providing a Severability Clause; and Providing an Effective Date

Mr. Kantarzhi presented Resolution 2024-08. The District Engineer will be the designated Purchasing Agent.

On MOTION by Mr. Storch and seconded by Mr. Fife, with all in favor, Resolution 2024-08, in substantial form, Authorizing an Individual Designated by the Board of Supervisors to Act as the District's Purchasing Agent for the Purpose of Procuring, Accepting, and Maintaining Any and All Construction Materials Necessary for the Construction, Installation, Maintenance or Completion of the District's Infrastructure Improvements as Provided in the District's Adopted Improvement Plan; Providing for the Approval of a Work Authorization; Providing for Procedural Requirements for the Purchase of Materials; Approving the Form of a Purchase Requisition Request; Approving The Form of a Purchase Order; Approving the Form of a Certificate of Entitlement; Authorizing the Purchase of Insurance; Providing a Severability Clause; and Providing an Effective Date, was adopted.

Mr. Boyd stated that Attachment 2, which is the Purchase Order, will be updated to include a blank line for the Purchase Order number, a line for the Purchase Order dollar amount and notation that it excludes sales tax and include a breakdown of shipping and insurance costs and specify delivery dates.

On MOTION by Mr. Storch and seconded by Mr. Fife, with all in favor, the Purchase Order form, as amended, was approved.

FOURTH ORDER OF BUSINESS **Consider Update to RFQ for Design-Builder for Edgewater Wetland Park Project Evaluation Committee**

Mr. Storch nominated Jim Boyd, Robbie Lee and Chris Warshaw as the Edgewater Wetland Park Project Evaluation Committee Members.

No other nominations were made.

On MOTION by Mr. Storch and seconded by Mr. Boyd, with all in favor, designating the Supervisors Jim Boyd and Robbie Lee and District Engineer Chris Warshaw as the Edgewater Wetland Park Project Evaluation Committee Members, was approved.

FIFTH ORDER OF BUSINESS **Consideration of Consultant Leasing Agreement with Swallowtail LLC**

Mr. Kantarzhi presented the redline versions of the Personnel Leasing Agreement with Swallowtail LLC and the Exhibit A Scope of Services. He requested approved in substantial form.

Mr. Boyd requested the following additional changes:

Page 1, 1st Paragraph, last line and throughout, except in the 2nd to last Paragraph: Change "Lease Personnel" to "Grant Manager or Grant Managers"

Page 3 and throughout: Correct numbering

Exhibit A, Scope of Services: Incorporate grant reporting language outlined on the Page 1, 6th Whereas Clause and correct overlapping England-Thims & Miller, Inc. (ETM) and Wetland Solutions, Inc. (WSI) scope of services.

Ms. Hutchens stated that the Scope of Service in the agenda is outdated; the newly revised document to include Mr. Boyd's comments, will be emailed to the Board for review. She explained the purpose of the Agreement and why compensation needs to be included.

Ms. Hutchens reviewed Family Lands Remembered, LLC's "Grant Manager" duties as overseeing all the grant reporting for Florida Department of Environmental Protection (FDEP) Grant Number LG009 and assisting with the RFQ.

This item will be presented for ratification at the next meeting.

On MOTION by Mr. Storch and seconded by Mr. Boyd, with all in favor, the Personnel Leasing Agreement with Swallowtail, LLC, in substantial form, subject to incorporating the changes specifically raised by Mr. Boyd into the Agreement, correcting the numbering in the Agreement and clarifying the scope of service language already provided to the Board, as explained by Ms. Hutchens, was approved.

SIXTH ORDER OF BUSINESS **Project Updates:**

Mr. Warshaw stated that he has no updates on Items 6A, 6B and 6C.

A. Edgewater Wetland Park

Mr. Kantarzhi stated that he received and distributed the two responses to the Request for Qualifications (RFQ) for the Edgewater Wetland Park Project to the Evaluation Committee Members and will email them to Mr. Warshaw.

The two respondents to the RFQ are Phillips & Jordan and Wharton-Smith, Inc./Wright-Pierce.

B. SR 442/I-95

C. Deering Trail

SEVENTH ORDER OF BUSINESS **Acceptance of Unaudited Financial Statements as of May 31, 2024**

The following format changes will be made to these and future Unaudited Financial Statements.

Page 1, Balance Sheet, Assets-Due from Kolter: Change “Kolter” to “name of entity contracted for that particular project, thought to be Deering Park 1”

On MOTION by Mr. Lee and seconded by Mr. Posey, with all in favor, the Unaudited Financial Statements as of May 31, 2024, as amended, were accepted.

EIGHTH ORDER OF BUSINESS **Approval of May 14, 2024 Regular Meeting Minutes**

On MOTION by Mr. Storch and seconded by Mr. Lee, with all in favor, the May 14, 2024 Regular Meeting Minutes, as presented, were approved.

NINTH ORDER OF BUSINESS **Staff Reports**

A. District Counsel: Kutak Rock LLP

B. District Engineer: England-Thims & Miller, Inc.

There were no District Counsel or District Engineer reports.

C. District Manager: Wrathell, Hunt and Associates, LLC

- **NEXT MEETING DATE: July 9, 2024 at 2:00 PM [Consider Responses to RFQ for Design-Builder for Edgewater Wetland Park Project]**
  - **QUORUM CHECK**

The next meeting will be on July 9, 2024 at 2:00 p.m.; the Evaluation Committee meeting will be on the same day at 11:00 a.m.

Mr. Kantarzhi reminded the Board Members to file Form 1 by the due date and to complete the required ethics training before December 31, 2024.

TENTH ORDER OF BUSINESS **Board Members' Comments/Requests**

There were no Board Members' comments or requests.

ELEVENTH ORDER OF BUSINESS **Public Comments**

No members of the public spoke.

TWELFTH ORDER OF BUSINESS **Adjournment**

On MOTION by Mr. Fife and seconded by Mr. Posey, with all in favor, the meeting adjourned at 2:51 p.m.

181
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185 _____ _____
186 Secretary/Assistant Secretary Chair/Vice Chair

DEERING PARK
STEWARDSHIP DISTRICT

STAFF
REPORTS

DEERING PARK STEWARDSHIP DISTRICT

BOARD OF SUPERVISORS FISCAL YEAR 2023/2024 MEETING SCHEDULE

LOCATION

Storch Law Firm, 420 S. Nova Road, Daytona Beach, Florida 32114

DATE	POTENTIAL DISCUSSION/FOCUS	TIME
October 10, 2023 CANCELED	**Regular Meeting**	**2:00 PM**
November 14, 2023 CANCELED	**Regular Meeting**	**2:00 PM**
December 12, 2023 CANCELED	**Regular Meeting**	**2:00 PM**
January 9, 2024	**Regular Meeting**	**2:00 PM**
February 13, 2024 CANCELED	**Regular Meeting**	**2:00 PM**
March 12, 2024	**Regular Meeting**	**2:00 PM**
https://teams.microsoft.com/l/meetup-join/19%3ameeting_YTczMzE3ZGItYmMwMy00OWZjLWI3MjctNWQ1OTk4YjgxODgz%40thread.v2/0?context=%7b%22Tid%22%3a%2294348502-fda0-4a80-8edb-52bd87fa537b%22%2c%22Oid%22%3a%2250b37528-b730-4578-8935-dc90866a9569%22%7d **Meeting ID:** 283 787 630 919 **Passcode:** ZXHeDk		
April 9, 2024	**Regular Meeting**	**2:00 PM**
https://teams.microsoft.com/l/meetup-join/19%3ameeting_NDllNGM5OTUtZjM1Mi00NjJjLTgyMjktZDAwMzk3ZDdhOGJk%40thread.v2/0?context=%7b%22Tid%22%3a%2294348502-fda0-4a80-8edb-52bd87fa537b%22%2c%22Oid%22%3a%2250b37528-b730-4578-8935-dc90866a9569%22%7d **Meeting ID:** 280 567 498 56 **Passcode:** ALDDcS		
May 14, 2024	**Regular Meeting**	**2:00 PM**
https://teams.microsoft.com/l/meetup-join/19%3ameeting_ZmM5NDI2Y2YtNTY2Ni00NGI4LThlMjEtN2FmNGQ1YTQ1ZmMy%40thread.v2/0?context=%7b%22Tid%22%3a%2294348502-fda0-4a80-8edb-52bd87fa537b%22%2c%22Oid%22%3a%2250b37528-b730-4578-8935-dc90866a9569%22%7d **Meeting ID**: 272 805 810 **132** **Passcode:** jypt6T		
June 11, 2024 *rescheduled to June 25, 2024*	**Regular Meeting**	**2:00 PM**
https://teams.microsoft.com/l/meetup-join/19%3ameeting_ZTQyM2Q1NmMtODZhZi00NTg1LWIxNDItZDg1OTk1ZDczZTVm%40thread.v2/0?context=%7b%22Tid%22%3a%2294348502-fda0-4a80-8edb-52bd87fa537b%22%2c%22Oid%22%3a%2250b37528-b730-4578-8935-dc90866a9569%22%7d **Meeting ID:** 246 187 975 594 **Passcode:** m5rvQV		
June 25, 2024	**Regular Meeting**	**2:30 PM**
https://teams.microsoft.com/l/meetup-join/19%3ameeting_YTE0OTc0MDMtZTY2ZS00OGQyLWJmNjItNmIzMmY2YjNlODQ0%40thread.v2/0?context=%7b%22Tid%22%3a%2294348502-fda0-4a80-8edb-52bd87fa537b%22%2c%22Oid%22%3a%2250b37528-b730-4578-8935-dc90866a9569%22%7d **Meeting ID:** 213 938 298 297 **Passcode:** h3jQc3		

DATE	POTENTIAL DISCUSSION/FOCUS	TIME
July 9, 2024	**Evaluation Committee Meeting** *RFQ for Design-Builder for Edgewater Wetland Park Project*	**11:00 AM**
July 9, 2024	**Regular Meeting**	**2:00 PM**
https://teams.microsoft.com/l/meetup-join/19%3ameeting_MGMyMzBmMzQtYjg2NS00ZDE1LWEwOTYtZmEzYmU1ZWU3NzE3%40thread.v2/0?context=%7b%22Tid%22%3a%2294348502-fda0-4a80-8edb-52bd87fa537b%22%2c%22Oid%22%3a%2250b37528-b730-4578-8935-dc90866a9569%22%7d **Meeting ID:** 233 035 830 379 **Passcode:** F8HoXp		
August 13, 2024	**Regular Meeting**	**2:00 PM**
https://teams.microsoft.com/l/meetup-join/19%3ameeting_MTMwMzAxZjYtZDZhMi00MmYxLTg1N2EtMDJjYmI1NjEyMDM2%40thread.v2/0?context=%7b%22Tid%22%3a%2294348502-fda0-4a80-8edb-52bd87fa537b%22%2c%22Oid%22%3a%2250b37528-b730-4578-8935-dc90866a9569%22%7d **Meeting ID:** 231 940 985 857 **Passcode:** qcx4XH		
September 10, 2024	**Regular Meeting**	**2:00 PM**
https://teams.microsoft.com/l/meetup-join/19%3ameeting_ZTZiNTgzMzYtNTM3NC00MmMzLTg1N2UtM2FhMTA2NDJkZjZj%40thread.v2/0?context=%7b%22Tid%22%3a%2294348502-fda0-4a80-8edb-52bd87fa537b%22%2c%22Oid%22%3a%2250b37528-b730-4578-8935-dc90866a9569%22%7d **Meeting ID:** 251 618 142 377 **Passcode:** hpbmQr		