

# University Park Recreation District

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<http://universityparkrd.com/>

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The regular Board Meeting of the **Board of Supervisors of University Park Recreation District** will be held on **Friday, June 14, 2024, at 1:00 PM** at the Business Offices located at 8301 The Park Boulevard, University Park, FL 34201 and or virtually.

**Meeting ID:** 845 8893 8513

**Passcode:** 755354

**Join meeting via Zoom:**

<https://us02web.zoom.us/j/84588938513?pwd=eUE4Q3BTNGVNLNXBsOGViRXk1cWo2QT09>

## **BOARD OF SUPERVISORS' WORKSHOP MEETING AGENDA**

### **Organizational Matters**

- Call to Order
- Roll Call to Confirm Quorum
- Public Comment Period *[for any members of the public desiring to speak on any proposition before the Board]*

### **Administrative Matters**

1. Consideration of the Minutes of the May 17, 2024, Board of Supervisors' Workshop Meeting
2. Consideration of the Minutes of the May 17, 2024, RFQ Bid Opening Meeting
3. Consideration of the Minutes of the May 21, 2024, Board of Supervisors' Meeting

### **Staff Report Matters**

4. District Counsel
5. District Manager
6. Club Management
  - a. Management Discussion & Analysis Report *(under separate cover)*

### **Business Matters**

7. Review and Consideration of RFQ Responses
  - a. DSDG Architects
  - b. Hoyt Architects
  - c. Goodwin Mills Cawood
8. Review and Consideration of PFM Financial Advisors Bond Anticipation Note (BAN) Assessment Consulting Services Proposal
9. Review and Consideration of Regions Term Sheet for the BAN
10. Review and Consideration of the BAN Methodology Report *(under separate cover)*
11. Review and Consideration of Any Additional Documents Pertaining to the BAN and/or Bond Issuance



**pfm**

**District Financial Matters**

12. Ratification of Payment Authorization No. 118

<b>Date</b>	<b>Meeting Type</b>	<b>Time</b>	<b>Location</b>	<b>Note</b>
July 30, 2024	Workshop Meeting	2:00 PM	University Park	Business Offices
August 9, 2024	Board Meeting	1:00 PM	University Park	Business Offices

13. Supervisor Requests & Comments

**Adjournment**



# **University Park Recreation District**

## **Consideration of the Minutes of the:**

- **May 17, 2024 Board of Supervisors' Workshop Meeting**
- **May 17, 2024, RFQ Bid Opening Meeting**
- **May 21, 2024, Board of Supervisors' Meeting**

**MINUTES OF MEETING**

**UNIVERSITY PARK RECREATION DISTRICT WORKSHOP MEETING**

**Friday, May 17, 2024**

**12:00 p.m.**

**Business Offices**

**8301 The Park Boulevard, University Park, FL 34201**

Board Members present in person or via phone:

Mark Criden	Vice Chairperson
Steve Ludmerer	Treasurer/2 <sup>nd</sup> Vice Chairperson
Sally Dickson	Chairperson
David Murphy	Assistant Secretary
Rusty Piersons	Assistant Secretary

Also, Present in person or via phone:

Vivian Carvalho	District Manager - PFM Group Consulting LLC
Venessa Ripoll	District Manager - PFM Group Consulting LLC (via phone)
Kwame Jackson	ADM - PFM Group Consulting LLC (via phone)
Mark Barnebey	District Counsel - Blalock Walters
John Fetsick	General Manager - Country Club
Various Audience Members in-person and via Zoom	

**FIRST ORDER OF BUSINESS**

**Organizational Matters**

**Call to Order and Roll Call**

The meeting was called to order at 12:00 p.m. by Ms. Dickson. Those in attendance are outlined above.

The Pledge of Allegiance was recited.

**Public Comments**

Tom, from Hampton Green, commented on the Board's commitment to consistent communication with the community and the importance for understanding of long-term goals in relation to the recent Bond Indenture. He asked for justification on expenditure plans and referenced Jim Case's resignation from the Board. He noted inconsistencies between Resolution 2024-13, from the March 22, 2024 meeting agenda and the version that appears on

the website.

Ms. Carvalho confirmed that the resolution has a scrivener error with the dates and advised that District Counsel is in the process of correcting the error. She noted that the Board approved the correct resolution with the correct exhibit during the March 22, 2024, meeting.

Dean Matt asked about the effective date of the Second Supplemental Trust Indenture and a capital spending plan that the community can agree with. He criticized the Board's actions and intentions and suggested that there has been falsification of documents and breaches of public disclosure laws. He also suggested that the bond validation appeal process will add six months and high costs which would be borne by the homeowners.

Paul Charlesworth expressed his opinion that the Board is comprised of people of goodwill and his concern that anyone would think anything to the contrary. He commented on the community's majority vote in favor of the bond issuance.

Mr. Barnebey noted that the Board approved the correct Second Supplemental Trust Indenture and stated that the Circuit Court approved the bond validation. He noted that the appeal period is 30 days.

Mary Jane supported the comments made in favor of the Board and the majority vote in favor of the bond issuance. She encouraged the homeowners who remain opposed to the bond to acknowledge that the large majority of people who did not vote in favor of the bond have accepted the result and support the efforts of the Board. She encouraged the Board to take action against persons who cause the residents to incur legal fees.

Steve Parkinson stated his opinion is that the bond referendum was done in a non- democratic way. He suggested that the vote was not for the Capital Improvement Plan, but for how it was going to be paid. He stated the Board should rethink how it was going to be paid for.

There were no further comments.

## **SECOND ORDER OF BUSINESS**

### **Discussion**

#### **Discussion of the Update on the Amendments to Rules & Regulations**

Mr. Ludmerer provided an update of the updates to the proposed amendments. He noted that he provided a summary titled Key Changes to Rules and Regulations.

There was discussion about the proposed changes.

Mr. Murphy asked for a few items to be rearranged and sentences added.

Mr. Ludmerer stated there will be a public hearing on the proposed amendments on May 21, 2024.

### **Discussion of Membership Caps and Initiation Fees**

Mr. Fetsick provided an overview of the proposed membership caps, waitlist procedures, and initiation fees. He provided information on the membership numbers from 2022, 2023, and 2024, along with the proposed membership cap for 2025. He noted capping the full-membership does not cap the full revenue.

There was a lengthy discussion.

It was confirmed that the legal notice for a public hearing on these items on May 21, 2024, has been done.

Mr. Barnebey noted that if a waitlist deposit was to be included at the public hearing, that would need to be included in the Rules and Regulations.

Mr. Murphy noted that the proposed deposit policy is only for non-residents on the waitlist.

It was agreed that the waitlist costs would include a \$1,000 non-refundable application fee and a \$30,000 initiation fee for non-resident full-membership, inclusive of a \$5,000 non-refundable deposit. The \$5,000 deposit is refundable if you are still on the waitlist after two years and no longer want to participate. This amount would accrue liability, but not be escrowed. The benefits of being on the waitlist will include one-day advance tee time availability. This would be revisited next year and adjusted accordingly.

There was a brief discussion about Social Membership and the cost of adding a Guest Fee.

Mr. Fetsick reviewed the initiation fees comparing the actual fees from 2022 through 2024 to the proposed fee of 2025. These were broken down into Full-Membership, Racquet Membership, and Social Membership. There was also comparison between resident and Non-Resident.

There was a discussion regarding a competitor, their amenities, benefits, and the difference in their fees compared to UPRD. It was proposed to increase the Social initiation fee for residents in the future.

## **Discussion on the Preliminary Review of FY 2025 Enterprise Fund Budget**

Mr. Fetsick introduced the item and noted that the Enterprise Fund is for the Country Club operations and the General Fund is for the Recreation District operations. Mr. Fetsick gave an Executive Summary of both funds.

Mr. Fetsick reviewed Enterprise Fund year-to-date FY 2024 budget, noting that it is forecast to be a 'break even'. This is mostly attributed to unanticipated high labor costs. The forecast for FY 2024 capital allocation is \$1.6million, compared to the budgeted \$1.06million, mainly driven by an increase in initiation fees due to Full-Membership sales.

Mr. Fetsick noted the annual dues increase for Social Membership is 15%. He reviewed the initiation fees, capital funding, and capital dues and noted that the fees remain competitive.

There was a brief discussion regarding the increase in the dues over the past three years.

Mr. Fetsick stated he would include a three-year track history for the District compared to a three-year track history for the benchmark.

Mr. Fetsick reviewed the Key Assumptions for the Golf Operations. He compared the 2023 golf rounds to budgeted 2025 golf rounds. He also reviewed the Trail Fee increase. There will be no new Non-Resident Trail Fees offered.

There was a discussion regarding cart fees.

Mr. Fetsick reviewed the Key Assumptions for the Dining Operations. The budget does not anticipate disruption to the operation while the kitchen is being renovated and the revenue reflects an increase, based on the menu pricing. He noted that he had a meeting with the Food and Beverage Committee and the recommendation was to increase the menu pricing and give all members a discount instead of implementing a non-member surcharge.

Mr. Fetsick reviewed the Key Assumptions for Labor. Except for the Golf Pro, there were no significant labor increases or decreases. Total payroll reflects 52% of total revenue, which is below the industry standard for Florida.

Mr. Fetsick reviewed the Executive Summary for the General Fund which included the Audit, District Counsel, District Management, and All Other Expenses. He noted that the FY 2024 forecast is unfavorably to budget primarily due to legal fees related to the bond process.

## Update on Bond Validation

There was a short discussion about the Final Judgment Order.

Mr. Ludmerer stated that Regions Advantage has extended the Bond Anticipation Note (BAN) closing date from June 12 to June 30.

There was a discussion regarding the BAN rates and possible costs related to the appeal process.

Ms. Dickson reviewed the upcoming scheduled meetings:

- Board Meeting and Open Public Hearing - May 21, 2024, 10:00 am.
- Continued Public Hearing, Workshop Meeting and Board Meeting - June 4, 2024, 2:00 pm.

There was a short discussion about the items that would be covered in the meetings and the possible need for an additional workshop meeting.

Mr. Ludmerer discussed the Business Group's recommendations which he would like included on the agenda of June 4 Workshop Meeting Agenda.

There was a discussion to have these recommendations included at a Workshop at a later time in order to have more time to discuss. This would include discussion of the Social Membership and possibly adding another tier, based on the recommendations.

It was agreed to have the Workshop Meeting scheduled for September 3, 2024, dedicated to discussing the Business Group's recommendations.

### THIRD ORDER OF BUSINESS

### Adjournment

There were no additional items to come before the Board.

Ms. Dickson adjourned the May 17, 2024, Workshop Meeting of University Park Recreation District at 2:04 p.m.

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Secretary / Assistant Secretary

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Chairperson / Vice Chairperson



**UNIVERSITY PARK RECREATION DISTRICT  
ARCHITECTURAL/ENGINEERING RFQ BID OPENING MEETING  
Friday, May 17, 2024  
7671 the Park Blvd., University Park, FL 34201  
3:15 p.m.**

Present and/or via Webex, the following people were in attendance:

John Fetsick            General Manager – University Park Country Club  
Mark Criden            Vice Chairperson – University Park Recreation District  
Vivian Carvalho       District Manager – PFM Group Consulting LLC (via Webex)

**FIRST ORDER OF BUSINESS**

**General Business Matters**

**Opening the RFQ Responses for  
Architectural/Engineering  
Services**

Mr. Fetsick confirmed the attendees via Webex and or in person that is outlined above.

The meeting was called to order at 3:20 p.m.

There was a total of three bids received.

The first bid was from DSDG Architects.

The second bid was from Hoyt Architects.

The third bid was from Goodwin Mills Cawood (GMC).

Mr. Fetsick confirmed that the three bids were received prior to the deadline of 3:00 p.m. on May 17, 2024. Mr. Fetsick will review the proposals and provide recommendations to the Board at the next Board Meeting.

**SECOND ORDER OF BUSINESS**

**Adjournment**

There was no further business to discuss. The meeting was adjourned at 3:25 p.m.

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Secretary/Assistant Secretary

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Chairperson/Vice Chairperson

**MINUTES OF MEETING**

**UNIVERSITY PARK RECREATION DISTRICT  
BOARD OF SUPERVISORS' MEETING**

**Tuesday, May 21, 2024**

**10:00 a.m.**

**The Business Offices**

**8301 The Park Boulevard, University Park, FL 34201**

Board Members present at roll call in person or via phone:

Sally Dickson	Chairperson
Mark Criden	Vice Chairperson
Steve Ludmerer	Treasurer/2 <sup>nd</sup> Vice Chairperson
David Murphy	Assistant Secretary
Rusty Piersons	Assistant Secretary

Also, Present in person or via phone:

Vivian Carvalho	District Manager - PFM Group Consulting LLC
Kwame Jackson	ADM - PFM Group Consulting LLC (via Zoom)
Venessa Ripoll	PFM Group Consulting LLC (via Zoom)
Mark Barnebey	District Counsel - Blalock Walters
John Fetsick	General Manager - Country Club
Curtis Nickerson	Director of Properties and Facilities - Country Club
Various audience members via Zoom	

**FIRST ORDER OF BUSINESS**

**Organizational Matters**

**Call to Order and Roll Call**

The meeting was call to order at 10:01 a.m. by Ms. Dickson and Ms. Carvalho confirmed quorum to proceed. Those in attendance are outlined above.

The Board recited the Pledge of Allegiance.

**Public Comments**

Mr. Dean Matt had comments about varying versions of Resolution 2024-13 in circulation.

Mr. Barnebey noted that there is one version of the resolution, that being what was considered and approved by the Board on March 22, 2024.

Ms. Dickson noted that there was one resolution before the Board and that was the one that was passed.

**SECOND ORDER OF BUSINESS**

**Administrative Matters**

**Consideration of the Minutes of:**

- **the April 2, 2024, Board of Supervisors' Workshop Meeting**
- **the April 12, 2024, Board of Supervisors' Meeting**
- **the April 30, 2024, Board of Supervisors' Workshop Meeting**

The Board reviewed the minutes.

ON MOTION by Mr. Criden, seconded by Mr. Murphy, with all in favor, the Board approved the minutes of the April 2, 2024, Board of Supervisors' Workshop Meeting, the April 12, 2024, Board of Supervisors' Meeting, and the April 30, 2024, Board of Supervisors' Workshop Meeting.

Mr. Ludmerer commended the PFM District Management Team and Mr. Murphy on the clarity and accuracy of the meeting minutes that have been presented recently.

**THIRD ORDER OF BUSINESS**

**Staff Report Matters**

**District Counsel** – No report.

**District Manager** – No report.

**Club Management (Management Discussion & Analysis Report)** – Mr. Fetsick mentioned that the Club is officially in off-season and noted the decrease in activities.

Mr. Fetsick noted that Justin Sears has been hired as the new Executive Chef with a start date of June 11, 2024. He advised that the Club hired GSI Executive Search who assisted with the recruitment process.

Mr. Fetsick provided an overview of dining events which received good support, with the

Mother's Day Brunch attendance growing to 472 attendees, an increase of over 100 persons compared to last year. He thanked the food and beverage team for the successful season.

Mr. Fetsick explained that the reduced opening hours for the Parke Grille have been discontinued due to the feedback of members. He asked for support of the members during the extended hours to prevent a negative financial impact on the operation. He noted that the team will be looking at incentives to drive member support.

There was a short discussion about the food and beverage operation.

The Country Club Full membership is 455, Racquets membership is 113, Social membership is 783, Summer golf and racquets membership are 82 and 23 respectively. There are 140 grandfathered non-members and 217 grandfathered members. Of the 1,351 overall memberships, 312 are non-residents. The unofficial full membership waitlist is currently at 18 persons, with one application pending.

There was a discussion about the junior executive membership, which has been discontinued, and range passes.

Mr. Nickerson provided an update on the short game area noting that the rough grade is complete, and irrigation will be installed tomorrow, with the final grade and sod to be applied in the following week. There has been additional work done with widening the pathways, and work will be done on the parking area. He also provided an update on the irrigation project noting that holes 23, 24 and 25 are complete, with 22 currently being completed. He noted that there have been numerous leaks the old irrigation system recently. The project is proceeding ahead of the projected timeline.

Mr. Ludmerer asked for an update on the canopies for the racquet facilities.

Mr. Nickerson noted that the poles for the canopies, and the canopies themselves, should be completely installed during the current week. He noted that there have been multiple issues with the vendor.

Mr. Fetsick gave a detailed overview of the Country Club's financials for March 2024.

#### **FOURTH ORDER OF BUSINESS**

#### **Business Matters**

#### **Continued Public Hearing on the Adoption of Revision to the Rules & Regulations**

Ms. Dickson asked for a motion to reconvene the Public Hearing.

ON MOTION by Mr. Criden, seconded by Mr. Piersons, with all in favor, the Board approved reconvening the Public Hearing on the Adoption of Revision to the Rules & Regulations.

Ms. Dickson noted that the public hearing will be continued to June 4, 2024, as discussed in the May 17, 2024, workshop.

Mr. Ludmerer noted that the current proposed revised document will be provided on the website and in the Club Weekly for the public to review prior to the June 4, 2024, public hearing.

Ms. Dickson opened the floor for any public comments.

There were no public comments.

ON MOTION by Mr. Criden, seconded by Mr. Piersons, with all in favor, the Board approved continuing the Public Hearing on the Adoption of Revision to the Rules & Regulations to June 4, 2024, at 2:00 PM.

**Public Hearing on the Adoption  
of Membership Caps and  
Initiation Fees**

Ms. Dickson asked for a motion to open the Public Hearing.

ON MOTION by Mr. Criden, seconded by Mr. Murphy, with all in favor, the Board approved opening the Public Hearing on the Adoption of Membership Caps and Initiation Fees.

Ms. Dickson noted that the public hearing will be continued to June 4, 2024, as discussed in the May 17, 2024 workshop, to allow the public to review the proposed fees prior to the public hearing.

Ms. Dickson opened the floor for any public comments.

There were no public comments.

ON MOTION by Mr. Criden, seconded by Mr. Piersons, with all in favor, the Board approved continuing the Public Hearing on the Adoption of Adoption of Membership Caps and Initiation Fees to June 4, 2024, at 2:00 PM.

**Consideration of Resolution 2024-17, Approving a Preliminary Enterprise Fund (Country Club) Budget for Fiscal Year 2025 and Setting a Public Hearing Date [Suggested Date, August 9, 2024]**

Mr. Fetsick provided a detailed overview of the Preliminary Enterprise Budget (Country Club) and the key assumptions used. Annual dues will increase by 9% for full memberships, 9% for racquet memberships, and 15 – 17% for social memberships. The total net revenue is \$13,797,375.00.

There were comments and short discussions throughout the presentation.

ON MOTION by Mr. Criden, seconded by Mr. Ludmerer, with all in favor, the Board approved Resolution 2024-17, Approving a Preliminary Enterprise Fund (Country Club) Budget for Fiscal Year 2025 and Setting a Public Hearing Date of August 9, 2024, at 1:00 PM at 8301 The Park Boulevard, University Park, FL 34201.

**Consideration of Resolution 2024-18, Approving a Preliminary General Fund Budget for Fiscal Year 2025 and Setting a Public Hearing Date [Suggested Date, August 9, 2024]**

Mr. Fetsick provided a detailed overview of the Preliminary General Fund Budget and explained that this budget reflects the operation and maintenance costs of the district. The total net revenue is \$253,500.00.

There were comments and short discussions throughout the presentation.

Ms. Carvalho noted that the resolution includes the Debt Service Budget, which is a repayment of the 2019 bond proceeds.

ON MOTION by Mr. Criden, seconded by Mr. Ludmerer, with all in favor, the Board approved Resolution 2024-18, Approving a Preliminary General Fund Budget and Debt Service Budget for Fiscal Year 2025 and Setting a Public Hearing Date of August 9, 2024, at 1:00 PM at 8301 The Park Boulevard, University Park, FL 34201.

**Review and Consideration of Architectural/Engineering RFQ Responses**

Mr. Fetsick noted that three responses were received. A review committee has been put together to review the responses and provide a recommendation to the Board at the June 4, 2024, Board meeting for a decision to be made.

There was a short discussion about the proposed timeline.

**Update on Bond Validation Hearing**

Mr. Ludmerer noted that contact was made with rating agencies and are currently evaluating the district for a rating on the bond.

Mr. Barnebey noted that final order was issued by the judge approving the issuance of the bonds. The appeal period ends on June 13, 2024.

**Update on Bond Anticipation Notice**

Mr. Ludmerer advised that a potential extension of the closing date, until June 30, 2024, was successfully discussed with Regions Capital Advantage, Inc. The working team will have an update at the June 14, 2024, Board of Supervisors Meeting.

**FIFTH ORDER OF BUISNESS**

**District Financial Matters**

**Ratification of Payment**

**Authorization Nos. 116 & 117**

Mr. Fetsick reviewed the payment authorizations for the Board.

ON MOTION by Mr. Criden, seconded by Mr. Ludmerer, with all in favor, the Board ratified Payment Authorization Nos. 116 & 117.

**Supervisor      Requests      &  
Comments**

Mr. Ludmerer reminded the Board Members that the Form 1 filings are now done electronically. He also mentioned the required ethics training for Board Members and asked Ms. Carvalho to arrange for Manatee County or a private firm to provide the Ethics Training Class for the Board. The preference is for the training to be done as a group rather than individually onsite.

There was a short discussion about the Form 1 filing.

Mr. Ludmerer mentioned persons interested in joining the advisory volunteer group. There was a short discussion on this matter.

Mr. Fetsick and Ms. Johnson will work on communicating the information to the membership and obtaining volunteers for this advisory group.

**SIXTH ORDER OF BUSINESS**

**Adjournment**

There were no further comments at this time.

ON MOTION by Mr. Criden, seconded by Mr. Ludmerer, with all in favor, the May 21, 2024, Board of Supervisors' Meeting of University Park Recreation District was adjourned at 11:41 a.m.

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Secretary / Assistant Secretary

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Chairperson / Vice Chairperson



# **University Park Recreation District**

Staff Reports

# University Park Recreation District

## Review and Consideration of RFQ Responses

- a. DSDG Architects
- b. Hoyt Architects
- c. Goodwin Mills Cawood



# STATEMENT OF QUALIFICATIONS FOR ARCHITECTURAL SERVICES

RFQ NO. 24.001

MAY 15, 2024

ORIGINAL

**DS  
DG**  
ARCHITECTS

DSDG IS DELIGHTED AND PROUD TO SHARE THIS PRESENTATION IN  
RESPONSE TO YOUR REQUEST FOR QUALIFICATION.

DS  
DG

ARCHITECTS

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ARCHITECTURE • PLANNING • INTERIOR DESIGN • CONSTRUCTION ADMINISTRATION

THANK YOU FOR CONSIDERING DSDG ARCHITECTS TO DESIGN YOUR NEW PROJECT FOR THE UNIVERSITY PARK COMMUNITY OF SARASOTA, FLORIDA. YOUR PROJECT IS EXTREMELY IMPORTANT TO US, AND WE VALUE THE OPPORTUNITY TO SUBMIT OUR PORTFOLIO OF WORK FOR YOUR CONSIDERATION. WE TRULY BELIEVE THAT WE ARE THE RIGHT TEAM FOR YOUR JOB. DELIVERING JOBS ON-TIME AND ON-BUDGET, RECIPIENT OF NUMEROUS COVETED AWARDS FOR EXCELLENCE AND DESIGN, LED BY OWNER AND PRINCIPAL ARCHITECT, MARK SULTANA, THE FIRM ENSURES THAT EACH PROJECT IS A SUCCESS BY LISTENING FIRST, OFFERING THOUGHTFUL DESIGN SOLUTIONS, AND COST CONTROL OPPORTUNITIES TO PROVIDE THE BEST QUALITY IN ARCHITECTURE.

OUR STAFF WORKS AS A TEAM ON ALL OF OUR COMMERCIAL PROJECTS. THIS APPROACH ENSURES THAT EVERY TEAM MEMBER HAS INTIMATE KNOWLEDGE OF THE PROJECTS THAT WE ARE WORKING ON SO THAT IF ONE INDIVIDUAL IS NOT AVAILABLE OTHERS CAN STEP-IN AND PROVIDE ANSWERS TO QUESTIONS PRESENTED. THIS PROCESS HAS PROVEN TO WORK ON ALL OF OUR PROJECTS AND THE CONTRACTOR TEAMS AND CLIENT APPRECIATE THE TEAMWORK APPROACH RATHER THAN THE INDIVIDUAL APPROACH.



ARCHITECTS

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ARCHITECTURE • PLANNING • INTERIOR DESIGN • CONSTRUCTION ADMINISTRATION

# INTRODUCTION



ARCHITECTS

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ARCHITECTURE • PLANNING • INTERIOR DESIGN • CONSTRUCTION ADMINISTRATION



Founded in 2001, DSDG Architects is a full-service, Sarasota-based architecture firm that is committed to creating livable, timeless, and high-quality buildings. To ensure the successful completion of our project, our team is engaged during every step of the design process. Beginning with Schematic Programming, projects are initially vetted for size, massing, and aesthetic intent. This includes a thorough analysis of the project site with respect to the local codes, site access, setback requirements, and density restrictions. With respect to the potential projects across your facility, we would review each project in detail, and then assess the potential sequencing of improvements.

The next step of this process is the Design Development phase where the engineers join the design team. We look forward to continuing the relationship with Kimley-Horn as our proposed civil engineer, DSDG architects will strategically pair mechanical, electrical, plumbing, and structural engineering services as required. With the engineers engaged they begin to identify the routing and sizing of building systems necessary to support the established design requirements. With a strong foundation, the project will then move forward into the Construction Documentation phase, where the details come together, ensuring that the building systems are organized in a thoughtful manner that maximizes ceiling heights, while maintaining efficient solutions for building systems that weave seamlessly into the architecture. Our firm also has a team of talented interior designers that can assist with any interior design related project components. Their scope of services can be provided as a separate proposal, when appropriate.

DSDG Architects will then submit the Construction Documents for permitting. Once the permit is released, we remain engaged with the project as it moves into the Construction Phase. Our team will attend all Owner-Architect-Contractor meetings as scheduled by your selected Construction Manager. At this stage, our role evolves into Construction Administration, ensuring that the architectural design is executed in the field as intended and designed. It is also critical to note that the staff we have dedicated to your project will remain the same from day one, until the completion of your project. We believe that this continuity of personnel is essential to the success of our projects, ensuring that early ideas and concepts are executed in the built environment.





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9.8	ACCESSIBILITY TO FINANCIAL RECORDS
9.9	OWNERSHIP DISCLOSURE
9.10	CURRENT WORKLOAD
9.11	MANATEE COUNTY WORK EXPERIENCE
9.12	ADDITIONAL INFORMATION
<b>TAB 10</b>	<b>SIMILAR COMPLETED PROJECTS</b>

# MINIMUM QUALIFICATIONS REQUIREMENTS



ARCHITECTS

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ARCHITECTURE • PLANNING • INTERIOR DESIGN • CONSTRUCTION ADMINISTRATION



PROOF OF REGISTRATION

Ron DeSantis, Governor Melanie S. Griffin, Secretary


**STATE OF FLORIDA**  
**DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION**  
**BOARD OF ARCHITECTURE & INTERIOR DESIGN**

THE ARCHITECT HEREIN IS LICENSED UNDER THE  
PROVISIONS OF CHAPTER 481, FLORIDA STATUTES

**SULTANA, MARK EDWARD**  
DSDG, LLC.  
1348 FRUITVILLE ROAD SUITE 204  
SARASOTA FL 34236

**LICENSE NUMBER: AR94536**

**EXPIRATION DATE: FEBRUARY 28, 2025**  
Always verify licenses online at [MyFloridaLicense.com](http://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.

VALID LICENSES

Ron DeSantis, Governor Melanie S. Griffin, Secretary

**STATE OF FLORIDA**  
**DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION**  
**BOARD OF ARCHITECTURE & INTERIOR DESIGN**

THE INTERIOR DESIGNER HEREIN IS REGISTERED UNDER THE  
PROVISIONS OF CHAPTER 481, FLORIDA STATUTES

**SULTANA, MARK EDWARD**  
1348 FRUITVILLE ROAD SUITE 204  
SARASOTA FL 34236

**LICENSE NUMBER: ID6611**

**EXPIRATION DATE: FEBRUARY 28, 2025**  
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**SEVERAL PROJECTS BY DSDG**

Arriving at each project with a clean slate, open ears and creative thinking, DSDG Architects is extremely proud of our body of work across the Gulf Coast region. Our designs evolve with each individual Owner, site, and programmatic requirements. With several successful club projects in our local area. Many of these projects have been with private owners and developers that have engaged our office again for more work. In reality, what that number actually represents to our firm is that our clients value our team and our design process, and most importantly that their projects were completed on-time and on-budget. In the pages that follow, please see our most relevant projects within the multi-family condominium category for your consideration.



# INFINITY • LONGBOAT KEY, FLORIDA

CLIENT • CROSSGATE PARTNERS  
DSDG • ARCHITECTS OF RECORD



13 Unit beach front condominium project with four living levels and a detached clubhouse and fitness center.



RANDY MOORE • (770) 331-3651 • [RMOORE@CROSSGATEPARTNERS.COM](mailto:RMOORE@CROSSGATEPARTNERS.COM)

START DATE • SEPTEMBER 2014 • COMPLETION DATE • DECEMBER 2017

# EVOLUTION • SARASOTA, FLORIDA

CLIENT • WB FINANCE  
DSDG • ARCHITECTS OF RECORD

20-unit condominium project with amenity level including fitness center, club room, yoga room, sauna, and elevated pool and pool deck.



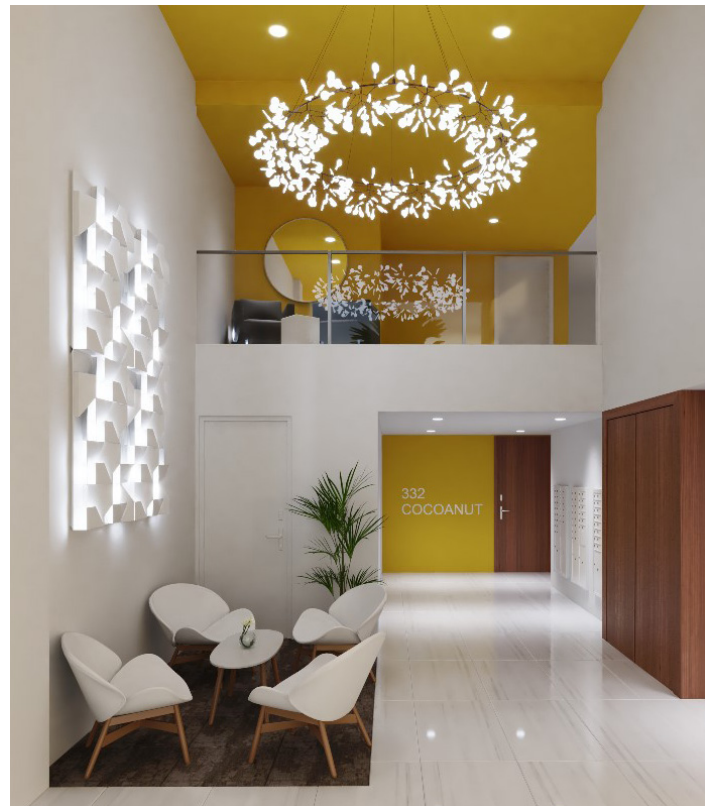
WOJCIECH ZUKIEWICZ • (941) 402-5595 • [WZUKIEWICZ@WBFINANCE.CZ](mailto:WZUKIEWICZ@WBFINANCE.CZ)

START DATE • AUGUST 2019 • COMPLETION DATE • JUNE 2024

# 332 COCOANUT • SARASOTA, FLORIDA

CLIENT • ALDINA, LLC  
DSDG • ARCHITECTS OF RECORD

34 Unit condominium with mixed use retail and office space.



MARK FAMIGLIO • (941) 356-4456 • [FAMIGLIO@COMCAST.NET](mailto:FAMIGLIO@COMCAST.NET)  
START DATE • JUNE 2018 • COMPLETION DATE • DECEMBER 2021



# HOTEL SIESTA KEY • SARASOTA, FLORIDA

CLIENT • ABC FAMILY, LLC  
DSDG • ARCHITECTS OF RECORD



121 Room hotel with resort style pool, commercial kitchen, restaurant, bars, fitness room, conference rooms, lobby, and house keeping.



DAVE BALOT • (941) 321-6989 • [DBALOT@YAHOO.COM](mailto:DBALOT@YAHOO.COM)  
START DATE • JUNE 2020 • COMPLETION DATE • IN PERMITTING



2.4 - COMPANY STANDING - F.S.B.A

Proposer hereby testifies that the they are NOT listed on the Florida State Board of Administration, Scrutinized List of Prohibited Companies.

Name of Proposer: Mark E. Sultana Date: 5 / 14 / 24

Signature of Proposer: [Handwritten Signature] Date: 5 / 14 / 24

2.5 - COMPANY STANDING - DEBARRED

Proposer hereby testifies that the they are NOT listed on the Florida Suspended or Debarred Vendor list.

Name of Proposer: Mark E. Sultana Date: 5 / 14 / 24

Signature of Proposer: [Handwritten Signature] Date: 5 / 14 / 24

2.6 - COMPANY STANDING - SAM/EPLS

Proposer hereby testifies that they are NOT on the Federal Convicted Vendor or Excluded Parties list (SAM/EPLS).

Name of Proposer: Mark E. Sultana Date: 5 / 14 / 24

Signature of Proposer: [Handwritten Signature] Date: 5 / 14 / 24

2.7 - JOINT VENTURE STATEMENT

Let his statements serve as a testimony that DSDG, LLC is NOT a joint venture.

Name of Proposer: Mark E. Sultana Date: 5 / 14 / 24

Signature of Proposer: [Handwritten Signature] Date: 5 / 14 / 24

2.8 - CONFLICT OF INTEREST RELATED TO RFQ

Proposer has not reported conflict of interest in relation to this RFQ, see Form 4.

FORMS



ARCHITECTS

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ARCHITECTURE • PLANNING • INTERIOR DESIGN • CONSTRUCTION ADMINISTRATION



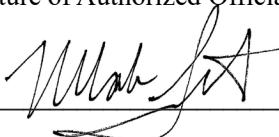
**FORM 1 - ACKNOWLEDGMENT OF ADDENDA**

The undersigned acknowledges receipt of the following addenda:

Addendum No. <u>  1  </u>	Date Received: <u>  4 / 22 / 24  </u>
Addendum No. <u>      </u>	Date Received:
Addendum No. <u>      </u>	Date Received:
Addendum No. <u>      </u>	Date Received:
Addendum No. <u>      </u>	Date Received:
Addendum No. <u>      </u>	Date Received:
Addendum No. <u>      </u>	Date Received:
Addendum No. <u>      </u>	Date Received:
Addendum No. <u>      </u>	Date Received:
Addendum No. <u>      </u>	Date Received:

Print or type Proposer's information below:

<u>Mark E. Sultana</u>	<u>(941) 920-2530</u>
Name of Proposer	Telephone
<u>1348 Fruitville Rd. STE 204</u>	<u>Sarasota, Florida, 34236</u>
Street Address	City/State/Zip
<u>marks@dsginc.com</u>	<u>www.dsdgarchitects.com</u>
Email Address	Website Address

<u>Mark Sultana, Owner / Architect</u>	Signature of Authorized Official Date 	Date: <u>5 / 14 / 24</u>
Print Name & Title of Authorized Officer	Signature of Authorized Official Date	



FORM 2 - PROPOSAL SIGNATURE FORM

The undersigned represents that by signing this Proposal Signature Form that:

- (1) He/she has the authority and approval of the legal entity purporting to submit the Proposal and any additional documentation which may be required such as the Joint Venture Agreement or Joint Venture Affidavit, if applicable; and
(2) All facts and responses set forth in the Proposal are true and correct; and
(3) If the Proposer is selected by District to negotiate an agreement, that Proposer's negotiators will negotiate in good faith to establish an agreement to provide the services described in this RFQ; and
(4) By submitting a Proposal and signing below, the Proposer agrees to the terms and conditions in this RFQ, which incorporates all addenda, appendices, exhibits, and attachments, in its entirety, and is prepared to sign the Agreement, of which a sample is incorporated into this RFQ as Exhibit C. The Proposer understands that if it submits exceptions to the Sample Agreement in its Proposal, the Proposer may be determined non-responsive.

Print or type Proposer's information below:

Form with fields for Name of Proposer, Telephone Number, Street Address, City/State/Zip, Email Address, Web Address, Print Name & Title of Authorized Officer, and Date. Includes handwritten signature of Mark E. Sultana.



**FORM 3 - PUBLIC CONTRACTING AND ENVIRONMENTAL CRIMES CERTIFICATION**

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

This sworn statement is submitted to UPRD by  
Mark Sultana, Owner / Architect of DSDG

\_\_\_\_\_ [print individual's name and title]

for \_\_\_\_\_ University Park Community Association

\_\_\_\_\_ [name of entity submitting sworn statement]

whose business address is: \_\_\_\_\_ 1348 Fruitville Rd. STE 204, Sarasota, FL, 34236

and (if applicable) its Federal Employer Identification Number (FEIN) is

\_\_\_\_\_ 01-0597013 \_\_\_\_\_. If the entity has no FEIN, include the Social Security

Number of the individual signing this sworn statement:

I, the undersigned, understand that no person or entity shall be awarded or receive a District contract for public improvements, procurement of goods or services (including professional services) or a county lease, franchise, concession or management agreement, or shall receive a grant of District monies unless such person or entity has submitted a written certification to District that it has not:

(1)been convicted of bribery or attempting to bribe a public officer or employee of UPRD, the State of Florida, or any other public entity, including, but not limited to the Government of the United States, any state, or any local government authority in the United States, in that officer's or employee's official capacity; or

(2)been convicted of an agreement or collusion among Proposers or prospective Proposers in restraint of freedom of competition, by agreement to bid a fixed price, or otherwise; or

(3)been convicted of a violation of an environmental law that, as determined by the County, reflects negatively upon the ability of the person or entity to conduct business in a responsible manner; or

(4) made an admission of guilt of such conduct described in items (1), (2) or (3) above, which is a matter of record, but has not been prosecuted for such conduct, or has made an admission of guilt of such conduct, which is a matter of record, pursuant to formal prosecution. An admission of guilt shall be construed to include a plea of nolo contendere; or

(5) where an officer, official, agent or employee of a business entity has been convicted of, or has admitted guilt to, any of the crimes set forth above on behalf of such and entity and pursuant to the direction or authorization of an official thereof (including the person committing the offense, if he/she is an official of the business entity), the business shall be chargeable with the conduct herein above set forth. A business entity shall be chargeable with the conduct of an affiliated entity, whether wholly owned, partially owned, or one which has common ownership or a common board of directors.

For purposes of this Form, business entities are affiliated if, directly or indirectly, one business entity controls or has the power to control another business entity, or if an individual or group of individuals controls or has the power to control both entities. Indicia of control shall include, without limitation, interlocking management or ownership, identity of interests amount family members, shared organization of a business entity following the ineligibility of a business entity under this Article, or using substantially the same management, ownership or principles as the ineligible entity.

Any person or entity who claims that this Article is inapplicable to him/her/it because a conviction or judgment has been reversed by a court of competent jurisdiction, shall prove the same with documentation satisfactory to District's Purchasing Official. Upon presentation of such satisfactory proof, the person or entity shall be allowed to contract with University Park Recreation District.

I UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE UPRD STAFF DETERMINES THAT SUCH PERSON OR ENTITY HAS MADE FALSE CERTIFICATION.

[Signature]  
Signature of Contractor Representative

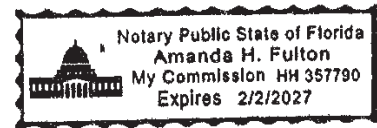
STATE OF Florida

COUNTY OF Sarasota

Sworn to and subscribed before me this \_\_\_\_\_ day of 14 05, 2024  
by Mark Sultana  Personally known OR  Produced the following identification

\_\_\_\_\_  
[Type of identification] Amanda Fulton Notary Public Signature My  
commission expires 2/2/2027

\_\_\_\_\_  
[Print, type or stamp Commissioned name of Notary Public]



**Signatory Requirement** - In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a corporation, this affidavit shall be executed by the corporate president.





**FORM 4 - CONFLICT OF INTEREST DISCLOSURE FORM**

The award of an agreement resulting from this RFQ is subject to the provisions of UPRD RULES. Proposer must disclose within its Proposal: the name of any officer, director, or agent who is also an employee of UPRD. Furthermore, Proposer must disclose the name of any UPRD employee who owns, directly or indirectly, an interest of more than five percent (5%) in the Proposer’s firm or any of its branches, divisions, or affiliates.

By signing below, Proposer confirms that it is not currently engaged or will not become engaged in any obligations, undertakings or contracts that will require the firm to maintain an adversarial role against the UPRD or that will impair or influence the advice or recommendations it provides to the UPRD.

Please check one of the following statements and attach additional documentation if necessary:

To the best of my knowledge, the undersigned firm has no potential conflict of interest for this RFQ.

The undersigned firm, by execution of this form, submits information which may be a potential conflict of interest for this RFQ.

Acknowledged and attested to by:

DSDG Architects

\_\_\_\_\_

Firm Name

\_\_\_\_\_

Signature

Mark E. Sultana, Owner / Architect

\_\_\_\_\_

Name and Title (Print or Type)

5 / 14 / 2024

\_\_\_\_\_

Date

**FORM 5 - NON-COLLUSION AFFIDAVIT**

STATE OF Florida  
COUNTY OF Sarasota

Before me, the undersigned authority, personally appeared Mark E. Sultana, who, after being by me first duly sworn, deposes and says of his/her personal knowledge that:

a. He/She is Owner / Architect of DSDG, LLC, the Proposer that has submitted a Proposal to perform work for the following:

RFQ No.: 24.001 Title: Statement of Qualifications

b. He/She is fully informed respecting the preparation and contents of the attached Request for Qualifications, and of all pertinent circumstances respecting such Solicitation.


Such Proposal is genuine and is not a collusive or sham Proposal.

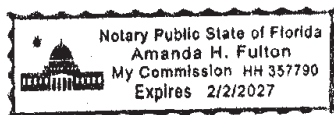
c. Neither the said Proposer nor any of its officers, partners, owners, agents, representatives, employees, or parties in interest, including this affiant, has in any way colluded, conspired, connived, or agreed, directly or indirectly, with any other Proposer, firm, or person to submit a collusive or sham Proposal in connection with the Solicitation and contract for which the attached Proposal has been submitted or to refrain from proposing in connection with such Solicitation and contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Proposer, firm, or person to fix the price or prices in the attached Proposal or any other Proposer, or to fix any overhead, profit, or cost element of the Proposal price or the Proposal price of any other Proposer, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against the District or any person interested in the proposed contract.

d. The price or prices to be submitted shall be fair and proper and shall not be tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Proposer or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

Signature: 

Subscribed and sworn to (or affirmed) before me this 14 day of May 2024 by Mark Sultana, who is personally known to me OR has produced \_\_\_\_\_ as identification.

Notary Signature   
Notary Name: Amanda Fulton  
Notary Public (State): Florida  
My Commission No: HH 357790  
Expires on: 2/2/2027  
SEAL





**FORM 6 - TRUTH – IN – NEGOTIATION CERTIFICATE**

The undersigned warrants (i) that it has not employed or retained any company or person, other than bona fide employees working solely for the undersigned, to solicit or secure the Agreement and (ii) that it has not paid or agreed to pay any person, company, corporation, individual, or firm other than its bona fide employees working solely for the undersigned or agreed to pay any fee, commission, percentage, gift, or any other consideration contingent upon or resulting from the award or making of the Agreement.

The undersigned certifies that the wage rates and other factual unit costs used to determine the compensation provided for in the Agreement are accurate, complete, and current as of the date of the Agreement.

(This document must be executed by an authorized official of Proposer (e.g., President, CEO, Partner, Managing Partner))

Name: Mark E. Sultana

Title: Owner / Architect

Date: 5 / 14 / 2024

Signature: 



FORM 7 – SCRUTINIZED COMPANY CERTIFICATION

This certification is required pursuant to Florida State Statute Section 287.135 and must be executed and returned with Proposer’s Proposal.

As of July 1, 2011, a company that, at the time of bidding or submitting a Proposal 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 is ineligible for, and may not bid on, submit a Proposal for, or enter into or renew a contract with an agency or local governmental entity for goods or services of \$1 million or more.

Companies must complete and return this form with its response.

Company: DSDG, LLC

FEIN: 01-0597013

Address: 1348 Fruitville Rd. STE 204

City/State/Zip: Sarasota, Florida, 34236

I, Mark Sultana, as a representative of DSDG, LLC

certify and affirm that this entity is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

Handwritten signature of Mark Sultana

Signature

Owner / Architect

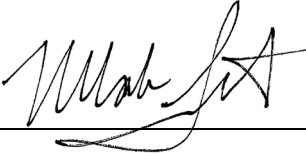
Title



**FORM 8, INSURANCE STATEMENT RFQ**

**THE UNDERSIGNED** has read and understands the insurance requirements applicable to any Agreement resulting from this solicitation and shall provide the insurances required in this RFQ within ten (10) days from the date of Notice of Intent to Award.

Proposer Name: Mark Sultana Date: 5 / 14 / 2024

Signature (Authorized Official): 

Printed Name/Title: Mark Sultana, Owner / Architect

Insurance Agency: McGriff Insurance Services, LLC


Agent Name: Carolyn Hoke Agent Phone: (727) 823-5551

*Return this signed statement with your proposal.*

**FORM 9, INDEMNITY AND HOLD HARMLESS**

**UNIVERSITY PARK RECREATION DISTRICT, A POLITICAL SUBDIVISION OF  
THE STATE OF FLORIDA**


The Successful Proposer shall indemnify and hold harmless District, its officers, and employees from liabilities, damages, losses, and costs, including but not limited to reasonable attorney's fees, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the Successful Proposer, its personnel, design professionals and other persons employed or utilized by the Successful Proposer in the performance of the Agreement, including without limitation, defects in design, or errors or omissions that result in material cost increases to District. Such indemnification shall include the payment of all valid claims, losses, and judgments of any nature whatsoever in connection therewith and the payment of all related fees and costs. The District reserves the right to defend itself with its own counsel or retained counsel at Successful Proposer's expense.

Signature of Authorized Official of Proposer:   
Title: Date: \_\_\_\_\_ Owner / Architect Date: 5 / 14 / 2024  
Project Number and /or Name: \_\_\_\_\_ RFQ. No, 24.001  
Insurance Agent: \_\_\_\_\_ Carolyn Hoke

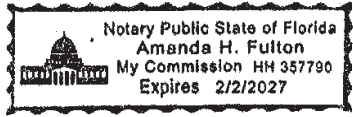
Acknowledgement:  
STATE OF Florida  
COUNTY OF Sarasota

The foregoing instrument was acknowledged before me this 14 day of May,  
20 24 by Mark Sultana, who is

Personally known to me  
OR  
 has produced \_\_\_\_\_ as identification.

Notary Signature   
Print Name Amanda Fulton

Seal



TRADE SECRETS

DS  
DG

ARCHITECTS

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ARCHITECTURE • PLANNING • INTERIOR DESIGN • CONSTRUCTION ADMINISTRATION

#### 4.1 - TRADE SECRETS

DSDG Architects has no trade secrets to declare, claim, or identify. With over twenty years of local experience, with notable accolades, this firm continues to stand at the forefront of design and execution. In terms of trade secrets, one of our best kept secrets is listen thoughtfully, and solve problems practically. Very often, the best solution is the simplest, and we recognize that complexity in design solution leads to confusion in the field. DSDG is proud of the relationships we maintain with consultants, clients, and construction managers. We truly value everyone's experience and we allow space for everyone in the room. As our portfolio continues to grow, we learn as a team from our hardships, reveal in our successes, and look forward to our growth with the next.

Another secret to our success is putting materials to the test. Every day of office is inundated with manufacturer's representatives pushing the next "great product" and selling us on how the industry is changing. And while we are always open to the future, this firm stays grounded in function and performance. For every person that offers us an exterior product, Mark happily accepts their sample and places it in his vegetable garden at home. Frequently, the products fail within weeks or months, and by the next year when the product representative returns to ask about their sales, we turn over the Florida tried and true sample, that failed our standards. It is this level of accountability and commitment to our quality of product that sets this firm apart from the rest. We continue to seek out products that perform, and we voice the results at the source. This open communication with the installers (contractors and their sub-contractors) along with the product manufacturers helps us streamline our designs into constructable and elegant built environments. Our staff stay on top of industry trends and frequently step away from the office to visit manufacturer facilities ranging in scope from plumbing in the Northern US, porcelain plants in Europe, and glass facilities in South America.





## PROPOSER STATEMENT OF ORGANIZATION



ARCHITECTS

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ARCHITECTURE • PLANNING • INTERIOR DESIGN • CONSTRUCTION ADMINISTRATION



**5.1 - LEGAL CONTRACTING NAME**

DSDG, LLC

D.B.A: DSDG Architects

**5.2 - STATE OF INCORPORATION**

Florida, U.S.A.

**5.3 - OWNERSHIP STRUCTURE OF THE COMPANY**

Mark Sultana - Principal & Owner - 90%

Scott Gross - Partner & Architect - 5%

Michael Casey Allen - Partner & Architect - 5%

**5.4 - FEDERAL IDENTIFICATION NUMBER**

01-0597013

5.5

Form **W-9**  
(Rev. October 2018)  
Department of the Treasury  
Internal Revenue Service

**Request for Taxpayer  
Identification Number and Certification**

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Give Form to the requester. Do not send to the IRS.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.  
**DSDG, LLC.**

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

Individual/sole proprietor or single-member LLC

C Corporation

S Corporation

Partnership

Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ **S**

Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities; not individuals; see instructions on page 3):

Exempt payee code (if any) **N/A**

Exemption from FATCA reporting code (if any) **N/A**

5 Address (number, street, and apt. or suite no.) See instructions.  
**1348 Fruitville Rd. Ste. #204**

6 City, state, and ZIP code  
**Sarasota, FL 34232**

7 List account number(s) here (optional)

Requester's name and address (optional)

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

				-					
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OR

Employer identification number

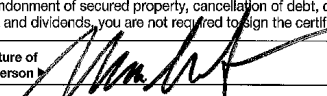
0	1	-	0	5	9	7	0	1	3
---	---	---	---	---	---	---	---	---	---

**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here      Signature of U.S. person       Date ▶ **8/26/2021**

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*

### 5.6 - FIRM CONTACT INFORMATION

Address: 1348 Fruitville Rd. STE, 204

Country, State, Area Code: Sarasota, Florida, 34236

Phone Number: 941-955-5645

Number of years at this location: 19 years (2005)

### 5.7 - LIST OF OWNERS/PARTNERS & OFFICERS

Principal & Owner: Mark Sultana

Partner: Scott Gross

Partner: Casey Allen

### 5.8 - PROOF OF MINORITY OWNED BUSINESS

DSDG is not a registered Minority Business Enterprise.



### 5.9 - FIRM REPRESENTATIVE CONTACT INFORMATION

Name: Mark Sultana

Phone Number: 941-955-5645

Email: marks@dsdginc.com

### 5.10 - LITIGATION HISTORY SUMMARY

DSDG, LLC has been in business for 23 years with ZERO history of litigation.

### 5.11 - HISTORY OF OWNERSHIP CHANGES

DSDG Architects was formed in 2001 with Principal Architects Mark Sultana 50% Owner and Thomas Denslow 50% Owner. In January 2019, Thomas Denslow retired from DSDG and Mark Sultana acquired Denslow's 50% share, making Mark Sultana 100% owner of DSDG Architects. In January of 2022 Scott Gross acquired 5% shares of DSDG. In January of 2024 Michael Casey Allen acquired 5% shares of DSDG Architects.



## RESPONDENT & TEAM'S EXPERIENCE



ARCHITECTS

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ARCHITECTURE • PLANNING • INTERIOR DESIGN • CONSTRUCTION ADMINISTRATION

### 6.1 - FIRM BACKGROUND, SIZE, AND YEARS IN BUSINESS

Launched in 2001, our 23 years of experience has become well known throughout the community and beyond for our clean and elegant concepts. The firm has consistently won multiple SRQ Home of The Year awards year after year in categories of Design, Sustainability, Renovation, and Interior Design. Principal Architect Mark Sultana, AIA, describes his process as “transforming words into pictures” while ensuring each project is successful by listening first, offering creative and meaningful solutions, and transforming wish lists into reality. Experienced in all aspects of building, DSDG Architects is a full-service firm providing comprehensive documentation from planning to permit with our team of highly skilled professionals. Our firm is known for delivering jobs on time and on budget. Based in Sarasota, Florida, we are proud to serve and enhance our beautiful community through award-winning design.

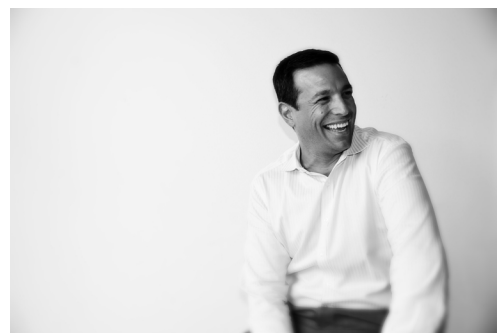
### 6.2 - PROPOSERS ARCHITECTURAL EXPERIENCE WITH GOVERNMENT AGENCIES

Although DSDG has performed government projects in the past, we are not currently working on any government projects. With over 23 years of doing business in Manatee County, DSDG Architects has successfully permitted over 100 commercial and residential structures. We are extremely well-versed in the local entitlements including zoning regulations and local building codes. Our firm has developed a very close professional relationship with the planning zoning officials and the local building department.

### 6.3 - PROPOSERS YEARS OF EXPERIENCE IN ARCHITECTURE

We are DSDG Architects, an architecture firm for clients that deserve award-winning design, using simple, clean and elegant concepts that keep clients coming back again and again. Delivering jobs on time and on budget, recipient of numerous coveted awards for excellence, principal architect Mark Sultana, AIA ensures each project is a success by listening first, offering solutions and through careful cost control providing the best quality in architecture.

Sultana is a master in the field of architecture, serving the community for many years. In business for over a decade, the firm DSDG Architects, founded in 2001, works hard to earn client satisfaction. Offering a team of dedicated highly skilled professionals with technical knowledge unsurpassed are committed to transforming ideas to reality seamlessly.





Mark Sultana, AIA, NCARB  
Owner, Principal Architect



Scott Gross, AIA, NCARB  
Partner Architect



Anita Keitel, AIA  
Architect



Joe Farris, AIA, NCARB, LEED AP  
Architect





**MARK SULTANA,** AIA, NCARB

**OWNER / PRINCIPAL**

**DSDG ARCHITECTS** 1348 Fruitville Road; Suite 204; Sarasota, FL 34236  
**OFFICE** 941.955.5645 • **WEBSITE** www.dsdgarchitects.com

**EMAIL** marks@dsdginc.com

**EDUCATION** New York Institute of Technology - BA in Architecture - 1994

**EXPERIENCE** DSDG Architects - 2001-Present | Architectural Experience: 25 Years

### LICENSURE & OTHER ORGANIZATIONS

Licensed Architect in the State of Florida - AR 94536

Licensed Interior Design in the State of Florida - ID 6611

Member of FGBC (Florida Green Building Coalition)

Member of GCBX

Member of Argus Foundation

Sarasota Yacht Club Building & Grounds Committee

Board Chair of InStride Therapy Center 2011- 2018

Past President - Gulf Coast Chapter of American Institute of Architects (AIA)- 2011

Member of NCARB (National Council of Architectural Registration Boards)

Post Disaster Safety Assessor

### COMPLETED & PENDING PROJECTS

#### CLUBS & HOSPITALITY

Bay Colony Golf Club House - Naples, FL

Laurel Oak Country Club - Sarasota, FL

Legends Golf Club - Sarasota, FL

Osa Yacht & Resort Club - Puerto Jimenez, Costa Rica

Pelican Marsh Golf Club House - Naples, FL

Players Club - Longboat Key, FL

Sarasota Yacht Club - Sarasota, FL

Sarasota Yacht Club - Pool Bar & Kitchen - Sarasota, FL

Sarasota Yacht Club - Master Plan - Sarasota, FL

Bird Key Yacht Club - Sarasota, FL

Creek Side RV Clubhouse and Fitness - Punta Gorda, FL

Isles Yacht Club Fitness Center - Punta Gorda, FL

Lemon Bay Golf and Country Club - Englewood, FL

Oaks Golf and Country Club - Sarasota, FL

Epicure Restaurant - Sarasota, FL

The Hotel Siesta - Sarasota, FL

#### INDUSTRIAL

Argen Warehouse - Sarasota, FL

Elite Motor Coach Storage - Sarasota, FL

Executive Storage - Sarasota, FL

InStride Horse Barn - Nokomis, FL

Legends Golf Maintenance Building - Sarasota, FL

#### OFFICE

Dental Care Alliance Corp. HQ. - Sarasota, FL

Department of Children Services - Sarasota, FL

Department of Corrections - Sarasota, FL

Department of Judicial Justice - Sarasota, FL

Fruitville Professional Villas - Sarasota, FL

Ringling Place Office - Sarasota, FL

Ringling Square Office - Sarasota, FL

Sarasota City Center Tenant Build-Outs - Sarasota, FL

Sea Gate Plaza - Ft. Lauderdale, FL

Osprey Management Multiple Bldgs - Sarasota, FL

Sarasota Association of Realtors Bldgs - Sarasota, FL



## RETAIL

Bay Street Village & Town Center - Osprey, FL  
Brandon Turner Salon - Sarasota, FL  
Hillview Square - Sarasota, FL  
Morton's Market - Sarasota, FL  
Robb & Stucky - Sarasota, FL  
Rugs as Art - Sarasota, FL  
Sunset Plaza - Sarasota, FL  
Shear Paradise Salon - Osprey, FL

## RESIDENTIAL HOMES

Allen Residence - Anna Maria, FL  
Ascione Residence - St. Pete Beach, FL  
Ballot Residence I&II - Sarasota, FL  
Bauza Residence - Sarasota, FL  
Beckstien Residence - Sarasota, FL  
Blue Water Spec House - Longboat Key, FL  
Brown Residence - Sarasota, FL  
Butterfield Residence I&II - Longboat Key, FL  
Casa Pocatello - Sarasota, FL  
Compton Residence I&II - Sarasota, FL  
Cox Residence - Sarasota, FL  
Crossley Residence - Sarasota, FL  
Dabney Residence - Sarasota, FL  
DiNaploi Residence I&II - Sarasota, FL  
DiPinto Residence I-IV - Sarasota, FL  
Dunlap Residence - Sarasota, FL  
Edmonds Residence - Sarasota, FL  
Farello Residence - Sarasota, FL  
Folvig Residence - Sarasota, FL  
Francis Residence - Boca Grande, FL  
Freigassner I&II Residence - Sarasota, FL  
Friedman Residence - Sarasota, FL  
Getter Residence - Englewood, FL  
Gerow Residence - Punta Gorda, FL  
Glover Residence - Sarasota, FL  
Granatir Residence - Sarasota, FL  
Gruber Residence I&II - Punta Gorda, FL  
Guzewicz Residence - Longboat Key, FL  
Harbor House Residence - Sarasota, FL  
Hargreaves Residence I&II - Sarasota, FL  
Hermansen Residence - Siesta Key, FL  
Hinkle Residence - Sarasota, FL  
Hoddinott Residence - Sarasota, FL  
Jackobs Residence - Sarasota, FL  
Jackson Residence - Manasota Key, FL  
Kaplan Residence - Sarasota, FL  
Kellogg Residence - Sarasota, FL  
Kelly Residence - Sarasota, FL  
King Residence - Osprey, FL

Kolodzieski Residence - Longboat Key, FL  
Le Seigneur Residence - Sarasota, FL  
Lido Key LLC - Sarasota, FL  
Lavalle-Bebeau Residence - Sarasota, FL  
Lees Residence - Sarasota, FL  
Libertore Residence - Sarasota, FL  
Linton Residence - Sarasota, FL  
Marlowe Residence - Sarasota, FL  
Marterie Residence - Longboat Key, FL  
Marterie Residence - Tarpon Springs, FL  
Martin Residence - Boca Grande, FL  
Merizon - Longboat Key, FL  
Michel Residence I&II - Sarasota, FL  
Murphy Residence - Sarasota, FL  
Myer Residence - Sarasota, FL  
Nichol Residence - Sarasota, FL  
Noble Residence - Sarasota, FL  
Odenath Residence - Sarasota, FL  
Pokoik Residence - Sarasota, FL  
Richardson Residence I&II - Sarasota, FL  
Riedlinger Residence - Lido Key, FL  
Robinson Residence - Sarasota, FL  
Rueter Residence - Siest Key, FL  
Rutledge Residence - Sarasota, FL  
Sultana Residence I-V Sarasota, FL  
Sypret Residence - Sarasota, FL  
Taylor Residence - Sarasota, FL  
The Homes of Laurel Park - Sarasota, FL  
Seaward Homes - Sarasota, FL  
Vensas Residence - Indian Rocks Beach, FL  
Voigt Residence I&II - Sarasota, FL  
Voigt Spec Homes I-XX - Sarasota, FL  
Yunis Residence - Sarasota, FL



**SCOTT GROSS**, AIA, NCARB

PARTNER / ARCHITECT

**DSDG ARCHITECTS** 1348 Fruitville Road; Suite 204; Sarasota, FL 34236  
**OFFICE** 941.955.5645 • **WEBSITE** www.dsdgarchitects.com

**EMAIL** scottg@dsdginc.com

**EDUCATION** Norwich University - Bachelor of Science in Architectural Studies - 2007  
Berlin, Germany - Minor in Art, Architectural Studio  
Norwich University - Master of Architecture

**EXPERIENCE** DSDG Architects: 2011 - Present  
WATG: 2008

### LICENSURE & OTHER ORGANIZATIONS

Licensed Architect in the State of Florida  
Licensed Interior Designer  
Member of the American Institute of Architects  
National Council of Architectural Registration Boards

### AWARDS + ACHIEVEMENTS

2019 SRQ Magazine Platinum - Betonhaus "Best Overall"  
2018 SRQ Magazine Platinum - Indlu Lamanzie "Best Overall"  
2018 SRQ Magazine Platinum - Compound Q "Best Bathroom"  
2017 SRQ Magazine Gold - Harbor House "Best Overall"  
2016 SRQ Magazine Platinum - Casa Pocatello

### COMPLETED & PENDING PROJECTS

#### RESIDENTIAL

Betonhaus - Sarasota, FL\*  
Casa Pocatello - Sarasota, FL\*  
Modern Farm House - Lakewood Ranch, FL\*  
Sand Dune House - Lido Key, FL\*  
Blue Marlin House - Bird Key, FL\*  
Indlu Lamanzie - Lido Key, FL\*  
Compound Q - Sarasota, FL\*  
Poinciana House - Nokomis, FL\*  
West Indies Residence - Siesta Key, FL\*  
Punt Gorda Modern - Punta Gorda, FL\*  
Lake Shore Residence - Sarasota, FL\*  
Prairie Retreat - Sarasota, FL\*  
Gulf View House - Lido Key, FL\*  
On the Beach - Indian Rocks Beach, FL\*  
Waldemere Residence - Sarasota, FL

#### CLUBS

Infinity Condominium Club House - Longboat Key, FL\*  
Sarasota Yacht Club Addition - Sarasota, FL\*

#### MULTI-FAMILY

One88 - Sarasota, FL\*  
7OneOne - Sarasota, FL\*  
Oceane - Siesta Key, FL\*

#### HIGHER EDUCATION

Ringling College of Art and Design - Sarasota, FL\*  
Studio Lab Campus  
Post Production Studio

#### RENOVATIONS

Mullet's Aluminium Showroom  
Robb & Stucky International



# ANITA KEITEL, AIA

ARCHITECT

**DSDG ARCHITECTS** 1348 Fruitville Road; Suite 204; Sarasota, FL 34236  
**OFFICE** 941.955.5645 • **WEBSITE** www.dsdgarchitects.com

**EMAIL** anitak@dsdginc.com

**EDUCATION** Arizona State University - Master of Architecture - 2013  
University of Florida - Bachelor of Science in Sustainability - 2010

**EXPERIENCE** DSDG, Architects: 2021 - Present  
Rowe Architects: 2019 - 2021  
Hall Architects: 2015 - 2019  
Fawley Bryant Architects: 2013 - 2015

## LICENSURE & OTHER ORGANIZATIONS

Licensed Architect in the State of Florida - AR 98218  
Licensed Interior Designer - ID 6993  
Member of the American Institute of Architects  
President - AIA Florida Gulf Coast  
Leadership Sarasota County Class of 2018  
Member of the Leadership Sarasota Alumni Group

## COMPLETED & PENDING PROJECTS

### MULTI-FAMILY

Six88 - Sarasota, FL  
Evolution - Sarasota, FL  
The Collection - Sarasota, FL  
5368 Gulf - Longboat Key, FL  
780 SRQ Condos - Sarasota, FL  
Evolve Longboat Key Residences - Longboat Key, FL  
Bayside College Dorms - Bradenton, FL

### CLUBS

Sarasota National Amenity Center - Venice, FL\*  
Royal Lakes County Club - Bradenton, FL\*  
Bird Key Yacht Club - Sarasota, FL

### K-12 EDUCATION

Tyrone Middle School - Saint Petersburg, FL\*  
IMG Academy - Bradenton, FL\*

### COMMERCIAL

Bayside Church Offices - Bradenton, FL\*  
Snell Engineering Offices - Sarasota, FL\*  
Gulfside Bank Renovations - Sarasota, FL\*  
University of Florida Satellite Offices - Sarasota, FL\*

### RELIGIOUS

Bayside Church EBC Expansions, Bradenton, FL\*  
Bayside Church - WBC Campus, Bradenton, FL\*

### HIGHER EDUCATION

SCF Studio for the Performing Arts - Bradenton, FL\*  
UF Blueberry Research Facility - Gainesville, FL\*  
Mote Marine Tropical Lab - Summerland Key, FL\*  
NCF Cook Library Renovations - Sarasota, FL\*

\* Indicates projects designed at previous firms



**JOSEPH A. FARRIS**, AIA, NCARB, LEED AP, CSI

ARCHITECT

**DSDG ARCHITECTS** 1348 Fruitville Road; Suite 204; Sarasota, FL 34236  
**OFFICE** 941.955.5645 • **WEBSITE** www.dsdgarchitects.com

**EMAIL** joef@dsdginc.com

**EDUCATION** Kent State University - Bachelor of Architecture - 1983

**EXPERIENCE** DSDG Architects: 2023 - Present

Frederick & Associate Architects - 2011 - 2023

DSDG Architects: 2006 - 2011

Clifford N. Scholte: 2000 - 2006

### LICENSURE & OTHER ORGANIZATIONS

Licensed Architect in the State of Florida - AR 0014175

Licensed Architect in the State of Ohio - 8608233

Licensed Architect in the State of S. Carolina - #111289

Member of the American Institute of Architects

National Council of Architectural Registration Boards

Florida Green Building Coalition

Rails-to-Trails Conservancy Member

CSI, Suncoast Chapter

Gulf Coast Builders Exchange

### AWARDS + ACHIEVEMENTS

AIA, Eastern Ohio Chapter Honor Award

Legacy Award for Montessori Canton, Ohio School

### COMPLETED & PENDING PROJECTS

#### DENTAL/MEDICAL OFFICES

Encompass Health (formerly HEALTHSOUTH)\*

Hawthorne Clinic and Research Center Building Medical Center, Sarasota, FL\*

Smileworks Kids Dentistry, Sarasota, FL

The Silverstein Institute, Dr. Michael Pawlus, Sarasota, FL\*

Dr. Monsul, Sarasota, FL\*

#### HIGHER EDUCATION

University of Virginia LTACH and Rehab Facility\*

UVA Pain Management and Imaging Center\*

UVA - Encompass Health Joint Venture Rehabilitation Hospital\*

University of Virginia Healthcare System, Ivy Mountain Master Plan\*

#### MULTI-FAMILY RESIDENTIAL

635 Orange Ave, Mixed Use, Sarasota, FL\*

Rawls Ave Townhomes, Sarasota, FL\*

Burns Court Townhomes, Sarasota, FL\*

\* Indicates projects designed at previous firms

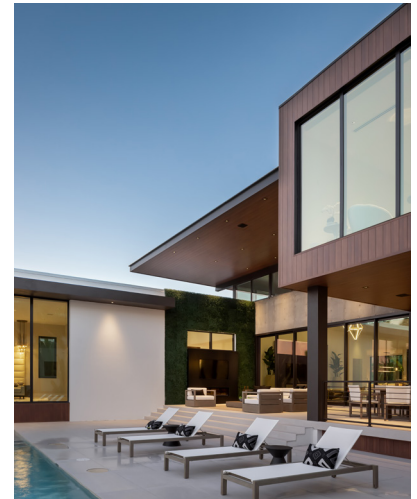
## 6.5 - PROPOSED SUB-CONSULTANTS

DSDG if chosen to be awarded the project by University Park, will assure that competent consultants and sub-contractors are chosen to complete the tasks defined in the scope of work. DSDG will consult client and owner's representative before engaging any consultants or subcontractors. After, DSDG will carefully evaluate consultants and sub-contractors to maintain a common vision and goal for the project, meeting ultimate client satisfaction. We understand that all consultants will be the responsibility of the Architect and under the Architect's contract.

## 6.6 - AWARDS AND ACCOLADES (SINCE 2019)

DSDG Architects is a firm that has become well accolades and awarded over the last 23 years.

- 2023 - SRQ Magazine | Gold "Best Overall Home Over 2 Million"
- 2023 - SRQ Magazine | Gold "Best Overall Home Between 1-2 Million"
- 2023 - SRQ Magazine | Platinum "Best Kitchen"
- 2023 - SRQ Magazine | Platinum "Best Green/Sustainability"
- 2023 - Houzz | Best of Houzz Design
- 2023 - Houzz | Best of Houzz Service
- 2022 - SRQ Magazine | Platinum "Best Overall Home Between 1 and 2 Million"
- 2022 - GCBX | 70th Annual Gala | Silver Keystone Sponsor
- 2022 - Houzz | Best of Houzz Design
- 2021 - SRQ Magazine | Gold "Best Overall Home Over 2 Million"
- 2021 - SRQ Magazine | Silver "Best Overall Home Over 2 Million"
- 2021 - SRQ Magazine | Platinum "Best Sustainable / Green"
- 2021 - SRQ Magazine | Gold "Best Overall Interior Design"
- 2021 - SRQ Magazine | Gold "Best Landscape / Outdoors"
- 2021 - Houzz | Best of Houzz Design
- 2020 - SRQ Magazine | Gold "Best Kitchen"
- 2020 - Houzz | Best of Houzz Design
- 2020 - Houzz | 25K Saves
- 2019 - SRQ Magazine | Platinum "Best Overall Home Over 2 Million"
- 2019 - SRQ Magazine | Platinum "Best Kitchen"
- 2019 - SRQ Magazine | Gold "Best Overall Home Between 1 and 2 Million"
- 2019 - SRQ Magazine | Platinum "Best Sustainable / Green"
- 2019 - SRQ Magazine | Platinum "Best Overall Home Under 1 Million"





**KAREN HARMON**  
**SARASOTA YACHT CLUB**

General Manager / Chief Operating Officer  
 Address: 1100 John Ringling Blvd, Sarasota, FL 34236  
 Cell/work phone: 941.365.4191 EXT. 304  
 Email: karen.harmon@sarasotayachtclub.org  
 Performance Period: 2020 - Present  
 Contract Value: \$6,000,000

**DAVID BALOT**  
**CLIENT**

Address: 5810 Midnight Pass, Sarasota, FL 34236  
 Cell/work phone: 941.321.6989  
 Email: dbalot@yahoo.com  
 Performance Period: 2007 - Present

**TAMMY HACKNEY**  
**BIRD KEY YACHT CLUB**

General Manager / Chief Operating Officer  
 Address: 301 Bird Key Dr, Sarasota, FL 34236  
 Cell/work phone: 941.953.4455 EXT. 102  
 Email: karen.harmon@sarasotayachtclub.org  
 Performance Period: 2020 - Present  
 Contract Value: \$17,000,000

**JENN STUTLER**  
**COMMUNITY FOUNDATION OF SARASOTA COUNTY**

General Manager / Chief Operating Officer  
 Address: 1819 Main St, Sarasota, FL 34236  
 Cell/work phone: 941.737.3473  
 Email: jstutler@stutlerstrategies.com  
 Performance Period: 2018 - Present  
 Contract Value: \$3,000,000

**PATRICK DEPINTO III**  
**SEAWARD DEVELOPMENT**

Principal and Chief Executive Officer  
 Address: 53 S Palm Ave, Sarasota, FL 34236  
 Cell/work phone: 941.388.2021  
 Email: patrick@seawarddevelopment.com  
 Performance Period: 2012 - Present

**PROJECT DESCRIPTION:**

- New 24,000 SF Clubhouse Building
- New covered pool bar and ancillary commercial kitchen
- New master plan for future expansion including new grill and free standing, 3 story building with administration and fitness facility

**PROJECT DESCRIPTION:**

- 5 High-end Single Family Custom Homes
- Hotel remodel with commercial bar and small kitchen
- New 127 room hotel with restaurant, commercial kitchen, fitness room, conference center, and pool

**PROJECT DESCRIPTION:**

- New 22,000 SF Clubhouse with pool, fitness room, dining, commercial kitchen, catering kitchen, yoga room, admin and teams pro shop

**PROJECT DESCRIPTION:**

- Extensive interior remodel with minor exterior remodel to existing facility, including architecture and interior design

**PROJECT DESCRIPTION:**

- 7 High-end Single Custom Homes
- Lido Residences Condo Project
- 711 Palm Condo Project

## PROPOSERS OFFICE LOCATION IN RELATION TO PROJECT



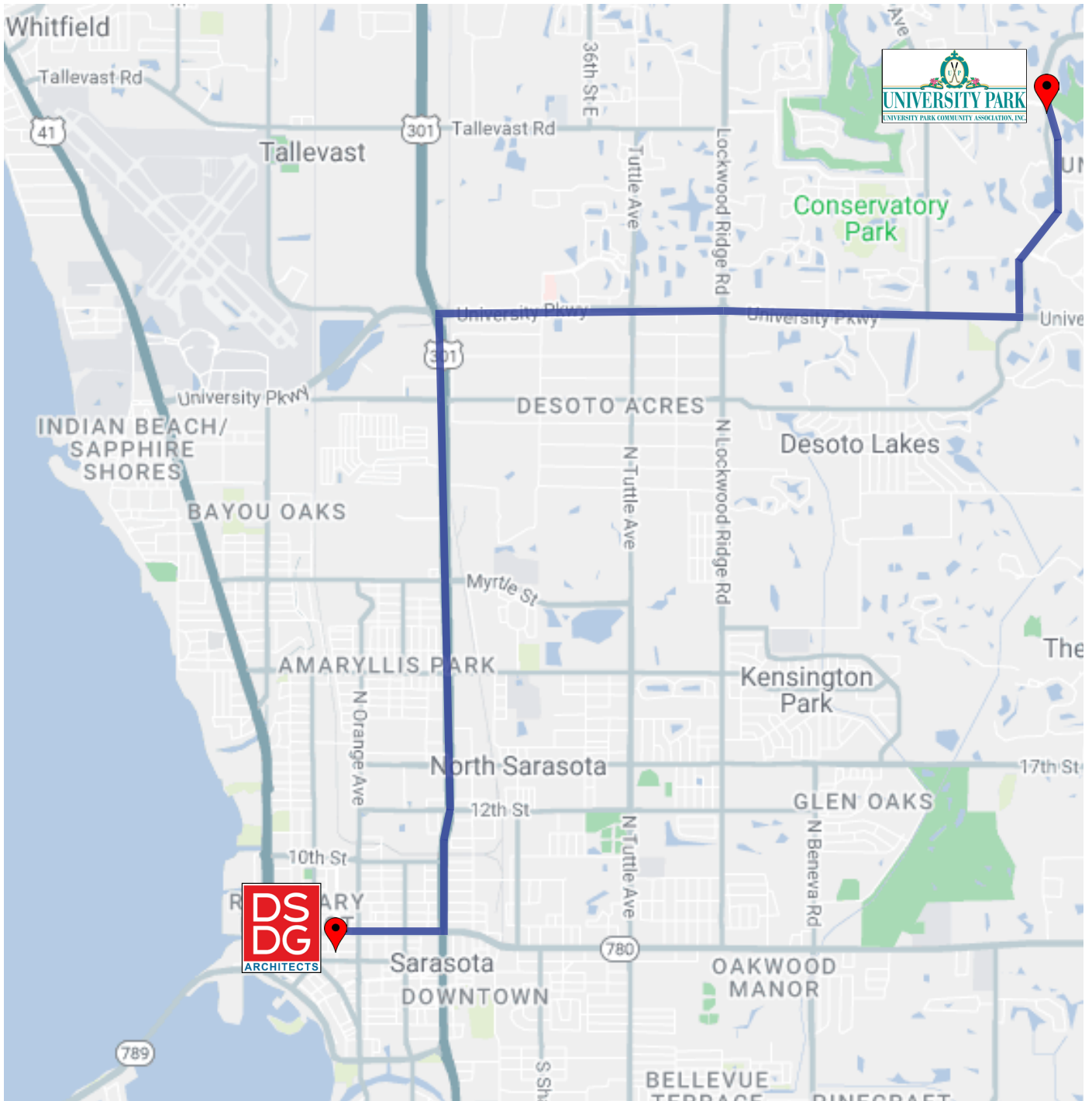
ARCHITECTS

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ARCHITECTURE • PLANNING • INTERIOR DESIGN • CONSTRUCTION ADMINISTRATION



PROPOSERS OFFICE LOCATION IN RELATION TO PROJECT



DSDG Main Office	9.0 Miles	University Park Country Club
1348 Fruitville Rd. Suite 204	23 Minute Drive	7671 The Park Blvd.
Sarasota, Florida, 34236	46 Minute Bike	University Park, Florida, 34201

# APPROACH TO DESIGN SERVICES



ARCHITECTS

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ARCHITECTURE • PLANNING • INTERIOR DESIGN • CONSTRUCTION ADMINISTRATION

## PROJECT APPROACH, ARCHITECT PERFORMANCE, AND METHOD OF ENGAGEMENT

First and foremost, the team including the DSDG Architects, Consultants, Contractor, and any committees i.e. citizens that utilize University Park which can be formed to establish the program will meet to discuss and formulate the kit of parts. From here forward, this group will be called the “Team”. This will include questionnaires provided to the team to start the process. The kit of parts are the spaces, interior and external to the building as a whole. The kit of parts will become the program for the design of the building. It will include the exterior and interior building style, spaces, sizes of spaces, uses and organization of the spaces along with many other detailed items.

Once the program is established the concept design will begin, the program may change and adjust during the concept design depending on the outcome of the design. The program will be designed into the site and floor plans of the new projects. DSDG uses the latest Revit and BIM drafting and design software to produce our concepts. The DSDG Architectural and Interior design team along with design consultants will meet to develop concepts for the design. DSDG will present multiple options of the concept site and floor plans to the other members of the team including the team members listed above to form and adjust the design to meet the requirements of the design. This part of the design approach is considered Phase 1a - Programing and Concept Design.

Once the concept design has been established DSDG will continue to meet with the Team to answer questions and modify the design based on provided feedback. This will move us into Phase 1b - Schematic Design. During the schematic design phase, we will meet with the local zoning and planning staff to establish any special site circumstances there may be. We will use the program we have established with the Team to further design the club building and site amenities and work in conjunction with a Civil Engineer and Landscape Architect to develop the site plan. In parallel, we will be working on exterior building elevations and a computerized 3d model of the building. During this time, we will be presenting the design as we progress to the team often. We would suggest meeting every other week during this time frame. When the schematic design is agreed upon by the Team, we will put together a formal presentation to present the design that the Team has created. This presentation will include plans, elevations, renderings, and a preliminary construction budget to construct the building.

At the approval of the design from all bodies we will begin Phase 2 - Design Development. During this phase we will engage our consultants in discussion and design of the buildings structural requirements and building systems. We will be detailing the approved design in the form of full building cross sections and interior elevations. We will be meeting with the Team on a regular basis to discuss such items as interior and exterior finishes, reflected ceiling plans, lighting and building materials. The Contractor will continue to provide costs and budgets for the projects throughout this phase.

The next phase, Phase 3 - Construction Documents, is an extremely important part of building a building. These are the drawings which are used for construction and permitting of the project. We will review all drawings with the Team during this phase and walk them through every drawing if necessary. Our Architects pride themselves on perfection in this phase. We use the latest versions of Revit and BIM to coordinate all drawings and details of the building. We will generate a very thorough and complete set of drawings. Once we are complete and all the drawings are coordinated, we will submit the drawings to be reviewed for a building permit.



### ACCESSIBILITY IN AREAS OF AVAILABILITY

DSDG staff working on the project all live locally in Sarasota and Manatee County. Meetings can be scheduled as needed with short warning and can be held in person on site or in our office.

### PHYSICAL MEETING ATTENDANCE OF PROPOSER

DSDG staff will attend all pre-scheduled meetings in person.

### ACCESSIBILITY AND AVAILABILITY DURING TERM OF AGREEMENT

DSDG staff will visit the job site during construction to assure the project details are being executed as planned. Our careful attention to detail and years in the field of Architecture and Construction provides us the knowledge to spot issues before the issues become problems. Our close proximity to the project ensures easy and quick accessibility and availability to the project.





## PROPOSER'S GREEN STRATEGIES AND USE OF SUSTAINABLE PRODUCTS

DSDG Architects appreciates University Park's sustainability initiatives and will support the inclusion of sustainable design principles into your projects to the extent desired. Sustainable principles promote providing fresh air and daylight to building occupants, minimizing disturbance of the microenvironment, conserving energy and resources, and respecting the community where the project is located. Additionally, many of the elements associated with sustainable design have been proven to improve members' enjoyment. Our team includes the participation of LEED Accredited Professionals in every discipline to help guide you in making decisions about sustainable elements that make sense for the University Park Development.

High-performance buildings can be a smart business decision, with products and technologies that are practical and have minimal impact on project cost. We're committed to helping our clients design and construct buildings that are productive and healthy environments, as well as energy and resource responsible. Sustainability needs to make sense within the context of each client's business needs and priorities. We believe it's important to offer our clients the operation and fiscal advantages that can be realized by incorporating sustainable design elements that make sense for their specific projects so that they can make the best choices for their business.

With LEED Accredited Professionals on staff, DSDG Architects recommends and incorporates sustainable design features that best align with each client's mission and further their goals wherever practical. We offer our clients the opportunity to be energy and resource-efficient by implementing concepts that reduce operating and maintenance costs, enhance public image, and increase worker productivity, whether or not they choose to pursue a sustainability or energy-efficient certification process like LEED or EnergyStar.





## DSDG QUALITY CONTROL

DSDG has been in business for almost 23 years. In this time, we have established a process for quality control unmatched by other Architectural firms. We have a multi-part quality control system established that provides our clients with the best set of coordinated drawings possible.

What is Quality Control?

The dictionary of Architecture and Construction defines it as “The inspection, analysis, and other relevant actions taken to provide control over what is being done, manufactured, or fabricated, so that a desirable level of quality is achieved and maintained”.

To achieve an A level set of plans you need the five “C’s”.

**-CONSISTENCY**, our drawings use a consistent detailing process making them similar no matter the type of project or use the building we are drawing is.

**-CODES**, Building and zoning code review, every project that we provide drawing for go through a multiple Architect and Engineer building and zoning code review. Once the Architect and Engineer have finished the review a meeting is coordinated with the zoning and building department to confirm findings.

**-COORDINATION**, all drawings including consultant drawings are coordinated by creating a build-ability conflict model in Revit and BIM (Building Information Model). The Architects and Consultants Revit drawings are brought into one model and checked for conflicts and conformity. For instance, ceiling cavity conflicts including structure, mechanical, electrical, plumbing and fire protection.

**-CHECKING**, DSDG performs a checking process that involves an internal peer review of all drawings. This is Architects and Engineers reviewing each other's drawings internal to the DSDG team. We also work with the contractor to check drawings, details, and budget to be sure all are in line.

**-COMPLETION**, review, this is done prior to the completion of the drawings and being submitted to building permit. It is a cohesive review of all drawings. It is inclusive of the Principal Architect, Project Architect and Staff, Engineers and Contractor.

## DSDG COMMITMENT TO TIME AND BUDGET

The team approach that DSDG Architects implements, combined with our experience designing, will ensure that your projects incorporate the whole teams' thoughts and ideas, creating a successful design which will be on schedule and meet the established budget criteria. We have an excellent track record with our clients designing major expansions and renovations. DSDG is devoted and committed to delivery your project on time and on budget, with a goal to exceed all client expectations.

A handwritten signature in black ink, appearing to read 'Mark Sultana', with a stylized flourish at the end.

Mark Sultana, AIA, NCARB  
Owner / Architect

### 8.7 - ADDITIONAL INFORMATION ON DSDG ARCHITECTS

DSDG Architect's first major commission in 2006 has paved the way for our hospitality driven business model. Originally a design competition, DSDG won with an abundance of work and process at the Presentation. DSDG created a vision in that initial competition and then spent the following 3 years protecting that vision from City reviews, commission hearings, community workshops, and consultants trying to make their jobs easier rather than best for the vision. This level of dedication is what DSDG brings to every project. Our unrivaled track record in architectural innovation, preservation, and sustainable design, combined with our deep appreciation for the rich history of architecture, uniquely positions us for success. DSDG Architects is a local architecture firm with a reputation for designing beautiful and functional buildings that consider the complex needs of our clientele. Our firm has been involved with a significant number of building projects local to Sarasota including the Sarasota Yacht Club, One 88, Infinity, Orange Club, Park Residences, and 711 Palm. The firm's portfolio includes medical offices, office buildings, office tenant build-outs, retail buildings, condominiums, clubhouses, restaurants, and high-end residential homes. DSDG has been doing business in Sarasota since February of 2001 and today, under the direction of architect and owner Mark Sultana, experiences continued growth and success. Our firm would be honored and excited to be given the opportunity to design for University Park and we are confident that you will be extremely pleased with our level of expertise, attention to detail, ability to listen, and quality of our work.

### 8.8 - ACCESSIBILITY - SECTION 508

While ADA compliance and WCAG conformance have become almost synonymous over the years, it's important to understand the distinction. Since WCAG itself is not a law, but a set of accessibility standards, there is no such thing as "compliance" with WCAG. However, WCAG can be, and has been, incorporated into the law as a standard for evaluating accessibility compliance, as in Section 508 of the Rehabilitation Act of 1973. The ADA does not specifically state conforming with WCAG standards as a requirement for compliance, but WCAG was designed to help website owners achieve the level of accessibility that is required by laws such as the ADA. To remember this distinction, it can be helpful to think of accessibility laws such as the ADA as the end destination—i.e., web accessibility for all—while WCAG maps out how to get there.

To gauge WCAG conformance, we would recommend you hire a consultant to first conduct an evaluation of your website or web content. This evaluation can consist of the step-by-step process of thoroughly and diligently testing whether that experience is usable by people with disabilities. A comprehensive accessibility evaluation typically involves a combination of automated testing and extensive manual evaluation.

The ADA Standards for Accessible Design ("ADA Standards").

DSDG Architects are versed in the latest building code standards and how to accommodate all the challenges of physical mobility. Common sense also guides us as we develop functional spaces for all club members including common health and biological changes that naturally occur.

# ORGANIZATIONAL STRUCTURE AND CAPACITY



ARCHITECTS

---

ARCHITECTURE • PLANNING • INTERIOR DESIGN • CONSTRUCTION ADMINISTRATION



STAFFING RESOURCES

DSDG's main office is located in Sarasota with a staff of 6 licensed architects, 5 project managers with architectural degrees, 3 architectural interns and 3 interior designers.



Mark Sultana  
Principal | AIA, NCARB



Scott Gross  
Partner | AIA, NCARB



Casey Allen  
Partner | AIA, RA-NY



Anita Keitel  
Architect | AIA



Roberto Gonzalez  
Architect | AIA, NCARB, LEED AP



Joe Farris  
Architect | AIA, NCARB, LEED AP



Mary Allen  
Project Manager



Paul Stepanis  
Project Manager | LEED AP



Christopher Richard  
Naples Studio Manager



Andrea Machado  
Project Manager



Megan Bobay  
Interior Designer | Allied ASID



Abbey Harms  
Interior Designer | Allied ASID



Amanda Hubbard  
Interior Designer | Allied ASID



Valerio Amicucci  
Architectural Intern



Michael Rios  
Architectural Intern



Samuel Anderson  
Architectural Intern



Brigitta Wagner Sultana  
Creative Director



Vickie Sultana Crotinger  
Account Manager



Danni Poe  
Business Development



Mandy Fulton  
Receptionist

**PROPOSER ACCESSIBILITY**

University Park Country Club  
 7671 The Park Blvd.  
 University Park, Florida, 34201

DSDG Main Office  
 1348 Fruitville Rd. Suite 204  
 Sarasota, Florida, 34236



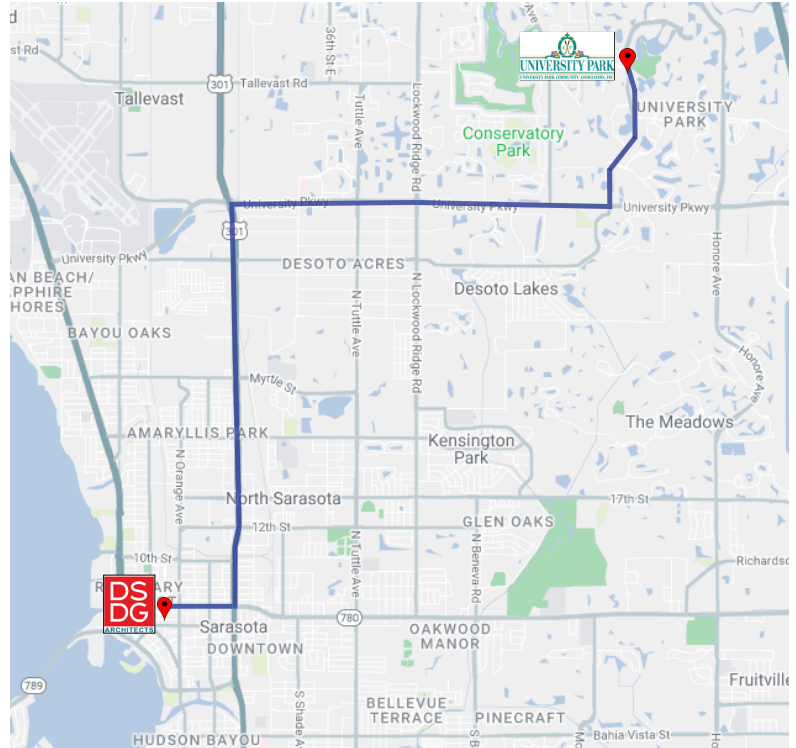
9.0 Miles



23 Minute Drive



46 Minute Bike



**OFFICE MANAGEMENT PLAN**

All appointed personnel proposed to be on this project work and live in the Sarasota and Manatee Community. We are properly staffed and provide professional services as needed. All of our professional consultants, civil, structural, mechanical, electrical, and plumbing, all maintain a fully staffed office in Sarasota-Manatee area.



Mark Sultana, Owner / Principal | AIA, NCARB





### **DSDG DESIGN SERVICES**

Architectural Drawings (site plans, floor plans, building elevations, and 3-D models of the exterior of the building)

Technical Specifications

Represent the Owner and attend all meetings set forth by Manatee County

Assist in Marketing and Sales materials

Attend Sales openings and meetings as needed

Coordination with the Owner and Project Team during the project duration

Attend meetings and conference calls throughout the duration of the project

### **CONSULTANT SERVICES**

DSDG has not selected any consultants for this project at this time so that all consultant can be selected with direct involvement of the Architect, Client, and Owner's Representative as a team. The following disciplines will be needed and contacted by the Architect.

Civil Engineering

Landscape Architecture

Structural Engineering

Mechanical Engineering

Electrical Engineering

Plumbing Engineering

Fire Protection Engineering

Interior Design Services

### **OWNER PROVIDED SERVICES + TESTING**

Geotechnical Soil Boring

Site Survey

Flow Test

Traffic Study

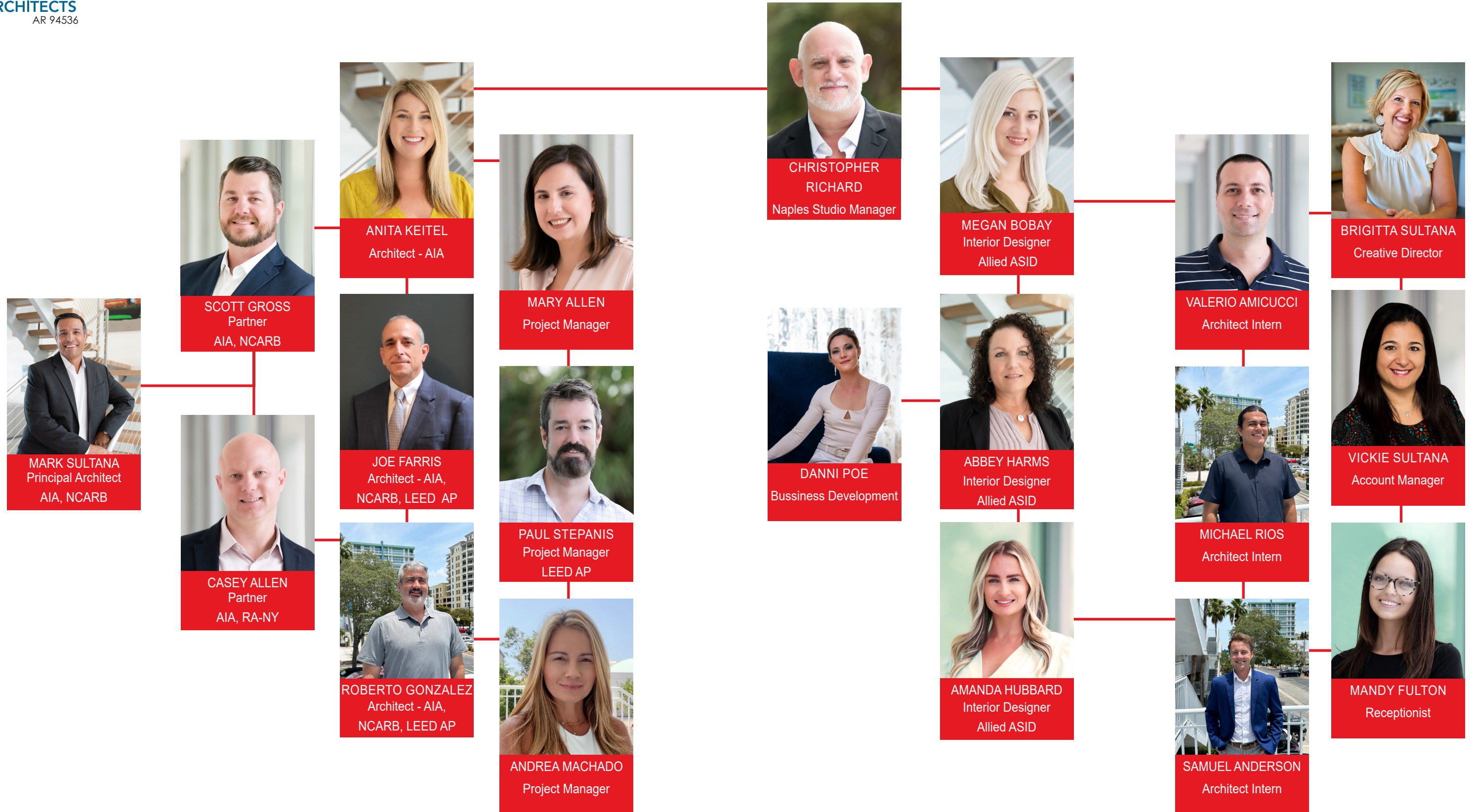
Pool Consultant

Building Envelope Consultant

Threshold Engineering

Florida Power and Light Coordination

Communications Provider (Cable and Internet)



### 9.5 - TEAMING WITH OTHER ENTITIES

DSDG will not be directly jointly performing with other entities to perform the scope of services.

### 9.6 - JOINT VENTURE

No joint venture is being proposed.

### 9.7 - STATEMENT OF FINANCIAL STABILITY

DSDG, LLC is financially stable, and we have included the letter below from our bank. In addition, in the 23 years that DSDG Architects has been in business our firm has had zero litigation related to any of our projects.

**Regions Bank**  
15051 S Tamiami Trail  
Fort Myers, FL 33908



March 16, 2022

Re: DSDG, LLC.

Account Numbers: 0047990597 & 0267090389

I am pleased to confirm that DSDG, LLC. has been an esteemed client of our financial institution since 2018. During this time, our client has maintained its accounts active and have been managed in a satisfactory manner.

This letter is confidential and has been written as a matter of business courtesy with the understanding that its source and contents will not be divulged, and that no responsibility therefore is to attached this bank or any of its officers.

If I can be of further service, please do not hesitate to reach out to me.

Sincerely,




Earnest J. Wilks  
Commercial Banking  
15051 S Tamiami Trail  
Fort Myers, FL 33908  
Cell: 404.747.6115 Fax: 239.454.0079  
earnest.wilks@regions.com

**9.8 - ACCESS TO FINANCIAL RECORDS**

At this time, DSDG will not share access to financial records. Should DSDG Architects be awarded the project by University Park, financial records may be requested for audit by financial analysts or auditor on behalf of University Park Association.

Name of Proposer: Mark E. Sultana Date: 5 / 14 / 24


Signature of Proposer:  Date: 5 / 14 / 24

**9.9 - OWNERSHIP DISCLOSURE**

DSDG Architects have no conflicts of interest as it relates to University Park for the projects' scope of work:  
No immediate family members or relatives of DSDG, LLC staff members are employees of University Park.  
No DSDG, LLC staff members, or members of our immediate families, are related to employees of University Park.  
There are no direct or indirect financial benefits to be gained by any employee of University Park and / or their family members, as the result of awarding a contract to DSDG, LLC.

The Proposer hereby certifies that they do NOT have ownership interest in the entities proposed for services, including ownership interest through the form of a parent, subsidiary, holding company, or any other form of business entity.

Name of Proposer: Mark E. Sultana Date: 5 / 14 / 24

Signature of Proposer:  Date: 5 / 14 / 24



CURRENT OFFICE WORKLOAD

PERSONNEL

CURRENT WORKLOAD

MARK SULTANA , AIA, NCARB



SCOTT GROSS, AIA, NCARB



CASEY ALLEN, AIA, RA-NY



ANITA KEITEL, AIA



JOE FARRIS, AIA, NCARB, LEED AP,



ROBERTO GONZALEZ, AIA, NCARB, LEED AP



MARY ALLEN



PAUL STEPANIS, LEED AP



ANDREA MACHADO





### 9.11 - MANATEE COUNTY WORK EXPERIENCE

DSDG has completed several projects in Manatee County including a hotel to residence conversion and remodeling project, dozens of single family residential projects, and we are currently working on a student housing project for Bayside Church.

### 9.12 - ADDITIONAL INFORMATION ON DSDG INTERIOR DESIGN

Another highlight to the DSDG team is our in-house interior design department. With experience ranging from high-end luxury single family housing, to clubhouses and tenant improvements they are able to add a layer to our design process that truly enhances the interior environment. Having them within our company allows us to keep them engaged throughout the entire design and construction process. They frequently have product, furniture, and lighting representatives in the office with materials ranging from residential to commercial grade selections. This blend of exposure to products creates the ideal environment for the clubhouse atmosphere often seeking to blend the commercial building type into a more relaxed and welcoming atmosphere. Going beyond selecting paint colors, our designers are able to assist with plumbing fixture selections, furniture procurement, and art installations. Depending on the scope of the project, our designers can become value-add resources for the team. Separate proposal to be provided, if/when project scope requires.



**SIMILAR COMPLETED PROJECTS**  
Country Club Facilities and Physical Fitness Facilities



**ARCHITECTS**

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ARCHITECTURE • PLANNING • INTERIOR DESIGN • CONSTRUCTION ADMINISTRATION

# BIRD KEY YACHT CLUB • SARASOTA, FLORIDA

301 BIRD KEY DR • SARASOTA, FLORIDA, 34236

PROJECT TIMELINE • OCTOBER 2023 - OCTOBER 2026

PROPOSER'S ROLE • ARCHITECT

PROJECT BUDGET • \$20,000,000

## SCOPE OF WORK

Architect of record hired to design, permit, and provide full permit drawings for a 22,000 SF new one story clubhouse building. The building includes dining, bars, fitness, commercial kitchen, restrooms, office space, warming kitchen, pool, site work, tennis courts and multi-use spaces.



# BIRD KEY YACHT CLUB • SARASOTA, FLORIDA

301 BIRD KEY DR • SARASOTA, FLORIDA



# SARASOTA YACHT CLUB • SARASOTA, FLORIDA

1100 JOHN RINGLING BLVD • SARASOTA, FLORIDA, 34236

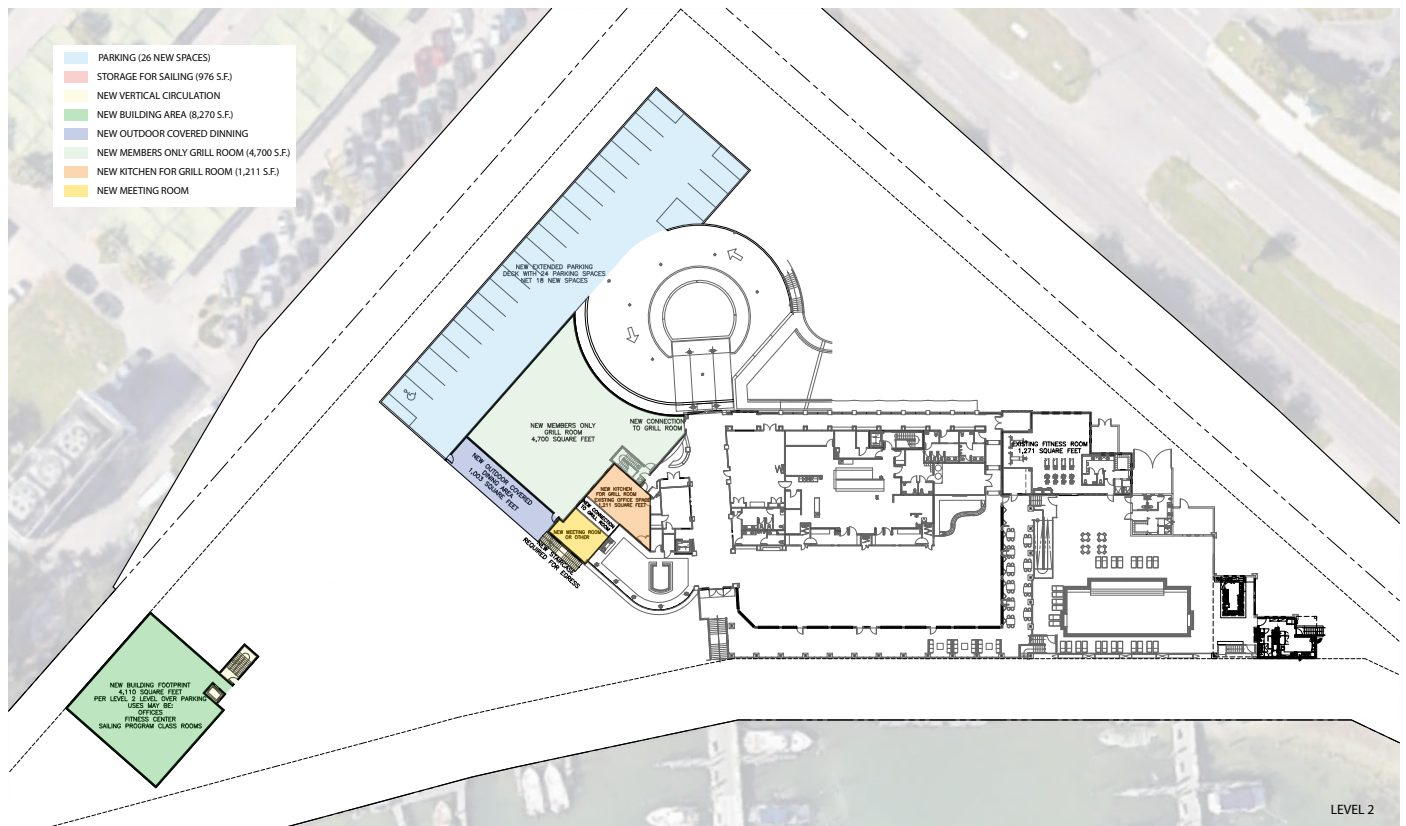
PROJECT TIMELINE • MAY 2023 - MAY 2024

PROPOSER'S ROLE • ARCHITECT

PROJECT BUDGET • \$6,000,000

## SCOPE OF WORK

Architect of record for future expansion and master plan for an existing clubhouse building. The project includes a new 5,000 SF addition includes new kitchen, grill room, dining, and outdoor dining, as well as the inclusion of a new 8,000 SF fitness and administration building.



**SIMILAR COMPLETED PROJECTS**  
**Commercial Kitchen Renovations**  
**and New Construction**



**ARCHITECTS**

---

ARCHITECTURE • PLANNING • INTERIOR DESIGN • CONSTRUCTION ADMINISTRATION

# SARASOTA YACHT CLUB • SARASOTA, FLORIDA

1100 JOHN RINGLING BLVD • SARASOTA, FLORIDA, 34236

PROJECT TIMELINE • APRIL 2018 - NOVEMBER 2018

PROPOSER'S ROLE • ARCHITECT

PROJECT BUDGET • \$1,500,000

## SCOPE OF WORK

Architect of record for a new outdoor covered pool side bar and interior commercial kitchen. The new Sarasota Yacht Club in 2018 DSDG was engaged to provide a new pool side bar and kitchen to the existing club.



## SIMILAR COMPLETED PROJECTS

Renovation Projects  
Large and Small



ARCHITECTS

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ARCHITECTURE • PLANNING • INTERIOR DESIGN • CONSTRUCTION ADMINISTRATION



# COMMUNITY FOUNDATION OF SARASOTA COUNTY INTERIOR RENOVATION • SARASOTA, FLORIDA

1819 MAIN ST • SARASOTA, FLORIDA, 34236

PROJECT TIMELINE • OCTOBER 2023 - MAY 2024

PROPOSER'S ROLE • ARCHITECT

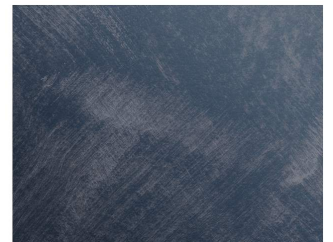
PROJECT BUDGET • \$3,000,000

## SCOPE OF WORK

Architect of record for a complete interior and partial exterior remodel to the community foundation of Sarasota County Office/conference building. Our services included full architecture and interior design for a full renovation.



Reception Desk



Conference Room 103



[Celestio Legno - Jig - Duchateau](#)  
Backlit LED Wood Accent Wall



Re-use existing metal signage  
And existing glass doors at reception

# LEMON BAY COUNTRY CLUB • SARASOTA, FLORIDA

9600 EAGLE PRESERVE DRIVE • ENGLEWOOD, FLORIDA, 34224

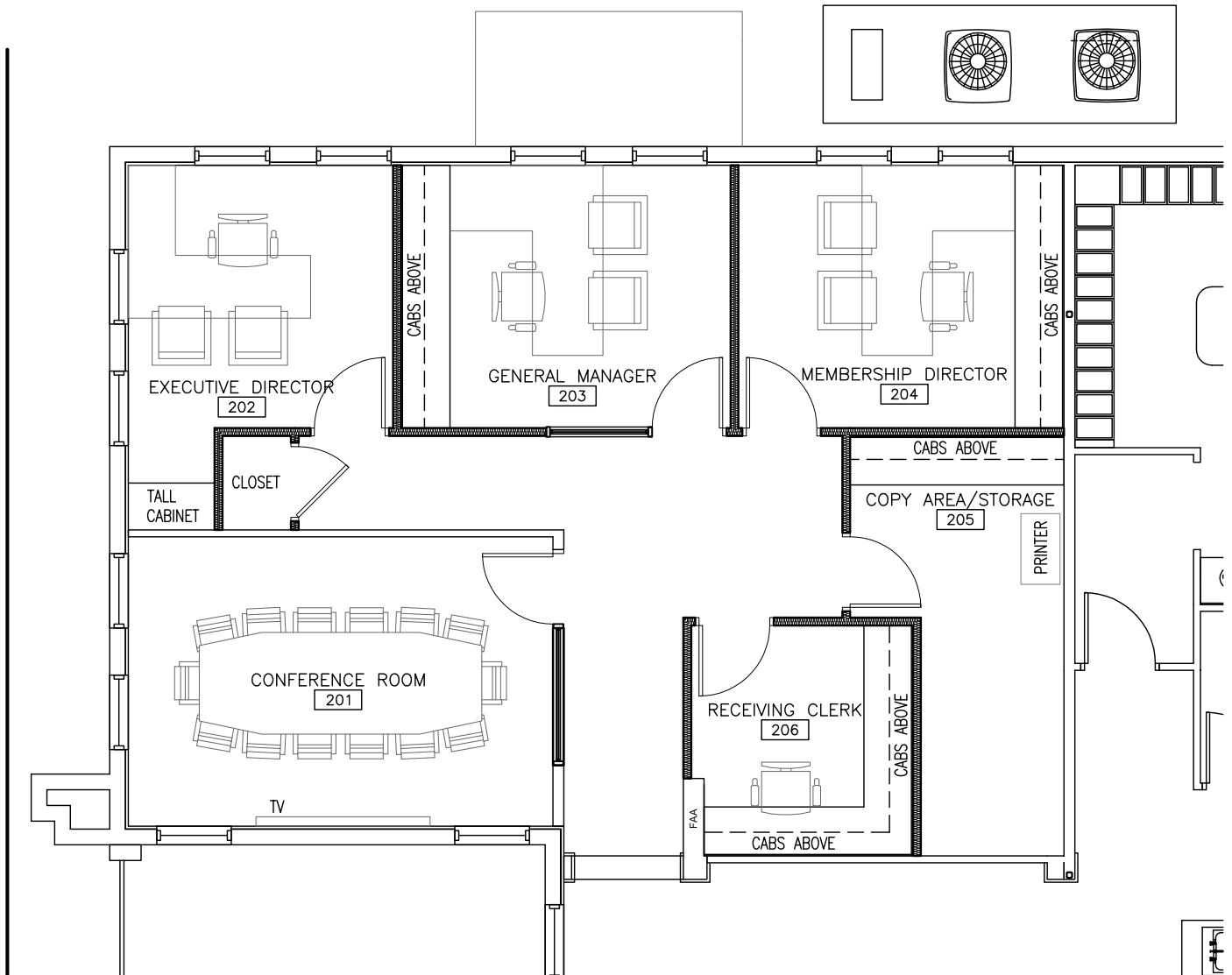
PROJECT TIMELINE • MARCH 2024 - MAY 2024

PROPOSER'S ROLE • ARCHITECT

PROJECT BUDGET • \$350,000

## SCOPE OF WORK

Architect of record for the renovation of existing office space and proshop, including full construction drawings completed in a quick time frame to accommodate membership season.



# OAKS COUNTRY CLUB • SARASOTA, FLORIDA

1100 JOHN RINGLING BLVD • SARASOTA, FLORIDA, 34236

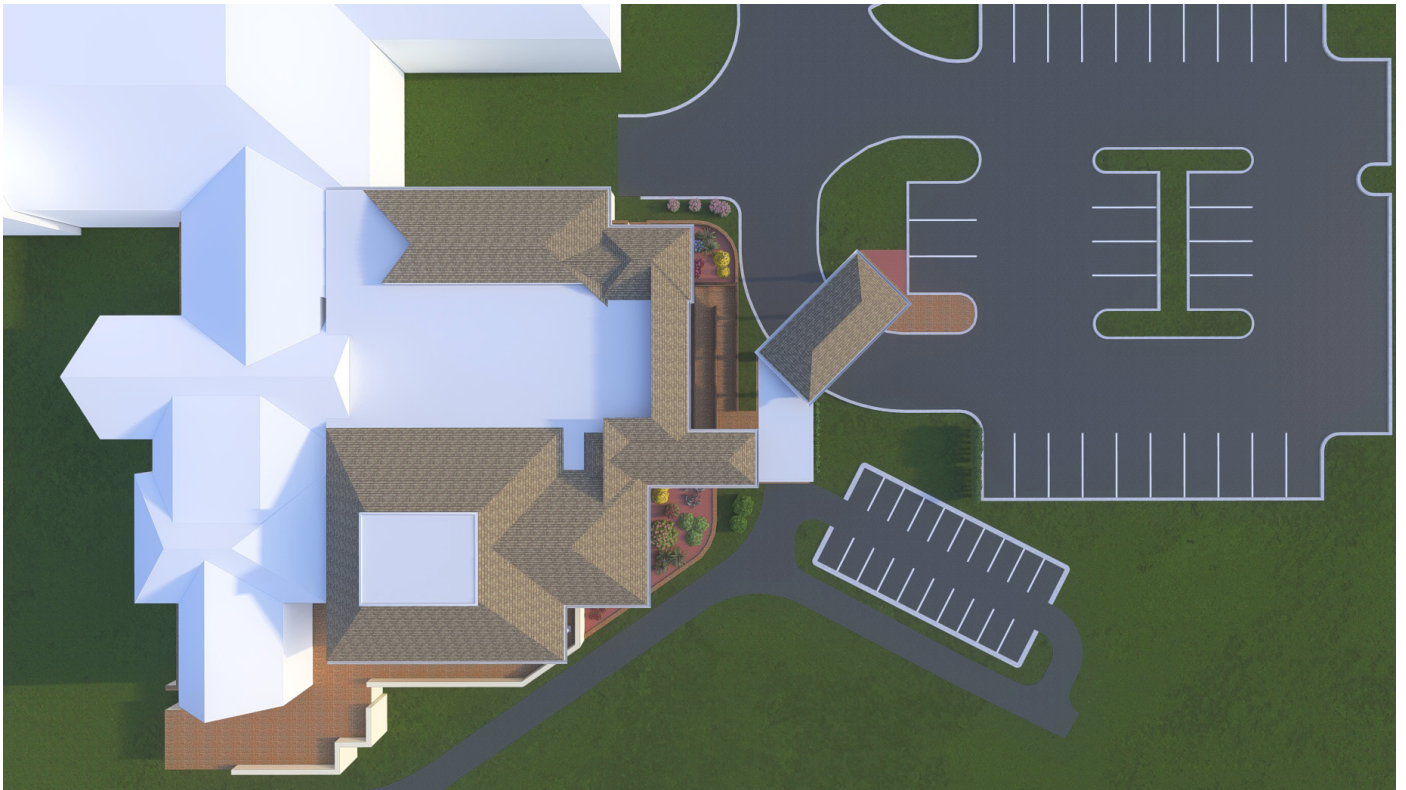
PROJECT TIMELINE • APRIL 2024 - JUNE 2024

PROPOSER'S ROLE • ARCHITECT

PROJECT BUDGET • \$150,000

## SCOPE OF WORK

Architect of record for a new porte cochere, covered walkway, and accessible ramp to be used as access to new grill room.



**SIMILAR COMPLETED PROJECTS**  
New Vertical Construction



**ARCHITECTS**

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ARCHITECTURE • PLANNING • INTERIOR DESIGN • CONSTRUCTION ADMINISTRATION

# PLAYER'S CLUB • LONGBOAT KEY, FLORIDA

1485 GULF OF MEXICO DR • LONGBOAT KEY, FLORIDA, 34228

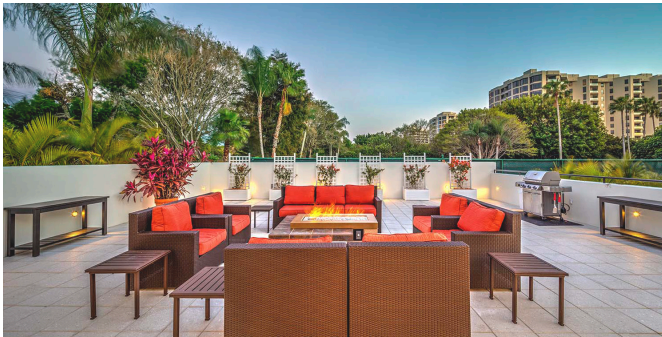
PROJECT TIMELINE • JUNE 2015 - AUGUST 2016

PROPOSER'S ROLE • ARCHITECT

PROJECT BUDGET • \$2,800,000

## SCOPE OF WORK

Architect of record hired to design, permit, consultant coordination, and provide full permit drawings for a 8,000 SF community clubhouse. The building includes community room, office space, library, fitness room, and outdoor covered living space.



# PLAYER'S CLUB • LONGBOAT KEY, FLORIDA

1485 GULF OF MEXICO DR • LONGBOAT KEY, FLORIDA, 34228



# THE COLLECTION CONDO • SARASOTA, FLORIDA

1335 SECOND STREET • SARASOTA, FLORIDA, 34236

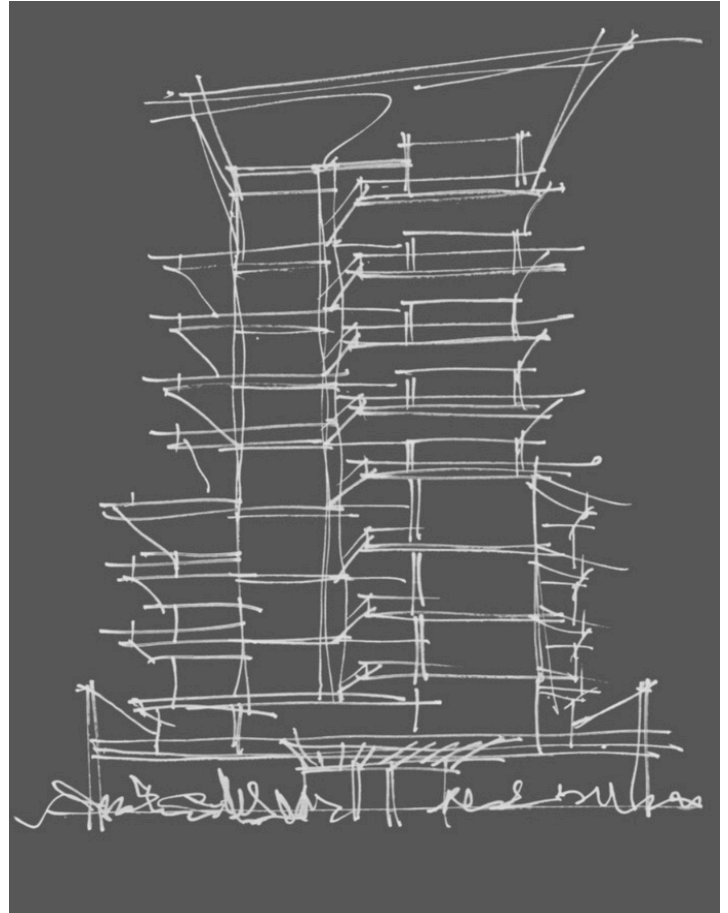
PROJECT TIMELINE • MAY 2018 - DECEMBER 2023

PROPOSER'S ROLE • ARCHITECT

PROJECT BUDGET • \$16,000,000

## SCOPE OF WORK

Architect of record hired to design, permit, consultant coordination, and provide full construction drawings and administration for a 12 unit high end condominium building. The building includes an amenity area with pool, fitness, conference room, sauna, restrooms, and community room.





**UNIVERSITY PARK RECREATION DISTRICT  
REQUEST FOR QUALIFICATIONS  
RFQ No. 24.001**



HOYT DSW INC  
1527 2<sup>ND</sup> Street Sarasota, FL 34236  
941-366-6066 x 101

**IN COLLABORATION WITH:**

KIMLEY HORN & ASSOCIATES  
QUEST DESIGN GROUP  
BLISS & NYITRAY, INC.

PROFESSIONAL RESTAURANT INCORPORATING DESIGN & EQUIPMENT

**ORIGINAL**



**TAB 1 – INTRODUCTION**



**UNIVERSITY PARK RECREATION DISTRICT  
REQUEST FOR QUALIFICATIONS  
RFQ No. 24.001**



**IN COLLABORATION WITH:**

KIMLEY HORN & ASSOCIATES

QUEST DESIGN GROUP

BLISS & NYITRAY, INC.

PROFESSIONAL RESTAURANT INCORPORATING DESIGN & EQUIPMENT

May 15, 2024

John Fetsick  
General Manager - UPRD  
7671 The Park Boulevard  
University Park, FL 34201

RE: University Park Recreation District (RFQ 24-001)

Dear Mr. Fetsick,

**HOYT Architects** is pleased to present our qualifications for the University Park Recreation District Project. We have carefully reviewed your Professional Services RFQ, and believe our team is uniquely qualified to serve the District on this assignment.

### **HOYT Architects**

Trusted by private developers, institutional leaders, and the public sector alike - for 30 years the team of designers, architects, and landscape architects at HOYT Architects has been creating some of Sarasota's most memorable places and spaces. Some of HOYT's top community venues include:

- Selby Library (Sarasota County's main library)
- Patriot Plaza at Sarasota National Cemetery (2016 Gulf Coast AIA People's Choice Award)
- Ed Smith Stadium (Home to the Baltimore Orioles Spring Training)
- Main Street, Lakewood Ranch (Lakewood Ranch's community shopping and entertainment center)
- Sarasota Bayfront Park (Downtown Sarasota's most popular waterfront destination)
- Town Center Green and Karon Family Pavilion (Longboat Key's new public square)

In addition, HOYT has designed some of the area's most exclusive residential amenity facilities - complete with clubhouses, fitness centers, meeting rooms, and kitchens. Each of the HOYT project team members also has a large portfolio of large and small renovation projects.

### **The HOYT team**

The Project design team members will be introduced and described in the sections that follow. Each of the key team members has strong experience designing clubhouses and dining facilities. The team includes:

- HOYT Architects – Architecture and Interior Design
- Quest Design Group – HVAC, plumbing, electric, and fire protection engineering
- Bliss and Nyitray Inc. – Structural engineering
- Professional Restaurant Incorporating Design and Equipment – Food service design
- Kimley Horn and Associates – Civil engineering
- Kimley Horn and Associates – Landscape architecture

### **Recent experience working with the Manatee County**

HOYT is presently in the site plan approval process for an expanded master plan and new building facilities for the Easterseals campus on Braden Avenue in Manatee County.

### **Programming and the final design concept**

The District has provided a good starting point for building programming. The HOYT team will work with the District to refine the final building programs, diagram the elements of the program, analyze options, and prepare the diagrams and exhibits that bring all the input together into one vivid and powerful concept design.

### **Visualization**

As the design for the project emerges, HOYT will provide real-time visualization of the evolving site,

buildings, and interiors. Every stakeholder will be able to experience both how the new buildings interact with the existing facilities, and how interior spaces function and feel.

In summary, we believe that our team, led and coordinated by HOYT Architects, brings to your project these 8 critical qualifications:

1. *Extensive residential amenity expertise and experience, and a knowledge of the latest trends.*
2. *Fitness facility design expertise and experience, including for professional athletes.*
3. *Restaurant and club-housing kitchen design expertise and experience*
4. *In-house interior design and landscape architecture expertise and experience.*
5. *Green building expertise and experience.*
6. *Broad experience and a successful track of assisting clients with community engagement.*
7. *Experience and a successful track working with Construction Managers*
8. *And, unmatched experiential design tools and expertise to help project clients move from vivid, early-stage concepts, to final designs.*

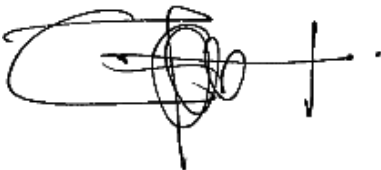
As you peruse our portfolio of work, you'll note that there's no architect-driven singular form or design style about these projects. Each is unique. The design for each project derived from a willingness to listen to our clients, and by a desire to create truly memorable projects, perfectly tailored to each client's needs and aspirations.

Our approach for each unique project is to build a team that best serves the project's needs. We bring together experts where we need them, and we act as the coordinating design team leader. We act as the client's agent – gathering input from them, sorting through all the technical details, and making sure that everyone is communicating effectively.

We offer expertise in not just a singular building type, but in our clear project management style, and in our **experiential approach to design**. Listening to the client, carefully coordinating the design team, and utilizing highly immersive, experiential visualization tools to move everyone from the world of 2D images to virtually walking through and around the space, as we design it – that's what we do. We are leaders in the field of experiential design and virtual reality communications.

We are eager to participate with the District in the expansion and enhancement of your campus and facilities. Thank you again for the opportunity to present our credentials.

Sincerely,

A handwritten signature in black ink, appearing to read 'Gary Hoyt', followed by a vertical line and a period.

Gary Hoyt FAIA  
President, HOYT Architects  
941-366-6066  
[gary@hoytarchitects.com](mailto:gary@hoytarchitects.com)

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# TAB 2 – MINIMUM QUALIFICATION REQUIREMENTS



## ONLINE SERVICES

- [Apply for a License](#)
- [Verify a Licensee](#)
- [View Food & Lodging Inspections](#)
- [File a Complaint](#)
- [Continuing Education Course Search](#)
- [View Application Status](#)
- [Find Exam Information](#)
- [Unlicensed Activity Search](#)
- [AB&T Delinquent Invoice & Activity List Search](#)

## LICENSEE DETAILS

3:47:45 PM 5/14/2024

**This is a business tracking record only.**  
[Click here for information on how to verify that this business is properly licensed.](#)

### Licensee Information

Name:	HOYT/DSW, INC. (Primary Name)
Main Address:	1527 2ND ST SARASOTA Florida 34236
County:	SARASOTA

### License Information

License Type:	Architect Business Information
Rank:	Business Info
License Number:	
Status:	Current,Active
Licensure Date:	04/21/1994
Expires:	

Special Qualifications	Qualification Effective
------------------------	-------------------------

Corporation	
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### Alternate Names

--

- [View Related License Information](#)
- [View License Complaint](#)



Ron DeSantis, Governor

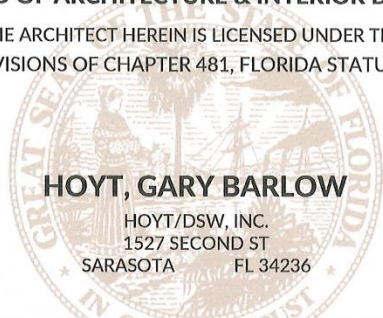
Melanie S. Griffin, Secretary



**STATE OF FLORIDA  
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION**

**BOARD OF ARCHITECTURE & INTERIOR DESIGN**

THE ARCHITECT HEREIN IS LICENSED UNDER THE  
PROVISIONS OF CHAPTER 481, FLORIDA STATUTES



**HOYT, GARY BARLOW**

HOYT/DSW, INC.  
1527 SECOND ST  
SARASOTA FL 34236

**LICENSE NUMBER: AR0008999**

**EXPIRATION DATE: FEBRUARY 28, 2025**

Always verify licenses online at [MyFloridaLicense.com](http://MyFloridaLicense.com)



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Ron DeSantis, Governor

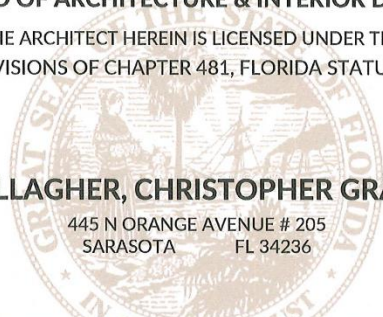
Melanie S. Griffin, Secretary



**STATE OF FLORIDA  
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION**

**BOARD OF ARCHITECTURE & INTERIOR DESIGN**

THE ARCHITECT HEREIN IS LICENSED UNDER THE  
PROVISIONS OF CHAPTER 481, FLORIDA STATUTES



**GALLAGHER, CHRISTOPHER GRANT**

445 N ORANGE AVENUE # 205  
SARASOTA FL 34236

**LICENSE NUMBER: AR99250**

**EXPIRATION DATE: FEBRUARY 28, 2025**

Always verify licenses online at [MyFloridaLicense.com](http://MyFloridaLicense.com)



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[Department of State](#) / [Division of Corporations](#) / [Search Records](#) / [Search by Entity Name](#) /

## Detail by Entity Name

Florida Profit Corporation  
HOYT/DSW, INC.

### Filing Information

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<b>Last Event</b>	AMENDMENT
<b>Event Date Filed</b>	09/17/2014
<b>Event Effective Date</b>	NONE

### Principal Address

1527 2ND ST.  
SARASOTA, FL 34236

### Mailing Address

1527 2ND ST.  
SARASOTA, FL 34236

### Registered Agent Name & Address

Hoyt Architects  
1527 2ND ST.  
SARASOTA, FL 34236

Name Changed: 02/10/2015

### Officer/Director Detail

#### **Name & Address**

Title President

HOYT, GARY B  
1527 2ND ST.  
SARASOTA, FL 34236

Title VP

GALLAGHER, CHRIS  
1527 2ND ST.  
SARASOTA, FL 34236

**Annual Reports**

Report Year	Filed Date
2022	01/27/2022
2023	04/24/2023
2024	02/21/2024

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**ONLINE SERVICES**

**LICENSEE DETAILS**

9:12:14 AM 2/26/2024

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- [Unlicensed Activity Search](#)
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**Licensee Information**

Name:	KIMLEY-HORN & ASSOCIATES, INC. (Primary Name)
Main Address:	421 FAYETTEVILLE STREET SUITE 600 RALEIGH North Carolina 27601
County:	OUT OF STATE
License Mailing:	421 FAYETTEVILLE STREET SUITE 600 RALEIGH NC 27601
County:	OUT OF STATE

**License Information**

License Type:	Engineering Business Registry
Rank:	Registry
License Number:	696
Status:	Current
Licensure Date:	05/10/1977
Expires:	

Special Qualifications	Qualification Effective

Alternate Names

- [View Related License Information](#)
- [View License Complaint](#)

# *State of Florida*

## *Department of State*

I certify from the records of this office that KIMLEY-HORN AND ASSOCIATES, INC. is a North Carolina corporation authorized to transact business in the State of Florida, qualified on April 24, 1968.


The document number of this corporation is 821359.

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 April 3, 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 Twenty-fourth day of April,  
2024*



  
*Secretary of State*

Tracking Number: 2703192226CU

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

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



Ron DeSantis, Governor

Melanie S. Griffin, Secretary



**STATE OF FLORIDA  
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION  
BOARD OF PROFESSIONAL ENGINEERS**

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

**WEDGEWORTH, SCOTT LOUIS**

3009 CLEMENTINE COURT  
UNIT 2325  
SARASOTA FL 34240

**LICENSE NUMBER: PE96799**

**EXPIRATION DATE: FEBRUARY 28, 2025**

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Ron DeSantis, Governor

Melanie S. Griffin, Secretary



**STATE OF FLORIDA**

**BOARD OF PROFESSIONAL ENGINEERS**

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PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

**BAKER, CHRISTOPHER RAY**

13425 3RD AVE NE  
BRADENTON FL 342120000

**LICENSE NUMBER: PE57962**

**EXPIRATION DATE: FEBRUARY 28, 2025**

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**STATE OF FLORIDA**

**BOARD OF PROFESSIONAL ENGINEERS**

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PROVISIONS OF CHAPTER 471, FLORIDA STATUTES

**SHEPARD, JON DANIEL**

7247 DELAINEY CT.  
SARASOTA FL 34240

**LICENSE NUMBER: PE71536**

**EXPIRATION DATE: FEBRUARY 28, 2025**

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Ron DeSantis, Governor

Melanie S. Griffin, Secretary



# STATE OF FLORIDA

## BOARD OF PROFESSIONAL ENGINEERS

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

**SPECIAL INSPECTOR NUMBER: 7025673**

**ALFONSO, LAZARO**

580 Village 580 VILLAGE BOULEVARD  
SUITE 310  
WEST PALM BEACH FL 33409

**LICENSE NUMBER: PE69782**

**EXPIRATION DATE: FEBRUARY 28, 2025**

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2. Hoyt Architects has performed architectural or engineering services for a minimum of four (4) projects since September 1, 2011. See below.

- a. HOYT Architects
- b. Sage Condominiums
- c. Property Markets Group
- d. Jon Glickman
- e. 917-886-9684
- f. [jglickman@propertymg.com](mailto:jglickman@propertymg.com)
- g. September 2020 to December 2022



- a. HOYT Architects
- b. Patriot Plaza
- c. Patterson Foundation
- d. Debra Jacobs
- e. 941-952-1413
- f. [djacobs@thepattersonfoundation.org](mailto:djacobs@thepattersonfoundation.org)
- g. December 2011 to March 2014





- a. HOYT Architects
- b. Aloft Hotel
- c. JWM Management, Inc.
- d. Shane Eagan
- e. 941-374-8800
- f. [seagan@wsemanagement.com](mailto:seagan@wsemanagement.com)
- g. May 2013 to July 2016



- a. HOYT Architects
- b. Sansara Condominiums
- c. MK Equity Corp.
- d. Matt Kihnke
- e. 773-457-4076
- f. [mrk@mkequity.com](mailto:mrk@mkequity.com)
- g. July 2013 to October 2016



4. Hoyt Architects is NOT listed on the Florida State Board of Administration, Scrutinized List of Prohibited Companies.
5. Hoyt Architects is not on the Florida Suspended or Debarred Vendor List
6. Hoyt Architects is not on the Federal Convicted Vendor or Excluded Parties list (SAM/EPLS)
7. Hoyt Architects is not a joint venture.
8. No conflicts of interests are present, see completed copy of Form 4.

**(Remainder of this page intentionally left blank)**

**TAB 3 – FORMS**

**See next page for forms**

**(Remainder of this page intentionally left blank)**

**FORM 1 - ACKNOWLEDGMENT OF ADDENDA**

The undersigned acknowledges receipt of the following addenda:

Addendum No. <u>1</u>	Date Received: <u>04/22/2024</u>
Addendum No. _____	Date Received: _____
Addendum No. _____	Date Received: _____
Addendum No. _____	Date Received: _____
Addendum No. _____	Date Received: _____
Addendum No. _____	Date Received: _____
Addendum No. _____	Date Received: _____
Addendum No. _____	Date Received: _____
Addendum No. _____	Date Received: _____

Print or type Proposer's information below:

Hoyt DSW INC dba, Hoyt Architects

Name of Proposer

941-366-6066

Telephone

1527 2nd Street

Street Address

Sarasota/FL/34236

City/State/Zip

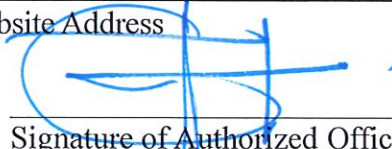
studio@hoytarchitects.com

Email Address

https://www.hoytarchitects.com/

Website Address

Gary B Hoyt, President  
 Print Name & Title of Authorized Officer



Signature of Authorized Official

Date May 14, 2024

**FORM 2 - PROPOSAL SIGNATURE FORM**

The undersigned represents that by signing this Proposal Signature Form that:

- (1) He/she has the authority and approval of the legal entity purporting to submit the Proposal and any additional documentation which may be required such as the Joint Venture Agreement or Joint Venture Affidavit, if applicable; and
- (2) All facts and responses set forth in the Proposal are true and correct; and
- (3) If the Proposer is selected by District to negotiate an agreement, that Proposer’s negotiators will negotiate in good faith to establish an agreement to provide the services described in this RFQ; and
- (4) By submitting a Proposal and signing below, the Proposer agrees to the terms and conditions in this RFQ, which incorporates all addenda, appendices, exhibits, and attachments, in its entirety, and is prepared to sign the Agreement, of which a sample is incorporated into this RFQ as Exhibit C. The Proposer understands that if it submits exceptions to the Sample Agreement in its Proposal, the Proposer may be determined non-responsive.

Print or type Proposer’s information below:

Hoyt DSW INC dba, Hoyt Architects

Name of Proposer

941-366-6066

Telephone Number

1527 2nd Street

Street Address

Sarasota/FL/34236

City/State/Zip

studio@hoytarchitects.com

Email Address

https://www.hoytarchitects.com/

Web Address

Gary B Hoyt, President

Print Name & Title of Authorized Officer

Date May 14<sup>th</sup>, 2024



Signature of Authorized Officer

(4) made an admission of guilt of such conduct described in items (1), (2) or (3) above, which is a matter of record, but has not been prosecuted for such conduct, or has made an admission of guilt of such conduct, which is a matter of record, pursuant to formal prosecution. An admission of guilt shall be construed to include a plea of nolo contendere; or

(5) where an officer, official, agent or employee of a business entity has been convicted of, or has admitted guilt to, any of the crimes set forth above on behalf of such an entity and pursuant to the direction or authorization of an official thereof (including the person committing the offense, if he/she is an official of the business entity), the business shall be chargeable with the conduct herein above set forth. A business entity shall be chargeable with the conduct of an affiliated entity, whether wholly owned, partially owned, or one which has common ownership or a common board of directors.

For purposes of this Form, business entities are affiliated if, directly or indirectly, one business entity controls or has the power to control another business entity, or if an individual or group of individuals controls or has the power to control both entities. Indicia of control shall include, without limitation, interlocking management or ownership, identity of interests among family members, shared organization of a business entity following the ineligibility of a business entity under this Article, or using substantially the same management, ownership or principles as the ineligible entity.

Any person or entity who claims that this Article is inapplicable to him/her/it because a conviction or judgment has been reversed by a court of competent jurisdiction, shall prove the same with documentation satisfactory to District's Purchasing Official. Upon presentation of such satisfactory proof, the person or entity shall be allowed to contract with University Park Recreation District.

I UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE UPRD STAFF DETERMINES THAT SUCH PERSON OR ENTITY HAS MADE FALSE CERTIFICATION.

GBH  
Signature of Contractor Representative

STATE OF Florida

COUNTY OF Sarasota

Sworn to and subscribed before me this 14th day of May, 2024  
by Gary Hoyt  Personally known OR  Produced the following identification

[Type of identification] \_\_\_\_\_ Notary Public Signature My  
commission expires 11-2-2027

CG

[Print, type or stamp Commissioned name of Notary Public]



**CHRIS GALLAGHER**  
Notary Public  
State of Florida  
Comm# HH441535  
Expires 11/2/2027

**Signatory Requirement** - In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a corporation, this affidavit shall be executed by the corporate president.



**FORM 4 - CONFLICT OF INTEREST DISCLOSURE FORM**

The award of an agreement resulting from this RFQ is subject to the provisions of UPRD RULES. Proposer must disclose within its Proposal: the name of any officer, director, or agent who is also an employee of UPRD. Furthermore, Proposer must disclose the name of any UPRD employee who owns, directly or indirectly, an interest of more than five percent (5%) in the Proposer's firm or any of its branches, divisions, or affiliates.

By signing below, Proposer confirms that it is not currently engaged or will not become engaged in any obligations, undertakings or contracts that will require the firm to maintain an adversarial role against the UPRD or that will impair or influence the advice or recommendations it provides to the UPRD.

Please check one of the following statements and attach additional documentation if necessary:

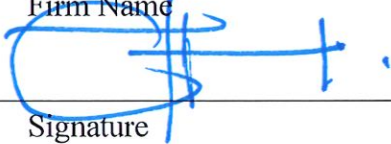
To the best of my knowledge, the undersigned firm has no potential conflict of interest for this RFQ.

The undersigned firm, by execution of this form, submits information which may be a potential conflict of interest for this RFQ.

Acknowledged and attested to by:

Hoyt DSW INC dba, Hoyt Architects

Firm Name



Signature

Gary B Hoyt, President

Name and Title (Print or Type)

May 14<sup>th</sup> 2024

Date

**Return this fully executed form with your Proposal.**

**FORM 5 - NON-COLLUSION AFFIDAVIT**

STATE OF Florida

COUNTY OF Sarasota

Before me, the undersigned authority, personally appeared Gary B Hoyt, who, after being by me first duly sworn, deposes and says of his/her personal knowledge that:

a. He/She is President of Hoyt Architects, the Proposer that has submitted a Proposal to perform work for the following:

RFQ No.: 24.001 Title: University Park Recreation District

b. He/She is fully informed respecting the preparation and contents of the attached Request for Qualifications, and of all pertinent circumstances respecting such Solicitation.

Such Proposal is genuine and is not a collusive or sham Proposal.

c. Neither the said Proposer nor any of its officers, partners, owners, agents, representatives, employees, or parties in interest, including this affiant, has in any way colluded, conspired, connived, or agreed, directly or indirectly, with any other Proposer, firm, or person to submit a collusive or sham Proposal in connection with the Solicitation and contract for which the attached Proposal has been submitted or to refrain from proposing in connection with such Solicitation and contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Proposer, firm, or person to fix the price or prices in the attached Proposal or any other Proposal, or to fix any overhead, profit, or cost element of the Proposal price or the Proposal price of any other Proposer, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against the District or any person interested in the proposed contract.

d. The price or prices to be submitted shall be fair and proper and shall not be tainted by any collusion, conspiracy, ~~connivance~~, or unlawful agreement on the part of the Proposer or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

Signature: [Handwritten Signature]

Subscribed and sworn to, (or affirmed) before me this 14th day of May 2024, by Gary Hoyt, who is personally known to me OR has produced \_\_\_\_\_ as identification.

Notary Signature: [Handwritten Signature]  
Notary Name: Chris Gallagher  
Notary Public (State): Florida  
My Commission No: HH 441535  
Expires on: 11-2-2027

SEAL



CHRIS GALLAGHER  
Notary Public  
State of Florida  
Comm# HH441535  
Expires 11/2/2027

**FORM 6 - TRUTH - IN - NEGOTIATION CERTIFICATE**

The undersigned warrants (i) that it has not employed or retained any company or person, other than bona fide employees working solely for the undersigned, to solicit or secure the Agreement and (ii) that it has not paid or agreed to pay any person, company, corporation, individual, or firm other than its bona fide employees working solely for the undersigned or agreed to pay any fee, commission, percentage, gift, or any other consideration contingent upon or resulting from the award or making of the Agreement.

The undersigned certifies that the wage rates and other factual unit costs used to determine the compensation provided for in the Agreement are accurate, complete, and current as of the date of the Agreement.

(This document must be executed by an authorized official of Proposer (e.g., President, CEO, Partner, Managing Partner)

Name: Gary B Hoyt

Title: President

Date: May 14<sup>th</sup> 2024

Signature: 

**FORM 7 – SCRUTINIZED COMPANY CERTIFICATION**

This certification is required pursuant to Florida State Statute Section 287.135 and must be executed and returned with Proposer’s Proposal.

As of July 1, 2011, a company that, at the time of bidding or submitting a Proposal 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 is ineligible for, and may not bid on, submit a Proposal for, or enter into or renew a contract with an agency or local governmental entity for goods or services of \$1 million or more.

Companies must complete and return this form with its response.

Company:

Hoyt DSW INC dba, Hoyt Architects

FEIN:

65-0437840

Address.

1527 2nd Street

City/State/Zip.

Sarasota/FL/34236

I, Gary B Hoyt, as a representative of Hoyt Architects

\_\_\_\_ certify and affirm that this entity is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

Signature

Gary B Hoyt

Printed Name

President

Title

May 14<sup>th</sup> 2024

Date

## FORM 8 – INSURANCE REQUIREMENTS

The Successful Proposer will not commence work under the resulting Agreement until all insurance coverages indicated by an “X” herein have been obtained. The Successful Proposer shall obtain and submit to the Procurement Division within ten (10) calendar days from the date of notice of intent to award, at its expense, the following minimum amounts of insurance (inclusive of any amounts provided by an umbrella or excess policy): Work under this Agreement cannot commence until all insurance coverages indicated herein have been obtained on a standard ACORD form (inclusive of any amounts provided by an umbrella or excess policy):

### **Automobile Liability Insurance Required Limits**

Coverage must be afforded under a per occurrence policy form including coverage for all owned, hired and non-owned vehicles for bodily injury and property damage of not less than:

- \$2,000,000 Combined Single Limit; OR
- \$1,000,000 Bodily Injury and \$1,000,000 Property Damage
- \$10,000 Personal Injury Protection (No Fault)
- \$500,000 Hired, Non-Owned Liability
- \$10,000 Medical Payments

*This policy shall contain severability of interests' provisions.*

### **Commercial General Liability Insurance Required Limits (per Occurrence form only; claims-made form is not acceptable)**

Coverage shall be afforded under a per occurrence policy form, policy shall be endorsed and name ‘University Park Recreation District, a political subdivision of the State of Florida’ as an Additional Insured, and include limits not less than:

- \$1,000,000 Single Limit Per Occurrence
- \$2,000,000 Aggregate
- \$2,000,000 Products/Completed Operations Aggregate
- \$1,000,000 Personal and Advertising Injury Liability
- \$100,000 Fire Damage Liability
- \$10,000 Medical Expense, and
- \$1,000,000, Third Party Property Damage
- \$ Project Specific Aggregate (Required on projects valued at over \$10,000,000)

*This policy shall contain severability of interests' provisions.*

**Employer's Liability Insurance**

Coverage limits of not less than:

- \$100,000 Each Accident
- \$500,000 Disease Each Employee
- \$500,000 Disease Policy Limit

Worker's Compensation Insurance

**US Longshoremen & Harbor Workers Act Jones Act Coverage**

Coverage limits of not less than:

- Statutory workers' compensation coverage shall apply for all employees in compliance with the laws and statutes of the State of Florida and the federal government.
- If any operations are to be undertaken on or about navigable waters, coverage must be included for the US Longshoremen & Harbor Workers Act and Jones Act.

Should 'leased employees' be retained for any part of the project or service, the employee leasing agency shall provide evidence of Workers' Compensation coverage and Employer's Liability coverage for all personnel on the worksite and in compliance with the above Workers' Compensation requirements. NOTE: Workers' Compensation coverage is a firm requirement. Elective exemptions are considered on a case-by-case basis and are approved in a very limited number of instances.

**Aircraft Liability Insurance Required Limits**

Coverage shall be afforded under a per occurrence policy form, policy shall be endorsed and name 'Manatee County a political subdivision of the State of Florida' as an Additional Insured, and include limits not less than:

- \$ Each Occurrence Property and Bodily Injury with no less than \$100,000 per passenger each occurrence or a 'smooth' limit.
- \$ General Aggregate.

**Un-Manned Aircraft Liability Insurance (Drone)**

Coverage shall be afforded under a per occurrence policy form, policy shall be endorsed and name 'Manatee County a political subdivision of the State of Florida' as an Additional Insured, and include limits not less than:

- \$ Each Occurrence Property and Bodily Injury; Coverage shall specifically include operation of Unmanned Aircraft Systems (UAS), including liability and property damage. • \$ General Aggregate

**Installation Floater Insurance**

When the contract or agreement **does not** include construction of, or additions to, above ground building or structures, but does involve the installation of machinery or equipment, Installation

Floater Insurance shall be afforded under a per occurrence policy form, policy shall be endorsed and name "Manatee County, a political subdivision of the State of Florida" as an Additional Insured, and include limits not less than:

- 100% of the completed value of such addition(s), building(s), or structure(s)

**Professional Liability and/or Errors and Omissions (E&O) Liability Insurances**

Coverage shall be afforded under either an occurrence policy form or a claims-made policy form. If the coverage form is on a claims-made basis, then coverage must be maintained for a minimum of three years from termination of date of the contract. Limits must not be less than:

- \$ 3,000,000 Bodily Injury and Property Damage Each Occurrence
- \$ 3,000,000 General Aggregate

**Builder's Risk Insurance**

When the contract or agreement includes the construction of roadways and/or the addition of a permanent structure or building, including the installation of machinery and/or equipment, Builder's Risk Insurance shall be afforded under a per occurrence policy form, policy shall be endorsed and name "University Park Recreation District, a political subdivision of the State of Florida" as an Additional Insured, and include limits not less than:

- An amount equal to 100% of the completed value of the project, or the value of the equipment to be installed
- The policy shall not carry a self-insured retention/deductible greater than \$10,000

Coverage shall be for all risks and include, but not be limited to, storage and transport of materials, equipment, supplies of any kind whatsoever to be used on or incidental to the project, theft coverage, and Waiver of Occupancy Clause Endorsement, where applicable.

**Cyber Liability Insurance**

Coverage shall comply with Florida Statute 501.171, shall be afforded under a per occurrence policy form, policy shall be endorsed and name 'Manatee County, a political subdivision of the State of Florida' as an Additional Insured, and include limits not less than:

- \$ Security Breach Liability
- \$ Security Breach Expense Each Occurrence
- \$ Security Breach Expense Aggregate
- \$ Replacement or Restoration of Electronic Data
- \$ Extortion Threats
- \$ Business Income and Extra Expense
- \$ Public Relations Expense

NOTE: Policy must not carry a self-insured retention/deductible greater than \$25,000.

**Hazardous Materials Insurance (As Noted Below)**

Hazardous materials include all materials and substances that are currently designated or defined as hazardous by the law or rules of regulation by the State of Florida or federal government. All coverage shall be afforded under either an occurrence policy form or a claims-made policy form, and the policy shall be endorsed and name 'UPRD, a political subdivision of the State of Florida' as an Additional Insured. If the coverage form is on a claims-made basis, then coverage must be maintained for a minimum of three years from termination of date of the contract. Limits must not be less than:

***Pollution Liability***

Amount equal to the value of the contract, subject to a \$1,000,000 minimum, for Bodily Injury and Property Damage to include sudden and gradual release, each claim and aggregate.

***Asbestos Liability (If handling within scope of Contract)***

Amount equal to the value of the contract, subject to a \$1,000,000 minimum, for Bodily Injury and Property Damage to include sudden and gradual release, each claim and aggregate.

***Disposal***

When applicable, Successful Proposer shall designate the disposal site and furnish a Certificate of Insurance from the disposal facility for Environmental Impairment Liability Insurance covering liability.

- Amount equal to the value of the contract, subject to a \$1,000,000 minimum, for Liability for Sudden and Accidental Occurrences, each claim and an aggregate.
- Amount equal to the value of the contract, subject to a \$1,000,000 minimum, for Liability for Non-Sudden and Accidental Occurrences, each claim and an aggregate.

**Hazardous Waste Transportation Insurance**

Successful Proposer shall designate the hauler and have the hauler furnish a Certificate of Insurance for Automobile Liability insurance with Endorsement MCS-90 for liability arising out of the transportation of hazardous materials. EPA identification number shall be provided.

All coverage shall be afforded under either an occurrence policy form or a claims-made policy form and the policy shall be endorsed and name "Manatee County, a political subdivision of the State of Florida" as an Additional Insured. If the coverage form is on a claims-made basis, then coverage must be maintained for a minimum of three years from termination of date of the contract. Limits must not be less than:

- Amount equal to the value of the contract, subject to a \$1,000,000 minimum, per accident.



**Liquor Liability Insurance**

Coverage shall be afforded under a per occurrence policy form, policy shall be endorsed and name “Manatee County, a political subdivision of the State of Florida” as an Additional Insured, and include limits not less than:

- \$1,000,000 Each Occurrence and Aggregate

**Garage Keeper’s Liability Insurance**

Coverage shall be required if the maintenance, servicing, cleaning or repairing of any County motor vehicles is inherent or implied within the provision of the contract.

Coverage shall be afforded under a per occurrence policy form, policy shall be endorsed and name “Manatee County, a political subdivision of the State of Florida” as an Additional Insured, and include limits not less than:

- Property and asset coverage in the full replacement value of the lot or garage.

**Bailee’s Customer Liability Insurance**

Coverage shall be required for damage and/or destruction when County property is temporarily under the care or custody of a person or organization, including property that is on, or in transit to and from the person or organization’s premises. Perils covered should include fire, lightning, theft, burglary, robbery, explosion, collision, flood, earthquake and damage or destruction during transportation by a carrier.

Coverage shall be afforded under a per occurrence policy form, policy shall be endorsed and name “Manatee County, a political subdivision of the State of Florida” as an Additional Insured, and include limits not less than:

- Property and asset coverage in the full replacement value of the County asset(s) in the Successful Proposer’S care, custody and control.

**Hull and Watercraft Liability Insurance**

Coverage shall be afforded under a per occurrence policy form, policy shall be endorsed and name “Manatee County, a political subdivision of the State of Florida” as an Additional Insured, and include limits not less than:

- \$ Each Occurrence
- \$ General Aggregate
- \$ Fire Damage Liability
- \$10,000 Medical Expense, and
- \$ Third Party Property Damage
- \$ Project Specific Aggregate (Required on projects valued at over \$10,000,000)

Other [Specify]

**BOND REQUIREMENTS  Bid Bond**

A Bid Bond in the amount of \$\_\_\_\_\_ or \_\_\_\_\_% of the total offer. Bid bond shall be submitted with the sealed response and shall include project name, location, and / or address and project number. In lieu of the bond, the bidder may file an alternative form of security in the amount of \$\_\_\_\_\_ or \_\_\_\_\_% of the total offer. in the form of a money order, a certified check, a cashier's check, or an irrevocable letter of credit issued to Manatee County. NOTE: A construction project over \$200,000 requires a Bid Bond in the amount of 5% of the total bid offer.

**Payment and Performance Bond**

A Payment and Performance Bond shall be submitted by Successful Bidder for 100% of the award amount and shall be presented to Manatee County within ten (10) calendar days of issuance of the notice of intent to award. NOTE: A construction project over \$200,000 requires a Payment and Performance Bond.

**INSURANCE REQUIREMENTS**

**I. THE POLICIES ARE TO CONTAIN, OR BE ENDORSED TO CONTAIN, THE FOLLOWING PROVISIONS:**

**Commercial General Liability and Automobile Liability Coverages**

- a. **“University Park Recreation District a Political Subdivision of the State of Florida,” is to be named as an Additional Insured in respect to:** Liability arising out of activities performed by or on behalf of the Successful Proposer, his agents, representatives, and employees; products and completed operations of the Successful Proposer; or automobiles owned, leased, hired or borrowed by the Successful Proposer. The coverage shall contain no special limitation(s) on the scope of protection afforded to the DISTRICT, its officials, employees or volunteers. In addition to furnishing a Certificate of Insurance, the Successful Proposer shall provide the endorsement that evidences DISTRICT being listed as an Additional Insured. This can be done in one of two ways: (1) an endorsement can be issued that specifically lists “UNIVERSITY PARK RECREATION DISTRICT, a Political Subdivision of the State of Florida,” as Additional Insured; or, (2) an endorsement can be issued that states that all Certificate Holders are Additional Insured with respect to the policy.
- b. The Successful Proposer's insurance coverage shall be primary insurance with respect to the DISTRICT, its officials, employees and volunteers. Any insurance or self-insurance maintained by the DISTRICT, its officials, employees or volunteers shall be excess of Successful Proposer's insurance and shall be non-contributory.

- c. The insurance policies must be on an occurrence form.

### **Workers' Compensation and Employers' Liability Coverages**

The insurer shall agree to waive all rights of subrogation against the DISTRICT, its officials, employees and volunteers for losses arising from work performed by the Successful Proposer for the DISTRICT.

## **II. General Insurance Provisions Applicable to All Policies**

1. Prior to the execution of contract, or issuance of a Purchase Order, and then annually upon the anniversary date(s) of the insurance policy's renewal date(s) for as long as this contract remains in effect, Successful Proposer shall furnish the DISTRICT with a Certificate(s) of Insurance (using an industry accepted certificate form, signed by the Issuer, with applicable endorsements, and containing the solicitation or contract number, and title or description) evidencing the coverage set forth above and naming "UNIVERSITY PARK RECREATION DISTRICT, a Political Subdivision of the State of Florida" as an Additional Insured on the applicable coverage(s) set forth above.
2. If the policy contains an aggregate limit, confirmation is needed in writing (letter, email, etc.) that the aggregate limit has not been eroded to procurement representative when supplying Certificate of Insurance. In addition, when requested in writing from the DISTRICT, Successful Proposer will provide the DISTRICT with a certified copy of all applicable policies. The address where such certificates and certified policies shall be sent or delivered is as follows:

**John Fetsick**  
**General Manager**  
**University Park Recreation District**  
**7671 The Park Boulevard**  
**University Park, FL 34201**

3. The project's title shall be listed on each certificate.
4. Successful Proposer shall provide thirty (30) days written notice to the Risk Manager of any cancellation, non-renewal, termination, material change, or reduction in coverage of any insurance policies to procurement representative including solicitation number and title with all notices.
5. Successful Proposer agrees that should at any time Successful Proposer fail to meet or maintain the required insurance coverage(s) as set forth herein, the DISTRICT may terminate this contract.
6. The Successful Proposer waives all subrogation rights against DISTRICT, a Political Subdivision of the State of Florida, for all losses or damages which occur during the contract and for any events occurring during the contract period, whether the suit is brought during the contract period or not.

7. The Successful Proposer has sole responsibility for all insurance premiums and policy deductibles.
8. It is the Successful Proposer's responsibility to ensure that his agents, representatives and subcontractors comply with the insurance requirements set forth herein. Successful Proposer shall include his agents, representatives, and subcontractors working on the project or at the worksite as insured under its policies, or Successful Proposer shall furnish separate certificates and endorsements for each agent, representative, and subcontractor working on the project or at the worksite. All coverages for agents, representatives, and subcontractors shall be subject to all of the requirements set forth to the procurement representative.
9. All required insurance policies must be written with a carrier having a minimum A.M. Best rating of A- FSC VII or better. In addition, the DISTRICT has the right to review the Successful Proposer's deductible or self-insured retention and to require that it be reduced or eliminated.
10. Successful Proposer understands and agrees that the stipulated limits of coverage listed herein in this insurance section shall not be construed as a limitation of any potential liability to the DISTRICT, or to others, and the DISTRICT'S failure to request evidence of this insurance coverage shall not be construed as a waiver of Successful Proposer'S obligation to provide and maintain the insurance coverage specified.
11. Successful Proposer understands and agrees that the DISTRICT does not waive its immunity and nothing herein shall be interpreted as a waiver of the DISTRICT'S rights, including the limitation of waiver of immunity, as set forth in Florida Statutes 768.28, or any other statutes, and the DISTRICT expressly reserves these rights to the full extent allowed by law.
12. No award shall be made until the Procurement Division has received the Certificate of Insurance in accordance with this section.

## FORM 8, INSURANCE STATEMENT RFQ

**THE UNDERSIGNED** has read and understands the insurance requirements applicable to any Agreement resulting from this solicitation and shall provide the insurances required in this RFQ within ten (10) days from the date of Notice of Intent to Award.

Proposer Name:

Hoyt Architects

Date:

May 14<sup>th</sup> 2024

Signature  
(Authorized  
Official):



A handwritten signature in blue ink, appearing to be 'GSI', is written over a horizontal line.

Printed Name/Title:

Gary B Hoyt, President

---

Insurance Agency:

Brown & Brown

---

Agent Name:

Cameron Poole

---

Agent Phone:

781-451-6936

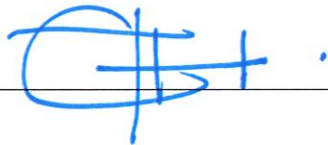
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***Return this signed statement with your proposal.***

**FORM 9, INDEMNITY AND HOLD HARMLESS**

**UNIVERSITY PARK RECREATION DISTRICT, A POLITICAL SUBDIVISION OF THE STATE OF FLORIDA**

The Successful Proposer shall indemnify and hold harmless District, its officers, and employees from liabilities, damages, losses, and costs, including but not limited to reasonable attorney's fees, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the Successful Proposer, its personnel, design professionals and other persons employed or utilized by the Successful Proposer in the performance of the Agreement, including without limitation, defects in design, or errors or omissions that result in material cost increases to District. Such indemnification shall include the payment of all valid claims, losses, and judgments of any nature whatsoever in connection therewith and the payment of all related fees and costs. The District reserves the right to defend itself with its own counsel or retained counsel at Successful Proposer's expense.

Signature of Authorized Official of Proposer: 

Title: Date: May 14<sup>th</sup>, 2024

Project Number and /or Name: University Park Recreation District No. 24.001

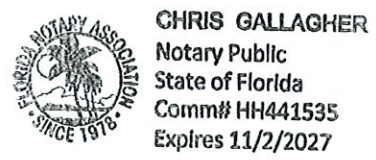
Insurance Agent: Brown & Brown / Cameron Poole

Acknowledgement:  
STATE OF Florida  
COUNTY OF Sarasota

The foregoing instrument was acknowledged before me this 14<sup>th</sup> day of May, 2024 by Gary B. Hoyt [FULL LEGAL NAME], who is

Personally known to me  
OR  
 has produced \_\_\_\_\_ as identification.

Notary Signature   
Print Name Chris Gallagher  
Seal



**TAB 4 - TRADE SECRETS**

There are no trade secrets to claim.

**(Remainder of this page intentionally left blank)**

## TAB 5 - PROPOSER STATEMENT OF ORGANIZATION

1. Legal Name: HOYT/DSW, Inc. dba HOYT Architects.
2. State of organization: Florida
3. Ownership structure: Corporation
4. Federal ID Number: 65-0437840
5. W-9: attached
6. Corporate office address:
  - a. 1527 2<sup>nd</sup> Street,
  - b. Sarasota, Florida 34236
  - c. 941-366-6066
  - d. Years at this location: 31 years (September 23, 1993)
7. Corporate Owners/Partners/Officers
  - a. President: Gary Hoyt
    - i. 1527 2<sup>nd</sup> Street, Sarasota, FL 34236
    - ii. gary@hoytarchitects.com
    - iii. 941-366-6066 / 941-586-6309
  - b. Vice President: Chris Gallagher
    - i. 1527 2<sup>nd</sup> Street, Sarasota, FL 34236
    - ii. chris@hoytarchitects.com
    - iii. 941-366-6066 / 941-284-2589
8. Proposed is not a minority-owned business enterprise.
9. Contact information:
  - a. Primary: Chris Gallagher
    - i. 941-366-6066 / 941-284-2589
    - ii. chris@hoytarchitects.com
    - iii. 1527 2<sup>nd</sup> Street
    - iv. Sarasota, FL 34236
  - b. Secondary: Jill Butterworth
    - i. 941-366-6066 / 941-763-9513
    - ii. jill@hoytarchitects.com
    - iii. 1527 2<sup>nd</sup> Street
    - iv. Sarasota, FL 34236



10. Prior ( in the last 3 years) or pending litigation involving a government agency or which may affect the performance of services: None

11. Anticipated Ownership Changes: The firm will be adding a new partner within the next 6 months:

- a. New Partner: George Scarfe
  - i. 941-366-6066 / 941-232-0499
  - ii. george.scarfe@hoytarchitects.com
  - iii. 1527 2<sup>nd</sup> Street
  - iv. Sarasota, FL 34236

**(Remainder of this page intentionally left blank)**

**Request for Taxpayer  
 Identification Number and Certification**

**Give Form to the  
 requester. Do not  
 send to the IRS.**

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type.  
See Specific instructions on page 3.

**1** Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.  
**HOYT DSW INC**

**2** Business name/disregarded entity name, if different from above  
**HOYT ARCHITECTS**

**3** Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

Individual/sole proprietor or single-member LLC     C Corporation     S Corporation     Partnership     Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ \_\_\_\_\_

**Note:** Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see instructions) ▶ \_\_\_\_\_

**4** Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) \_\_\_\_\_

Exemption from FATCA reporting code (if any) \_\_\_\_\_

*(Applies to accounts maintained outside the U.S.)*

**5** Address (number, street, and apt. or suite no.) See instructions.  
**1527 2ND STREET**

**6** City, state, and ZIP code  
**SARASOTA FL 34236**

**7** List account number(s) here (optional)

Requester's name and address (optional)

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

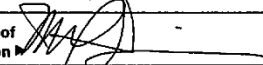
<b>Social security number</b>									
			-						
OR									
<b>Employer identification number</b>									
6	5	-	0	4	3	7	8	4	0

**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

**Sign Here**    Signature of U.S. person ▶     Date ▶ 12/7/23

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*

## TAB 6 – RESPONDENT AND TEAM’S EXPERIENCE

1. Hoyt Architects has been providing professional architectural services in the Sarasota/Manatee area for more than 30 years. The firm's background includes master planning, urban design, landscape architecture, interior design, historic preservation, residential design, multi-family design, hospitality design, office and institutional design, retail and restaurants, libraries, parks, sports facilities, and fitness and clubhouse facilities. The firm has 15 employees.
  
2. Hoyt Architects has provided professional architectural services for the following projects for the following government agencies:
  - a. **The City of Sarasota** (Municipal Auditorium, One Stop Office Building, Bayfront Park, Downtown Zoning and Massing Study, Fruitville Road Roundabout visualization study)
  
  - b. **Sarasota County** (Selby Library, Fruitville Library, Ed Smith Stadium, Ed Smither Stadium Clubhouse, Buck O’Neil Baseball Clubhouse, Colonial Oaks Park, Woodmere Park)
  
  - c. **The Town of Longboat Key** (Longboat Key Town Center, Town Center Pavilion)
  
  - d. **Sarasota Housing Authority** (Amaryllis Park Place apartments, Amaryllis Park Place II, Amaryllis Park Place III, Lofts on Lemon apartments, Lofts on Lemon II, McCown Tower, McCown Annex)
  
  - e. **Cocoa Beach** (Cocoa Riverfront Park)
  
  - f. **Collier County** (Vineyards Park)
  
  - g. **Martin County** (Indian Riverside Park)
  
  - h. **Polk County** (Carter Road Park)
  
  - i. **University of Florida** (DCP Campus)
  
  - j. **US Department of Veterans Affairs** (Patriot Plaza at Sarasota National Cemetery)
  
3. Hoyt Architects has been providing professional architectural services in the Sarasota/Manatee area for more than 30 years.

4. Key personnel assigned to this project include Gary Hoyt (30+ years at Hoyt Architects), Chris Gallagher (10+ years at Hoyt Architects), George Scarfe (10+ years at Hoyt Architects) and Jill Butterworth (1 year).

The current primary office for each is 1527 2<sup>nd</sup> Street, Sarasota, Florida 34236. Contact information and roles are listed below. Resumes follow.

- Gary Hoyt (Project Designer)
    - gary@hoytarchitects.com
    - 941-366-6066 / 941-586-6309
  - Chris Gallagher (Project Manager)
    - chris@hoytarchitects.com
    - 941-366-6066 / 941-284-2589
  - George Scarfe (Job Captain)
    - 941-366-6066 / 941-232-0499
    - george.scarfe@hoytarchitects.com
  - Jill Butterworth (Interior Designer)
    - 941-366-6066 / 941-763-9513
    - jill@hoytarchitects.com
5. Proposed sub-consultants are listed below. Resumes follow.
    - Kimley Horn and Associates (Civil Engineering)
      - Scott Wedgeworth
    - Kimley Horn and Associates (Landscape Architecture)
      - Matt Dunn
    - Bliss and Nyitray Inc. (Structural Engineering)
      - Gabe Lietz
    - Quest Design Group (MEPF Engineering)
      - Chris Baker
    - PRIDE (Food Service Design)
      - Paul Guillaume
  6. Significant accomplishments, recognition, and awards:
    - 2023 Florida Redevelopment Association Award – Outstanding Housing Project
    - 2020 Ringling College - Innovation by Design Award
    - 2019 SRQ Magazine - Gold Award
    - 2017 SRQ Magazine – Building of the Year Award

7. References listed below:

- Property Markets Group
  - 398 NE 5<sup>th</sup> Street, 13<sup>th</sup> Floor, Miami, FL 33132
  - Jon Glickman
  - 917-886-9684
  - jglickman@propertymg.com
  - Design of a luxury beachfront condominium project
  - October 2020 to March 2023
  - \$768,000
  
- Town of Longboat Key
  - 501 Bay Isles Road, Longboat Key, FL 34228
  - Isaac Brownman
  - 941-316-1988 Ext. 2210
  - ibrownman@longboatkey.org
  - Design of Longboat Key Town Center and Karon Family Pavilion
  - March 2021 to September 2023
  - \$62,100
  
- JWM Management, Inc.
  - 1229 S Tamiami Trail, Sarasota, FL 34239
  - Shane Eagan
  - 941-374-8800
  - seagan@wsemanagement.com
  - Design of the aloft Hotel in Downtown Sarasota
  - May 2013 to July 2015
  - \$1,149,000
  
- Willis Smith Construction
  - 5001 Lakewood Ranch Blvd., Sarasota, FL 34240
  - John LaCivita
  - 941-366-3116 x310
  - JLaCivita@willissmith.com
  - Design of the City of Sarasota One Stop Shop Office Building
  - February 2021 to May 2024
  - \$357,000



**PERSONAL PROFILE**

As the founding Principal of Hoyt Architects, Mr. Hoyt has more than 30 years experience in the design, planning, and programming of a wide variety of building types. Prior to forming his own firm, Gary worked as a design Architect for the internationally recognized firm of Safdie Architects where he was involved in several notable projects such as Cambridge Center and The National Gallery of Canada. Mr. Hoyt co-founded Design Options, one of the first 3rd party programs for AutoCAD, dedicated to using CAD as a design tool. After exiting Design Options, he founded Hoyt Architects, a leading Florida Architecture & Planning firm, and serves as its President and Director of Design. Hoyt's experience with numerous mixed-use and town planning projects integrates a wide range of commercial, institutional, and residential building types into unified urban design solutions. Mr Hoyt is also President of H.A.L. (Hoyt Architecture Lab), a 3D visualization laboratory and associated tech company IMERZA.

**EDUCATION**

Master of Architecture  
University of Florida

**REGISTRATION**

Registered Professional Architect  
Florida, Georgia and Massachusetts

**INDUSTRY AFFILIATIONS**

American Institute of Architects  
Association for Computer Aided  
Design in Architecture

National Council of Architectural  
Registration Boards

**COMMUNITY AFFILIATIONS**

Advisory Board, University of Florida,  
College of Design Construction and  
Planning

Former Chairman, Sarasota Housing  
Authority

Former Board Member, Committee  
Housing Corporation

Former President, Boy Scouts of  
America SW Florida Council  
Chairman of the Physical Resources  
Committee, Boy Scouts of America  
SW Florida Council  
Member, Urban Land Institute

**SELECTED PROJECTS**

Aloft Hotel + Apartments at One Palm  
Sarasota, FL

The Jewel  
Sarasota, FL

The DeSota - Mixed-Use  
Development  
Sarasota, FL

Oriole's Major League Spring Training  
Stadium & Clubhouse  
Sarasota, FL

Patriot Plaza - Sarasota National  
Cemetery  
Sarasota, FL

Hyatt Hotel Stesia Key  
Sarasota, FL

Hyatt Hotel Ballroom/Conference  
Center  
Sarasota, FL

Marina Towers  
Sarasota, FL

Main Street Entertainment Complex  
Sarasota, FL

Selby Library  
Sarasota, FL

Summerhill  
Atlanta, GA

Main Street at Lakewood Ranch  
Lakewood Ranch, FL



**PERSONAL PROFILE**

Chris Gallagher, a partner with HOYT Architects, has 30 years of experience in design, planning, and construction. He is the designer of the acclaimed Citrus Square, a three-story, mixed-use, authentically-detailed, pedestrian-friendly project in downtown Sarasota. Citrus Square was awarded the Best New Low-Rise Development in the U.S. in 2011. Planning Edges called Citrus Square: "The most important building in Sarasota". Mr. Gallagher is also Headmaster Emeritus of the New Gate Montessori School.

**EDUCATION**

Bachelor of Science in Environmental Design  
University of Massachusetts

Master of Architecture  
University of Colorado, College of Design and Planning

**AWARDS**

2021 Sarasota Lifetime of Leadership Award

The Chairman's Cup 2012 - for Exceptional Contribution of Service to the Community

Best New Low-Rise Development Award

Commercial Design of Distinction Award, Biz 941 Magazine

Keep Sarasota Beautiful, Commercial

**Beautification Award**

Design Excellence Award for Outdoor Living; Residential and Building Magazine

The Mayor's Preservation Award

**PROFESSIONAL & COMMUNITY AFFILIATIONS**

Past Chair, City of Sarasota Planning Board

Past Chair, City of Sarasota Parking Advisory Committee

Past Chair, Greater Sarasota Chamber of Commerce

Past Chair, Leadership Sarasota

Past Chair, Sarasota Alliance for Historic Preservation

Past Chair, Sarasota Tree Advisory Counsel

Past Member, Sarasota Affordable Housing Advisory Committee

Member, International Council of Shopping Center

Member, International CPTED Association

Member, AIA

Member, NCARB

**LECTURES & TEACHING**

In Search of Great Streets and Squares: Barcelona

What aspiring Montessori schools can learn from the world's greatest cities

The Changing Landscape of Multi-Family Design

The Importance of Beauty to a Child

**REGISTRATION**

Registered Professional Architect  
Florida, Maine

**SELECT PROJECTS**

Citrus Square Residences I, II, III, IV  
Sarasota, FL

1500 State Street  
Sarasota, FL

Amaryllis Park Place  
Sarasota, FL

Belle Haven Historic Renovations  
Sarasota, FL

Palm Tower Offices  
Sarasota, FL

The Pearl Condominiums  
Sarasota, FL

Herald Tribune Offices  
Sarasota, FL



**PERSONAL PROFILE**

George has more than 20 years in the construction industry, beginning as apprentice plumber and then damage control man in the U.S. Navy. By utilizing his GI Bill, George returned to school to obtain a degree in Architectural Drafting. After working as a drafter, he returned to school and obtained his Masters Degree in Architecture from The University of South Florida. George has worked on a variety of projects including medical offices, educational buildings, public buildings, assisted living, hospitality, retail, high rise, mixed use and upscale residential condominiums.

**EDUCATION**

Master of Architecture  
University of South Florida

**AWARDS**

World Architecture (WA) Designer Award  
Tampa, FL  
  
2010 Resilient City Finalist

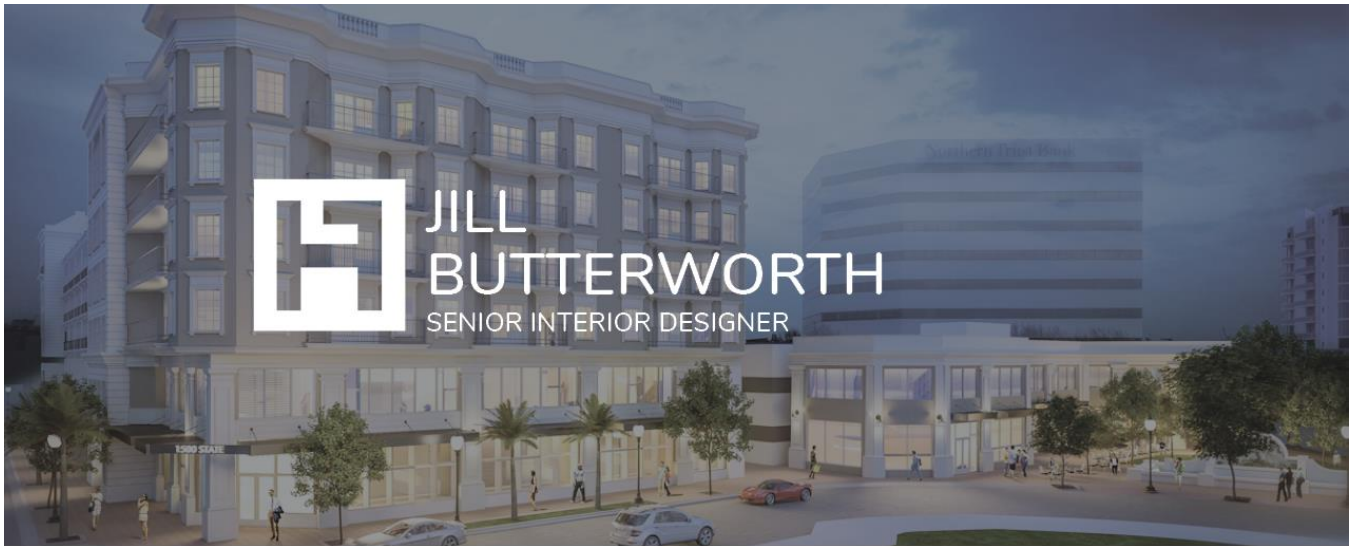
**REFERENCES**

Out of Door Academy Renovations  
Sarasota, FL  
  
Cranes View Lodge ALF & Memory Care Wing  
Claremont, FL  
  
North Port Medical Center (Sarasota Memorial Hospital)  
North Port, FL  
  
Englewood Community Hospital  
Englewood, FL  
  
Heritage Harbor Medical Building  
Manatee County, FL  
  
Intercoastal Medical Office Building  
Lakewood Ranch, FL  
  
Sarasota County Fire Station #3  
Sarasota, FL  
  
Sarasota County Health Department  
Sarasota, FL  
  
Cattleridge Medical II  
Sarasota, FL  
  
Gocio Elementary Renovations  
Sarasota, FL

**LOCAL PAST PROJECTS**

The DeSota  
Sarasota, FL  
  
The Mark  
Sarasota, FL  
  
One Palm  
Sarasota, FL  
  
The Jewel  
Sarasota, FL





**PERSONAL PROFILE**

Design Lead for high-end residential clients. Produced furniture layouts, finish & furniture selections, mill-work details and shop drawings, obtained pricing, tracked order shipments, selected and coordinated art, decor & furnishings, deliveries and installations.

**EDUCATION**

Bachelors of Fine Arts Interior Design, Northern Illinois University

**REFERENCES**

2006 NCIDQ Certified and actively participating in ongoing

Licensed Interior Designer, State of Florida

**PAST PROJECTS**

Lobby of Plymouth Harbor Sarasota, FL

Renovations of Lobby, Pool Bar, Vineyard Grill, Meeting Rooms JW Marriott - Grand Lakes Orlando, FL

Renovation of Lobby Ritz Carlton - Grand Lakes Orlando, FL

Renovation of Meeting Rooms Renaissance - SeaWorld Orlando, FL

# Kimley»Horn

## Firm Overview

Founded in 1967, Kimley-Horn is a full-service, employee-owned, multidisciplinary consulting firm offering a broad range of engineering, planning, landscape architecture, and environmental services to clients in both the private and public sectors. Over the years, the firm has grown from a small group of engineers and planners to one of the most respected consulting engineering firms in the nation—and a recognized leader in land development. Today, Kimley-Horn has over 7,500 employees in more than 120 offices across the United States and in Puerto Rico, offering a full range of consulting services to local, regional, national, and international clients.

Kimley-Horn has a long history of successfully delivering projects that function as both destination gathering spaces and highly complex, sustainable engineering achievements. The firm achieves this by implementing a well-grounded design process coupled with creative exploration. Kimley-Horn planners and engineers are adept at creating places people want to experience.

Kimley-Horn's integrated team will conceptualize with an emphasis on the overall functionality and safety of the built environment. This full-service level of attention and understanding lessens the burden on your staff and ensures efficiency of communication, schedule, budget control, and the production of high-quality deliverables. This expertise helps ensure the initial vision is carried all the way through to the end user, resulting in a marquee, destination project that sets new standards for design.

In addition, Kimley-Horn's local Sarasota team has partnered closely with the University Park Recreation District on the University Park Country Club Master Plan, providing a full range of services including conceptual 3D renderings and public involvement. Kimley-Horn brings the essential local knowledge and familiarity with your staff to make these improvements a success.





## Scott Wedgeworth, P.E.

Civil Engineer

### PROFESSIONAL CREDENTIALS

- Bachelor of Science, Civil Engineering, Stevens Institute of Technology
- Professional Engineer in Florida, #96799

Kimley»Horn

### SPECIAL QUALIFICATIONS

Scott is a civil engineer with six years of experience. Scott specializes in land development projects in Sarasota County, the City of Sarasota, City of Bradenton, and Manatee County. Scott is experienced in environmental permitting through the Southwest Florida Water Management District (SWFWMD) and the Florida Department of Environmental Protection (FDEP). Scott is well-versed in the storm water design requirements of Sarasota County and the SWFWMD. He is also proficient in the use of the Interconnected Pond Routing, Version 4 (ICPR4) software.

### RELEVANT PROJECTS

**University Park Country Club Master Plan, Sarasota, FL** — Project Engineer. Kimley-Horn is providing professional landscape architectural and land planning services for the University Park Country Club master plan that's a part of the University Park Recreation District. University Park Recreation District, located on the border of Manatee and Sarasota Florida Counties, is located within the gates of an award-winning master planned community of more than 1,200 homes with 32 individual neighborhoods. The Recreation District includes a semi-private Country Club featuring 27 holes of championship golf, 11 lighted tennis courts, a state-of-the-art fitness center, a casual lounge/bar/card room as well as a full-service restaurant.

**Celery Fields Quads Park, Sarasota, FL** — Project Engineer. Kimley-Horn was selected to aid in the design concepts for a re-naturalization of more than 30 acres of upland located adjacent to Celery Fields in Sarasota. This project was designed in coordination with The Conservation Foundation of the Gulf Coast and the Sarasota Audubon Society to create additional wildlife and birding habitat on parcels previously designated for commercial construction. The design plan package includes a visionary concept of tying three parcels together through a ribbon of planted native trees, and provides for an education demonstration of three unique habitat ecosystems; mesic hammock, hardwood hammock, and pine flatwoods. The plan also includes associated improvements for parking layouts, the location of the proposed site features, ingress/egress into the park, locations of buildings and other structures, alignment of sidewalks and pathways, among other features like an inclusive, natural playground. 3D digital illustrative models of the site were also provided to the client for marketing and public relations purposes, as well as to provide as a fundraising campaign tool. Additionally, grant services and creative design solutions resulted in a successful grant application with up to \$450,000 of grant funds available for implementation of the natural systems restoration project elements.

**The Bay Park, Sarasota, FL** — Project Engineer. Kimley-Horn, in collaboration with project lead Agency Landscape + Planning, provided professional consulting services for the Master Plan, Phase 1, and the ongoing \$65-million Phase 2. The park has already established a cultural and economic legacy for the region while ensuring open public access to the Sarasota Bayfront. Special features of the first phase of the Bay include an iconic ibis-themed children's playground, a recreational mangrove walk with a kayak launch, a 30-foot spiral shade structure and concessions pavilion, and an events and performance lawn. Beyond the natural assets provided by the Bayfront, this park offers greater connectivity to surrounding neighborhoods and reflect Sarasota's diverse heritage while emphasizing sustainability.

**University Park Apartments Preliminary Wastewater Analysis, Sarasota, FL** — Project Engineer. The University Park Apartments project is located on a 9.8-acre parcel in Sarasota County. Kimley-Horn is performing a preliminary analysis of the wastewater collection and transmission system that will include calculations of the wastewater contributions based on Equivalent Dwelling Units (EDU) tabulations required by Sarasota County, the preliminary design of a proposed standard lift station located on the site, and an analysis of downstream lift station to prove capacity and further impacts within Sarasota County Public Utilities wastewater system.



## Matt Dunn, ASLA

Kimley-Horn  
Project Manager  
and Lead  
Landscape  
Architect

### PROFESSIONAL CREDENTIALS

- Bachelor, Landscape Architecture, Virginia Polytechnic Institute and State University
- American Society of Landscape Architects (ASLA)

Kimley»Horn

### SPECIAL QUALIFICATIONS

Matt brings more than nine years of landscape architecture and project management experience. He is well versed in construction document preparation, presentation graphics, illustrative 3D renderings, construction phase services, and arboriculture services for a variety of local and nationally recognized clients. Notably, his experience involves a mix of code minimum required landscape design, enhanced landscape design, arboriculture services, and master planning for both private land development and public realm projects. He has led numerous luxury residential and amenities pursuits throughout Florida, and is well-versed in local conditions.

### RELEVANT PROJECTS

**University Park Country Club Master Plan, Sarasota, FL** — Project Manager. Kimley-Horn is providing professional landscape architectural and land planning services for the University Park Country Club master plan that's a part of the University Park Recreation District. University Park Recreation District, located on the border of Manatee and Sarasota Florida Counties, is located within the gates of an award-winning master planned community of more than 1,200 homes with 32 individual neighborhoods. The Recreation District includes a semi-private Country Club featuring 27 holes of championship golf, 11 lighted tennis courts, a state-of-the-art fitness center, a casual lounge/bar/card room as well as a full-service restaurant.

**Celery Fields Quads Park, Sarasota, FL** — Landscape Analyst. Kimley-Horn was selected to aid in the design concepts for a re-naturalization of more than 30 acres of upland located adjacent to Celery Fields in Sarasota. This project was designed in coordination with The Conservation Foundation of the Gulf Coast and the Sarasota Audubon Society to create additional wildlife and birding habitat on parcels previously designated for commercial construction. The design plan package includes a visionary concept of tying three parcels together through a ribbon of planted native trees, and provides for an education demonstration of three unique habitat ecosystems; mesic hammock, hardwood hammock, and pine flatwoods. The plan also includes associated improvements for parking layouts, the location of the proposed site features, ingress/egress into the park, locations of buildings and other structures, alignment of sidewalks and pathways, among other features like an inclusive, natural playground. 3D digital illustrative models of the site were also provided to the client for marketing and public relations purposes, as well as to provide as a fundraising campaign tool. Additionally, grant services and creative design solutions resulted in a successful grant application with up to \$450,000 of grant funds available for implementation of the natural systems restoration project elements.

**Plymouth Harbor, Sarasota, FL** — Project Manager. Plymouth Harbor is a church-sponsored, not-for-profit continuing care retirement community (CCRC). In addition to comfortable living, the 16-acre waterfront community provides residents with a variety of recreational and wellness facilities and activities. Kimley-Horn provided landscape architecture, land planning, civil, environmental, and structural engineering services for the redevelopment of a private 3.2-acre waterfront amenity area, including permitting through the City of Sarasota and the Southwest Florida Water Management District (SWFWMD). The new design includes the removal of invasive species and failing structures, such as an elevated boardwalk and pedestrian bridge, and improvements to pedestrian circulation including a 12-foot-wide rubberized multi-use waterfront walking trail, a meandering six-foot-wide rubberized walking trail, large seating areas, shade structures, enhanced landscaping, and lighting. This revitalized waterfront amenity will connect residents to nature through educational signage and safely bringing residents closer to the water's edge. The design incorporates existing amenities such as kayak storage and water access, and a shaded pavilion and gazebo.



**JON D. SHEPARD, P.E.**  
**SENIOR ELECTRICAL ENGINEER**

**Education:** 2004 Graduate - Florida State University, Tallahassee, Florida, (BSME).

**Professional**

**Registration:** Holds current license in Florida (PE71536), Missouri, Washington, Oregon, Arizona, Tennessee and Ohio.

**Profile:**

Jon Shepard graduated from the Florida State University with a Bachelor’s of Science in Mechanical Engineering (BSME) in 2004. Mr. Shepard became a registered mechanical engineer in 2010. He joined the Quest Design Group team in 2005 to pursue a career in architectural engineering. Mr. Shepard has project engineering experience on a wide range of projects including residential, commercial, institutional, and industrial buildings.

**Relevant**

**Experience:** Experience includes Mechanical, Plumbing, Fire Protection, and Electrical Engineer, Project Engineer, and Project Manager on numerous projects for the construction industry including commercial, industrial and institutional buildings for the private and public sectors. Engineering experience includes the design, modification, and repair of HVAC, plumbing, fire sprinkler, and electrical systems; project planning; and mechanical and electrical system testing, troubleshooting and repair.

**Applicable**

**Experience:** In his long tenure with Quest Design Group Mr. Shepard has gained experience in local private sector projects, including but not limited to:

- Hospitality, Resort Facilities and Country Clubs.
- Low Rise, Mid Rise and High Rise Residential Buildings.
- Low Rise, Mid Rise and High Rise Office Buildings.
- Medical Office Buildings with wet exam rooms.
- Mixed Use Buildings.
- Parking Garages
- Fire Stations.
- Churches.
- Shopping Centers and Retail Tenants.
- Public and Private Schools; and University Buildings
- Recreational, clubs and YMCA facilities.
- Restaurants.
- Assisted Living Facilities and Nursing Homes (ACHA related)

Oak Brook Chicago Sarasota Tampa Mechanical Electrical Plumbing Fire Protection

1859 Northgate Boulevard, Suite 1  
Sarasota, FL 34234 | info@questdg.com  
P (941) 351-9996 | www.questdg.com





## CHRISTOPHER R. BAKER, P.E., LEED AP VICE PRESIDENT OF ENGINEERING - SARASOTA OFFICE

**EDUCATION:** University of Florida, Gainesville FL, 1995

**PROFESSIONAL**

**REGISTRATION:** Holds current license in Florida (PE57962), New Jersey, Texas, Louisiana, Connecticut, Nevada, Massachusetts, Wisconsin, Montana and Indiana.

**PROFILE:**

Christopher (Chris) Baker graduated from the University of Florida with a Bachelor's of Science degree in Mechanical Engineering (BSME) in 1995. Mr. Baker joined Quest Design Group in 1997 and became a registered mechanical engineer in 2002. Mr. Baker has project engineering and management experience on a wide range of projects including schools, commercial office, retail, industrial, institutional, and single and multi family residential.

**RELEVANT**

**EXPERIENCE:**

Experience includes Mechanical Engineer, Project Engineer, Project Manager, and Commissioning Agent across a wide range of commercial, industrial and institutional buildings, large and small. Chris has considerable public and private sector experience. Engineering experience includes the design, modification, and repair of HVAC, plumbing and fire sprinkler systems; project planning, contract administration; and mechanical system testing, troubleshooting and repair.

**Applicable**

**Experience:**

In his Long and successful tenure with Quest Design Group Mr. Baker has gained experience in local public sector projects, including but not limited to:

- Hospitality, Resort Facilities and Country Clubs.
- Low Rise, Mid Rise and High Rise Residential Buildings.
- Low Rise, Mid Rise and High Rise Office Buildings.
- Medical Office Buildings with wet exam rooms.
- Mixed Use Buildings.
- Parking Garages
- Fire Stations.
- Churches.
- Shopping Centers and Retail Tenants.
- Public and Private Schools; and University Buildings
- Recreational, clubs and YMCA facilities.
- Restaurants.
- Assisted Living Facilities and Nursing Homes (ACHA related)

Oak Brook Chicago Sarasota Tampa

Mechanical Electrical Plumbing Fire Protection

1859 Northgate Boulevard, Suite 1  
Sarasota, FL 34234 | info@questdg.com  
P (941) 351-9996 | www.questdg.com




**LISTING OF PREVIOUS CLUBHOUSE PROJECTS**

**QDG Team**

QDG is a fully staffed mechanical and electrical engineering firm specializing in the design of electrical power distribution, lighting, air conditioning, heating, ventilation, plumbing and fire protection systems for the construction industry. Having performed as the design professionals on thousands of projects, QDG is known for working closely with clients to determine requirements and find solutions to complex project problems. Our team has considerable design experience and is the key to QDG's continued growth and development. QDG's team-based project management approach is essential for maintaining design and technical quality control.

**Relevant Experience:**

<p>The Lodge at Lakewood Ranch 16235 Player's Drive, Lakewood Ranch, FL 34202</p>	
<p>Mechanical/Electrical/Plumbing/ and Fire Protection Engineering Design Services Willis Smith Contractors 2017</p>	

Chicago Nashville Sarasota Tampa Mechanical Electrical Plumbing Fire Protection

7247 Delainey Court  
Lakewood Ranch, FL 34240 | info@questdg.com  
P (941) 351-9996 | [www.questdg.com](http://www.questdg.com)



<p>Mistwood Golf Club 1700 W Renwick Road, Romeoville, IL 60446 (815) 254-3333</p>
<p>Merit Award from the Chicago Building Congress</p>
<p>Mechanical/Electrical/Plumbing/ and Fire Protection Engineering Design Services</p>
<p>International Contractors, Inc. (ICI) 2014-2016</p>



<p>Lakewood Ranch Country Club Mechanical Renovation</p>
<p>Cost: \$ 1.2 million (Mechanical)</p>
<p>Willis Smith Contractors Project Manager /2019</p>





**Additional Clubhouse Facilities completed and/or in design:**

FACILITY	LOCATION
Isla Del Sol Yacht Club	St. Petersburg
Prosperity Lakes Clubhouse	Manatee County, FL
Casa Nashville Clubhouse	Nashville, TN
Grafton Ridge Clubhouse	Eustis, FL
Trotters Crossing Clubhouse	Zephyrhills, FL
Cedar Mill Clubhouse	Cedar Mill, FL
Blackrock Cove Clubhouse	Yulee, FL
Siena Cove Clubhouse	Siena Cove, FL
Robinson Ranch Clubhouse	Robinson Ranch, FL
Pine Grove Clubhouse	St. Cloud, FL
Tara Golf and Country Club	Bradenton, FL
Laurel Oaks Country Club Renovation	Sarasota, FL
Oaks Country Club Renovations to Kitchen and Dining Room	Sarasota, FL
FireFox Country Club New Clubhouse Facility	Naples, FL
Meadows Country Club and Dining Room Renovations	Sarasota, FL
Imperial Golf Club New Clubhouse and Cart Storage	Naples, FL
Palmetto Pines Country Club	Cape Coral, FL
River Wilderness Golf Club Renovation	Parrish, FL
Bradenton Country Club Renovations	Bradenton, FL
Heritage Harbour New Clubhouse/Cart Storage	Bradenton, FL
RiverStrand New Clubhouse/Cart Storage	Bradenton, FL
Windstar Country Club New Clubhouse/Cart Storage	Naples, FL
Colliers Reserve Country Club New Clubhouse/Cart Storage	Naples, FL
The Concessions Country Club New Clubhouse/Cart Storage	Sarasota, FL
Bird Key Yacht Club Renovations	Sarasota, FL
Isles Yacht Club New Clubhouse	Punta Gorda, FL
Boca Bay Pass Club	Boca Grande, FL
Sarasota Harbor Yacht Club	Sarasota, FL
Sarasota Bay Club Building Review	Sarasota, FL
Meadows Clubhouse Building Review	Sarasota, FL
Lakewood Ranch Country Club	Lakewood Ranch, FL

**LISTING OF PREVIOUS RESTAURANT PROJECTS**

**QDG Team**

QDG is a fully staffed mechanical and electrical engineering firm specializing in the design of electrical power distribution, lighting, air conditioning, heating, ventilation, plumbing and fire protection systems for the construction industry. Having performed as the design professionals on thousands of projects, QDG is known for working closely with clients to determine requirements and find solutions to complex project problems. Our team has considerable design experience and is the key to QDG’s continued growth and development. QDG’s team-based project management approach is essential for maintaining design and technical quality control.

**Relevant Experience:**

Selva Grille University Town Center
67 N Cattlemen Road, Sarasota, FL 34243



Chicago Nashville Sarasota Tampa Mechanical Electrical Plumbing Fire Protection

7247 Delainey Court  
Lakewood Ranch, FL 34240 | info@questdg.com  
P (941) 351-9996 | [www.questdg.com](http://www.questdg.com)



Libby's Neighborhood  
Brasserie

1917 S Osprey Ave,  
Sarasota, FL 34239



Sage Restaurant

1216 First Street  
Sarasota, FL 34236



Grove
10670 Boardwalk Loop Lakewood Ranch, FL 34202



**Additional Restaurants completed and/or in design:**

FACILITY	LOCATION
Off the Hook Seafood	Sarasota, FL
Libbys Restaurant	Lakewood Ranch
Sandbar Restaurant	Holmes Beach, FL
Beach House	Bradenton Beach, FL
Mar Vista Restaurant	Longboat Key, FL
Habaneros Restaurant	Bradenton, FL
Carmelos Restaurant	Punta Gorda, FL
Chateau 13	Bradenton, FL
Anita's Restaurant	Nokomis, FL
Havana Jacks	Marathon, FL
Hawaiian BBQ	Sarasota, FL
Pascones	Sarasota, FL
Capt Curts	Sarasota, FL



## LAZARO ALFONSO, P.E.

Principal / Partner

Mr. Alfonso has over 25 year's experience in the field of construction and structural engineering.

Before joining Bliss & Nyitray, Inc., Mr. Alfonso worked for a reputable General Contractor in South Florida. He maintains his status as a Certified General Contractor with the State of Florida. The construction experience gives him a unique perspective on detailing and the importance of economy and constructability on all of his projects.

He takes pride in being responsive and working with the Architect and Contractor to provide simple solutions to complex design issues.

### EDUCATION

Bachelor of Science in Civil Engineering  
University of Florida 2003  
Major: Structural Engineering

Master of Science in Engineering  
University of Florida – 2005

### PROFESSIONAL EXPERIENCE

Experience Prior To BNI: 2 Years  
With BNI Since 2007

### PROFESSIONAL REGISTRATIONS

Licensed Professional Engineer  
- Florida  
- Alabama

### PROFESSIONAL ASSOCIATIONS

- American Concrete Institute  
- American Institute of Steel Construction  
- Concrete Reinforcing Steel Institute

### CERTIFIED SPECIAL INSPECTOR

- Florida

### CERTIFIED GENERAL CONTRACTOR

- Florida

### CONTACT

West Palm Beach Office  
O: (561) 623-7081  
C: (305) 796-3809  
[lalfonso@bniengineers.com](mailto:lalfonso@bniengineers.com)

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## RELEVANT PROJECTS

### Confidential Private Golf Clubhouse in St. Lucia

- New state-of-the-art full amenity Country Clubhouse servicing the 375 acre property with an 18 hole golf course in St. Lucia.
- Engineer of Record

### Riviera Golf Country Clubhouse, Coral Gables, Florida

- 75,000 SF clubhouse for Riviera Country Club in December 2018. The new clubhouse is located in the heart of Coral Gables and across the fairway from the iconic Biltmore hotel.
- Designed by Peacock + Lewis and constructed by Beauchamp Construction, the new clubhouse boasts an 8,000 SF fitness and aquatic center, a 400-member event space, a 2,500 SF dining room, wrap-around terraces, and a new entrance on Blue Road.
- The new clubhouse is home to over 1,000 members and continues Riviera Country Club's 75+ year legacy.
- Engineer of Record

### Broken Sound Country Club (Briland Club), Harbor Island, Bahamas

- A new country club which includes a marina structure, floating docks,
- hotel, residential units, restaurants, spa, and a power plant on 21 acres of land at Dunmore Town
- Principal in Charge, Engineer of Record

### Frenchmen Creek Golf Clubhouse, Palm Beach Gardens,

### Florida

- \$74 million new state-of-the-art 124,450 square foot clubhouse. Demolition of the existing clubhouse building will start in the late summer of 2022, and the new clubhouse project completed in late 2024.
- Principal in Charge

### Ocean Reef Dolphin Clubhouse, Key Largo, Florida

- Renovation to the Dolphin Clubhouse located in the exclusive Ocean Reef Club on the beautiful Dolphin Course. A total of 48,000 square feet, (includes a 28,000 SF clubhouse and 20,000 SF cart barn) this majestic club was designed by Peacock & Lewis Architects and includes a golf shop, bar and dining options overlooking a lake on the course.
- The three-story structure which is supported by piles will consist of a cast in place concrete with post – tensioned decks, concrete block and masonry infill with a stucco skin, and distinct Florida Keys architecture.
- Principal in Charge

### Lauderdale Yacht Club, Fort Lauderdale, Florida

- The previous clubhouse was demolished and a new two-story, 36,941-square-foot clubhouse at the club's longtime location on a point overlooking the Intracoastal Waterway in Fort Lauderdale was constructed.
- The new clubhouse includes a spacious main dining room on the first floor, expandable to include the smaller Cove Harbor room. Also on the ground floor is

the Abenaki Lounge, the Cypress Bar and the Wine Room, plus children's play room, club shop and covered terrace. In addition to administrative offices, the second floor features the Burgee Bar, the Commodore Room and the Gold Room for relaxing, dining and members' events, with covered and uncovered terrace areas offering panoramic views of the Intracoastal Waterway.

- Principal in Charge

#### **Canopy Hotel by Hilton, West Palm Beach, Florida**

- Design and Construction of a 14-story hotel with 150 ultra-contemporary luxury guest rooms on top of three floors of podium parking with a grand lobby with very high-end finishes, restaurants, meeting rooms, rooftop lounge, spa and pool.
- Engineer of Record, Project Manager

#### **Port of Nassau, Nassau, Bahamas**

- The new and improved Port of Nassau will include a dock expansion, new arrival center featuring a Junkanoo Museum and a newly designed Health Center with quarantine facility, an indoor/outdoor marketplace, Amphitheatre, and multiple restaurants.
- Project Engineer

#### **Four Seasons Hotel Palm Beach, Palm Beach, Florida**

- Phase I renovations to the exterior public space areas included a 40,000 SF pool deck with a new secondary pool, new outdoor restaurant (Seaway), 20 new first-floor balcony stairways, new railings, awning system, replacement of all guest room windows and sliding glass windows, and re-concepted, porte cochere/entry with transplanted Banyan tree.
- Phase I also consisted of 35 guest rooms and interior public space areas to include Flories Restaurant and Bar, lounge, and kitchen.
- Phase II consisted of 150 guest rooms, 12 suites, and eight (8) cabanas. All suites were fully gutted and renovated, and all guest rooms received a full mechanical upgrade.
- Engineer of Record

#### **Aquablú, Fort Lauderdale, Florida**

- A new 20-story residential tower that includes 45-units, a 97-car garage with a residential rooftop
- Project Engineer

#### **1000 Ocean, Boca Raton, Florida**

- 7 Story, 52 unit luxury condo over 2 story garage
- Cast in place concrete columns and shear walls with post-tensioned flat slabs
- including a 30 inch thick transfer slab supporting the residential units
- Project Engineer, Threshold Inspector



Broken Sound Clubhouse  
Peacock + Lewis Architects



For over 65 years, Bliss & Nytray has worked hand in hand with our architectural partners to create structures that are as pleasurable to use as they are to look at.

We understand that the structural logic of a form is not simply a mathematical solution but a reflection of the architect's inspiration and vision.

Our engineers bring more than technical expertise to a project. They bring open minds and the creativity to apply their expertise in new and imaginative ways.

Gulfstream Park Clubhouse  
BRPH Architects



Lego Mar Resort & Club  
Nichols Brosch Wurst Wolfe & Associates



**Tell us what you want to achieve and we'll work with you to make it happen.**



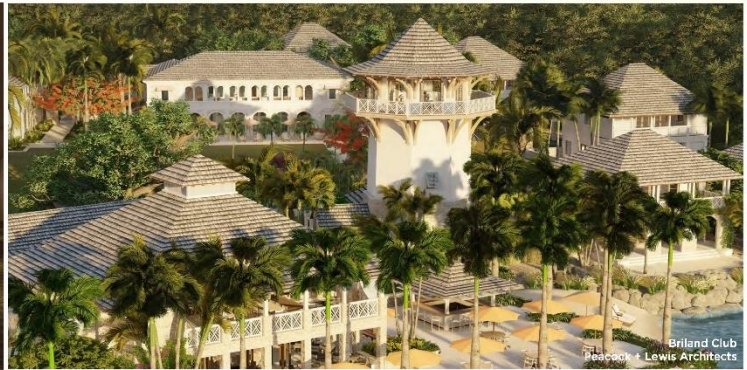
Briarland Club  
Peacock + Lewis Architects



Melrose Golf Club  
Leo A Daly Architects



Gulfstream Park Clubhouse  
BRPH Architects



Briarland Club  
Peacock + Lewis Architects



Lauderdale Yacht Club  
Spina O'Rourke & Partners



Broken Sound Clubhouse  
Peacock + Lewis Architects



Ocean Reef Dolphin Clubhouse Renovation  
Peacock + Lewis Architects



Lauderdale Yacht Club  
Spina O'Rourke & Partners





Ocean Reef Dolphin Clubhouse Renovation  
Peacock + Lewis Architects



Palma Ceia Country Club Pool Deck  
Renovation and Outdoor Bar Expansion -  
Peacock + Lewis Architects



Ocean Reef Dolphin Clubhouse Renovation  
Peacock + Lewis Architects



Broken Sound Clubhouse  
Peacock + Lewis Architects



Palma Ceia Country Club Pool Deck  
Renovation and Outdoor Bar Expansion -  
Peacock + Lewis Architects



Lauderdale Yacht Club  
Spina O'Rourke & Partners



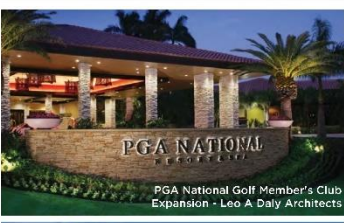
Ocean Reef Dolphin Clubhouse  
Peacock + Lewis Architects



Palma Ceia Country Club Pool Deck  
Renovation and Outdoor Bar Expansion -  
Peacock + Lewis Architects



Lauderdale Yacht Club  
Spina O'Rourke & Partners



PGA National Golf Member's Club  
Expansion - Leo A Daly Architects



PGA National Golf Club  
Renovation and Expansion - Leo A  
Daly Architects



Melreese Golf Club  
Leo A Daly Architects



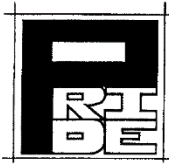
Riviera Country Club  
Peacock + Lewis Architects



Riviera Country Club  
Peacock + Lewis Architects



Pelican Country Club  
Peacock + Lewis Architects



**PROFESSIONAL  
RESTAURANT  
INCORPORATING  
DESIGN &  
EQUIPMENT**

Monday, May 13, 2024

Hoyt Architects  
c/o Chris Gallagher  
1527 Second Street  
Sarasota, Fl 34236

Dear Chris,

Please find attached a list of the completed and current Country Club Projects we have worked on in the past. Please feel free to call me if you have any questions.

Boca Grande Club, Boca Grande, Fl  
Bradenton Yacht Club, Bradenton Fl  
Concessions Golf & Country Club, Sarasota, Fl  
Field Club, Sarasota, Fl  
Forest Lakes Country Club, Sarasota Fl  
Heritage Harbor, Sarasota Fl  
Kelly Greens Country Club, Fort Meyers, Fl  
Key Royal Club, Holmes Beach Fl  
Laural Oaks Country Club, Sarasota, Fl  
Long Boat Key Tennis Club, Sarasota, Fl  
Lexington Country Club, Ft. Meyers, Fl  
The Meadows Country Club, Sarasota, Fl  
The Oaks Country Club, Sarasota, Fl  
Palm Aire Country Club, Sarasota, Fl  
Plantation Country Club, Venice Fl  
Riverstrand Golf & Country Club, Parrish, Fl  
Tara Golf & Country Club, Bradenton, Fl  
TPC Sawgrass, Ponte Vedra, Fl

This is a small list of the Clubs that we have had the privilege to work with over the past 35 years. My experience as a former Club Manager has helped me to understand what type of changes a club requires to make it more efficient for the staff and management to operate.

I look forward to helping your club to improve your operation as we proceed.  
Sincerely yours,

*Paul Guillaume*

PAUL M. GUILLAUME  
President

2401 McClellan Pkwy  
Sarasota, Fl 34239  
Telephone 941-953-2164 Fax 941-954-7595

**TAB 7 PROPOSERS OFFICE LOCATION IN RELATION TO THE PROJECT**

Location is at 1527 2<sup>nd</sup> Street Sarasota FL, 34236

**(Remainder of this page intentionally left blank)**

## Tab 8 - APPROACH TO DESIGN SERVICES

1. Per the RFQ, the District has four key objectives and requirements:
  - a. That the Proposer can meet the needs of the project scope.
  - b. That the Proposer can successfully control the project.
  - c. That the Proposer can maintain quality control.
  - d. And, that the Proposer can satisfactorily staff the project.

Outlined below is how the HOYT team can meet those requirements.

2. The project scope requires that the Proposer has the requisite experience and expertise to meet the specific needs of this project. As outlined in our resumes and project lists, the HOYT team is well-qualified to meet those needs.

HOYT Architects will be responsible for overall project management. With 30 years of experience on projects of every scale, both new construction and renovation, HOYT is well qualified to manage this project for the District.

HOYT will also be responsible for all the architectural and interior design elements of the project. Again, HOYT is well-qualified. All of the many luxury condominium and apartment projects in HOYT's portfolio include clubhouse space and high-end fitness facilities.

HOYT is well versed in office design, having just completed the City of Sarasota's new 25,000 SF office building. And HOYT regularly works on restaurants and commercial kitchens – there are currently six commercial kitchens in design or construction in HOYT's workflow.

Quest Design Group (QDG) will be responsible for MEP design. As indicated elsewhere in this proposal, they have decades of work on clubhouses and commercial kitchens. HOYT has worked with P.R.I.D.E. on many commercial kitchen projects. P.R.I.D.E. understands workflow and is detail-oriented, successfully partnering with chefs on dozens of projects throughout the region.

HOYT teams with Bliss and Nyitray (BNI) for structural design on several projects every year. They understand new work and complex renovations.

3. Methodology for engaging with the District representatives: HOYT's project management philosophy is based upon a project team concept. Each member of the project team is selected based on their particular expertise and the unique needs of each project. The principal in-charge of Project Management (Chris Gallagher AIA) ensures continuity for each project phase from start-up through construction administration. For each project, a series of project organization meetings are undertaken with the client and project team members. This allows the client /consultant team to formulate a clear understanding of the project goals and objectives.

From that point a set of detailed strategies can be outlined to accomplish the agreed upon goals. At the outset of the project a work plan is prepared outlining all work elements including scope, schedule, and budget for all participants. The plan will address responsibilities, authority, communication, document control, invoicing, progress reporting, quality control, and major work elements.

When managing a multiple consultant team, we require all team members to provide status reports twice a month. In return, our project manager reports back to the consultant with project status memos which detail their progress, project milestones and deliverable dates. Utilizing these

techniques, our project manager can quickly identify potential problems and introduce corrective measures immediately. This approach ensures a smooth running and cost-effective project.

4. Availability and accessibility: As a local team, just under 9 miles away, HOYT representatives are easily available to attend scheduled meetings. At a minimum, HOYT can be available to meet weekly during design construction.
5. HOYT has completed many NGBS green buildings. While we understand that the District is not seeking any green certification, the same strategies can be employed in the design of the new facilities.
6. Time and budget requirements letter: See attached.
7. Staffing: After 30 years in business, HOYT does not believe that piling bodies onto a project ensures success. We hire smart, efficient people. Besides their general skills, each staff member develops specific expertise in at least one element of the design and/or construction process.

So while the staff assigned to the project, as outlined herein, will stay with the project from beginning to end, other staff members will participate as the project moves along from concept design and initial visualization to final punch out and CO.

8. Per Addendum #1, Section 508 does not apply.
9. ***NOTE: As previously communicated via email, we have been counseled by our insurance carrier that we cannot agree to Section 12.4 of AIA B101-2017 in its entirety.***

## TAB 9 - ORGANIZATIONAL STRUCTURE AND CAPACITY

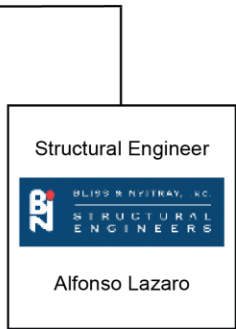
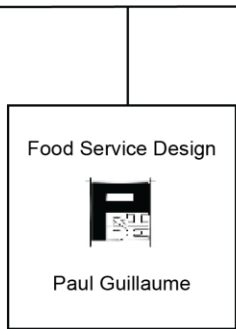
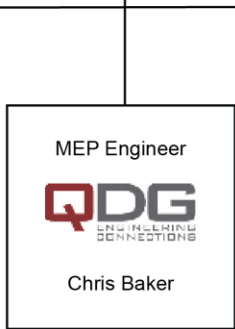
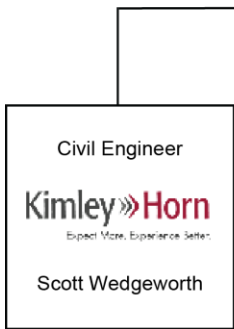
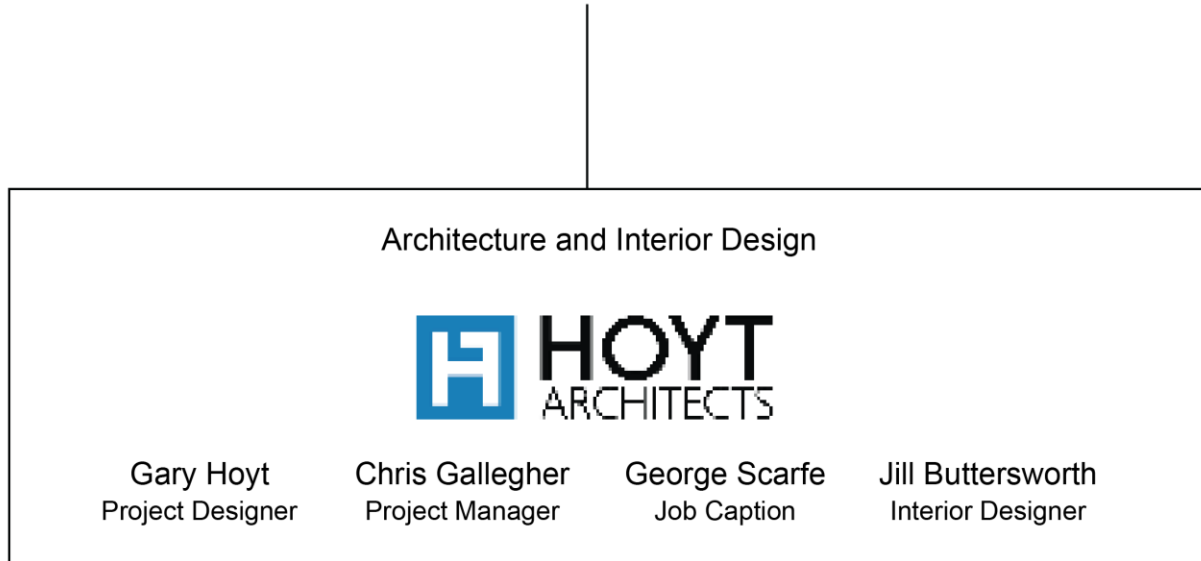
1. Staffing Resources at Hoyt's Sarasota offices:
  - a. Architects (4)
  - b. Landscape Architect (1)
  - c. Interior Designer (1)
  - d. Architecture production staff (7)
  - e. Administrative staff (2)
2. Location of Managing office: Sarasota, Florida. No plans have been advanced to employ District citizens for this project.
3. Sub-consultants:
  - a. Kimley Horn and Associates (Civil Engineering)
  - b. Kimley Horn and Associates (Landscape Architecture)
  - c. Bliss and Nyitray Inc. (Structural Engineering)
  - d. Quest Design Group (MEPF Engineering)
  - e. PRIDE (Food Service Design)
4. Org Chart: See Attached.
5. Recent prior work, jointly performed:
  - a. Aspire Apartments
    - i. Hoyt
    - ii. Bliss and Nyitray (BNI)
    - iii. Quest Design Group
  - b. Easterseals Facility
    - i. Hoyt
    - ii. Bliss and Nyitray (BNI)
    - iii. P.R.I.D.E.
  - c. Sage Condominiums
    - i. Hoyt
    - ii. Bliss and Nyitray (BNI)
    - iii. Quest Design Group
  - d. Amaryllis II apartments
    - i. Hoyt
    - ii. Quest Design Group
  - e. Longboat Key Karon Family Pavilion
    - i. Hoyt
    - ii. Bliss and Nyitray (BNI)
  - f. Waffle Monkey Restaurant
    - i. Hoyt
    - ii. P.R.I.D.E.

- g. Shugar Champagne Bar
  - i. Hoyt
  - ii. P.R.I.D.E.

- 6. Joint Venture: No joint venture is proposed.
- 7. Financial capacity: The firm does not authorize access to our financial records. Hoyt Architects has been in business for 30+ years.
- 8. Audit: The firm does not authorize outside access to its financial records.
- 9. Ownership interest in other entities proposed for services: None.
- 10. Proposer and subcontractor workloads: Hoyt and each of the sub-consultants have been in business for 30+ years. Each guarantees to meet the agreed-upon design services schedule.
- 11. District projects in the last two years: None.
- 12. Additional Information: Hoyt offers the most advanced virtual reality modeling of any design firm in the area. This modeling takes place in the schematic design phase, allowing the District and stakeholders a clear vision of the design at the earliest possible time.

**(Remainder of this page intentionally left blank)**





## TAB 10 - SIMILAR COMPLETED PROJECTS

### a. Country Club Facilities and Physical Fitness Facilities

- Country Club Facilities: Del Webb Clubhouse
  - Owner Name: Pulte Homes
  - Address: Lakewood Ranch, FL
  - Project Dates: January 2015 – December 2017
  - Role: Design Architect/Architect of Record
  - Scope: New construction of a 20,000 SF clubhouse, including meeting rooms, kitchen, and fitness center.
  - Project Costs: \$5.5M



- Physical Fitness Facilities: Buck O’Neil Baseball Clubhouse Complex
  - Owner Name: Sarasota County
  - Address: Sarasota, FL
  - Project Dates:
  - Role: Design Architect/Architect of Record
  - Scope: 15,000 SF Clubhouse and fitness center for the Baltimore Orioles.
  - Project Costs: \$3.8M



b. Commercial Kitchens

- Renovation: Poppo's Commissary Kitchen
  - Owner Name: Poppo's Taqueria
  - Address: Manatee County, FL
  - Project Dates: August 2018 to January 2019
  - Role: Design Architect/Architect of Record:
  - Scope: Small remodel for a commissary kitchen for a chain of locally owner fast-casual restaurants.
  - Project Costs: \$160,000
  
- New Construction: Metz Culinary Kitchen
  - Owner Name: Metz Culinary Management
  - Address: Sarasota, FL
  - Project Dates: November 2016 to April 2018
  - Role: Design Architect/Architect of Record
  - Scope: New 12,700 SF commercial kitchen for catering and commissary business.
  - Project Costs: \$2.5M

c. Renovation Projects

- Large: The Belle Haven
  - Owner Name: Quay Venture LLC
  - Address: Sarasota, FL
  - Project Dates: June 2018 to October 2020
  - Role: Design Architect/Architect of Record
  - Scope: Renovation of an 18,000 SF historically designated three-story building.
  - Project Costs: \$2.9M



- Large: McCown Tower
  - Owner Name: Sarasota Housing Authority
  - Address: Sarasota, FL
  - Project Dates: June 2021 to May 2024
  - Role: Design Architect/Architect of Record
  - Scope: Renovation of a 10-story, 100-unit apartment complex. Required phasing into 5 phases. Four phases remained occupied as construction proceeded on one phase.
  - Project Costs: \$13M

- **Small: Lila Restaurant**
  - Owner Name: Ryan Boeve
  - Address: Sarasota Florida
  - Project Dates: November 2015 to October 2016
  - Role: Design Architect/Architect of Record
  - Scope: Renovation of an existing 1930s retail space into a small restaurant
  - Project Costs: \$170,000



d. New Vertical Construction

- Project: Citria Apartments and Clubhouse
  - Owner Name: Stock Development
  - Address: Sarasota, FL
  - Project Dates: January 2018 to December 2021
  - Role: Design Architect/Architect of Record
  - Scope: 300 apartments, with 10,000 SF, two-story clubhouse
  - Project Costs: \$31M





# Professional Architectural and Engineering Services

for University Park Recreation District - Manatee County, FL

RFP# 24.001 - Submitted May 15, 2024



Goodwyn Mills Cawood

Building Communities



[www.gmcnetwork.com](http://www.gmcnetwork.com)



**Tab 1**  
Introduction



**Goodwyn Mills Cawood**

1819 Main Street  
Suite 608  
Sarasota, FL 34236

T (941) 312-5523  
F (850) 433-0508  
www.gmcnetwork.com

May 15, 2024

University Park Recreation District  
John Fetsick, General Manager - UPRD  
7671 The Park Boulevard  
University Park, FL 34201

Re: **RFQ No. 24.001 - Professional Architectural and Engineering Services**  
New Community Activity Building/Administrative Offices, New fitness building, and Renovations

Dear Members of the Selection Committee,

We are pleased to submit our proposal for RFQ No. 24.001, seeking Professional Architectural and Engineering Services for the development of the New Community Activity Building/Administrative Offices, New Fitness Building, and Renovations. As a local firm deeply rooted in Sarasota, FL, and boasting a rich history of successful collaborations in the region, we believe that Goodwyn Mills Cawood (GMC) is uniquely positioned to bring unparalleled value and expertise to this project. Here's why our team stands out:



**Local Expertise:** Being local isn't just about geography; it's about understanding the fabric of our community. With years of experience serving Sarasota and its surrounding areas, we possess an intimate understanding of the local building codes, regulations, and community dynamics that will be invaluable in navigating the intricacies of this project seamlessly.

**Proven Collaboration:** Our collaborative approach extends not only within our firm but also with our trusted network of local consultants. We have a longstanding history of successful partnerships with Kimley Horn, Bennett Pless, and Genesis, having worked together on numerous projects. This ensures a cohesive and streamlined process from conceptualization to completion, minimizing risks and maximizing efficiency.

**Innovative Design Solutions:** At GMC, we don't just design buildings; we craft experiences. Our team of skilled architects, engineers, and designers is dedicated to pushing the boundaries of creativity while adhering to the project's functional requirements. From the modernization of the old fitness center to the meticulous planning of the new activity buildings and kitchen, we are committed to delivering innovative, sustainable, and cost-effective solutions tailored to the unique needs of the University Park community.

**Client-Centric Approach:** Our clients are at the heart of everything we do. We prioritize open communication, active listening, and collaboration to ensure that your vision is not only realized but exceeded. Our hands-on approach means that you can expect personalized attention and dedicated support at every stage of the project, from initial concept development to post-construction services.

**Community Impact:** Beyond bricks and mortar, we are deeply invested in the social and economic vitality of Sarasota. We understand the transformative power of architecture in enriching lives and fostering community cohesion. By creating vibrant, functional spaces that inspire and engage, we aim to leave a lasting legacy that enhances the quality of life for generations to come.

In conclusion, choosing GMC as your partner means selecting a team that is not only local in proximity but also local in passion, commitment, and expertise. We are ready to bring our collective talents to bear on this exciting endeavor and look forward to the opportunity to collaborate with you in bringing your vision to life. Thank you for considering our qualifications. Should you require any further information or wish to discuss the project in more detail, please do not hesitate to contact us.

Sincerely,

**Sara Butler, AIA, LEED Green Associate**  
Senior Vice President, Architecture

sara.butler@gmcnetwork.com | T (941) 312-5523 M (615) 333-7200

**Building Communities.**



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▲ Paris Landing State Park Lodge -  
Buchanan Tennessee



Please scan the QR code below for a short video about GMC and be sure to visit our website at: [gmcnetwork.com](http://gmcnetwork.com).

SCAN ME! ▼





**Tab 2**  
Minimum Qualification Requirements

## 1. Registered with the State of Florida - GMC

# *State of Florida Department of State*

I certify from the records of this office that GOODWYN MILLS CAWOOD FL LLC is an Alabama limited liability company authorized to transact business in the State of Florida, qualified on February 4, 2021.

The document number of this limited liability company is M21000001388.

I further certify that said limited liability company has paid all fees due this office through December 31, 2024, that its most recent annual report was filed on January 4, 2024, and that its status is active.

I further certify that said limited liability company 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 Fourth day of January, 2024*



  
*Secretary of State*

Tracking Number: 0086199514CC

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

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

# 1. Registered with the State of Florida Genesis Engineering

**LICENSEE DETAILS**

11:14:02 AM 1/25/2024

**Licensee Information**

Name:	GENESIS ENGINEERING GROUP, LLC (Primary Name)
Main Address:	224 3RD STREET N FRANKLIN Tennessee 37064
License Mailing:	2601 CATTLEMAN RD SUITE 501 SARASOTA SARASOTA FL 34232
County:	SARASOTA

**License Information**

License Type:	Engineering Business Registry
Rank:	Registry
License Number:	29304
Status:	Current
Licensure Date:	11/09/2010
Expires:	



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

Previous On List Next On List Return to List Genesis Engineering Search

Events No Name History

**Detail by Entity Name**  
Foreign Limited Liability Company  
GENESIS ENGINEERING GROUP, LLC

**Filing Information**

Document Number	M10000004347
FEI/EIN Number	27-2455746
Date Filed	10/01/2010
State	TN
Status	ACTIVE
Last Event	LC STMT OF R/R/O CHG
Event Date Filed	10/19/2021
Event Effective Date	NONE

**Principal Address**  
134 4th Ave N  
Franklin, TN 37064

Changed: 02/10/2024

**Mailing Address**  
2601 Cattleman Rd Ste 501  
Sarasota, FL 34232

## Kimley Horn

**State of Florida  
Department of State**

I certify from the records of this office that KIMLEY-HORN AND ASSOCIATES, INC. is a North Carolina corporation authorized to transact business in the State of Florida, qualified on April 24, 1968.

The document number of this corporation is 821359.

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 April 3, 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 Twenty-fourth day of April, 2024*


  
 Secretary of State

Tracking Number: 2703192226CU

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.  
<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

## Bennett-Pless

**State of Florida  
Department of State**

I certify from the records of this office that BENNETT & PLESS, INC. is a Georgia corporation authorized to transact business in the State of Florida, qualified on June 4, 1985.

The document number of this corporation is P06282.

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 9, 2024, and that its status is active.

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

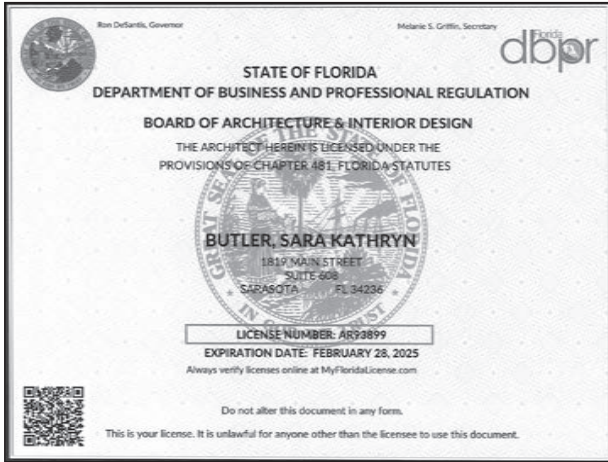
*Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Fourteenth day of February, 2024*


  
 Secretary of State

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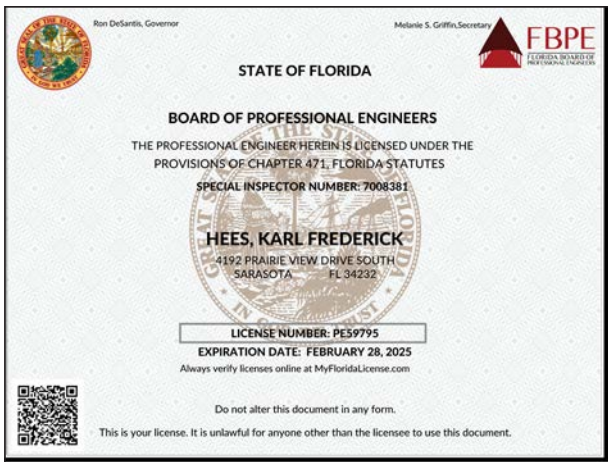
## 2. Valid Engineering/Architectural Licenses - Page 2



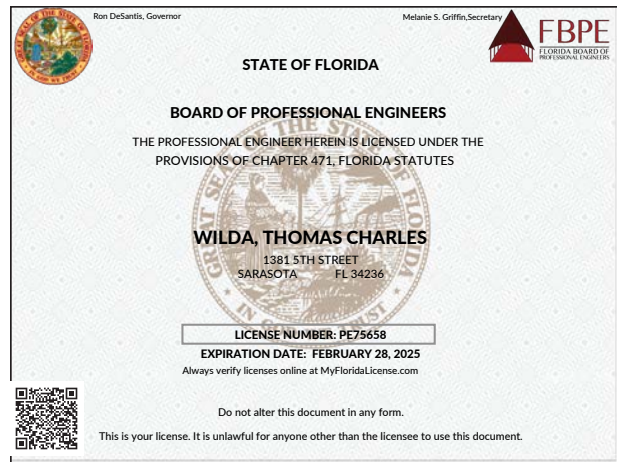
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Registered Architect License No. AR93899



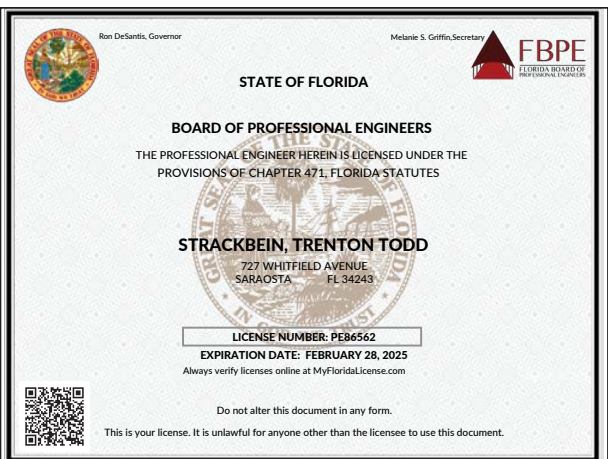
**Julian Norman-Webb, NCARB, LEED AP BD+C**  
Registered Architect License No. AR96720



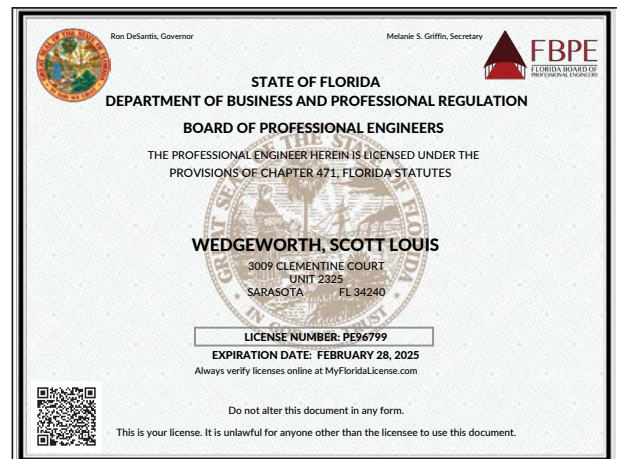
**Karl Hees, PE**  
Professional License No. PE59795



**Tom Wilda, PE**  
Professional License No. PE75658



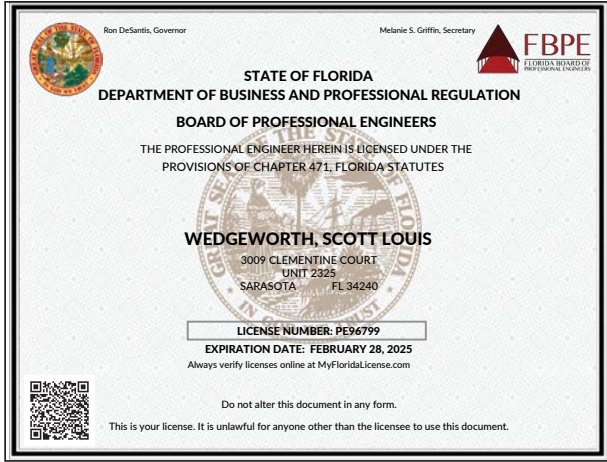
**Trenton Strackbein, PE**  
Professional License No. PE86562



**Scott Wedgeworth, PE**  
Professional License No. PE96799



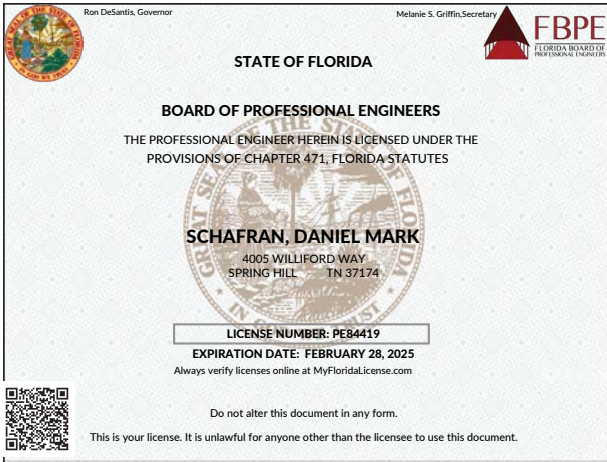
## 2. Valid Engineering/Architectural Licenses - Page 3



**Scott Wedgeworth, PE**  
Professional License No. PE96799



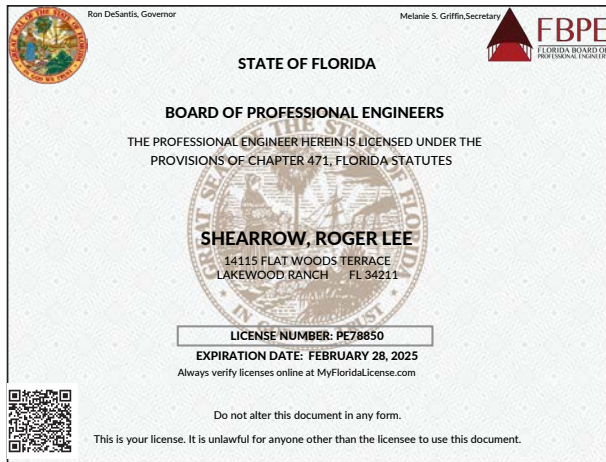
**Danielle Stewart, AICP**  
License No. 35686



**Dan Schafran, PE**  
Professional License No. PE84419



**Mike Haney, PE, LEED AP, CxA**  
Professional License No. PE55130



**Roger L Shearrow, PE, LEED AP, CxTS**  
Professional License No. PE78850

### 3. Completed A/E Projects Since 2011

Proposer or its subcontractor has performed architectural or engineering services for a minimum of four (4) projects since September 1, 2011.



Contact: Dr. Dennis Veronese  
(334) 887-2100  
dveronese@auburnschools.org

#### Auburn High School Cafeteria and Kitchen Renovations

GMC updated Auburn High School's cafeteria and kitchen. Within the first week of opening the brand new Auburn High School Cafeteria & Kitchen, lunch sales increased by 150 meals per day! This contemporary dining space includes a versatile assembly area that stimulates school-lunch participation and upgrades the campus image as a whole.



Contact: Ron Pulley  
1070 Shoreline Drive Gulf Breeze, FL  
(850) 934-5140 | rpulley@gulfbreezefl.gov

#### Gulf Breeze Community Center - Gulf Breeze, FL

The Gulf Breeze Community Center, designed by Goodwyn Mills Cawood (formerly Bay Design), is a 44,000 square foot recreational facility in the City of Gulf Breeze. It underwent a significant transformation with a 20,000 square foot renovation and a new 24,000 square foot addition. The center features two basketball gymnasiums, four multi-purpose rooms, a game room, a commercial kitchen, and exterior tennis courts. Notable design elements include an exterior covered porch overlooking 10 tennis courts, tiered landscaped seating, and a tennis pro shop. The facility prioritizes sustainability with 100% geothermal heating/cooling, LED lighting, daylight harvesting, and low-voltage controls, earning it LEED Certification. Dates: Completed in 2013



Contact: Kevin Rhatigan  
General Manager / COO  
Brays Island Planation  
843-846-3114 | krhatigan@braysisland.org

#### Brays Island Fitness Center - Sheldon, SC

When Brays Island Plantation outgrew their fitness and recreation center, which GMC originally designed, they engaged our team to design the renovation and expansion of the facility. The project consisted of renovating the existing 6,000 sf building and adding a 6,000 sf addition that houses new fitness studios, locker rooms, steam rooms, a refurbished indoor pool, a wellness center, as well as massage and physical therapy rooms. The design for the addition adheres to the original building's traditional proportions and aesthetic while doubling the original building's size. Dates: July 2017 - May 2020



Contact: Daniel Island Yacht Club  
101 River landing Drive Charleston, SC  
(843) 471-1881

#### Daniel Island Yacht Club Renovation - Daniel Island, SC

The Daniel Island Yacht Club, a 13,000-square-foot renovation project by Daniel Island Real Estate, now stands as a beacon of luxury overlooking the scenic Daniel Island Waterfront Park in South Carolina. GMC provided architectural design services for this transformation, which included multiple dining areas, bar and lounge spaces, a full commercial kitchen, support spaces, and offices, as well as a two-story veranda offering breathtaking views. Exterior enhancements maximized natural light and river vistas, while the second floor underwent extensive remodeling to seamlessly integrate new features. This elegant club sets a new standard for upscale leisure and hospitality, offering members and guests an unparalleled experience of sophistication and relaxation. Dates: July 2021 - February 2023

**Tab 2** Minimum Qualification Requirements

**4. Proposer Is NOT listed on the Florida State Board of Administration, Scrutinized List of Prohibited Companies.**

Goodwyn Mills Cawood is NOT listed on the Florida State Board of Administration, Scrutinized List of Prohibited Companies.

**5. Proposer is not on the Florida Suspended or Debarred Vendor List**

Goodwyn Mills Cawood is NOT listed on the Florida Suspended or Debarred Vendor List.

**6. Proposer is not on the Federal Convicted Vendor or Excluded Parties list (SAM/EPLS)**

Goodwyn Mills Cawood is NOT on the Federal Convicted Vendor or Excluded Parties list (SAM/EPLS).

**7. If Proposer is submitting as a joint venture, it must have filed the required documents**

Goodwyn Mills Cawood is NOT submitting as a joint venture.

▼ Daniel Island Yacht Club - Daniel Island, SC



## 7. Proposer has no reported conflict of interests in relation to this RFQ.

### FORM 4 - CONFLICT OF INTEREST DISCLOSURE FORM

The award of an agreement resulting from this RFQ is subject to the provisions of UPRD RULES. Proposer must disclose within its Proposal: the name of any officer, director, or agent who is also an employee of UPRD. Furthermore, Proposer must disclose the name of any UPRD employee who owns, directly or indirectly, an interest of more than five percent (5%) in the Proposer's firm or any of its branches, divisions, or affiliates.

By signing below, Proposer confirms that it is not currently engaged or will not become engaged in any obligations, undertakings or contracts that will require the firm to maintain an adversarial role against the UPRD or that will impair or influence the advice or recommendations it provides to the UPRD.

Please check one of the following statements and attach additional documentation if necessary:

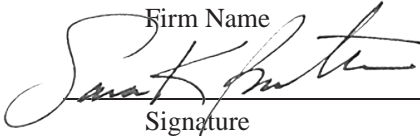
To the best of my knowledge, the undersigned firm has no potential conflict of interest for this RFQ.

The undersigned firm, by execution of this form, submits information which may be a potential conflict of interest for this RFQ.

Acknowledged and attested to by:

**Goodwyn Mills Cawood, LLC**

Firm Name



Signature

**Sara K. Butler, AIA, Senior Vice President, Architecture**

Name and Title (Print or Type)

**May 14, 2024**

Date

**Return this fully executed form with your Proposal.**



**Tab 3**  
Forms

**FORM 1 - ACKNOWLEDGMENT OF ADDENDA**

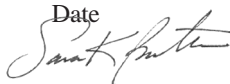
The undersigned acknowledges receipt of the following addenda:

Addendum No. <u>1</u>	Date Received: April 22, 2024
Addendum No. _____	Date Received:
Addendum No. _____	Date Received:
Addendum No. _____	Date Received:
Addendum No. _____	Date Received:
Addendum No. _____	Date Received:
Addendum No. _____	Date Received:
Addendum No. _____	Date Received:
Addendum No. _____	Date Received:

Print or type Proposer's information below:

<u>Goodwyn Mills Cawood, LLC</u>	<u>(941) 312-5523</u>
Name of Proposer	Telephone
<u>1819 Main Street, Suite 608</u>	<u>Sarasota, FL 34236</u>
Street Address	City/State/Zip
<u>sara.butler@gmcnetwork.com</u>	<u>www.gmcnetwork.com</u>
Email Address	Website Address

Print Name & Title of Authorized Officer  
 Sara Butler, AIA | Sr. VP Architecture

Signature of Authorized Official  
 Date  
 5/14/24

**FORM 2 - PROPOSAL SIGNATURE FORM**

The undersigned represents that by signing this Proposal Signature Form that:

- (1) He/she has the authority and approval of the legal entity purporting to submit the Proposal and any additional documentation which may be required such as the Joint Venture Agreement or Joint Venture Affidavit, if applicable; and
- (2) All facts and responses set forth in the Proposal are true and correct; and
- (3) If the Proposer is selected by District to negotiate an agreement, that Proposer’s negotiators will negotiate in good faith to establish an agreement to provide the services described in this RFQ; and
- (4) By submitting a Proposal and signing below, the Proposer agrees to the terms and conditions in this RFQ, which incorporates all addenda, appendices, exhibits, and attachments, in its entirety, and is prepared to sign the Agreement, of which a sample is incorporated into this RFQ as Exhibit C. The Proposer understands that if it submits exceptions to the Sample Agreement in its Proposal, the Proposer may be determined non-responsive.

Print or type Proposer’s information below:

Goodwyn Mills Cawood

Name of Proposer

(941) 312-5523

Telephone Number

1819 Main Street, Suite 608 Sarasota, FL 34236

Street Address

City/State/Zip

sara.butler@gmcnetwork.com

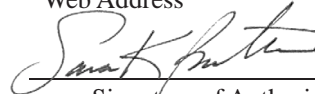
Email Address

Sara Butler, AIA Senior Vice President, Architecture

Print Name & Title of Authorized Officer  
Date

www.gmcnetwork.com

Web Address



Signature of Authorized Officer

**FORM 3 - PUBLIC CONTRACTING AND ENVIRONMENTAL CRIMES  
CERTIFICATION**

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

This sworn statement is submitted to UPRD by

Sara Butler, AIA Senior Vice President, Architecture

[print individual's name and title]

for Goodwyn Mills Cawood, LLC

[name of entity submitting sworn statement]

whose business address is: 1819 Main Street, Suite 608, Sarasota, FL 34236

and (if applicable) its Federal Employer Identification Number (FEIN) is

# 85-4128572

\_\_\_\_\_. If the entity has no FEIN, include the Social Security

Number of the individual signing this sworn statement:

I, the undersigned, understand that no person or entity shall be awarded or receive a District contract for public improvements, procurement of goods or services (including professional services) or a county lease, franchise, concession or management agreement, or shall receive a grant of District monies unless such person or entity has submitted a written certification to District that it has not:

(1)been convicted of bribery or attempting to bribe a public officer or employee of UPRD, the State of Florida, or any other public entity, including, but not limited to the Government of the United States, any state, or any local government authority in the United States, in that officer's or employee's official capacity; or

(2)been convicted of an agreement or collusion among Proposers or prospective Proposers in restraint of freedom of competition, by agreement to bid a fixed price, or otherwise; or

(3)been convicted of a violation of an environmental law that, as determined by the County, reflects negatively upon the ability of the person or entity to conduct business in a responsible manner; or



(4)made an admission of guilt of such conduct described in items (1), (2) or (3) above, which is a matter of record, but has not been prosecuted for such conduct, or has made an admission of guilt of such conduct, which is a matter of record, pursuant to formal prosecution. An admission of guilt shall be construed to include a plea of nolo contendere; or

(5)where an officer, official, agent or employee of a business entity has been convicted of, or has admitted guilt to, any of the crimes set forth above on behalf of such and entity and pursuant to the direction or authorization of an official thereof (including the person committing the offense, if he/she is an official of the business entity), the business shall be chargeable with the conduct herein above set forth. A business entity shall be chargeable with the conduct of an affiliated entity, whether wholly owned, partially owned, or one which has common ownership or a common board of directors.

For purposes of this Form, business entities are affiliated if, directly or indirectly, one business entity controls or has the power to control another business entity, or if an individual or group of individuals controls or has the power to control both entities. Indicia of control shall include, without limitation, interlocking management or ownership, identity of interests amount family members, shared organization of a business entity following the ineligibility of a business entity under this Article, or using substantially the same management, ownership or principles as the ineligible entity.

Any person or entity who claims that this Article is inapplicable to him/her/it because a conviction or judgment has been reversed by a court of competent jurisdiction, shall prove the same with documentation satisfactory to District's Purchasing Official. Upon presentation of such satisfactory proof, the person or entity shall be allowed to contract with University Park Recreation District.

I UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE UPRD STAFF DETERMINES THAT SUCH PERSON OR ENTITY HAS MADE FALSE CERTIFICATION.

Sara Butler  
Signature of Contractor Representative

STATE OF Georgia

COUNTY OF Fulton

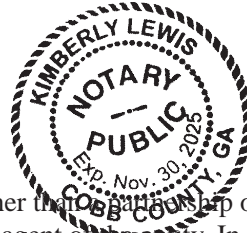
Sworn to and subscribed before me this \_\_\_\_\_ day of 14th \_\_\_\_\_ May, 2024  
by Sara Butler, Senior Vice President, Architecture .  Personally known OR  Produced the following identification

Personally Known

[Type of identification] \_\_\_\_\_ Notary Public Signature My  
commission expires November 30, 2025

Kimberly Lewis

[Print, type or stamp Commissioned name of Notary Public]



**Signatory Requirement** - In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a corporation, this affidavit shall be executed by the corporate president.

**FORM 4 - CONFLICT OF INTEREST DISCLOSURE FORM**

The award of an agreement resulting from this RFQ is subject to the provisions of UPRD RULES. Proposer must disclose within its Proposal: the name of any officer, director, or agent who is also an employee of UPRD. Furthermore, Proposer must disclose the name of any UPRD employee who owns, directly or indirectly, an interest of more than five percent (5%) in the Proposer’s firm or any of its branches, divisions, or affiliates.

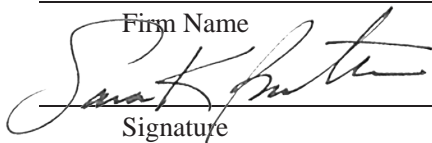
By signing below, Proposer confirms that it is not currently engaged or will not become engaged in any obligations, undertakings or contracts that will require the firm to maintain an adversarial role against the UPRD or that will impair or influence the advice or recommendations it provides to the UPRD.

Please check one of the following statements and attach additional documentation if necessary:

- To the best of my knowledge, the undersigned firm has no potential conflict of interest for this RFQ.
- The undersigned firm, by execution of this form, submits information which may be a potential conflict of interest for this RFQ.

Acknowledged and attested to by:

**Goodwyn Mills Cawood, LLC**

Firm Name  
  
Signature

**Sara K. Butler, AIA, Senior Vice President, Architecture**

Name and Title (Print or Type)

**May 14, 2024**

Date

**Return this fully executed form with your Proposal.**

**FORM 5 - NON-COLLUSION AFFIDAVIT**

STATE OF Georgia

COUNTY OF Fulton

Before me, the undersigned authority, personally appeared Sara Butler, AIA, who, after being by me first duly sworn, deposes and says of his/her personal knowledge that:

a. He/She is Sr. Vice President, Architecture of Goodwyn Mills Cawood, the Proposer that has submitted a Proposal to perform work for the following:

RFQ No.: 24.001 Title: A/E Services University Park Recreation District

b. He/She is fully informed respecting the preparation and contents of the attached Request for Qualifications, and of all pertinent circumstances respecting such Solicitation.

Such Proposal is genuine and is not a collusive or sham Proposal.

c. Neither the said Proposer nor any of its officers, partners, owners, agents, representatives, employees, or parties in interest, including this affiant, has in any way colluded, conspired, connived, or agreed, directly or indirectly, with any other Proposer, firm, or person to submit a collusive or sham Proposal in connection with the Solicitation and contract for which the attached Proposal has been submitted or to refrain from proposing in connection with such Solicitation and contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Proposer, firm, or person to fix the price or prices in the attached Proposal or any other Proposer, or to fix any overhead, profit, or cost element of the Proposal price or the Proposal price of any other Proposer, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against the District or any person interested in the proposed contract.

d. The price or prices to be submitted shall be fair and proper and shall not be tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Proposer or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

Signature: *Sara Butler*

Subscribed and sworn to (or affirmed) before me this 14th day of May 2024, by Sara Butler, AIA Sr. VP, Architecture, who is personally known to me OR has produced Personally Known as identification.

Notary Signature *Kimberly Lewis*

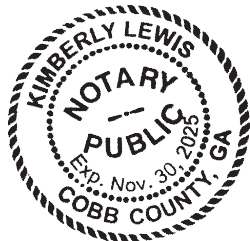
Notary Name: Kimberly Lewis

Notary Public (State): Georgia

My Commission No: Georgia Does not issue commission numbers

Expires on: November 30, 2025

SEAL



**FORM 6 - TRUTH – IN – NEGOTIATION CERTIFICATE**

The undersigned warrants (i) that it has not employed or retained any company or person, other than bona fide employees working solely for the undersigned, to solicit or secure the Agreement and (ii) that it has not paid or agreed to pay any person, company, corporation, individual, or firm other than its bona fide employees working solely for the undersigned or agreed to pay any fee, commission, percentage, gift, or any other consideration contingent upon or resulting from the award or making of the Agreement.

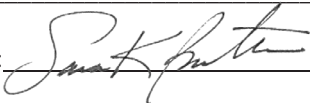
The undersigned certifies that the wage rates and other factual unit costs used to determine the compensation provided for in the Agreement are accurate, complete, and current as of the date of the Agreement.

(This document must be executed by an authorized official of Proposer (e.g., President, CEO, Partner, Managing Partner))

Name: Sara Butler, AIA

Title: Senior Vice President, Architecture

Date: May 14, 2024

Signature: 

**FORM 7 – SCRUTINIZED COMPANY CERTIFICATION**

This certification is required pursuant to Florida State Statute Section 287.135 and must be executed and returned with Proposer’s Proposal.

As of July 1, 2011, a company that, at the time of bidding or submitting a Proposal 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 is ineligible for, and may not bid on, submit a Proposal for, or enter into or renew a contract with an agency or local governmental entity for goods or services of \$1 million or more.

Companies must complete and return this form with its response.

Company:

Goodwyn Mills Cawood, LLC

FEIN:

85-4128572

Address.

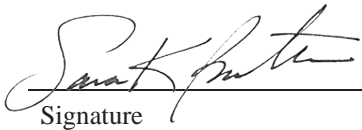
1819 Main Street, Suite 608

City/State/Zip.

Sarasota, FL 34236

I, Sara Butler, AIA, as a representative of Goodwyn Mills Cawood

certify and affirm that this entity is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

  
Signature

Senior Vice President, Architecture

Title

Sara Butler, AIA

May 14, 2024


- 7. The Successful Proposer has sole responsibility for all insurance premiums and policy deductibles.
- 8. It is the Successful Proposer's responsibility to ensure that his agents, representatives and subcontractors comply with the insurance requirements set forth herein. Successful Proposer shall include his agents, representatives, and subcontractors working on the project or at the worksite as insured under its policies, or Successful Proposer shall furnish separate certificates and endorsements for each agent, representative, and subcontractor working on the project or at the worksite. All coverages for agents, representatives, and subcontractors shall be subject to all of the requirements set forth to the procurement representative.
- 9. All required insurance policies must be written with a carrier having a minimum A.M. Best rating of A- FSC VII or better. In addition, the DISTRICT has the right to review the Successful Proposer's deductible or self-insured retention and to require that it be reduced or eliminated.
- 10. Successful Proposer understands and agrees that the stipulated limits of coverage listed herein in this insurance section shall not be construed as a limitation of any potential liability to the DISTRICT, or to others, and the DISTRICT'S failure to request evidence of this insurance coverage shall not be construed as a waiver of Successful Proposer'S obligation to provide and maintain the insurance coverage specified.
- 11. Successful Proposer understands and agrees that the DISTRICT does not waive its immunity and nothing herein shall be interpreted as a waiver of the DISTRICT'S rights, including the limitation of waiver of immunity, as set forth in Florida Statutes 768.28, or any other statutes, and the DISTRICT expressly reserves these rights to the full extent allowed by law.
- 12. No award shall be made until the Procurement Division has received the Certificate of Insurance in accordance with this section.

**FORM 8, INSURANCE STATEMENT RFQ**

**THE UNDERSIGNED** has read and understands the insurance requirements applicable to any Agreement resulting from this solicitation and shall provide the insurances required in this RFQ within ten (10) days from the date of Notice of Intent to Award.

Proposer Name: Goodwyn Mills Cawood, LLC Date: May 14, 2024

Signature  
(Authorized  
Official):

  
\_\_\_\_\_

Printed Name/Title: Sara Butler, AIA, Senior Vice President, Architecture

Insurance Agency: Harmon Dennis Bradshaw, Inc.

Agent Name: Julie Faulkner Agent Phone: (334) 273-7277

*Return this signed statement with your proposal.*



**FORM 9, INDEMNITY AND HOLD HARMLESS**

**UNIVERSITY PARK RECREATION DISTRICT, A POLITICAL SUBDIVISION OF THE STATE OF FLORIDA**

The Successful Proposer shall indemnify and hold harmless District, its officers, and employees from liabilities, damages, losses, and costs, including but not limited to reasonable attorney’s fees, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the Successful Proposer, its personnel, design professionals and other persons employed or utilized by the Successful Proposer in the performance of the Agreement, including without limitation, defects in design, or errors or omissions that result in material cost increases to District. Such indemnification shall include the payment of all valid claims, losses, and judgments of any nature whatsoever in connection therewith and the payment of all related fees and costs. The District reserves the right to defend itself with its own counsel or retained counsel at Successful Proposer’s expense.

Signature of Authorized Official of Proposer: *Sara Butler*

Title: Date: Senior Vice President, Architecture May 14, 2024

Project Number and /or Name: RFQ 24.001 A/E Services for University Park Recreation District

Insurance Agent: Julie Faulkner

Acknowledgement:

STATE OF Georgia

COUNTY OF Fulton

The foregoing instrument was acknowledged before me this 14th day of May, 2024 by \_\_\_\_\_ [FULL LEGAL NAME], who is Sara Butler, AIA

Personally known to me

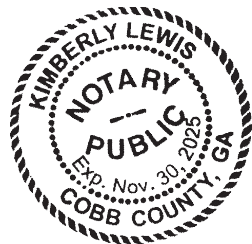
OR

has produced \_\_\_\_\_ as identification.

Notary Signature *Kimberly Lewis*

Print Name Kimberly Lewis

Seal





**Tab 4**  
Trade Secrets

## Identify any Trade Secret being claimed

GMC does not identify any trade secrets being claimed in this submittal package.



▲ Athens Alabama Recreation Center



**Tab 5**

# Proposer Statement of Organization

## Proposer Information and Documentation

### 1. Legal Contracting Name:

**Goodwyn Mills Cawood, LLC dba GMC**

1819 Main Street, Suite 608

Sarasota, FL 34236

### 2. State of Organization/Corporation:

Headquartered in Montgomery, Alabama.

### 3. Ownership structure of Proposer's Company:

GMC is a Limited Liability Corporation (LLC).

### 4. Federal Identification Number:

EIN #85-4128572

### 5. Proposer's W-9 Form:

Please see next page for GMC's W-9 form.

### 6. Contact Information for Proposer:

#### Corporate Office:

2660 EastChase Lane

Suite 200

Montgomery, AL 36117

(334) 271-3200

#### Local Office:

1819 Main Street, Suite 608

Sarasota, Florida 34236

T (615) 479-8053 F (256) 536-9913

sara.butler@gmcnetwork.com

gmcnetwork.com

### 7. List of Officers, owners and/or partners, or managers of the firm. Include names, email addresses, and phone numbers:

Please see list of Officers on Page 33-34

### 8. Provide supporting documentation from the certifying entity agent indicating Proposer is a certified Minority-owned Business Enterprise, if applicable.

GMC is not a minority owned-business.

### 9. Contact information for Proposer's primary and secondary representatives during this RFQ process.

Primary Contact

**Sara Butler, AIA, LEED Green Associate**

Senior Vice President, Architecture

1819 Main Street, Suite 608

Sarasota, Florida 34236

T (615) 479-8053 F (256) 536-9913

sara.butler@gmcnetwork.com



Secondary Contact:

**Julian P.A. Norman-Webb, AIA, NCARB, ARB, LEED AP BD+C**

Project Architect

1819 Main Street, Suite 608

Sarasota, Florida 34236

T (941) 320-8020

julian.norman-webb@gmcnetwork.com



### 10. Summary of Pending Litigation:

Goodwyn Mills Cawood (GMC) is a nationally recognized architecture and engineering firm. Although GMC's involvement in claims and lawsuits is extremely infrequent (0.001%) compared to our volume of projects and due to the risk management and quality control efforts of our teams, litigation in which we are a party does occur from time to time. On these rare occasions, we consider these matters confidential between our firm and our clients, and we are not allowed to disclose information on specific cases. We also maintain general and professional liability, workers' compensation and automobile insurance in sufficient limits to cover any outstanding claims or lawsuits. Our legal counsel fully anticipates that any such claims will be resolved well within the policy limits. There are no unsatisfied judgments against GMC.

### 11. Provide details of any ownership changes to Proposer's organization in the past three years or changes anticipated within 6 months of the due date and time (e.g., mergers, acquisitions, changes in executive leadership):

GMC does not foresee any ownership changes in the organization within the next six months.

Form <b>W-9</b> (Rev. October 2018) Department of the Treasury Internal Revenue Service	<h2 style="margin:0;">Request for Taxpayer Identification Number and Certification</h2> <p style="margin:0;">▶ Go to <a href="http://www.irs.gov/FormW9">www.irs.gov/FormW9</a> for instructions and the latest information.</p>	Give Form to the requester. Do not send to the IRS.
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Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>Goodwyn Mills Cawood LLC</b>	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ <u>  P  </u> <small>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</small> <input type="checkbox"/> Other (see instructions) ▶	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
	5 Address (number, street, and apt. or suite no.) See instructions. <b>2660 Eastchase Lane Suite 200</b>	Requester's name and address (optional)
	6 City, state, and ZIP code <b>Montgomery, AL 36117</b>	
	7 List account number(s) here (optional)	

<b>Part I Taxpayer Identification Number (TIN)</b> Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> , later.  <b>Note:</b> If the account is in more than one name, see the instructions for line 1. Also see <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <th colspan="9" style="text-align: left;">Social security number</th> </tr> <tr> <td style="width:33.33%; text-align: center;">[ ] [ ] [ ]</td> <td style="width:3.33%; text-align: center;">-</td> <td style="width:33.33%; text-align: center;">[ ] [ ] [ ]</td> <td style="width:3.33%; text-align: center;">-</td> <td style="width:33.33%; text-align: center;">[ ] [ ] [ ] [ ] [ ] [ ]</td> </tr> <tr> <th colspan="9" style="text-align: left;">or</th> </tr> <tr> <th colspan="9" style="text-align: left;">Employer identification number</th> </tr> <tr> <td style="text-align: center;">8</td> <td style="text-align: center;">5</td> <td style="text-align: center;">-</td> <td style="text-align: center;">4</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">8</td> <td style="text-align: center;">5</td> <td style="text-align: center;">7</td> <td style="text-align: center;">2</td> </tr> </table>	Social security number									[ ] [ ] [ ]	-	[ ] [ ] [ ]	-	[ ] [ ] [ ] [ ] [ ] [ ]	or									Employer identification number									8	5	-	4	1	2	8	5	7	2
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<b>Part II Certification</b> Under penalties of perjury, I certify that: <ol style="list-style-type: none"> <li>The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and</li> <li>I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and</li> <li>I am a U.S. citizen or other U.S. person (defined below); and</li> <li>The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.</li> </ol> <b>Certification instructions.</b> You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.	
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<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶ 1/2/2024
------------------	----------------------------	-----------------

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*

**Tab 5** Proposer Statement of Organization

# Firm Principals

Name	Address	Phone No.	Email
<b>CEO</b> Jeffrey Brewer, AIA	2400 5th Avenue South, Suite 200 Birmingham, Alabama 35233	(205) 879-4462	jeffrey.brewer@gmcnetwork.com
<b>COO</b> Galen Thackston, PE, LEED Green Associate	2400 5th Avenue South, Suite 200 Birmingham, Alabama 35233	(205) 879-4462	galen.thackston@gmcnetwork.com
<b>CFO</b> Amanda Davis	2660 EastChase Lane, Suite 200 Montgomery, Alabama 36117	(334) 271-3200	amanda.davis@gmcnetwork.com
<b>Board of Directors</b>			
Lee Walters, PWS (Chairman)	11 North Water Street, Suite 15250 Mobile, Alabama 36602	(251) 460-4006	lee.walters@gmcnetwork.com
Kevin Laird, PE	117 Welborn Street Greenville, South Carolina 29601	(864) 527-0460	kevin.laird@gmcnetwork.com
Galen Thackston, PE, LEED GA	2660 EastChase Lane, Suite 200 Montgomery, Alabama 36117	(334) 271-3200	galen.thackston@gmcnetwork.com
Cedric Campbell, PE	2660 EastChase Lane, Suite 200 Montgomery, Alabama 36117	(334) 271-3200	cedric.campbell@gmcnetwork.com
Freddie Lynn, Jr., AIA LEED Green Associate	2660 EastChase Lane, Suite 200 Montgomery, Alabama 36117	(334) 271-3200	freddie.lynn@gmcnetwork.com
John Bricken III, PLA, ASLA LEED Green Associate	2660 EastChase Lane, Suite 200 Montgomery, Alabama 36117	(334) 271-3200	john.bricken@gmcnetwork.com
Steve Jernigan, FAIA, LEED AP	720 Bayfront Parkway, Suite 200 Pensacola, Florida 32502	(941) 312-5523	steve.jernigan@gmcnetwork.com
<b>Executive Vice Presidents</b>			
John Averrett, PE, LEED AP	2660 EastChase Lane, Suite 200 Montgomery, Alabama 36117	(334) 271-3200	john.averrett@gmcnetwork.com
John Bricken III, PLA, ASLA LEED Green Associate	2660 EastChase Lane, Suite 200 Montgomery, Alabama 36117	(334) 271-3200	john.bricken@gmcnetwork.com
Steve Cawood, PE	117 Welborn Street Greenville, South Carolina 29601	(864) 527-0460	steve.cawood@gmcnetwork.com
Chris Engel, AIA, NCARB LEED AP BD+C	2400 5th Avenue South, Suite 200 Birmingham, Alabama 35233	(205) 879-4462	chris.engel@gmcnetwork.com
Bobby Kemp, PE	2660 EastChase Lane, Suite 200 Montgomery, Alabama 36117	(334) 271-3200	bobby.kemp@gmcnetwork.com
Kevin Laird, PE	117 Welborn Street Greenville, South Carolina 29601	(864) 527-0460	kevin.laird@gmcnetwork.com

**Tab 5 Proposer Statement of Organization**

Name	Address	Phone No.	Email
<b>Executive Vice Presidents Continued</b>			
Jof Mehaffey, PWS	3310 West End Avenue, Suite 420 Nashville, Tennessee 37203	(615) 333-7200	jof.mehaffey@gmcnetwork.com
Robert Ramsey	6120 Powers Ferry Rd NW, Suite 200 Atlanta, Georgia 30339	(770) 952-2481	robert.ramsey@gmcnetwork.com
David Reed, PE, PLS	2660 EastChase Lane, Suite 200 Montgomery, Alabama 36117	(334) 271-3200	david.reed@gmcnetwork.com
Kevin Wales, PE	2400 5th Avenue South, Suite 200 Birmingham, Alabama 35233	(205) 879-4462	kevin.wales@gmcnetwork.com
Bill Wallace, AIA	2660 EastChase Lane, Suite 200 Montgomery, Alabama 36117	(334) 271-3200	bill.wallace@gmcnetwork.com
<b>Regional Vice Presidents</b>			
Cedric Campbell, PE	2660 EastChase Lane, Suite 200 Montgomery, Alabama 36117	(334) 271-3200	cedric.campbell@gmcnetwork.com
Gary Owen, AIA, LEED Green Associate	2400 5th Avenue South, Suite 200 Birmingham, Alabama 35233	(205) 879-4462	gary.owen@gmcnetwork.com
Jim Teel	6120 Powers Ferry Rd NW, Suite 200 Atlanta, Georgia 30339	(770) 952-2481	jim.teel@gmcnetwork.com
Joseph Binkley, AIA	3310 West End Avenue, Suite 420 Nashville, Tennessee 37203	(615) 333-7200	joseph.binkley@gmcnetwork.com
Lee Walters, PWS	11 North Water Street, Suite 15250 Mobile, Alabama 36602	(251) 460-4006	lee.walters@gmcnetwork.com
Steve Jernigan, FAIA, LEED AP	720 Bayfront Parkway, Suite 200 Pensacola, Florida 32502	(941) 312-5523	steve.jernigan@gmcnetwork.com
<b>Corporate Vice Presidents</b>			
Abby Basinger	2400 5th Avenue South, Suite 200 Birmingham, Alabama 35233	(205) 879-4462	abby.basinger@gmcnetwork.com
Brian Carey	2400 5th Avenue South, Suite 200 Birmingham, Alabama 35233	(205) 879-4462	brian.carey@gmcnetwork.com
Mario Galloway	2660 EastChase Lane, Suite 200 Montgomery, Alabama 36117	(334) 271-3200	mario.galloway@gmcnetwork.com
Kristen Hunt	2660 EastChase Lane, Suite 200 Montgomery, Alabama 36117	(334) 271-3200	kristen.hunt@gmcnetwork.com
Ashley McKeithan	11 North Water Street, Suite 15250 Mobile, Alabama 36602	(251) 460-4006	ashley.mckeithan@gmcnetwork.com





**Tab 6**

Proposer and Team's Experience

# 1. Summary of Background, size and years in business

GMC got its start in 1947 as a small consulting engineering firm founded by Donald Mills Sr. In 1965, George Goodwyn started Goodwyn Engineering, following his service in the military and work as a bridge construction superintendent. A few years later, George reconnected with a former college classmate, Don Mills Jr., who was running his father's engineering company. In 1975, the two merged their firms to form Goodwyn & Mills Consulting Engineers. In 1985, Steve Cawood joined the team, resulting in the formation of Goodwyn, Mills & Cawood, Inc. One year later, GMC's architecture department was

established, setting the stage for the firm's multi-disciplined approach. Over the years, more disciplines have been added, including landscape architecture, transportation engineering, environmental, electrical engineering, geotechnical engineering and more, bringing all of these services under one roof. In 2020, GMC began transitioning from an S-Corporation to an LLC in order to support the firm's growth and provide more ownership opportunities for its employees, establishing Goodwyn Mills Cawood, LLC, as of Dec. 4, 2020.

**77**  
Years in  
Business

**550+**  
Employees

**24**  
Offices

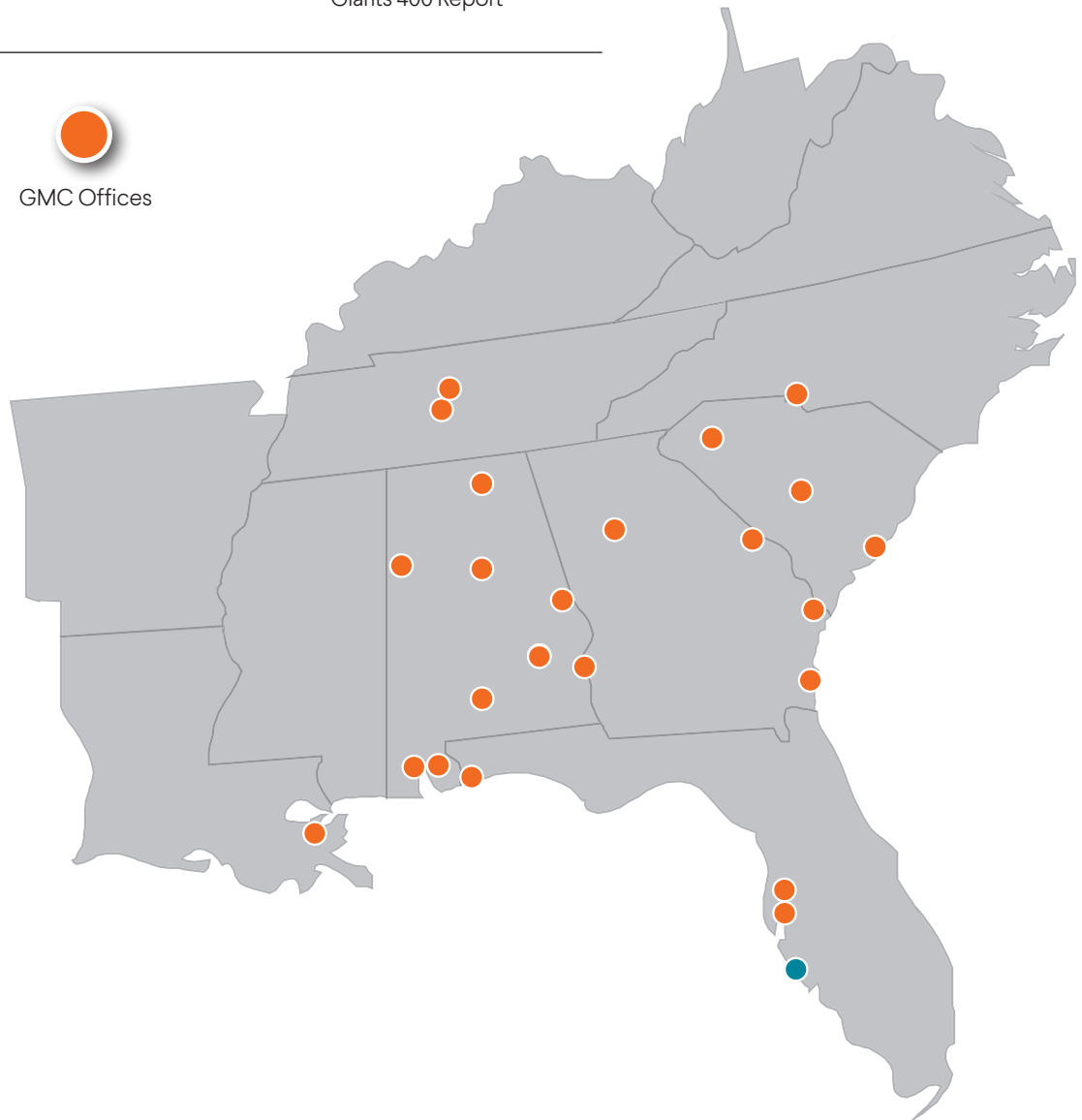
**#36**  
**Top A/E Firms Nationwide**  
Building Design + Construction  
Giants 400 Report



GMC Sarasota, FL



GMC Offices



## 2. Experience in architectural / engineering services for other government agencies, particularly those within Florida

Goodwyn Mills Cawood has a **rich history of providing architectural and engineering services to various government agencies, especially those within Florida**. We have demonstrated expertise across a wide range of project types, including government offices, city halls, community centers, and municipal engineering.

Our approach to design is client-centric, emphasizing collaboration and feedback throughout the process. We understand that every space has its unique story and aim to translate client desires into **functional and cost-effective design solutions**. Goodwyn Mills Cawood's process involves merging form and function, balancing project needs with creative inspiration.

Having **worked with numerous municipal and federal government agencies in Florida**, including Sarasota County, City of Punta Gorda, Santa Rosa County, City of Pensacola, Pasco County, City of Gulf Breeze, Panama City, and City of Lakeland, to name a few, Goodwyn Mills Cawood has **developed deep familiarity with Florida's codes and regulations**.

Overall, Goodwyn Mills Cawood brings a wealth of experience, perspective, and expertise to each project, believing that design plays a crucial role in creating a true sense of place. **Our track record of successful projects and lasting relationships with government agencies in Florida underscores our capability and commitment to delivering high-quality architectural and engineering services.**

Royal Club Fitness and Tennis Center - Naples, FL



## 3. Years of Experience in Architecture and Engineering - 77 Years

### Airport Planning

- Economic Feasibility Studies
- Grant and Funding Assistance
- Parking Apron Design and Construction
- Taxiway Design, Widening, and Ext.
- Taxiway Rehabilitation
- Runway Design and Construction
- Runway Rehabilitation
- Airfield Lighting, Navigational Aids and ILS
- Corporate and T-Hangars
- General Paving Rehab
- Entrance Roads and Parking Areas
- Utilities, Water and Sewer Systems

### Architecture

- Architectural Design
- Interior Design
- Master Planning
- New Construction
- General Renovations
- Site Analysis
- Accessibility Reviews
- Program Review and Analysis
- Facility Programming
- Historic Renovations
- Building Additions
- Reroofing Projects
- Mechanical and Electrical System Renovations
- Construction Administration

### Civil Engineering

- Design/Construction Administration for:
  - Residential Developments
  - Commercial and Office Developments
  - Industrial Parks/Sites
  - Institutional and Educational Facilities
  - Street and Drainage Projects
  - Parks and Recreation Projects
  - Gas Distribution Systems
- Boundary and Topographic Surveys

### Electrical Engineering

- Evaluation of Existing Systems
- Electrical and Communication Design
- Energy Efficiency Studies
- Third Party Equipment Evaluation (ACIL)
- ETAP Arc Flash/Short Circuit Study
- Breaker Coordination Study
- Exterior Overhead and Underground Power Design
- Generator Design, Selection and Testing
- LEED Design and Certification
- Power Distribution
- Interior and Exterior Lighting Design and Photometry
- Fire Alarm and Life Safety Design
- Lightning Protection Design
- Uninterruptable Power System Site Installation and Verification

- Water and Wastewater Power Design
- Architectural Lighting Design
- Construction Administration

### Environmental

- Phase I and Phase II ESA Environmental Assessments
- Environmental Impact Documents and Statements
- Green Infrastructure Design
- Stormwater
  - Master Planning
  - Utilities
  - Permitting and Compliance
- Wetland Delineations
- Wetland Permitting
- Wetland Mitigation
- Mitigation Banking
- Stream Restoration Plans
- Endangered and Threatened Species Survey
- Flood Plain Studies
- Detention Pond Design
- Air Permitting
- Landfill Design and Permitting
- Source Water Protection Plans
- Hydrogeological Evaluations
- Brownfield Projects
- Underground Storage Tank Closure and Investigations
- Geographical Information System (GIS)

### Geotechnical Engineering

- Construction Materials Testing
- Field Exploration
- Laboratory Testing Services
- Foundation Analysis and Design
- Slope/Embankment Stability
- Pavement Evaluation and Design
- Soil Stabilization
- Ground Improvement
- In-situ Moisture and Density
- Dynamic Cone Penetrometer Testing
- Subgrade Evaluation and Proofrolling Observations
- Pile and Pier Observation
- Foundation Construction Monitoring
- Fill Testing and Control
- Concrete Placement Inspection
- Compressive Strength Testing
- Reinforcing Steel Inspection
- Grout Sampling and Masonry Block Testing
- Asphalt Placement Inspection and Coring
- Structural Steel Observations

### Landscape Architecture

- Detailed Site Design
- Hardscape Design for Residential, Commercial and Retail Environments
- Planting and Irrigation Design
- Recreation Planning and Design

- Bike and Pedestrian Facility Planning
- Master Planning Residential Dev
- Master Planning Mixed-use Dev
- Downtown Redevelopment Strategies
- Streetscape Design
- Construction Documents
- Drawings and Specifications
- Construction Administration

### Municipal Engineering

- Water Treatment Plant Design
- Wastewater Treatment Plant Design
- Water Modeling
- Water Main Extensions
- Distribution Systems
- Evaluation of Existing Systems
- Computer Control Systems
- Well Systems
- Pumping Stations
- Storage Tanks
- Sewer Line Extensions
- Sanitary Sewer Rehabilitation
- Gas System Design

### Planning

- Master Planning
- Campus and Community Planning
- Economic Development Planning

### Right Of Way

- Appraisals and Appraisal Review
- Condemnation Support Services
- Cost Estimates
- Due Diligence
- Easement Acquisition
- Environmental Assessments
- Fee Acquisitions
- Negotiations
- Partial or Whole Acquisitions
- Relocation Assistance
- Right of Entry Agreements
- Title Research

### Surveying

- As-Built/Record Surveys
- Boundary Surveys
- Construction Surveying & QA/QC
- FEMA Surveys & Documentation
- Hydrographic Surveys
- Rights of Way/Easement Surveys
- Subdivision Platting
- Topographic Surveys
- Aerial Drone Surveys
- GIS Data Collection
- 3D Scanning & modeling

### Transportation Engineering

- Project Identification
- Concept Development/Planning
- Assist with Funding Opportunities
- Grant Applications
- Environmental Studies/Permitting

- Surveying
- Geotechnical Design
- Right-of-Way Services
- Final Design
- Project Letting
- Airport Engineering and Planning
- Roadway Utility Improvements
- Stormwater Improvements
- Intersection Improvements
- Pedestrian Walkways
- Roundabouts
- Roadway Resurfacing
- Erosion Control Design
- Streetscape
- Local Maintenance Resurfacing Program Grant Applications
- Industrial Access Roadways
- Department of Transportation Projects including:
  - Roadways
  - Drainage
  - Public Hearings
  - Private Development Roadways
  - Construction Engineering
  - Land Planning
  - Engineering
  - Street and Drainage
  - Parks and Recreation
  - Gas Distribution Systems
- Construction Administration

### Disaster Recovery

- Debris Removal Monitoring
  - Debris Hauling Certification
  - Debris Hauling Vehicle Certification (Volumetric)
  - Private Property Debris Removal
  - Data Management
  - Document Management
  - Disaster Recovery Monitoring with ADMS
  - Progress Reporting
- Cost Recovery
  - Preliminary Damage Assessment
  - Damage Site Surveys
  - Collection and Compilation of PDAs
  - FEMA Grant Applications
  - Small/Large Project Formulation and Scoping
  - Applicant Scoping Meeting Facilitation
  - Project Worksheet (PW) Development
  - Procurement Assistance
  - Expenditure Review/Approval and Reconciliation
  - Direct Administrative Cost (DAC) Support
  - Appeals Support
  - Closeout and Audit Assistance
- FEMA Hazard Mitigation Assistance
  - Application Development
  - Benefit Cost Analysis
  - Project Monitoring
  - Feasibility Studies
  - Program Reporting
  - Budget and Schedule Preparation
  - Mitigation Plan Development
  - Disaster Preparedness and Planning

## 4. Key Staff assigned to project including resumes

### Sara Butler, AIA, LEED Green Associate

Senior Vice President, Architecture / Project Executive

(615) 479-8053    sara.butler@gmcnetwork.com



**GMC Sarasota Office:** 1819 Main Street, Suite 608, Sarasota, FL 34236

Sara's relocation to Sarasota from our Nashville office brings a seasoned architect and a community-minded leader to the forefront, enriching both our office and the local community with her expertise and passion. She is a licensed architect in 16 states, including Florida, and has over 30 years of experience in the planning and design of a variety of project types including commercial, hospitality, healthcare, education, and athletic facilities. She oversees the architectural team in our Sarasota office and focuses on the delivery of quality planning, detailed design, and client satisfaction. Over the years, Sara has been recognized and awarded for her outstanding design and leadership qualities, and has contributed numerous award-winning projects to GMC's portfolio. In addition to her influence throughout the firm, Sara is involved with various outreach programs and not-for-profit organizations within the community.

#### Relevant Experience

- Tennessee Tower 30th Floor Executive Conference Kitchen Reno - Nashville, TN
- The Lodge at Paris Landing State Park - Buchanan, TN
- AC Hotel by Marriott - Brentwood, TN
- MPower Training and Fitness - Tennessee
- Treehouse/Three House Restaurant Expansion Study - Nashville, TN
- Cracker Barrel Restaurants - Various locations across the US
- Dalt's Restaurant Renovation - Nashville, TN
- Sarasota County PDS - Sarasota, FL
- Sarasota County Employee Health Center - Sarasota, FL
- Wayne County Hospital Physical Therapy Addition - Monticello, KY
- Rokeby Condominium Tower Renovation - Nashville, TN
- Dolce Ballroom Addition, Renovations and ADA Upgrades- Peachtree, GA
- UAB Gold Residence Hall - Birmingham, AL
- Vanderbilt Alpha Epsilon Pi Fraternity House Renovation - Nashville, TN
- Springboard Landing Assisted Living - Nashville, TN
- Portland Fire Hall No 1 - Portland, TN
- Portland/Sumner County EMS/Fire Hall - Portland, TN
- LaVergne Planning for City Hall, Police and Fire Stations - LaVergne, TN
- Tennessee Highway Patrol Headquarters - Jackson, TN
- Tennessee Highway Patrol Department of Safety Dispatch Communication Center and Vehicle Repair Shop - Jackson, TN
- Tennessee National Guard Winchester Readiness Center - Winchester, TN
- Tennessee Air Guard at Berry Field Refueling Station - Nashville, TN
- Memphis Readiness Center Expansion - Memphis, TN
- Tennessee National Guard Consultant Contract (State and Federal Contracts) - Statewide, TN
- Tennessee Highway Patrol District III Headquarters Renovations - Nashville, TN
- Clover Bottom Firing Range Preliminary Study - Nashville, TN
- Tennessee Highway Patrol Department of Safety Facility Assessment & Evaluation Study - Jackson, TN
- Deberry State Prison Programming and Design for Clinic Buildout - Nashville, TN
- Tennessee National Guard, Chattanooga Readiness Center Renovation Study -



#### Education:

Bachelor of Architecture, Auburn University, 1991

#### Licenses and Certifications:

Registered Architect in Florida and AZ, CA, CO, GA, ID, IN, LA, MD, MO, NM, NY, OK, TN, TX, WI

#### Affiliations:

- American Institute of Architects (AIA)
- National Council of Architectural Registration Boards (NCARB)
- USGBC, Member
- Lakewood Ranch Business Alliance
- Sarasota Chamber - Engage Sarasota

#### Awards and Honors:

- NCARB, Cut Score Development Committee
- "Rising Star" Profile, Nashville Business Journal, 2008
- "40 under 40" Recipient, Building Design and Construction, 2008
- "Nashville Emerging Leader", 2008
- Recipient of the Leadership Healthcare Council Delegate trip, 2008
- Leadership Franklin Class of 2013

## Tab 6 Proposer and Team's Experience

# Julian Norman-Webb, AIA, NCARB, LEED AP BD+C

Project Manager

(941) 313-3195    Julian.norman-webb@gmcnetwork.com

 **GMC Sarasota Office:** 1819 Main Street, Suite 608, Sarasota, FL 34236

Julian is a registered architect on both sides of the Atlantic with 27 years of experience in the United States, France, and the United Kingdom. He has worked across disciplines, across cultures and languages, across multiple codes and jurisdictions, and across many project types. He has the ability to recognize the preponderance of common skills that span buildings of all types, and to then be able to hone in on the unique requirements of a specific project type. Rather than repeating a generic formula, Julian leads teams that provide clients with specifically unique designs that meet their budget, their program, their sustainable goals, and fully support how the client wishes their project to be perceived. His work has been published in local media, the Huffington Post, and on ArchDaily.com, as well as being exhibited at Center for Architecture Sarasota, and at several American Institute of Architect Conventions, most notably at the 2014 American Institute of Architects National Convention, Atlanta. Julian looks to provide support and leadership to his community, most notably through the American Institute of Architects and for various educational, not-for-profit organizations. He initiated the local Architecture in Education program in local elementary and middle schools, and volunteers for the national Odyssey of the Mind program.

### Relevant Experience

- Sarasota Memorial Hospital Kitchen Expansion - Sarasota, FL
- Port Royal Club Fitness Center - Naples, FL\*
- Port Royal Club Tennis Center - Naples, FL\*
- Chelsea and Spirit Centers St. Thomas More Church - Sarasota, FL
- Rick Macci Tennis Academy - Boca Raton, FL
- Sarasota County Planning and Development Offices - Sarasota, FL
- Punta Gorda City Hall Expansion - Punta Gorda, FL
- Vamo Drive Historical Structures Analysis and Park Conceptual Design - Sarasota, FL
- Fruitville Public Library Building Envelope Renovation - Sarasota, FL
- Bibliothèque de France - Paris, France\*
- Sarasota County Jacaranda Public Library - Venice, FL\*
- Naples Botanical Gardens Master Plan - Naples, FL\*
- HealthFirst Holmes Regional Medical Center Pharmacy Renovation - Melbourne, FL
- Sarasota County Health Department Headquarters ADA compliance - Sarasota, FL
- HealthFirst Palm Bay Hospital Pharmacy - Palm Bay, FL
- HealthFirst Palm Bay Hospital Operating Rooms Renovation - Palm Bay, FL
- First Step of Sarasota Residential Campus - Sarasota, FL\*
- King's College London New Hunts House, Guy's Hospital - London, United Kingdom\*
- Citadines Trafalgar Square Hotel - London, United Kingdom\*
- Marshall's Store - Oviedo, FL
- Shops at Sylva - Sylva, NC



### Education:

- Certificate in Professional Practice and Management in Architecture, The Bartlett School of Architecture, University College London, UK
- Bachelor of Architecture, University of Bath, UK
- European Union ERASMUS Scholarship Université Libre de Bruxelles Brussels, Belgium
- Invited Scholarship Student INSA de Strasbourg, Strasbourg, France
- Bachelor of Science with Honours, General Architectural Studies, University of Bath, UK

### Licenses and Certifications:

- Registered Architect in FL #AR96720, United Kingdom #0671331

### Affiliations:

- US NCARB Certificate Holder 76619
- LEED Accredited Professional - Building Design and Construction - GBCI 10483875
- American Institute of Architects (AIA)
- National Council of Architectural Registration Boards (NCARB)
- Architects Registration Board United Kingdom (ARB)
- ACE Mentor Program of America Mentor, Judge, and Guest Speaker, 2014-2019
- Odyssey of the Mind (Florida) Regional and State Judge, 2008 - present
- St Thomas More Church Lector, 2005 - present
- American Institute of Architects
- Florida Gulf Coast Chapter President, 2018  
Vice President, 2017  
Secretary, 2015-2016

\* Projects completed with previous firm.

## Tab 6 Proposer and Team's Experience



**Dylan Bernius**  
Project  
Coordinator

(941) 586-7904

dylan.bernius@gmcnetwork.com

**GMC Sarasota Office:**  
1819 Main Street, Suite 608,  
Sarasota, FL 34236

**Education:** Master of Architecture,  
University of Detroit Mercy, 2004

Dylan Bernius has an extensive background in architectural services, boasting over 23 years of experience in the field. His skill set encompasses a variety of technical and creative abilities, making him a valuable asset to any architectural or engineering project. He is efficient in Revit, AutoCAD, Microsoft Office Suite, Adobe Photoshop and Permitting. Dylan's creativity, technical expertise, and project management capabilities make him a valuable asset in the field of architecture and engineering.

### Relevant Experience

- Loral Oaks County Club expansion and renovation – Sarasota, FL\*
- Forest Lakes Country Club - Clubhouse, Condominiums/Amenities & Golf Course Master Plan – Sarasota, FL\*
- Sarasota Yacht club – Sarasota, FL\*
- Desoto Boys and Girls Club of Manatee County – Bradenton, FL\*
- Riverhouse Waterfront Grill, Heavy timber Restaurant Renovation – Palmetto, FL\*
- Field Stone CDD-Grand Reserve Clubhouse and Amenities – Parrish, FL\*
- The Aviary at Rutland Ranch – Community Signage, Clubhouse and Pool Amenity Pavilion – Parrish, FL\*
- Cape Coral Technical College Expansion – Cape Coral, FL
- City of DeBary Main Street – DeBary, Florida
- Lakeland Ambulatory Surgery Center



**John Escobar**  
BIM/  
Renderings

(941) 312-5523

john.escobar@gmcnetwork.com

**GMC Sarasota Office:**  
1819 Main Street, Suite 608,  
Sarasota, FL 34236

**Education:** Bachelor in Electrical Engineering,  
Colombian National University – Bogota, CO

John is a highly skilled drafting professional with over 20 years of experience dedicated to elevating companies through innovative software implementation and creative design solutions. Proficient in a wide range of drafting software including Revit, AutoCAD Architectural, Sketchup, Lumion, and more. Known for implementing CAD standards and utilizing realistic renderings and animations as effective sales tools. Adept at exceeding customer expectations by identifying their needs and delivering exceptional service throughout the design process. Passionate about technology and committed to continuous learning and improvement.

### Relevant Experience

- Sarasota County PDS One Stop – Sarasota, FL
- City of Punta Gorda City Hall – Punta Gorda, FL
- Sarasota County EIT and Employee Health Center – Sarasota, FL
- Cape Coral Technical College Expansion – Cape Coral, FL
- City of DeBary Main Street – DeBary, FL
- Taste of Texas Travel Plaza – Canton, TX
- Numerous Residential Homes ranging 1,000 – 8,000 sf – Various Locations, FL\*
- Floor Plan Creator for Numerous Homes – Various Locations, FL\*



**Jamie Bordelon**  
Interior  
Design Assoc.

(850) 432-0706

jamie.bordelon@gmcnetwork.com

**GMC Pensacola Office:**  
720 Bayfront Parkway, Suite 200,  
Pensacola, FL 32502

**Education:** Bachelor in Fine Art in Interior Design,  
Rocky Mountain College of Art & Design – Lakewood, CO

Jamie recently joined our team and is a dedicated designer with a passion for creating safe, functional, and beautiful spaces. With a keen eye for detail and a commitment to understanding clients' needs and desires, Jamie excels in both commercial and residential design. Jamie's expertise spans from interior space planning to selecting materials and completing drawings. She is proficient in Revit, AutoCAD and InDesign. Jamie brings a holistic approach to every project, ensuring exceptional results.

### Relevant Experience

- Shore Thing Cigars Commercial Fit Up – Orange Beach, AL\*
- The Beach Club Hideway Village Event Space Interior Renovation – Gulf Shores, AL\*
- Lake Lurleen State Park Welcome Center Interior Renovation, Coker, AL\*
- The Beach Club Indoor Cabana and Pool Bathroom Renovation – Gulf Shores, AL\*
- The Palms Commercial Office Space Fit Up – Orange Beach, AL\*
- Shade Office Commercial Office Space – Orange Beach, AL\*
- Fowler Residence Interior Renovation and Addition – Gulf Shores, AL\*
- Braden Residence Home Addition – Orange Beach, AL\*
- Smith Residence Interior Renovation and Addition – Foley, AL\*
- Thomas Residence – New Custom Home – Orange Beach, AL\*

*\*performed with previous firm*

## 5. Sub-consultants assigned to the project



**Dan Schafran, P.E. *Principal Electrical Engineer***  
**Professional Experience: 18 Years**



### **Summary of Applicable Experience:**

Mr. Schafran brings 18 years of experience in all phases of engineering analysis and design for electrical systems for a wide variety of building types. Dan has worked on a broad range of projects types including healthcare, commercial, religious/worship, municipal, fire/rescue, parks & recreation, multi-family/mixed use, residential, industrial/manufacturing, primary and higher education, hospitality and physical sciences. Dan also has significant construction experience and is equally comfortable working with construction managers (CM), design builders, owner direct hire and low bid contractors. Dan's design experience includes both low and medium voltage power systems, structured cabling, service distribution, emergency power systems and arc fault analysis. Dan serves in the role as Principal Electrical Engineer for Genesis and oversees the development of design standards, details, specifications and overall electrical direction for the company.

### **Education:**

Syracuse University  
Bachelor of Science - Electrical Engineering / 2006

### **Registrations:**

Professional Engineer: *FL and 16 other states*  
National Council of Examiners for Engineering and Surveying

### **Professional Affiliations:**

Member - IES  
Member - NFPA

Tennessee  
615.628.7270

Florida  
941.444.2189

[www.geneng.net](http://www.geneng.net)





**Mike Haney, P.E., LEED AP, CxA, *Principal Engineer***  
**Professional Experience: 30 Years**



**Summary of Applicable Experience:**

Mr. Haney brings 30 years of experience in all phases of engineering analysis and design for mechanical, electrical, plumbing and fire protection systems for a wide variety of building types. Mike excels in all aspects of inter-disciplinary project development and management including scope of work development, facility survey/inspections, design, cost estimating, coordination, construction administration and project quality/budget control. He has worked on a broad range of project types including healthcare, commercial, religious/worship, municipal, fire/rescue, parks & recreation, multi-family/mixed use, residential, aviation, transportation, industrial/manufacturing, primary and higher education, hospitality and physical sciences. Mike also has significant prime project management experience and leads the energy services efforts for Genesis which includes performance contracting, energy audits/modeling, LEED facilitation, control system integration and commissioning. Mike has significant construction experience and is equally comfortable working with construction managers (CM), design builders, owner direct hire and low bid contractors. Mike has worked on dozens of LEED certified projects and has worked on the design or facilitated the certification of additional projects under the alternative rating systems including Energy Star, Green Globes, ICC 700, NGBS, EarthCraft, Standard 189P and others. Mike recently served in the role of lead Engineer and Green Building Consultant for the first project to be certified (platinum certification) in the Dominican Republic and he's the engineer responsible for one of the largest geothermal water source heat pump systems in the southeast United States.

**Education:**

University of Maryland, College Park, MD  
Bachelor of Science - Mechanical Engineering / 1993

**Registrations:**

Professional Engineer: *FL and 15 other states*  
National Council of Examiners for Engineering and Surveying  
AABC Certified Commissioning Agent – Since 2009  
LEED Accredited Professional – Since 2007

**Professional Affiliations:**

Member - American Society of Heating, Refrigeration and Air Conditioning Engineers  
Member - AABC Commissioning Group

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Florida  
941.444.2189

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**Tab 6 Proposer and Team's Experience**



**Roger L. Shearrow, P.E., LEED AP, CxTS, Senior Plumbing and Fire Protection Engineer**  
**Professional Experience: 27 Years**

**Summary of Applicable Experience:**

Mr. Shearrow is a Senior Mechanical Engineer with 27 years of experience in the building industry with extensive experience in mechanical engineering design for HVAC, Plumbing, and Fire Protection systems. Roger is adept at all phases of design, construction document production, and construction administration from initial planning to design documentation, submittal review/approval, construction site inspections, and project close/punch list reports. He has worked on a broad range of building projects including K-12 education, higher education, healthcare, office, retail, restaurant, institutional, and industrial experience.

**Education:**

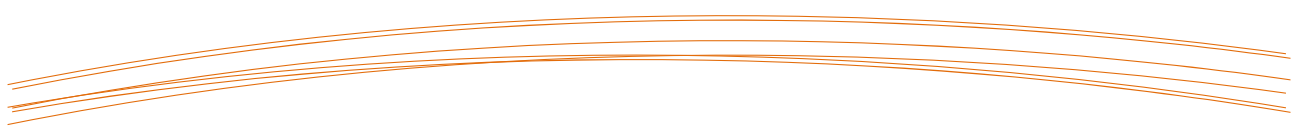
University of Arizona  
Bachelor of Science - Mechanical Engineering / 1995

**Registrations:**

Professional Engineer: *FL and 7 other states*  
NCEES Record updated to apply for licensure in additional state(s), if required.  
Commissioning Process Technical Service Provider (CxTS) from University of Wisconsin, Madison  
LEED® Accredited Professional (Legacy) from US Green Building Council.  
Fire Sprinkler Design Certificate from AFSA.

**Professional Affiliations:**

American Society of Heating, Refrigerating, and Air-Conditioning Engineers.  
American Society of Plumbing Engineers.



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**Matt Dunn,  
ASLA**

**Kimley-Horn  
Project Manager  
and Lead  
Landscape  
Architect**

**PROFESSIONAL CREDENTIALS**

- Bachelor, Landscape Architecture, Virginia Polytechnic Institute and State University
- American Society of Landscape Architects (ASLA)

Kimley»Horn

**SPECIAL QUALIFICATIONS**

Matt brings more than nine years of landscape architecture and project management experience. He is well versed in construction document preparation, presentation graphics, illustrative 3D renderings, construction phase services, and arboriculture services for a variety of local and nationally recognized clients. Notably, his experience involves a mix of code minimum required landscape design, enhanced landscape design, arboriculture services, and master planning for both private land development and public realm projects. He has led numerous luxury residential and amenities pursuits throughout Florida, and is well-versed in local conditions.

**RELEVANT PROJECTS**

**University Park Country Club Master Plan, Sarasota, FL** – Project Manager. Kimley-Horn is providing professional landscape architectural and land planning services for the University Park Country Club master plan that's a part of the University Park Recreation District. University Park Recreation District, located on the border of Manatee and Sarasota Florida Counties, is located within the gates of an award-winning master planned community of more than 1,200 homes with 32 individual neighborhoods. The Recreation District includes a semi-private Country Club featuring 27 holes of championship golf, 11 lighted tennis courts, a state-of-the-art fitness center, a casual lounge/bar/card room as well as a full-service restaurant.

**Celery Fields Quads Park, Sarasota, FL** – Landscape Analyst. Kimley-Horn was selected to aid in the design concepts for a re-naturalization of more than 30 acres of upland located adjacent to Celery Fields in Sarasota. This project was designed in coordination with The Conservation Foundation of the Gulf Coast and the Sarasota Audubon Society to create additional wildlife and birding habitat on parcels previously designated for commercial construction. The design plan package includes a visionary concept of tying three parcels together through a ribbon of planted native trees, and provides for an education demonstration of three unique habitat ecosystems; mesic hammock, hardwood hammock, and pine flatwoods. The plan also includes associated improvements for parking layouts, the location of the proposed site features, ingress/egress into the park, locations of buildings and other structures, alignment of sidewalks and pathways, among other features like an inclusive, natural playground. 3D digital illustrative models of the site were also provided to the client for marketing and public relations purposes, as well as to provide as a fundraising campaign tool. Additionally, grant services and creative design solutions resulted in a successful grant application with up to \$450,000 of grant funds available for implementation of the natural systems restoration project elements.

**Plymouth Harbor, Sarasota, FL**– Project Manager. Plymouth Harbor is a church-sponsored, not-for-profit continuing care retirement community (CCRC). In addition to comfortable living, the 16-acre waterfront community provides residents with a variety of recreational and wellness facilities and activities. Kimley-Horn provided landscape architecture, land planning, civil, environmental, and structural engineering services for the redevelopment of a private 3.2-acre waterfront amenity area, including permitting through the City of Sarasota and the Southwest Florida Water Management District (SWFWMD). The new design includes the removal of invasive species and failing structures, such as an elevated boardwalk and pedestrian bridge, and improvements to pedestrian circulation including a 12-foot-wide rubberized multi-use waterfront walking trail, a meandering six-foot-wide rubberized walking trail, large seating areas, shade structures, enhanced landscaping, and lighting. This revitalized waterfront amenity will connect residents to nature through educational signage and safely bringing residents closer to the water's edge. The design incorporates existing amenities such as kayak storage and water access, and a shaded pavilion and gazebo.



**Peter Van Buskirk, P.E., AICP**  
Senior Advisor

**PROFESSIONAL CREDENTIALS**

- Bachelor of Science, Civil Engineering, Union College
- Professional Engineer in Florida, #38859
- American Institute of Certified Planners, #017311
- American Planning Association (APA), Member
- American Society of Civil Engineers (ASCE), Member
- Florida Engineering Society (FES), Member

Kimley»Horn

**SPECIAL QUALIFICATIONS**

Peter has 42 years of experience providing engineering services to both the public and private sectors. He has served as project engineer/project manager for a wide variety of projects, including large-scale residential subdivisions, major retail developments, parks, drainage design, and utility design projects. Peter is experienced in the procedures for permitting site development projects with local government agencies, the Florida Department of Transportation (FDOT), the Florida Department of Environmental Protection (FDEP), various Florida water management districts, and the U.S. Army Corps of Engineers (USACE). His project management responsibilities have included client and contractor relations, public meetings and presentations, project organization, and scheduling. Peter earned a Bachelor of Science degree in Civil Engineering from Union College. He is a Professional Engineer in Florida, as well as a certified planner (American Institute of Certified Planners). Peter is currently a member of the American Society of Civil Engineers, Florida Engineering Society, and the American Planning Association.

**RELEVANT PROJECTS**

**Babcock Ranch, Lee County, FL** — Project Engineer. Surrounded by the 73,000-acre Babcock Ranch Preserve, Babcock Ranch is a planned 17,000-acre, eco-centric community for more than 50,000 future residents. The vision of developer Kitson & Partners includes enhancing water quality, abating regional drainage issues, and developing the site in a socially responsible manner to preserve much of the natural habitat. In addition, Babcock's homes and businesses will be powered by renewable solar energy, making it the first solar town in the United States. Kimley-Horn became involved with the project early in the due diligence and planning phases, and we continue to provide engineering and planning services. We have provided the master planning for the overall project and individual villages, including the town center and first 1,000 units of development. We continue to provide the master planning, design, and environmental resource permitting of the surface water management system for the 26+/- square mile development of regional impact. In addition, we provide landscape architecture services including design, permitting, and construction phase services for the Babcock Ranch subdivisions, commercial sites, water and wastewater infrastructure, and roadways.

**Celery Fields Quad Park, Sarasota County, FL** — Project Engineer. Kimley-Horn provided design, planning, and community involvement services related to the park projects. Master plan components for Celery Fields included environmental enhancement and restoration of the site agricultural areas; a five-trail system; hard trails for bicycles and rollerblades; soft trails for walking and jogging; a waterfront plaza; an interactive fountain and promenade; an interpretive signage system; provisions for a kayak and canoe launch; a visitor's center with restrooms; and a design to celebrate site history and bird watching activities.

**Gran Paradiso, North Port, FL** — Project Planner. Composed of 1,000 single-family and multifamily units, Gran Paradiso features an amenity center building with a resort-style pool, a neighborhood center, pocket parks, and multimodal paths. Kimley-Horn provided full design, permitting and CEI services for Phase 1 of this 1,068-acre residential subdivision. The project included the construction of both public and private infrastructure for several owners. All the work was completed under one construction contract to achieve economies of scale. Public infrastructure constructed during this project included over two miles of collector roadway, turn-lane additions to US-41, over 12,200 linear feet of water main, 12,600 linear feet of force main and 12,300 linear feet of reclaimed water main, four sewage lift stations, a reclaimed water pump station, almost 500 linear feet of concrete box culvert, and thirty stormwater management lakes and associated water control structures. The public collector roads are closed drainage, two-lane divided and undivided roads, with sidewalks, street lighting, landscaping, and irrigation.



**Trenton  
Strackbein,  
P.E.**

Lead Civil  
Engineer

**PROFESSIONAL CREDENTIALS**

- Bachelor of Science, Civil Engineering, University of Florida
- Professional Engineer in Florida, #86562

Kimley»Horn

**SPECIAL QUALIFICATIONS**

Trenton is a civil engineer specializing in land development with more than 10 years of experience. He has wide-ranging design, permitting, and construction administration experience on private and public sector projects. His project portfolio includes residential, commercial, roadway, and theme park projects. He is an expert in the design of stormwater management infrastructure and public utilities. He has permitting experience with the Southwest Florida Water Management District (SWFWMD), Manatee County Planning and Public Works Departments, Sarasota County Development Services, and the City of North Port Planning Department. Trenton earned his Bachelor of Science in Civil Engineering from the University of Florida and is a registered Professional Engineer in Florida.

**RELEVANT PROJECTS**

**BeachWalk by Manasota Bay Master Planned Community, Englewood, FL** — Project Engineer. Among the thousands of acres of single-family residential communities that our local team has developed is the 780-acre BeachWalk by Manasota Key master planned community for Pulte Homes. Kimley-Horn has been involved with this project for more than 15 years, providing multidisciplinary consulting services including due diligence, site civil engineering, land planning, landscape architectural services, transportation and roadway engineering, utility infrastructure design, permitting, and construction phase services. Most recently, Kimley-Horn was awarded a contract for Phase II of this residential community proposed to include more than 1,600 single-family homes at full build-out. Kimley-Horn is tackling the more challenging aspects of this project, like the 25,000 linear feet of offsite forcemain improvements, the relocation of a Sarasota County collector road, and FDOT roadway and utility improvements. The BeachWalk community places an emphasis on walkability and community amenities such as resort-style recreational facilities, 200 acres of preserve and greenspace, a luxury club house, and an extensive trail network that connects the residential components of the overall development.

**Legacy Trail Extension, Sarasota County, FL** — Project Engineer. Kimley-Horn provided Sarasota County with trail design and related engineering and landscape architectural services for the Legacy Trail Extension project from Culverhouse Nature Park to Payne Park, as well as the North Port Connector trail from the east end of pavement on Forbes Trail to Warm Mineral Springs park. For these two segments, Kimley-Horn provided trail design and related civil engineering, structural/bridge engineering, bridge inspection, planning/landscape architecture, environmental assessment/permitting, stormwater management, utilities infrastructure, communication system, and community engagement services.

**Lorraine Lakes, Lakewood Ranch, FL** — Project Engineer. Kimley-Horn provided planning, engineering, and landscape architectural services for a 1,500-unit residential subdivision for Lennar Homes in Lakewood Ranch. This project required a General Development Plan (GDP) through Manatee County. Trenton created the master stormwater management model for the entire development. He also assisted in the plan production and permitting process. The permitting process required approvals through Manatee County Planning, Manatee County Public Works, SWFWMD, and FDEP.

**Celery Fields Quads Park, Sarasota, FL** — Project Engineer. Kimley-Horn was selected to aid in the design concepts for a re-naturalization of more than 30 acres of upland located adjacent to Celery Fields in Sarasota. The design plan package includes a visionary concept of tying three parcels together through a ribbon of planted native trees, and provides for an education demonstration of three unique habitat ecosystems; mesic hammock, hardwood hammock, and pine flatwoods. The plan also includes associated improvements for parking layouts, the location of the proposed site features, ingress/egress into the park, locations of buildings and other structures, alignment of sidewalks and pathways, among other features like an inclusive, natural playground. Grant services and creative design solutions resulted in a successful grant application with up to \$450,000 of grant funds available for implementation of the natural systems restoration project elements.



**Scott Wedgeworth, P.E.**  
Civil Engineer

**PROFESSIONAL CREDENTIALS**

- Bachelor of Science, Civil Engineering, Stevens Institute of Technology
- Professional Engineer in Florida, #96799

Kimley»Horn

**SPECIAL QUALIFICATIONS**

Scott is a civil engineer with six years of experience. Scott specializes in land development projects in Sarasota County, the City of Sarasota, City of Bradenton, and Manatee County. Scott is experienced in environmental permitting through the Southwest Florida Water Management District (SWFWMD) and the Florida Department of Environmental Protection (FDEP). Scott is well-versed in the storm water design requirements of Sarasota County and the SWFWMD. He is also proficient in the use of the Interconnected Pond Routing, Version 4 (ICPR4) software.

**RELEVANT PROJECTS**

**University Park Country Club Master Plan, Sarasota, FL** – Project Engineer. Kimley-Horn is providing professional landscape architectural and land planning services for the University Park Country Club master plan that's a part of the University Park Recreation District. University Park Recreation District, located on the border of Manatee and Sarasota Florida Counties, is located within the gates of an award-winning master planned community of more than 1,200 homes with 32 individual neighborhoods. The Recreation District includes a semi-private Country Club featuring 27 holes of championship golf, 11 lighted tennis courts, a state-of-the-art fitness center, a casual lounge/bar/card room as well as a full-service restaurant.

**Celery Fields Quads Park, Sarasota, FL** – Project Engineer. Kimley-Horn was selected to aid in the design concepts for a re-naturalization of more than 30 acres of upland located adjacent to Celery Fields in Sarasota. This project was designed in coordination with The Conservation Foundation of the Gulf Coast and the Sarasota Audubon Society to create additional wildlife and birding habitat on parcels previously designated for commercial construction. The design plan package includes a visionary concept of tying three parcels together through a ribbon of planted native trees, and provides for an education demonstration of three unique habitat ecosystems; mesic hammock, hardwood hammock, and pine flatwoods. The plan also includes associated improvements for parking layouts, the location of the proposed site features, ingress/egress into the park, locations of buildings and other structures, alignment of sidewalks and pathways, among other features like an inclusive, natural playground. 3D digital illustrative models of the site were also provided to the client for marketing and public relations purposes, as well as to provide as a fundraising campaign tool. Additionally, grant services and creative design solutions resulted in a successful grant application with up to \$450,000 of grant funds available for implementation of the natural systems restoration project elements.

**The Bay Park, Sarasota, FL** – Project Engineer. Kimley-Horn, in collaboration with project lead Agency Landscape + Planning, provided professional consulting services for the Master Plan, Phase 1, and the ongoing \$65-million Phase 2. The park has already established a cultural and economic legacy for the region while ensuring open public access to the Sarasota Bayfront. Special features of the first phase of the Bay include an iconic ibis-themed children's playground, a recreational mangrove walk with a kayak launch, a 30-foot spiral shade structure and concessions pavilion, and an events and performance lawn. Beyond the natural assets provided by the Bayfront, this park offers greater connectivity to surrounding neighborhoods and reflect Sarasota's diverse heritage while emphasizing sustainability.

**University Park Apartments Preliminary Wastewater Analysis, Sarasota, FL** – Project Engineer. The University Park Apartments project is located on a 9.8-acre parcel in Sarasota County. Kimley-Horn is performing a preliminary analysis of the wastewater collection and transmission system that will include calculations of the wastewater contributions based on Equivalent Dwelling Units (EDU) tabulations required by Sarasota County, the preliminary design of a proposed standard lift station located on the site, and an analysis of downstream lift station to prove capacity and further impacts within Sarasota County Public Utilities wastewater system.



**Chris  
Cianfaglione,  
PLA, ASLA,  
ISA**

**Senior Landscape  
Architect**

**PROFESSIONAL CREDENTIALS**

- Bachelor of Landscape Architecture, University of Florida
- Professional Landscape Architect in Florida, #6667207
- ISA Certified Arborist, FL-6527A
- American Society of Landscape Architects (ASLA), Full Member
- International Society of Arboriculture (ISA), Member

Kimley»Horn

**SPECIAL QUALIFICATIONS**

Chris is a landscape architect with 15 years of experience in the design, management, and implementation of world-class parks, streetscapes, residential developments, and cultural institutions for various local and nationally recognized clients. Specifically, his experience includes construction document preparation, public presentations, master planning, illustrative 3D visualizations, project photography, and LID strategies. Chris is a professional landscape architect in Florida and an ISA-certified arborist. Chris' knowledge of design protects and enhances natural features and habitats, integrating them into the overall design while incorporating current innovations and sustainable development practices.

**RELEVANT PROJECTS**

**University Park Country Club Master Plan, Sarasota, FL** — Landscape Architect. Kimley-Horn is providing professional landscape architectural and land planning services for the University Park Country Club master plan that's a part of the University Park Recreation District. University Park Recreation District, located on the border of Manatee and Sarasota Florida Counties, is located within the gates of an award-winning master planned community of more than 1,200 homes with 32 individual neighborhoods. The Recreation District includes a semi-private Country Club featuring 27 holes of championship golf, 11 lighted tennis courts, a state-of-the-art fitness center, a casual lounge/bar/card room as well as a full-service restaurant.

**Celery Fields Quads Park, Sarasota, FL** — Project Manager. Kimley-Horn was selected to aid in the design concepts for a re-naturalization of more than 30 acres of upland located adjacent to Celery Fields in Sarasota. This project was designed in coordination with The Conservation Foundation of the Gulf Coast and the Sarasota Audubon Society to create additional wildlife and birding habitat on parcels previously designated for commercial construction. The design plan package includes a visionary concept of tying three parcels together through a ribbon of planted native trees, and provides for an education demonstration of three unique habitat ecosystems; mesic hammock, hardwood hammock, and pine flatwoods. Additionally, grant services and creative design solutions resulted in a successful grant application with up to \$450,000 of grant funds available for implementation of the natural systems restoration project elements.

**Plymouth Harbor, Sarasota, FL** — Landscape Architect. Plymouth Harbor is a church-sponsored, not-for-profit continuing care retirement community (CCRC). In addition to comfortable living, the 16-acre waterfront community provides residents with a variety of recreational and wellness facilities and activities. Kimley-Horn provided landscape architecture, land planning, civil, environmental, and structural engineering services for the redevelopment of a private 3.2-acre waterfront amenity area, including permitting through the City of Sarasota and the Southwest Florida Water Management District (SWFWMD). The new design includes the removal of invasive species and failing structures, such as an elevated boardwalk and pedestrian bridge, and improvements to pedestrian circulation including a 12-foot-wide rubberized multi-use waterfront walking trail, a meandering six-foot-wide rubberized walking trail, large seating areas, shade structures, enhanced landscaping, and lighting. This revitalized waterfront amenity will connect residents to nature through educational signage and safely bringing residents closer to the water's edge. The design incorporates existing amenities such as kayak storage and water access, and a shaded pavilion and gazebo.



**Jake Hess,**  
**ISA**  
Landscape  
Architecture  
Designer

**PROFESSIONAL CREDENTIALS**

- Bachelor of Landscape Architecture, University of Maryland
- ISA Certified Arborist, FL-10035A

Kimley»Horn

**SPECIAL QUALIFICATIONS**

Jake has two years of experience as a landscape architecture designer. His experience includes creating elegant designs for clients, 3D renderings, estimating materials, material orders, and project management. Jake earned a Bachelor of Landscape Architecture and Plant Sciences from the University of Maryland, College Park. His software skills include Sketchup, Lumion, Vector Works, AutoCAD, and ArcGIS.

**RELEVANT PROJECTS**

**University Park Country Club Master Plan, Sarasota, FL** – Landscape Designer. Kimley-Horn is providing professional landscape architectural and land planning services for the University Park Country Club master plan that's a part of the University Park Recreation District. University Park Recreation District, located on the border of Manatee and Sarasota Florida Counties, is located within the gates of an award-winning master planned community of more than 1,200 homes with 32 individual neighborhoods. The Recreation District includes a semi-private Country Club featuring 27 holes of championship golf, 11 lighted tennis courts, a state-of-the-art fitness center, a casual lounge/bar/card room as well as a full-service restaurant.

**Parrish Community Park - Phase I, Manatee County, FL** – Landscape Designer. Kimley-Horn was awarded this work assignment to provide professional landscape architectural and engineering services for Parrish Community Park – Phase I in Manatee County. The County desires to develop a portion of two adjoining parcels along the east side of Fort Hammer Road. The scope of work includes the design of a new 11.50-acre park with a performance pavilion, picnic pavilions, restrooms, parking, walking trails, fitness stations, boardwalks, festival seating infrastructure, playground, splash pad, site grading and preparation, landscaping, irrigation, and site electrical. In addition to design, Kimley-Horn will provide community engagement, coordination with the construction manager, permitting, and construction phase services.

**Plymouth Harbor, Sarasota, FL** – Landscape Designer. Plymouth Harbor is a church-sponsored, not-for-profit continuing care retirement community (CCRC). In addition to comfortable living, the 16-acre waterfront community provides residents with a variety of recreational and wellness facilities and activities. Kimley-Horn provided landscape architecture, land planning, civil, environmental, and structural engineering services for the redevelopment of a private 3.2-acre waterfront amenity area, including permitting through the City of Sarasota and the Southwest Florida Water Management District (SWFWMD). The new design includes the removal of invasive species and failing structures, such as an elevated boardwalk and pedestrian bridge, and improvements to pedestrian circulation including a 12-foot-wide rubberized multi-use waterfront walking trail, a meandering six-foot-wide rubberized walking trail, large seating areas, shade structures, enhanced landscaping, and lighting. This revitalized waterfront amenity will connect residents to nature through educational signage and safely bringing residents closer to the water's edge. The design incorporates existing amenities such as kayak storage and water access, and a shaded pavilion and gazebo.

**Wellen Park, North Port, FL** – Landscape Designer. In 2019, Kimley-Horn facilitated a design charrette to envision a new mixed-use town center for Wellen Park. The center is centrally located within the broad masterplan community and situated on an 80-acre man-made lake. The design contained retail, restaurants, a food truck container court, and multiple event spaces in a cohesive downtown campus. Kimley-Horn provided landscape architecture, civil engineering, utilities, arboriculture, wayfinding and signage design, permitting, and furnishing procurement for Wellen Park Downtown. We coordinated with multiple architects, created streetscapes, shade structures, intricate paving, splash pads, playgrounds, and a nature-based walkway that connected to the 3-mile loop lake trail. Kimley-Horn also relocated 27 large heritage oak trees from the original site into the final plan. Wellen Park Downtown was completed in early 2023.





## Danielle Stewart, AICP

### Planning and Entitlements

#### PROFESSIONAL CREDENTIALS

- Master, Urban and Regional Planning, University of Michigan-Ann Arbor
- Bachelor of Science, Public Administration, University of Central Florida
- American Institute of Certified Planners, #35686

Kimley»Horn

#### SPECIAL QUALIFICATIONS

Danielle is a certified planner in Kimley-Horn's Sarasota office with two years of experience. Her experience includes services related to planning and entitlements, code development, data analysis, and public involvement. Danielle earned her Master's in Urban and Regional Planning from the University of Michigan-Ann Arbor, and she is an accredited member of the American Institute of Certified Planners.

#### RELEVANT PROJECTS

**The Bay Park, Sarasota, FL** — Project Planner. Kimley-Horn, in collaboration with project lead Agency Landscape + Planning, provided professional consulting services for the Master Plan, Phase 1, and the ongoing \$65-million Phase 2.

The park has already established a cultural and economic legacy for the region while ensuring open public access to the Sarasota Bayfront. Special features of the first phase of the Bay include an iconic ibis-themed children's playground, a recreational mangrove walk with a kayak launch, a 30-foot spiral shade structure and concessions pavilion, and an events and performance lawn. Beyond the natural assets provided by the Bayfront, this park offers greater connectivity to surrounding neighborhoods and reflect Sarasota's diverse heritage while emphasizing sustainability.

**Creekside Entitlements, Manatee County, FL** — Project Planner. Kimley-Horn is revising the existing entitlements for Creekside Commons II to allow for multifamily residential on the rear portion of the property and additional 30,000 square feet of gross leasable area within the PD-C. Tasks include planning services as well as transportation services including transportation and traffic analysis.

**Planning and Entitlements Services for the Twin Laurel Property, Sarasota County, FL** — Project Planner. Based on the client's proposed development program, a Critical Area Plan (CAP) and a corresponding Comprehensive Plan Amendment and Rezoning as well as a possible Special Exception and JPA is required for the project. The property is part of an approximate 31-acre development in unincorporated Sarasota County. Kimley-Horn is providing planning, transportation, and preliminary civil engineering support services as it relates to the CAP, Rezoning, and Comprehensive Plan Amendment, as well as the Special Exception and JPA Amendment.

**Unified Development Ordinance (UDO), Greer, SC** — Project Planner. Kimley-Horn has served the City of Greer for a decade—beginning with the award winning Greer Community Master Plan and culminating with the soon-to-be adopted UDO rewrite. In 2021, the City selected Kimley-Horn to update its UDO. The new UDO is an out-of-the-box look at planning best practices and their application to a growing, diverse community. The Kimley-Horn team emphasized consistency with the City's land use plan, corrected code conflicts, and addressed outdated planning and zoning practices. The new UDO reorganizes and simplifies the document while minimizing the reliance of staff interpretation of current standards as project progress. The cornerstones of the new UDO are clear and easily understood terms, standards, and metrics supported by maps and graphics that allow ease of use.

**UDO Rewrite and Zoning Map Update, Monroe, NC** — Project Planner. In 2018, Kimley-Horn completed the "Forward Monroe" Land Use and Transportation Plan. We are now updating the City's UDO to implement that plan and update the land use and zoning standards, including compliance with state planning provisions. As part of the UDO update, the Kimley-Horn team prepared an initial assessment of the codes, including providing initial recommendations for amendment. Part of the UDO update is creating "mixed-use" areas and a hybrid development code comprising form-based and traditional zoning code standards. In concert with the UDO update, Kimley-Horn also is updating the City's zoning map to reflect the new zoning districts and link development-related data to each parcel. The City of Monroe City Council adopted the new UDO and zoning map on April 12, 2022.



## Karl F. Hees, PE

Sr. Structural Specialist

Karl has over 29 years experience providing structural engineering and project management services. As the founder of Hees & Associates in 2006, he continues to manage the Sarasota office for Bennett & Pless. His engineering and management experience includes a variety of projects including community, schools, residential, renovation, and historic preservation projects. His experience in analysis and design covers a wide range of structures, from single story residences to professional sports stadiums, and materials including steel, reinforced concrete, masonry, timber and aluminum.

### EDUCATION

Bachelor of Science in Civil Engineering, University of South Florida, Tampa Campus

### REGISTRATIONS

Registered Professional Engineer in FL, AL, CO, GA, MI, MT, NY, NC, PA, SC, TX, VA FL PE59795

### AFFILIATION

- American Institute of Steel Construction
- Florida Structural Engineers Association
- American Society of Civil Engineers Fellow

### EXPERIENCE

- Bradenton Yacht Club Renovation, Bradenton, FL
- Copperleaf Clubhouse Addition & Renovation, Bonita Springs, FL
- Lakeland Clubhouse, Lakeland, Florida
- Anne Dever Regional Park Community Center, Englewood, FL
- Tara Golf & Country Club Renovation and Addition, Sarasota, FL
- Wymberly Clubhouse Renovations, Martinez, GA
- Pandion Ridge Clubhouse, Orange Beach, AL
- Hyde Park Clubhouse, Easton, MD
- Lakeview Clubhouse, Danbury, CT
- North Charlotte Regional Park Recreation Center, Port Charlotte, FL
- West Manatee Fire Rescue Administrative Building, Bradenton, FL
- Bank of Ozarks Corporate Center, Bradenton, FL
- Bardmoor II Medical Office Building, Clearwater, FL
- Desoto Medical Office Building, Arcadia, FL
- IMG East Campus Gym Addition, Bradenton, FL
- Sun-N-Fun RV Resort Indoor Pool & Fitness Center, Sarasota, FL
- Atlanta Braves Spring Training Complex Clubhouse, North Port, FL
- Big Sugar River Bar Kitchen Build-out, Sarasota, FL
- Ooze & Schmooze Kitchen Build-out, St. Petersburg, FL
- Lakewood Ranch Country Club Kitchen, Sarasota, FL





## THOMAS C. WILDA, PE

Project Manager - Sr. Structural Engineer

Tom has 23 years of experience as a structural engineer. He has served as lead engineer for numerous projects including education, healthcare facilities, public works projects, retail, commercial and office buildings. His technical responsibilities include structural design and analysis, preparation of technical specifications, coordination of design documents, review of contractor submittals, construction administration and field observations. Tom's is respected by local architects for completing projects on time, and on budget. Tom's responsiveness, collaborative approach and "can do" attitude allows for a seamless project delivery process.

### EDUCATION

Bachelor of Science Civil Engineering, Southern Illinois University Edwardsville, IL

### REGISTRATIONS

Registered Professional Engineer in FL PE75658

### EXPERIENCE


- Bradenton Yacht Club Renovation, Bradenton, FL
- Copperleaf Clubhouse Addition & Renovation, Bonita Springs, FL
- Lakeland Clubhouse, Lakeland, Florida
- Anne Dever Regional Park Community Center, Englewood, FL
- Tara Golf & Country Club Renovation and Addition, Sarasota, FL
- Wymberly Clubhouse Renovations, Martinez, GA
- Pandion Ridge Clubhouse, Orange Beach, AL
- Hyde Park Clubhouse, Easton, MD
- Lakeview Clubhouse, Danbury, CT
- North Charlotte Regional Park Recreation Center, Port Charlotte, FL
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- Bank of Ozarks Corporate Center, Bradenton, FL
- Bardmoor II Medical Office Building, Clearwater, FL
- Desoto Medical Office Building, Arcadia, FL
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- Sun-N-Fun RV Resort Indoor Pool & Fitness Center, Sarasota, FL
- Atlanta Braves Spring Training Complex Clubhouse, North Port, FL
- Big Sugar River Bar Kitchen Build-out, Sarasota, FL
- Ooze & Schmooze Kitchen Build-out, St. Petersburg, FL
- Lakewood Ranch Country Club Kitchen, Sarasota, FL



## 6. Unique Accomplishments, Recognitions or Awards

# Firm Rankings

At GMC, we have a great story to tell. Our mission is “to create opportunities for our people and the people we serve to build communities that thrive,” and this drives everything we do. We uphold this mission by working hard every day to serve our communities with quality, integrity, creativity and care. When we are recognized for our work by esteemed organizations, it reassures us that we are doing the right things and continue to be directed by our core values in all that we do. We are very thankful to be consistently ranked as a Top 500 design firm by Engineering News-Record and hold many Top 100, even Top 50 slots in the Building Design + Construction (BD+C) Giants 400 Report.

**2024 Southeast's Design Firm of the Year**



**16**  
**Top Design Firms in the Southeast 2023**  
*ENR Southeast*



**23**  
**Top A/E Design Firms 2023**  
*Building Design + Construction*



**76**  
**Hospitality Firms 2023**  
*Building Design + Construction*



**61**  
**Top 300 Architecture Firms 2023**  
*Architectural Record*



**73**  
**Hotel & Resort Firms 2023**  
*Building Design + Construction*

## 7. References for A/E Government Related Projects

1

- a. **Name:** **SARASOTA COUNTY**
- b. **Address:** 1001 Sarasota Center Blvd, Sarasota, FL 34240
- c. **Contact name:** Doug Driscoll, County Project Manager
- d. **Contact phone:** (941) 822-5584
- e. **Email address:**
- f. **Brief description of work:** New design and construction for the new Planning and Development offices for Sarasota County (50,000 sf). Project to be LEED certified and meet the 2030 Challenge. CMAR: HalfAcer Construction
- g. **Performance Period:** 7/22/2022 to 7/1/2025 estimated completion
- h. **Total Dollar Amount of contract:** \$34,012,177

2

- a. **Name:** **SARASOTA MEMORIAL HOSPITAL**
- b. **Address:** 11700 South Tamiami Trail Sarasota, FL 34239
- c. **Contact name:** John Salt, Director of Engineering & Campus Facilities
- d. **Contact phone:** (941) 917-1741
- e. **Email address:** john-salt@smh.com
- f. **Brief description of work:** GMC has served as the Sarasota Memorial Hospital (SMH) architect for ongoing architecture and planning estimating services since 2012. Work includes test fits, interior concept plans and new facility building plans. Some projects materialize into interior renovation work and equipment and facility upgrades for the hospital. Currently, GMC has a Continuing Services Agreement with SMH.
- g. **Performance Period:** 2012 to present
- h. **Total Dollar Amount of contract:** Varies by Project

3

- a. **Name:** **WHITESSELL-GREEN INC.**
- b. **Address:** 240 N Tarragona St, Pensacola, FL 32502
- c. **Contact name:** Robert Fabbro
- d. **Contact phone:** (850) 434-5311
- e. **Email address:** rfabbro@whitesell-green.com
- f. **Brief description of work:** 5-story, 42,500 sf office building. steel frame, masonry veneer exterior
- g. **Performance Period:** 2/2015 to 8/2017
- h. **Total Dollar Amount of contract:** \$765,000

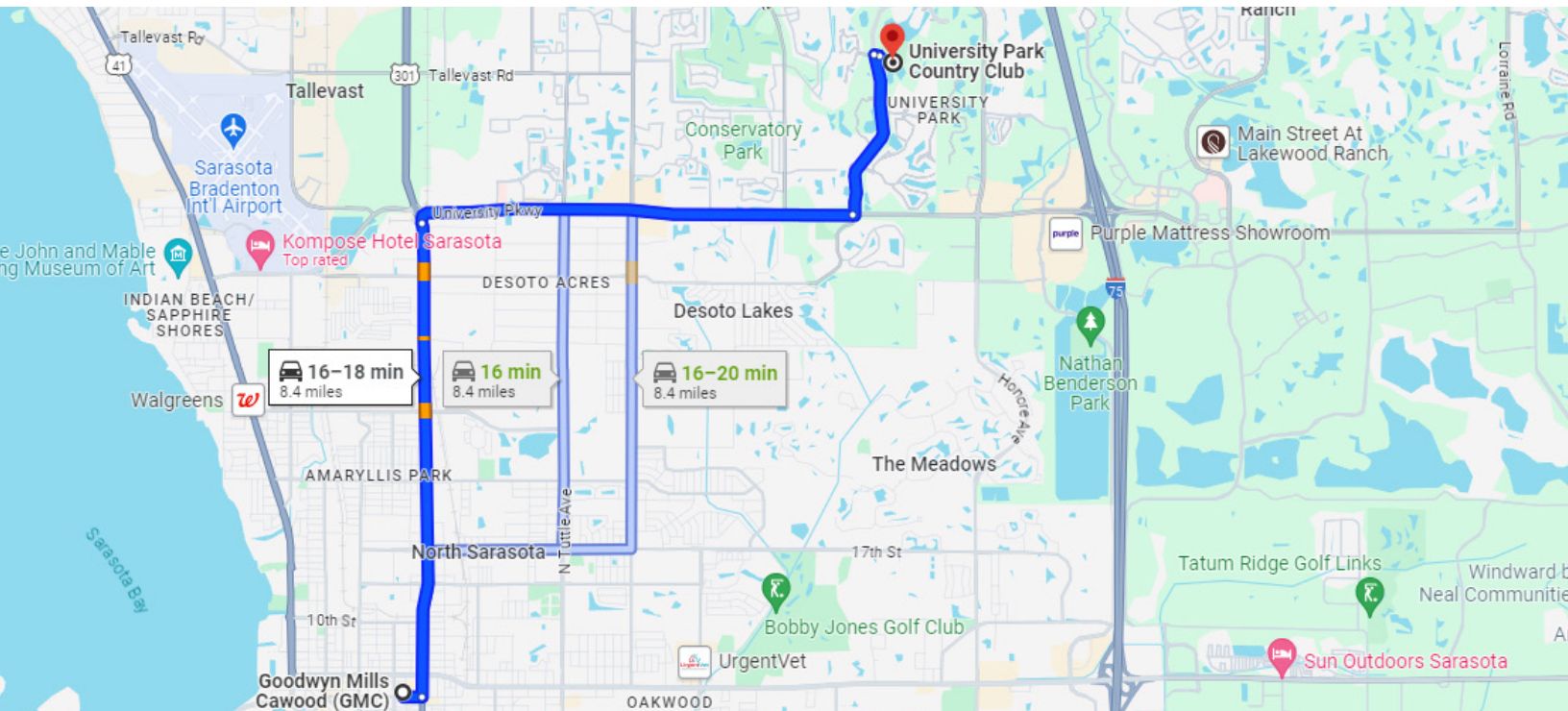
4

- a. **Name:** **YMCA OF NORTHWEST FLORIDA**
- b. **Address:** 165 E. Intendencia Street Pensacola, FL 32502
- c. **Contact name:** Michal Bodenhausen
- d. **Contact phone:** (850) 432-8327 ext. 12
- e. **Email address:** mbodenhausen@ymcanwfl.org
- f. **Brief description of work:** Design of a new 53,240 sf YMCA in downtown Pensacola which includes full size gymnasium, aquatics center, wellness center, multi-purpose/community rooms, demonstration kitchen, locker rooms, conference room and administration office
- g. **Performance Period:** 6/2013 to 6/2016
- h. **Total Dollar Amount of contract:** \$10,600,000



**Tab 7**  
Proposers Office Location in  
Relation to the Project

**Tab 7** Proposers Office Location in Relation to the Project



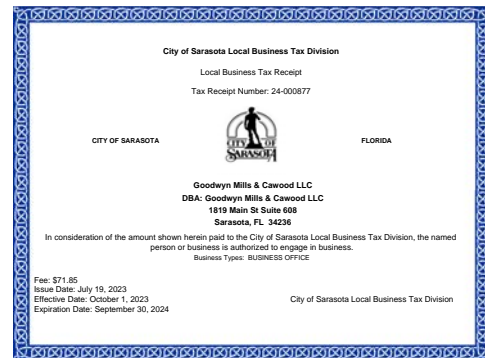
## We Are Local!

Goodwyn Mills Cawood's office **location in Sarasota, Florida, just 8.5 miles from University Park**, showcases our strong local presence in Manatee and Sarasota County. We understand the vital importance of being local to the project area, as it allows us to respond swiftly to our clients' needs.

At Goodwyn Mills Cawood (GMC), we highly value local expertise and connections. While we have a broad presence across various locations, including Florida, we prioritize being deeply rooted in the Sarasota community. **Our team members, Julian and Dylan are not only seasoned professionals but also locals** who intimately understand Sarasota's dynamics, regulations, and unique characteristics.

Our proximity to the project **ensures prompt engagement with stakeholders, firsthand understanding of project requirements, and delivery of timely and personalized solutions**. By being local, we efficiently navigate local codes and regulations, facilitating smoother project execution and enhancing communication with University Park.

Ultimately, our commitment to Sarasota and our ability to leverage our local presence make us **a dependable and responsive partner for your project**. This local advantage enables us to deliver exceptional architectural and engineering services tailored to the your community's needs.





**Tab 8**  
Approach to Design Services



## Tab 8 Approach to Design Services

Goodwyn Mills Cawood's (GMC) cohesive Design Team provides a depth of expertise that allows us to capture the "big picture" and understand the details a project entails. Utilizing our comprehensive approach, we look at each project from many vantage points to identify creative solutions.

Understanding the "why" of a project defines the "how" and our approach welcomes client and user input from the very beginning. From initial brainstorming to workshop sessions, GMC look at project parameters, including cost limits and schedules for design and construction, not as a limiting factor, but one that creates boundaries for creative thinking and problem solving. Working within these parameters does not inhibit creativity, and economy can be a major consideration, not a constraint.

### Communication

As Architect of Record and Prime Project Manager, GMC will take the lead and primary responsibility for communication with Sarasota County. The GMC Project Principal, Sara Butler, AIA, LEED GA; Project Manager, Julian Norman-Webb, AIA, LEED AP BD+C; Project Coordinator, Dylan Bernius, and BIM Support, John Escobar, will be assigned to the project from beginning to end. The assigned leadership team successfully communicates with their previous clients and we look forward to continuing that success with University Park recreation District.

We believe the best projects begin with clear vision. Through being intentional and accountable, we take complicated projects and make attainable goals that not only keep the team on track, but also create a road map that promotes clarity and honest communication.

### ***Our philosophy is simple: Be Honest, Be Positive, Be Proactive.***

Our team realizes that recreation district projects within successful communities can be unique. Communication during design and construction is paramount to the success of a sensitive project set within an occupied residential community and within beautiful mature landscaping.

We communicate regularly through:

- Attending and documenting design meetings with the District and consultants
- Documenting existing site conditions and then providing a full set of drawings of the existing conditions
- Providing bi-monthly Project Status reports to the District
- Provide weekly observation reports to the District during construction administration
- Attend regularly scheduled Owner/Architect/Contractor (OAC) meetings during construction administration.

We will work hand in hand with University Park Recreation District in the program development and early site layout. We believe a well-crafted written description of the project scope including square footage calculations and construction budgets forms the foundation of a successful project. Once the program is complete and the project can progress into 30% Design, GMC will lead a collaborative design process that combines the design expertise of GMC, knowledge of fitness centers, hospitality, administrative offices, and the image and character of sub-tropical University Park. Our benchmark for the creation of presentation deliverables such as appealing 3-D renderings, site plans, floor plans, and construction budgets is high as we seek to communicate our analysis and ideas clearly. Progress will be tracked throughout against a project schedule gantt chart and project budget.

### Envisioning

A new Community Activity Building/Administrative Offices, New Fitness Building, and associated renovations of the existing fitness building and kitchen, is an investment in the resilience and brand of the University Park community.

Our Sarasota team is here to serve you, and our Team's excellence is in providing clients with the options and ideas that translate your functional and qualitative needs into buildings of which University Park is proud. We come with no preconceptions or formulated ideas: instead, we listen, ask questions, and listen again. Only when we have understood your requirements and undertaken our due diligence in understanding the site and community does the Team commence exploring different design solutions.

The potential of a more rationally planned site layout integrated with the existing mature trees and landscape can be a beautiful addition to the University park community and we are fully conscious of how the project should respect the beauty of the site and create synergy with the existing buildings. We strongly believe this impact could be considerable and positive, enhancing the community, and providing modern efficient state of the art facilities.

GMC will utilize physical models, 3D renderings, and drawings to fully portray our design ideas throughout the design process. As the project advances, these drawings become more and more detailed and distilled, leading to the final product of the construction documents, the recipe book, from which the construction manager can build the finished product.

### Design Team Approach to This Project

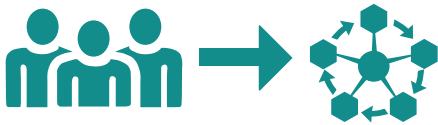
The Design Team has been selected and organized so as to provide a comprehensive coverage of all the areas of expertise that will be required to render this project successful. The team is one where the different members

**Tab 8 Approach to Design Services**

have already worked together locally and works collaboratively, both internally and with the Owner and Construction Manager. All communications go through the GMC Project Manager with regards to outside parties, and within the team, all parties are copied on internal correspondence so that decisions are not made concerning one discipline without taking into account the effect on another. Regular Design Team meetings will be held so as to maintain progress, resolve any outstanding issues, and plot the path forward within the time constraints of the project schedule.

The GMC Principal & Project Manager have undertaken county commission hearings, led public and neighborhood workshops, and presented projects at galas, fundraisers, and public exhibitions. Within whatever parameters the District and Club wish to set, GMC are always ready and willing to present their part in your project to the community.

The sequence of the Design team’s work is presented under Project Phase Tasks in this section of the response; but the mode of operation is to clearly **obtain information** at the beginning of the project; **listen** so as to fully understand the Owner requirements; **consult** with the relevant agencies and utilities; **work collaboratively** within the Design team and with the Owner; constantly **verify** the project is within budget and schedule; and **review** the work internally as part of the project quality management, and externally with the authorities having jurisdiction so as to facilitate the permitting processes.



**Design Team & Process Management**

The design process will be managed by the Project Architect, Julian Norman-Webb, AIA, from GMC’s Sarasota office, who will also be

University Park’s primary point of contact and available at all times. The sub-consultants will report to the Project Architect who will maintain the project schedule and coordinate the disciplines as the design progresses. The sub consultants are held contractually to be accountable to GMC. The history of the proposed team working continuously together over a period of several years means we can confidently state that, with the level of respect and professionalism shown to each other by the different members of the Team, there will be no issues of the sub consultants not performing their shares of the work within the required time frame. The team is all in this for the long haul, we value each others participation and want this to succeed for everyone. It is not a team thrown together for this project, it is a pre-existing team looking to build on its current successes in civic, administrative office, hospital systems, and medical wellness projects in Sarasota County and central Florida and wishing to serve University Park with some of its many areas of expertise.

**A Local Team**

GMC Sarasota is embedded in the Sarasota community with offices on Main Street and staff with local experience dating back to 2002. We are always available for in-person meetings at University Park and also undertake remote meetings as required. We manage an in-house schedule to ensure leadership and staff maintain project continuity through vacations and unforeseen conditions.

**Quality Control Methods**

GMC has developed a formal quality assurance review process for verifying that drawings and specifications are complete, technically correct, coordinated between disciplines and conforming to regulatory requirements before they are released for construction to protect our clients’ interests and to minimize problems during construction. Our experience is that having an independent review by people outside the project production team helps identify coordination, constructibility, and regulatory conformance issues.

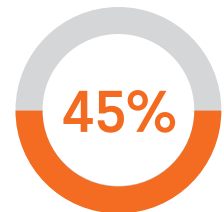
**Staff Resources**



**Senior Management**



**Architect / Engineers of Record**



**Project Architect/ Subconsultant Project Managers**



**Revit / CADD Technician**



**Interior Designer / Acoustician / AV / Security consultants**



**Administrative**

## Tab 8 Approach to Design Services

We have staff with special training and experience who are skilled in reviewing drawings and specifications and knowledgeable about construction and regulatory requirements. They have developed review checklists and techniques of proven effectiveness. Only senior staff members are authorized to perform quality reviews, all having more than twenty-five (25) years of experience.

The earlier problems can be identified, the less costly it is to solve them. While it is common to wait until after 50% completion of contract documents to perform quality assurance reviews, we have found it effective to perform progress reviews at the end of schematic and design development phases to identify issues that need to be resolved in the following phase. During the production of construction documents, our review techniques can reduce the number and severity of requests for information or change orders. Whether it's a matter of confusion or conflicting requirements, or inter-discipline coordination problems, it is always best to solve these problems on paper before they become costly or time-consuming headaches at the job site.

### Errors and Omissions

GMC strive to ensure there are zero errors and omissions on all projects. Our offices in Florida have not had any claims, mediation, arbitration, litigation, or other form of dispute resolution filed by or against GMC.

### Cost and Schedule Control

GMC recognizes the importance of accurate estimating at each stage of project service delivery, as a management and decision tool for the owner. Our team has been uniquely successful in maintaining cost control on projects. We begin each project with a comprehensive, preliminary cost estimate and actively update the cost estimate, with the client and construction manager, through design completion. GMC has the benefit of having been through the recent pricing of several projects of a similar scale within Florida and with a variety of contractors - so we have current pricing data from the local market to work with. We do welcome

University Park appointing a Construction Manager who is integrated into the Design Team early in the project and with whom such issues can be discussed as they are the first to be receiving price change information in real time on their other local projects.

The ability to maintain costs directly relates to our experience, as well as our planning and preparation before the project begins. It is perhaps appropriate to note that, over the past four years, projects have been bid for an average of 2% below budget with total change orders, not including owner requested items, averaging less than 3% per project, for a net addition of 1.0% per facility on an average basis.

Value engineering is normally, in practice, a pseudonym for a reduction in quality leading to lower costs. Anyone can achieve that and the effects are often higher maintenance, replacement, or running costs down the road. True value engineering is designing, with all the consultants and pricing information available, in such a manner that the best return is obtained for every resident's dollar spent. That every decision is made so that it facilitates, and thus reduces the cost, of the next. That way the building is designed in budget and with the 'most bang for the buck' because there are no extraneous costs for solving issues which should never have arisen. A good example of this is knowing how to design the building so as to have an architectural layout, the most efficient structure, and the most efficient layout of mechanical systems all within the one design. This inherently minimizes costs and produces the most value within budgetary constraints.

GMC will spell out what can be afforded in the current market for the proposed budget and if that is less than the Owner's initial vision then the first order of business is the reconciliation of the two. Ultimately, it is for the Owner to set the budget and understand, with the Architect's assistance, what is feasible for that sum of money. We will clearly state that the vision and the budget are not compatible if we believe that to be the

case. If attempts are made by the Owner to increase the scope of the building during the design phases then we will remind the Owner of the budget and clarify the choices that must be made, or the alternates that could be presented for pricing. If the scope creep is coming from members of the Design Team because the initial Basis For Design is being deviated from then the Project Architect will review that concern with the Design Team to ascertain why and what the solution is to bring the design back within the confines of the budget.

### Permitting Agencies and Utility Companies

The interface with the authorities that have jurisdiction and the utility companies will be a shared responsibility of the Civil Engineer of Record and the Project Architect. For both of us, the initial step is to review all existing information that we can obtain, verify it with the visible existing conditions, and ascertain what is missing. That missing information will then be obtained by survey and/or by contacting the relevant utilities or County departments. This operation will be performed immediately upon commencement as it can cause delays. The value of having a local civil engineer on the team, as we do in Kimley Horn, is of great value as they already have a knowledge of this particular site, the parties involved and have contacts with the different utilities.

GMC interact with many Building Department and Zoning Plan reviewers, staff, and Inspectors on many projects and engender respectful relationships, generating conditions in which the project may be run past their staff at an early schematic stage to ensure there are no concerns that could require future revisions of the design. If there were any expressed concerns, they would be reviewed at this early conceptual stage.

### Sustainable Building Rating System

GMC have experience of designing LEED certified projects and are currently doing so locally with municipal clients. We also work with clients wishing to follow sustainability goals without obtaining

## Tab 8 Approach to Design Services

certification and we bring our expertise to bear in exactly the same manner.

Sustainable design does place a clear emphasis on initial investment to reduce Life Cycle Costs of the building, which leads to a more economical building in the long-term. The District will need to provide guidance as to what investment is preferred at construction, in order to minimize future running costs in the years ahead. The Design Team, Construction Manager, and utilities, will be able to provide the data on which to make those decisions.

There are certainly opportunities for rainwater harvesting and climate tolerant landscaping. Greater levels of insulation and careful detail design is relatively economical and can reduce the required mechanical loads. Careful glare-free daylighting by the informed placement of north facing windows can greatly reduce lighting loads and significantly improve the quality of the workspaces. Sustainable 'green' products and materials are a standard part of our repertoire. Solar panels may be an option but this would require detailed examination.

### Permitting & Regulatory Agencies

GMC always strives to develop an excellent working relationship with all permitting and regulatory agencies, soliciting their input early in the process. The staff proposed for your project have a track record of working on projects with a significant number of regulatory agencies, whose requirements are sometimes in conflict! Through conversation and proactively proposing creative solutions we have always managed to square the circle.

The Project Manager, Julian Norman-Webb, AIA, has worked with local cities

and counties on the permitting of many local municipal and private projects. Through clear documentation, discussion, and proactive communication, Julian has limited the potential for conflicts to the point where there have not been undue challenges.

Julian has led projects requiring a Special Exception from the Sarasota County Commission and has a track record of achieving unanimous decisions through consistent argumentation and an understanding of how to reconcile the goals of an ordinance and a client's wishes for development. Furthermore, he has worked on historical projects with a necessity to include the US Secretary of the Interior's Guidelines on the Rehabilitation of Historic Structures, and on both new and historical projects is maintains communication with the relevant Floodplain Reviewers to manage projects located in the floodplain. Probably the most difficult was the Special Exception required for the expansion of St Thomas More Catholic Church in Sarasota as it required addressing the concerns of the local community whose neighborhood association had initially voted to strongly object to the first phase of the development. Julian led a neighborhood workshop to explain the project, assuage fears as to the impact of the landscaping of the property. Ultimately, there were no compromises to the development or the landscape and the project received its Special Exception by unanimous consent.

On a permitting note, we have completed the reroofing of a County Library in Sarasota where we negotiated with the County Building Department to allow field testing of a fully-adhered roofing

system (to avoid roof system fasteners projecting through the visible roof deck which forms the ceiling below) in lieu of a Florida Product Certificate or Miami-Dade Notice of Acceptance. Similarly, we have received what is believed to be the first Sarasota County approval of a rainscreen cladding system which has significant benefits of moisture and thermal control. This attests to our team's fluency in the technical aspects of the project where design decisions are substantiated through code-based logic and ASTM or AINSI testing protocols.

## Project Completion Within Schedule & Budget

GMC is a highly experienced firm with highly experienced office teams who are passionate about their work. The key members of the project team each have over 25 years architecture experience and have successfully completed projects within a 25 mile radius of University Park. We work closely with a select number of consultants so we are not learning on the job - our workflow is already tried and tested.

Were there to be unforeseen requirements which required an injection of manpower then GMC has the depth of staff and expertise to be able to do so. Our offices work on projects simultaneously all the time, so suddenly having to increase the number of staff working on a project is not an issue. The leadership and client interface is always, and remains, local.

## Team Responsiveness

Our offices only solicit work that it know it can fulfill in the event of being successful and your project is no exception. We will be ready to hit the ground running in July 2024 if we are successful in being awarded the bid and are fully available in the meantime to interview, respond to questions, and provide any necessary additional supporting information.

## Tab 8 Approach to Design Services

### Project Phase Tasks

#### Programming and Pre-Design

Working closely with you and any of your own consultants, the Design Team will produce a Building Program for all site and building development. As an initial starting point of conversation we would like to review the various options that were previously studied and either accepted or rejected, so that we fully understand your requirements and wishes as well as bringing the experience of the Design Team to the table.

Goodwyn, Mills & Cawood have a track record of insightful analysis and interpretation of Owner / User aspirations and requirements. A project schedule with milestones and critical paths will be elaborated and reflect any milestones required to allow financing or statutory approvals. The Design Team will review Cost Management at this stage with the intention of establishing objectives and budget.

The Design Team will undertake a site analysis to review environmental factors such as solar orientation, shading, sun angles, views, and the direction of prevailing winds. Goodwyn, Mills & Cawood provide strong site and master planning abilities. Site planning will allow for both efficient and secure cart and vehicular access, pedestrian movements, landscaping and provision of security.

Representative deliverables for this phase of the project include:

- Agenda prepared and distributed by GMC Project Manager
- Minutes of project review meetings prepared and distributed by GMC Project Manager
- Physical site model suitable for display
- Model photographs and Site Plan drawings in a variety of formats.

#### Proposed Meetings Schedule:

M1

##### KICK-OFF & ENVISIONING MEETING

###### Objective:

- To understand and document the District's full requirements for the new Community Activity Building/Administrative Offices, New Fitness Building, renovation of existing fitness building and renovation of existing kitchen, and what it is envisioned to include.
- Would the District envision including other aspirations if the design & budget permitted?
- To understand the budget constraints for the project.
- To know the bigger picture. Are their requirements for the project to integrate with other future plans?

###### Attendees:

University Park Country Club General Manager  
University Park Owner's representative  
GMC Project Principal  
GMC Project Manager  
Kimley Horn - Civil Engineer of Record  
Kimley Horn - Landscape Architect of Record  
Bennett & Pless - Structural Engineer of Record  
Genesis Eng. - Mechanical Engineer of Record  
Genesis Eng. - Electrical Engineer of Record

M1

##### PROGRAMMING / PRE-DESIGN 100% PROGRESS

###### Objective:

- To present and confirm a Building Program for all site and building development associated with the project.
- To establish a baseline Basis of Design and Project Budget (hard and soft costs) against which the Design Team can proceed.
- To confirm a Project Schedule with milestones and critical paths.
- To present and confirm a conceptual site master plan.

###### Attendees:

University Park Country Club General Manager  
University Park Owner's representative  
GMC Project Manager  
Kimley Horn - Civil Engineer of Record  
Kimley Horn - Landscape Architect of Record  
Bennett & Pless - Structural Engineer of Record  
Genesis Eng.- Mechanical Engineer of Record  
Genesis Eng. - Electrical Engineer of Record

## Tab 8 Approach to Design Services

### 30% Design

Using the site analysis and following the decisions reached in the Pre-design phase, the Design Team will create a conceptual architectural building and remodel design for Owner review and approval. Drawings with furniture layouts and study models, both physical and virtual, will be used to illustrate the design and the relationship of the proposal to the existing buildings and surrounding environment. Goodwyn, Mills & Cawood are recognized for their creative solutions to challenging building programs. Each project is considered on its own merits, without preconceptions, so as to determine the best possible response to the given parameters. GMC welcome that a Construction Manager is to be appointed by the Owner and included on the team to provide cost estimation services at this phase.

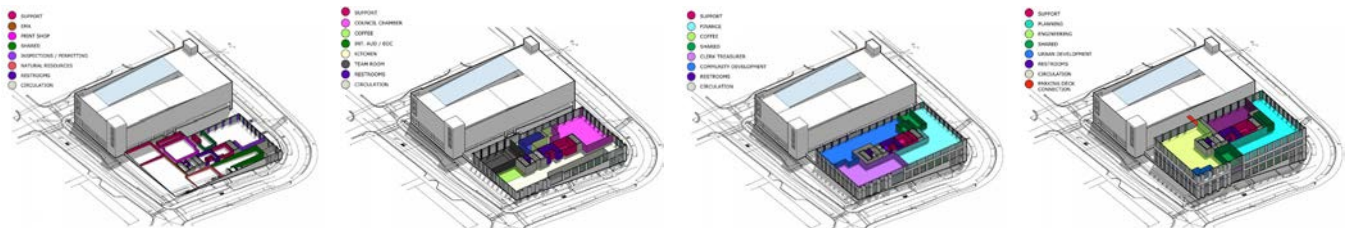
The Design Team shall proceed with those activities set forth in the following list and as required to produce a schematic design for the project:

- Examine the site to determine the potential for different configurations and orientations of the new buildings
- Confirm space need requirements and adjacencies
- Code research
- Assess Accessibility Compliance
- Assess Security requirements
- Develop the proposed buildings through diagrams, schematic site and floor plans, massing models and character sketches.
- Undertake Energy and Water model for a 3D computer simulation of the initial design moves to allow informed decisions to be made in the later selection of building systems
- Confirm compatibility of the design with sustainable design parameters

Representative deliverables for this phase of the project include:

- Agenda prepared and distributed by GMC Project Manager
- Minutes of project review meetings prepared and distributed by GMC Project Manager
- Schematic Design drawings and model for Owner review and approval
- Outline Specifications for Owner review and approval.

Huntsville City Hall  
Goodwyn Mills Cawood



## M2

### 30% DESIGN - 50% PROGRESS

#### Objective:

- To review the first proposed conceptual architectural building design and potential options, and document Owner's feedback.
- To review Owner's access control and security requirements with the proposed initial design.
- To review Owner's maintenance staff considerations.
- To incorporate Owner's thoughts developed since the preceding meeting.
- Review Opinion of Probable Construction Cost.
- Review Project Schedule gantt chart progress.
- To review 50% completion of civil engineering drawings for permitting.
- Review Project Schedule gantt chart

#### Attendees:

University Park Country Club General Manager  
University Park Owner's representative  
GMC Project Principal  
GMC Project Manager  
Kimley Horn - Civil Engineer of Record  
Kimley Horn - Landscape Architect of Record  
Bennett & Pless - Structural Engineer of Record  
Genesis Eng. - Mechanical Engineer of Record  
Genesis Eng. - Electrical Engineer of Record

## Tab 8 Approach to Design Services

### M3

#### 30% DESIGN - 100% PROGRESS

##### Objective:

- To review the second proposed architectural building design and document Owner's feedback.
- To review Owner's access control and security requirements with the proposed second design.
- To review Owner's maintenance staff considerations.
- To incorporate Owner's thoughts developed since the preceding meeting.
- To review the proposed structural, mechanical, electrical, plumbing, and fire protection strategies.
- Review Opinion of Probable Construction Cost.
- To review submission of civil engineering drawings for permitting.
- Review Project Schedule gantt chart progress.

##### Attendees:

University Park Country Club General Manager  
University Park Owner's representative  
GMC Project Principal  
GMC Project Manager  
Kimley Horn - Civil Engineer of Record  
Kimley Horn - Landscape Architect of Record  
Bennett & Pless - Structural Engineer of Record  
Genesis Eng. - Mechanical Engineer of Record  
Genesis Eng. - Electrical Engineer of Record

### 60% Design

Based upon the approved 30% Design documents and following the authorized project scope, schedule and budget, the Design Team will prepare 60% Design documents consisting of a model, drawings and specifications required to establish the scope of the project with regards to civil, architectural, mechanical, plumbing, electrical, fire prevention and security systems. Acoustical and lighting design are included within the aforementioned systems. Many projects in the industry have their good initial design concepts compromised during the detail and development phases. Our team of architects, engineers and consultants led by Goodwyn, Mills & Cawood Sarasota have worked together for well over a decade on a full range of projects and continuously collaborate successfully.

The Design Team shall proceed with those activities set forth in the following list and as required to develop the design:

- Participate in meetings regarding project scope and design direction with the Owner.
- Develop a scale site and building model with corresponding building floor plans, elevations and sections.
- Develop system diagrams that describe the proposed structural, environmental and life safety systems.
- Studies of energy and resource efficiency, indoor air quality, water conservation building operations and maintenance. The sustainable design integrates multiple environmental and resource issues in parallel with other aspects of the design.
- Monitor and report on the previously established opinion of probable construction cost

Representative deliverables for this phase of the project include:

- Agenda prepared and distributed by GMC Project Manager
- Minutes of project review meetings prepared and distributed by GMC Project Manager
- Design Development drawings and model for Owner review and approval
- Expanded Outline Specifications for Owner review and approval.

### M5

#### 60% DESIGN - 50% PROGRESS

##### Objective:

- To review the proposed architectural building design with initial structural, mechanical, electrical, plumbing, and fire protection design. Document Owner feedback.
- To review Owner's access control and security requirements with the proposed design.
- To review Owner's maintenance staff considerations.
- To review detailed Owner's detailed proposed furniture and equipment layouts.
- To review acoustic design strategies with regards to finishes, & mechanical design.
- Review Opinion of Probable Construction Cost.
- Review Project Schedule gantt chart progress.

##### Attendees:

University Park Country Club General Manager  
University Park Owner's representative  
GMC Project Principal  
GMC Project Manager  
Bennett & Pless - Structural Engineer of Record  
Genesis Eng. - Mechanical Engineer of Record  
Genesis Eng. - Electrical Engineer of Record

## Tab 8 Approach to Design Services

M6

### 60% DESIGN - 100% PROGRESS

#### Objective:

- To review the proposed architectural building design with structural, mechanical, electrical, plumbing, and fire protection design. Document Owner feedback.
- Review Opinion of Probable Construction Cost.
- Review Project Schedule gantt chart progress.

#### Attendees:

University Park Country Club General Manager  
University Park Owner's representative  
GMC Project Principal  
GMC Project Manager  
Bennett & Pless - Structural Engineer of Record  
Genesis Eng. - Mechanical Engineer of Record  
Genesis Eng.- Electrical Engineer of Record

### 90% Design

Based upon the approved 60% Design documents the Design Team shall prepare Construction Documents consisting of drawings and specifications for Owner review and approval. These documents will explain and quantify the design and develop the project parameters in accordance with all building and development codes, applicable guidelines and standards and with the target LEED rating. Energy efficiency criteria will be highlighted with regards to their application to building envelope design and to the design and selection of lighting, equipment and HVAC systems. In the same manner indoor air quality criteria will be applied to ventilation system control, materials selection building commissioning and building maintenance. With its many years of collaboration and much longer lengths of individual professional experience the Design Team led by Goodwyn, Mills & Cawood Sarasota is highly skilled at the interpretation of codes and the development of detailed construction documents.

The Design Team shall proceed with those activities set forth in the following list and as required to prepare the project for competitive bidding by the Owner appointed Construction Manager:

- Preparation of final construction drawings
- Preparation of specifications with parameters for material origin, recycled content and VOC levels, amongst others. Specific practices outlined for Indoor Air Quality during Construction.
- Coordination of design team members' work
- Quality Control review
- Assistance to the Construction Manager with continuous monitoring and reporting of the opinion of probable construction cost to reflect the project scope and market conditions

Representative deliverables for this phase of the project include:

- Agenda prepared and distributed by GMC Project Manager
- Minutes of project review meetings prepared and distributed by GMC Project Manager
- Signed and sealed copies of Construction Documents and Project Specifications
- PDF electronic version of final Construction Documents and Project Specifications

M7

### 90% DESIGN - 50% PROGRESS

#### Objective:

- To review the proposed architectural building design with structural, mechanical, electrical, plumbing, and fire protection design. Document Owner feedback.
- To review Project Specifications
- Review Opinion of Probable Construction Cost.
- Review Project Schedule gantt chart progress.

#### Attendees:

University Park Country Club General Manager  
University Park Owner's representative  
GMC Project Manager  
GMC Interior Designer  
Kimley Horn - Landscape Architect of Record  
Bennett & Pless - Structural Engineer of Record  
Genesis Eng. - Mechanical Engineer of Record  
Genesis Eng. - Electrical Engineer of Record

M8

### 90% DESIGN - 100% PROGRESS

#### Objective:

- To review the proposed architectural building design with structural, mechanical, electrical, plumbing, and fire protection design. Document Owner feedback.
- To review Project Specifications
- Review Opinion of Probable Construction Cost.
- Review Project Schedule gantt chart progress.

#### Attendees:

University Park Country Club General Manager  
University Park Owner's representative  
GMC Architect of Record  
GMC Project Architect  
GMC Interior Designer  
Kimley Horn - Landscape Architect of Record  
Bennett & Pless - Structural Engineer of Record  
Genesis Eng. - Mechanical Engineer of Record  
Genesis Eng. - Electrical Engineer of Record



## Tab 8 Approach to Design Services

### Guaranteed Maximum Price Negotiation

The Design Team, following the Owner's approval of the completed Construction Documents shall assist in obtaining the negotiated proposal for the Work from the Owner appointed Construction Manager. The Design Team led by Goodwyn, Mills and Cawood Sarasota has a successful history of designing buildings and producing documents that meet the client's budget.

The Design Team shall provide project specific support to the Owner and Construction Manager during this phase as set forth in the following abbreviated list of tasks:

- Participate in a pre-bid conference to outline the project requirements with the Owner's Representative(s), interested subcontractors and material suppliers.
- Prepare clarifications and addenda in response to Owner, Construction Manager or bidder queries.
- Analyze bidders requests to use alternates
- Support Construction Manager negotiation efforts with apparent low bidders

Representative deliverables for this phase of the project include:

- Cost Analysis Documents
- Final Price Negotiation meeting notes / minutes
- Clarifications or Addenda, if required

### Construction

The Design Team's responsibility to provide the basic services for the construction phase commences with the award of the contract for construction to the Owner selected Construction Manager and terminates at the transmittal to the Owner of the final Architect signed Certificate for Payment. The Design Team led by Goodwyn, Mills & Cawood Sarasota is composed of professional architects and engineers who possess the qualifications and background required to effectively support the Owner's interests during construction.

The Design Team shall provide administration of the construction contract as set forth in the following abbreviated list of tasks and as stipulated in the executed construction contract:

- Coordinate a pre-construction conference with Owner's Representative, General Contractor and major subcontractors
- Provide project representation in the field as required to confirm the construction activity is in accordance with the project requirements
- Timely review and processing of shop drawings and other submittals
- Preparation of supplemental drawings and specifications as necessary to clarify the project requirements
- Review and certify the General Contractor's applications for payment
- Coordinate weekly project coordination meetings at the construction site

- Review of General Contractor's prepared as-built drawings and other close-out documents
- Participation in Punch and Final inspections and other close-out activities

Representative deliverables for this phase of the project include:

- Agenda prepared and distributed by GMC Project Manager
- Project Coordination Meeting Minutes prepared and distributed by GMC Project Manager
- Processed submittal files
- Incremental certificates of project compliance
- Certificate of Substantial Completion

### Construction Administration & Management Overview

#### Overall Team Structure

The District's primary contact during the construction phase will remain the Project Manager, Julian Norman-Webb, AIA, who will attend all weekly Owner-Architect-Contractor (OAC) meetings and manage the construction administration process. Julian has a long history of construction administration and has always undertaken the construction administration for the projects he has designed, believing that the person best suited to managing the process is the person who designed the building. In Florida these have included projects at many scales, from 55,000 SF municipal buildings, to 29,000 SF religious buildings and 3 story multi-family projects, to high-end single family residences. Elsewhere it has been 5 story higher education buildings, a 7 story hotel, historic renovations including the British Embassy in Paris, and bespoke urban houses. As someone who has worked for a major international contractor in the past, Julian is specially qualified to see the process of contract administration from all sides, to develop and maintain effective communications with construction manager staff, and to proactively assist the contractor in being able to look ahead and answer any questions the contractor may have before he/she has formulated them. Weekly construction observation visits will be made by the Design Team, and these will also involve the engineering consultants and the Architect.

The Design Team are well versed in project management platforms such as Procore and have successfully worked with Owners and General Contractors who have customized their own project management platforms.

#### Maintaining Project Schedule During Construction

GMC specifications require the Contractor to provide a construction schedule prior to the commencement of construction. Progress against this schedule is logged at least every two weeks so that it is clear whether, or not, the construction schedule is being maintained. Should Contractor delays be potentially endangering the construction schedule

## Tab 8 Approach to Design Services

then this concern will be brought to the Contractor's attention, minuted, and the concern substantiated.

At the end of the day, means and methods are the General Contractors purview, but there are advantages to the Architect chairing the OAC meetings to ensure that the minutes are complete and detailed. Many OAC meeting minutes are threadbare, this team's minutes are not. OAC meeting minutes that are compiled in a full and detailed manner, distributed to all team members, and accepted into the project record at the next OAC meeting, provide a strong basis for holding all parties fairly accountable.

If the delivery of materials or equipment was proving troublesome, as can still be the case for some time given current conditions, GMC would proactively work with the General Contractor to see if possible alternatives with shorter lead times could alleviate the delay and not compromise the Owner's investment.

### Review and Processing of Submittals

All submittals for a project are routed through GMC where they are logged by project, specification section, date received, and content description. Our staff then determines whether the submittal is to be reviewed by in-house staff or sent to a consultant. For submittals sent out, the date is entered into a log and tracked for timely response.

Our review, including the review of our consultants' shop drawings, are expected to be returned quickly and expeditiously, most of the time well within two (2) weeks. After the submittals are reviewed, they are logged with the relevant mark for the action taken before returning copies to the General Contractor. The submittal is then posted to the log showing the date returned to the General Contractor and the action taken. This closes out the submittal. Copies of all reviewed submittals are filed by specification and submittal number. Submittals are reviewed by technically qualified staff and final review is by the Project Architect. We believe that the submittal process is a very important part of constructing a building and we are committed to correct and timely reviews. By already having a timely process in place for our exceedingly time-sensitive healthcare projects we are often able to return the submittal in as little as one (1) week. Our team receives rave reviews from Contractors who have been involved with our team through this process. A sample submittal log can be made available for your review.

Our Project Specifications are deliberately edited from Master Spec originals to minimize any possibility of differing interpretations of the specifications. They are thoroughly vetted so that the products listed and referred to are project specific, and not 'boiler-plate'. Clarity is our watchword and we rarely have any conflicts of interpretation. Item key marks and notes on the drawings are referenced in the drawings and

the product or assembly description is written once so that the chance of errors because of a description being written multiple times are avoided.

### Review and Processing of Requests For Information (RFI's)

RFI's for a project are routed through GMC where they are logged by project and date received. The Project Architect then determines whether the RFI is to be reviewed by in-house staff or sent to a consultant. For RFI's sent out, the date is entered into a log and tracked for timely response.

Our response including the review of our consultants' responses, are expected to be returned quickly and expeditiously, most of the time well three (3) days. After the RFI's are answered, they are logged before returning copies to the General Contractor. Copies of all RFI responses are filed by RFI number.

RFI's are responded to by the Project Architect and where necessary, with the provision of information by the engineers of record or other consultants. We believe that the RFI process is a very important part of constructing a building and we are committed to responding as expeditiously as possible so as to assist the General Contractor in maintaining his schedule.

It should be noted that our goal is to have as complete construction documents as one fairly can so that the potential for Requests For Information during the construction process is minimized.

### Construction Observation Services

Regular, at a minimum of every week, construction observation visits will be made by the Design Team, and these will also involve the engineering consultants and the Architect of Record in coordination with the Project Architect. Visits are scheduled so as to be more frequent during times of greater activity or need for observation and also so as to coincide with project milestones. All observation visits are followed promptly by a Site Observation report which records weather conditions, parties present, construction activity viewed, and observations made. Photographs of the construction and any materials stored are included and labeled as a part of the report. The report is issued to all parties. GMC's consultants will all make similarly formatted reports for their areas of expertise.

### Review and Processing of Contractor Payments

Our team is very thorough regarding the review and processing of contractor applications for payment. First, we require the schedule of values be broken down into quantities that are easily measured. Trade value breakdown should be included on the Application for Payment forms. These breakdowns are measured carefully against the contractor's progress on a monthly basis and are assessed monthly at a site construction observation visit.

## Tab 8 Approach to Design Services

At least ten (10) days before the date established for each progress payment, the Contractor submits to us an itemized application for payment for operations completed in accordance with the Schedule of Values. Site visits by the construction administration department are scheduled to correspond with the cut-off date for applications for payment so that we can verify progress against the Schedule of Values. Within seven (7) days after receipt of the Contractor's application for payment, we will either issue to the Owner a certificate for payment for such amounts as we determine properly due, or we will notify the Contractor and Owner in writing of reasons for withholding certifications in whole or in part.

### **Risk Assessment**

Our team members are all very familiar with the Owner/ Architect Agreement, as well as the General Conditions for Construction. For any particular project for which they are involved, key issues and items that differ to any significant degree from these documents are brought to the Owner's attention with clarity and quickness.

Some contractors attempt what is known in the industry as "front-loading". This is early invoicing that exceeds the actual value of work in place, which exposes the Owner to the risk of insufficient funds to pay subcontractors at the end of the project. Because we carefully monitor the level of completion before certifying payment applications, we can reduce the risk to the Owner for overpayment.

We issue notices of non-conforming work to the contractor when project staff observes work that is not in conformance to the drawings and specifications. Copies of these notices are sent to the Owner to keep him/her informed as the Contractor's performance. Our specifications require various coordination and pre-installation conferences, many of which require manufacturer participation that reduces risk to the Owner of latent defects in materials that may be concealed by subsequent construction. We welcome participation by Owner staff in these meetings, especially those that concern critical construction (such as waterproofing) or those that concern elements which affect Owner operation of the building or customer appeal.

### **Substantial and Final Completion**

Upon the achievement of Substantial Completion by the General Contractor, GMC will verify they are in agreement and, in the affirmative, issue a Certificate of Substantial Completion. A punch list will be compiled of outstanding items requiring completion or items requiring some form of remediation or touch-up. GMC will perform this work immediately and expeditiously so as to permit the General Contractor to remedy any items that might prevent 100% completion of County Inspections and the issuing of the Certificate of Occupancy. The Project Architect will be available for the Certificate of Occupancy inspections in case any design related issues are raised during the walk-through and to immediately pro-actively address any concerns that might be raised. GMC will reinspect the completed work once the General Contractor attests that the punch-list is 90% complete and then will reinspect after supposed 100% completion.

### **Project Close-Out**

GMC can provide record drawings of the completed construction using the construction documents and following observations made during the construction, any revisions or clarifications made during construction, or information provided by the General Contractor as to exact underground piping runs. These record drawings will be compiled as a final Building Information model (Revit) which can be provided both in this format, as an IFC model, and/or as conventional 2D AutoCAD files at any release from 2013 onwards.

The GMC Project Architect will walk the building at the 100% Punch list verification with an Owner's representative to be sure any and all concerns of the Owner have been covered. GMC will be the conduit for ensuring all final warranties, instruction and maintenance manuals, and agreed training sessions have been completed and provided to the Owner.

### **Post-construction**

The services of Goodwyn, Mills & Cawood include post construction services that include a project visit with the Owner's Representative, eleven months after the Certificate of Substantial Completion, to resolve any outstanding items that have arisen during the initial use of the building and which require resolution by the General Contractor within the 12 month warranty period. Goodwyn, Mills & Cawood takes its responsibilities for completed projects very seriously and we always remain "on call" for our clients.

## Sustainable Environment

Our firm is a leader in incorporating and designing sustainable, state-of-the-art, and environmentally friendly facilities. We believe sustainable design is simply “better design,” and our long-standing focus on providing the best environment for building-users is now enhanced by a wider-awareness of sustainability.

With 40 LEED accredited professionals GMC is ready to help meet current standards for energy efficiency and sustainability in order to benefit from reduced operational costs and impact to the environment. GMC can assist with LEED certification, energy modeling, life cycle cost analysis, low-impact development and other strategies to help meet sustainability and operational goals.

**Recovered Materials** We conduct extensive research into potential building materials and products with recovered content. In doing so, we attempt to integrate environmental considerations into every stage of the project’s life.

**Waste Reduction** Space requirements for on-site building recycling programs are also considered and integrated into the design. Our Project Specifications contain a Construction and Demolition Waste Recycling section as well as numerous references to job-site waste minimization procedures.

**Energy Efficiency** We incorporate passive solar technology, thereby minimizing the building’s reliance on mechanical systems and ensuring that necessary systems make effective use of the most efficient equipment. Lighting schemes are developed to be comfortable and to maximize daylight during appropriate hours.

**Cost Savings** Each of our projects includes sustainable features designed to lower utility bills and reduce the building’s impact on the environment. Our designs promote and incorporate the use of recycled materials, light reflection, green roof and light-reflective colors.

Our LEED Project Specialists have in-depth knowledge of all LEED rating systems, certifications, and comparable programs, and meet with clients and project teams to identify sustainable design strategies that can positively impact client goals and objectives.

2   
LEED  
PLATINUM  
PROJECTS

6   
LEED  
GOLD  
PROJECTS

12   
LEED  
SILVER  
PROJECTS

9   
LEED  
CERTIFIED  
PROJECTS

## Statement Attesting Commitment to the District



**Goodwyn Mills Cawood**

1819 Main Street  
Suite 608  
Sarasota, FL 34236

T (941) 312-5523  
F (850) 433-0508  
www.gmcnetwork.com

May 15, 2024

University Park Recreation District  
John Fetsick, General Manager - UPRD  
7671 The Park Boulevard  
University Park, FL 34201

Re: **RFQ No. 24.001 - Professional Architectural and Engineering Services**  
New Community Activity Building/Administrative Offices, New fitness building, and  
Renovations

Dear Members of the Selection Committee,

GMC's commitment to meeting University Park's time and budget requirements underscores our dedication to delivering projects that align with the community's needs and resources. We understand the importance of adhering to the outlined schedule and financial parameters to ensure the success of the project and the satisfaction of all stakeholders involved.

Our team is fully aware of the significance of timely completion and staying within the allocated budget. We recognize that these factors are essential for the efficient execution of the project and for maintaining the trust and confidence of our clients, including University Park Recreation District.

Our collaborative approach extends not only within our firm but also with our trusted network of local consultants. We have a longstanding history of successful partnerships with Kimley Horn, Bennett Pless, and Genesis, having worked together on numerous projects. This ensures a cohesive and streamlined process from conceptualization to completion, minimizing risks and maximizing efficiency.

GMC remains committed to proactive problem-solving and collaborative decision-making to uphold our promise of meeting the District's time and budget requirements. We view challenges as opportunities for innovation and improvement, and we are dedicated to delivering a successful outcome that exceeds expectations while respecting the agreed-upon constraints.

Sincerely,

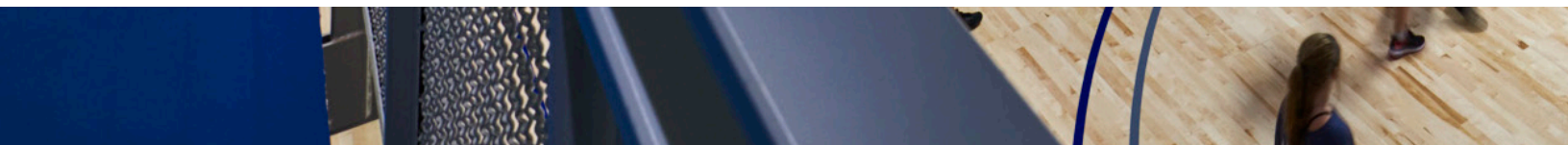
A handwritten signature in black ink, appearing to read 'Sara Butler', is written over a light blue horizontal line.

**Sara Butler, AIA, LEED Green Associate**

Senior Vice President, Architecture  
sara.butler@gmcnetwork.com  
(615) 333-7200



**Tab 9**  
Organizational Structure and Capacity

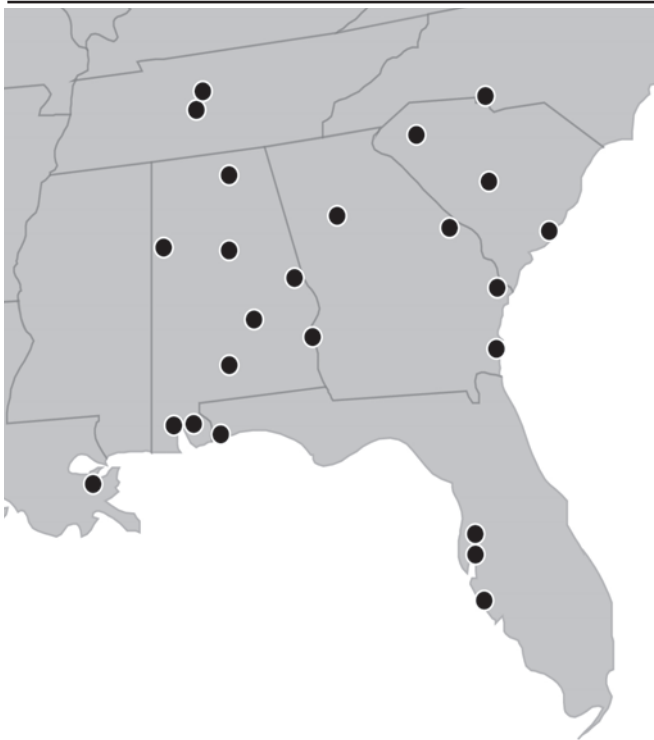


# 1. Staffing Resources

**Goodwyn Mills Cawood (GMC), LLC** is one of the largest architecture and engineering firms in the region with offices across the Southeast. Whether designing schools, parks, hospitals and other commercial developments, or providing clean water, safe streets and protecting endangered environments, GMC takes great pride in serving our communities through the transformative work we do. Every project is guided by the foundational concept that communities are built by people, not companies, and we strive to serve our communities with quality, integrity, creativity and care. GMC is equipped to provide all of the services associated with architecture, interior design, civil engineering, environmental services, landscape architecture, planning, transportation engineering, geotechnical engineering, electrical engineering,

surveying and disaster recovery. We provide services to a diverse group of public and private sector clients, including county and municipal governments, federal and state agencies, private corporations, industries and developers.

GMC offers creative solutions to complex challenges. Our staff recognizes that if a project is to be successful, it must first meet the needs of the client. Therefore, we work with each client individually to assure satisfaction in all areas of each project including a functional design and a project within budget. Measuring our success by our many accomplishments, we have a proven track record of meeting a client's design needs economically, efficiently, and in the time frame outlined by the client.



## Office Locations

- Andalusia, AL - 3
- Auburn, AL - 7
- Birmingham, AL - 101
- Daphne, AL - 23
- Eufaula, AL - 1
- Huntsville, AL - 16
- Mobile, AL - 46
- Montgomery, AL - 128
- Vernon, AL - 4
- Lutz, FL - 7
- Pensacola, FL - 10
- Sarasota, FL - 10**
- Tampa, FL - 6
- Atlanta, GA - 47
- Augusta, GA - 16
- Brunswick, GA - 2
- Savannah, GA - 13
- New Orleans, LA - 4
- Charlotte, NC - 3
- Charleston, SC - 10
- Columbia, SC - 11
- Greenville, SC - 42
- Brentwood, TN - 14
- Franklin, TN - 15
- Knoxville - 1
- Nashville, TN - 50

## 568 Total Employees

## Our Disciplines By the Numbers



Architecture  
**158**



Interior Design  
**17**



Engineering  
**159**



Environmental  
**29**



Landscape Architecture  
**13**



Disaster Recovery  
**6**



GIS  
**3**



Planning  
**12**



Geotechnical  
**39**



Electrical  
**11**



Transportation  
**53**



Surveying  
**11**

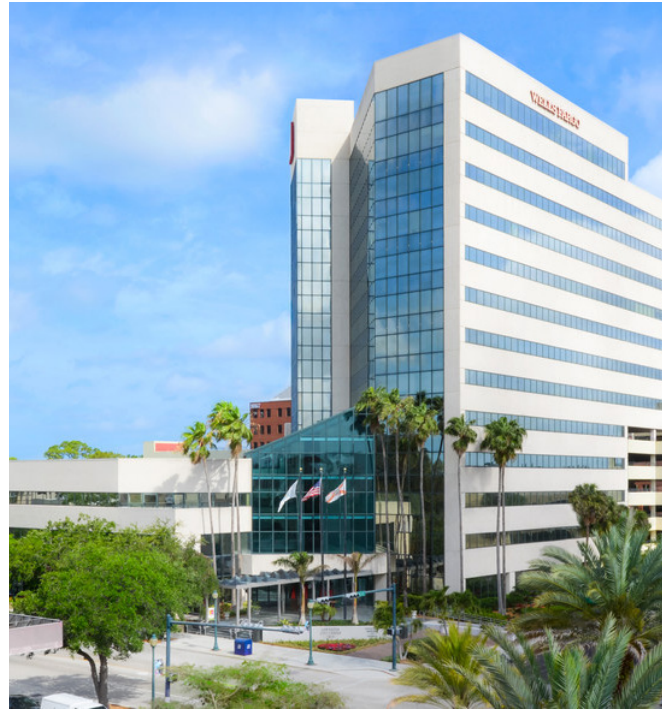
## 2. Details of Managing Office

### GMC Sarasota Office

Goodwyn Mills Cawood (GMC) is a long established firm with 550+ employees across the southeast United States with a local office in Sarasota and a sister office in Tampa, both with substantial design experience.

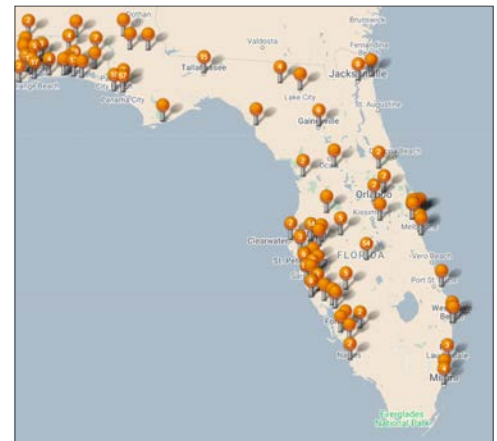
**Our Sarasota office is staffed with local professionals of high caliber who have all worked in Sarasota and Manatee counties since at least 2009.** Our firm's work has been recognized with many awards and our Sarasota office staff have also been recognized by juries involving building owners, architects, and the public.

Our firm is currently working on the Sarasota County Planning and Development Offices; the new Employee Health Center for Sarasota County; the new Data Center for Sarasota County; and expansion of the City Hall for Punta Gorda.



▼ GMC is working on the City Hall for Punta Gorda, Florida.

▲ Our Office Location 1819 Main Street, Suite 608



▲ GMC projects across Florida



### 3. Sub-consultants Information

We have identified the following firms to use as consultants on the University Park Recreation District Project



Our multidisciplinary engineering team offers in-house design integration solutions for various building systems, including Structural and MEP (mechanical, electrical, and plumbing) engineering. Our team has a passion for partnership, sustainability, and proper planning, with the goal of bringing our clients' ideas to life.

**Sun 'n Lake Golf Course Clubhouse, Sebring, Florida** This project consisted of the design of a new clubhouse facility for support of the golf operations. The primary objective of this project was to modernize the facility and to provide amenities suitable to attract larger events. Scope include new commercial kitchen, dining spaces, bar area, gathering areas, club room, pro shop, and various support spaces.

**Norstar Lincoln Village, Bradenton, Florida** This project is a new community clubhouse designed for the Lincoln Village community. This facility included amenities for residents that include gathering areas, recreation areas, restroom facilities, food prep, management offices, fitness center and various support spaces. This project was constructed through a federal funding grant program and was completed through the design-build process.

**Harrison Ranch Community Center, Parrish, Florida** Project consisted of the design of a community center for support of community activities. Areas include gymnasium, game rooms, meeting rooms, family room, corporate support offices, prep kitchen and an outdoor socializing area. Building is single story and was completed using several 'Green' technologies including LED lighting and variable refrigerant flow HVAC systems.



Founded in 1967, Kimley-Horn is a full-service, employee-owned, multidisciplinary consulting firm offering a broad range of engineering, planning, landscape architecture, and environmental services to clients in both the private and public sectors. Over the years, the firm has grown from a small group of engineers and planners to one of the most respected consulting engineering firms in the nation—and a recognized leader in land development. Today, Kimley-Horn has over 7,500 employees in more than 120 offices across the United States and in Puerto Rico, offering a full range of consulting services to local, regional, national, and international clients.

Kimley-Horn has a long history of successfully delivering projects that function as both destination gathering spaces and highly complex, sustainable engineering achievements. The firm achieves this by implementing a well-grounded design process coupled with creative exploration. Kimley-Horn planners and engineers are adept at creating places people want to experience.

Kimley-Horn's integrated team will conceptualize with an emphasis on the overall functionality and safety of the built environment. This full-service level of attention and understanding lessens the burden on your staff and ensures efficiency of communication, schedule, budget control, and the production of high-quality deliverables. Kimley-Horn will partner with us to help ensure the initial vision is carried all the way through to the end user, resulting in a marquee, destination project that sets new standards for design.



In addition, Kimley-Horn has partnered closely with the University Park Recreation District on the University Park Country Club Master Plan, providing a full range of services including conceptual 3D renderings and public involvement. Their team brings the essential local knowledge and familiarity with your staff to make these improvements a success.



The demands of today's complex engineering environment require a highly skilled staff of specialists with real-world training in the required disciplines. Hees & Associates a division of Bennett & Pless incorporates an outstanding staff of qualified engineers with decades of practical design and construction experience. Each of our projects is produced by a cohesive team that pairs technical skills and practical application within the framework of present-day scheduling demands. Our track record of successful projects completed on-time and on-budget demonstrates a commitment to overcoming structural engineering challenges and providing quality client deliverables.

founded in **1964** team members **140+**

## 4. Organizational diagram identifying key personnel

# Your Team
















- Goodwyn Mills Cawood
- Kimley Horn
- Genesis Engineering
- Bennett Pless



### Project Management

 <p><b>Julian Norman-Webb, AIA, NCARB, LEED AP BD+C</b> Project Manager</p>	 <p><b>Sara Butler, AIA, LEED GA</b> VP Architecture/ Project Executive</p>
--	--

### Architect/Engineering Design Team

 <p><b>Dylan Bernius</b> Project Coordinator</p>	 <p><b>Matt Dunn, ASLA</b> Project Manager/Lead Landscape Architect</p>	 <p><b>Dan Schafran, PE</b> Principal Electrical Engineer</p>	 <p><b>Karl Hees, PE</b> Structural Engineer</p>	
 <p><b>John Escobar</b> BIM / Renderings</p>	 <p><b>Peter VanBuskirk, P.E., AICP</b> Senior Advisor</p>	 <p><b>Chris Cianfaglione, PLA, ASLA, ISA</b> Sr. Landscape Architect</p>	 <p><b>Mike Haney, PE, LEED AP, CxA</b> Principal Engineer</p>	 <p><b>Tom Wilda, PE</b> Sr. Structural Engineer</p>
 <p><b>Jamie Bordelon</b> Interior Design Associate</p>	 <p><b>Trenton Strackbein, P.E.</b> Lead Civil Engineer</p>	 <p><b>Jake Hess, ISA</b> Landscape Architect Designer</p>	 <p><b>Roger L. Shearrow, PE, LEED AP, CxTS</b> Sr. Plumbing/ FP Engineer</p>	
	 <p><b>Scott Wedgeworth, P.E.</b> Civil Engineer</p>	 <p><b>Danielle Stewart, AICP</b> Planning and Entitlements</p>		

## 5. Similar Work Jointly Performed

We have a longstanding history of successful partnerships with Kimley Horn, Bennett Pless, and Genesis, having worked together on numerous projects. This ensures a cohesive and streamlined process from conceptualization to completion, minimizing risks and maximizing efficiency.

## 6. Joint Venture

GMC has no intention of establishing a joint venture for this project.

## 7. Financial Capacity

GMC operates in a manner that protects our financial stability so that we can be there for our clients and our employees through any challenges. Our diversified client base, sound financial planning, and the multi-disciplined organization of our firm provide a strong, revenue-generating system that ensures our stability. Our firm maintains relationships with several financial institutions and financial references are to the right. The information provided below is a snapshot of our firm's historical stability according to a Duns & Bradstreet rating report of GMC.

Statements below have been summarized from our D&B report as evidence of our financial stability.

<b>DUNS Reference Number</b>	117818244
<b>D&amp;B Rating</b>	4A1
<b>Financial Stress Class</b>	1 (Lowest Risk)
<b>Credit Score Class</b>	1 (Lowest Risk)
<b>Financial Stress National Percentile</b>	99 ( <i>Highest Risk: 1; Lowest Risk: 100</i> )
<b>Financial Stress Score</b>	1664 ( <i>Highest Risk: 1,001; Lowest Risk: 1,875</i> )

\*The Financial Stress Class of 1 for GMC shows that firms with this classification had a failure rate of .03% (3 per 10,000), which is lower than the average of businesses in D&B's database.

\*The Credit Score Class of 1 for GMC shows that 6.0% of firms with this classification paid one or more bills severely delinquent, which is lower than the average of businesses in D&B's database.

Financial Stress Norms for Companies in the Same National Percentile	
- Region (East South Central)	43
- Industry (Business, Legal, Engineering)	52
- Employee Range (100-499)	75
- Years in Business Range (26+)	77
- Subject Company (GMC)	99

1

### CRAFT BANK

Mary Gray, VP  
1575 Northside Drive NW  
Building 100, Suite 200  
Atlanta, GA 30318  
(678) 736-5060

2

### COUNTYBANK

James R. Fowler, Jr., WMS  
201 W. McBee Avenue  
Greenville, SC 29601  
(864) 335-2400

3

### RIVER BANK & TRUST

Gene Crane, Account Manager  
Account No. 200066512  
P O Box 240938  
Montgomery, AL 36124  
(334) 396-6565

4

### ARC (RIDGWAY'S LLC)

Rod Ellison, Account Manager  
P O Box 203890  
Dallas, TX 75320-3890  
(404) 873-5911

5

### ABS BUSINESS SYSTEMS

Eddie Cobb, Account Manager  
868 Lagoon Commercial Blvd.  
Montgomery, AL 36117  
(334) 396-0809

6

### HAIGLER AUTO PARTS & SERVICE, INC.

Billy Haigler, Account Manager  
4287 Atlanta Highway  
Montgomery, AL 36109  
(334) 272-2025

## 8. Statement of Financial Authorization



**Goodwyn Mills Cawood**

PO Box 242128  
Montgomery, AL 36124

T (334) 271-3200  
F (334) 272-1566

[www.gmcnetwork.com](http://www.gmcnetwork.com)

February 6, 2024

RE: Financial Record Access

To whom it may concern,

Goodwyn Mills Cawood LLC authorizes a County auditor or financial analyst access to financial records, including all records prepared by an independent firm.

If you have any questions, feel free to contact me directly at 334-532-3217 or via email at [kristen.hunt@gmcnetwork.com](mailto:kristen.hunt@gmcnetwork.com).

Sincerely,

A handwritten signature in blue ink that reads "Kristen Hunt".

Kristen Hunt  
VP of Finance

Building Communities

## 9. Ownership Interest Disclosure

Goodwyn Mills Cawood, LLC is owned by Goodwyn Mills & Cawood, Inc and Goodwyn Mills & Cawood 2, Inc. Goodwyn Mills & Cawood, Inc owns 97.134% and Goodwyn Mills & Cawood 2, Inc owns 2.866%

## 10. Current Workload next 6 months

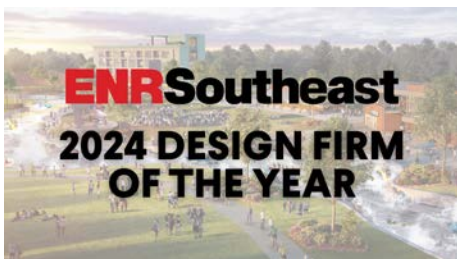
GMC Florida Architecture Workload				
GMC Projects	Status	Completion	Construction Cost	Project Fee
Cape Coral Tech College Expansion	Schematic Design	12/1/2025	\$13,000,000	\$91,962
Acadia Clinic Lebanon PA	Construction	7/1/2024	\$1,090,000	\$76,300
Acadia Clinic Manatowoc WI	Construction	8/1/2024	\$650,000	\$45,000
Acadia Clinic Delevan WI	Construction Documents	11/1/2024	\$650,000	\$45,000
Acadia Chambursburg, PA	Construction	12/1/2024	\$650,000	\$45,000
Acadia Clinic York, PA	Construction	10/1/2024	\$650,000	\$45,000
SC EIT and Administration	Construction	9/2025	\$24,000,000	\$870,003
Sarasota County Employee Health Facility	Construction	9/2025	\$3,600,000	\$204,075
City of Punta Gorda City Hall	Bidding	6/1/2025	\$6,126,000	\$600,000
Sarasota County One Stop	Construction	6/1/2025	\$34,000,000	\$1,606,289
LWRMC Multi Purpose RF Room	Construction	9/1/2024	\$470,000	\$33,000
Palm Bay Hospital Med Surgery Renovation	Detailed Design	6/2026	\$515,000	\$360,000

## 11. List of Design Projects Awarded by Manatee County

Although, GMC has not designed any contracts for Manatee County but we do have extensive experience in Manatee County including the following current projects that are located in Manatee County. Our team has worked in Manatee County for more than 15 years and have experience with the County Zoning and Building Permit process.

- Aldi Retail Store – University Pkwy – 20571 sf, start 2021, Completed June 2022, +/- \$6,200,000
- Outback Rest. & Aldi plus 2 Outparcels, OBS – 4,694 sf, Aldi 19,432 SF, Construction to start April 2023, \$10,000,000.00
- Aldi Retail Store – Moccasin Wallow Road – 20,664 sf, In permitting, construction to start late 2024, \$6,700,000.00

## 12. Additional Information





**Tab 10**  
Similar Completed Projects

## Tab 9 Similar Completed Projects

### a. Country Club Facilities and Physical Fitness Facilities

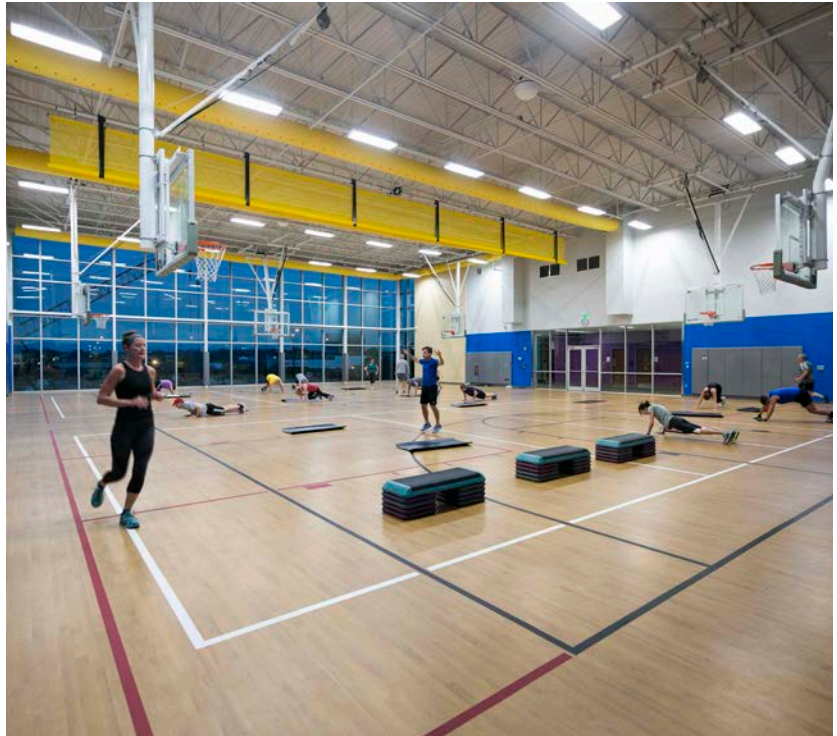
# Downtown Pensacola YMCA

**Location:** Pensacola, Florida  
**Size:** 53,240 sf  
**Status:** Completed November 2016  
**Construction Cost:** \$10,600,000

**Contact:**  
Michael Bodenhausen, CEO  
YMCA of Northwest Florida  
165 East Intendencia Street  
Pensacola Florida 32502  
(850) 432-8327 ext. 12

GMC, formerly Bay Design Architects, completed a new two-story YMCA in downtown Pensacola. Project includes full size gymnasium, aquatics center, wellness center, multi-purpose/community rooms, demonstration kitchen, locker rooms, conference room and administration office.

A healthcare partner has also teamed with the YMCA to provide a therapy component. The facility was designed using energy efficient building systems and the materials were selected help to achieve an efficient building envelope. A series of community and member input meetings were held prior to the design of the building to develop the program. The entire facility is designed to be a unique place where people can learn to improve their health and quality of life.



**Tab 9 Similar Completed Projects**

**b. Commerical Kitchen New Construction**

# The Lodge at Paris Landing State Park

**Location:** Buchanan, Tennessee

**Size:** 102,000 sf

**Status:** Completed 2022

**Cost:** \$40,072,644

**Contact:**

Ben Dunn

State of Tennessee Real Estate

Asset Management

WRS Tennessee Tower

312 Rosa L. Parks Avenue, 24th Floor

Nashville, Tennessee 37243

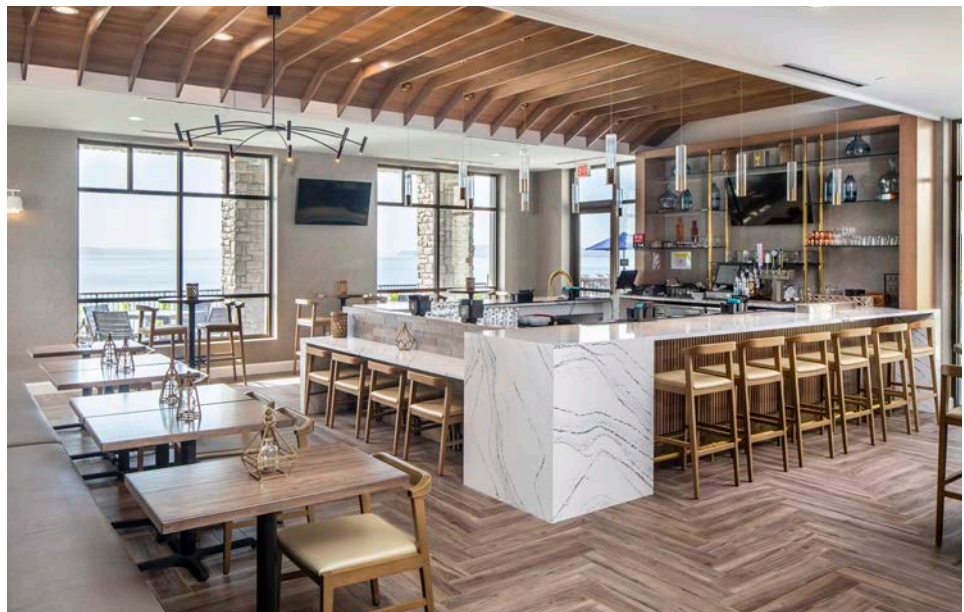
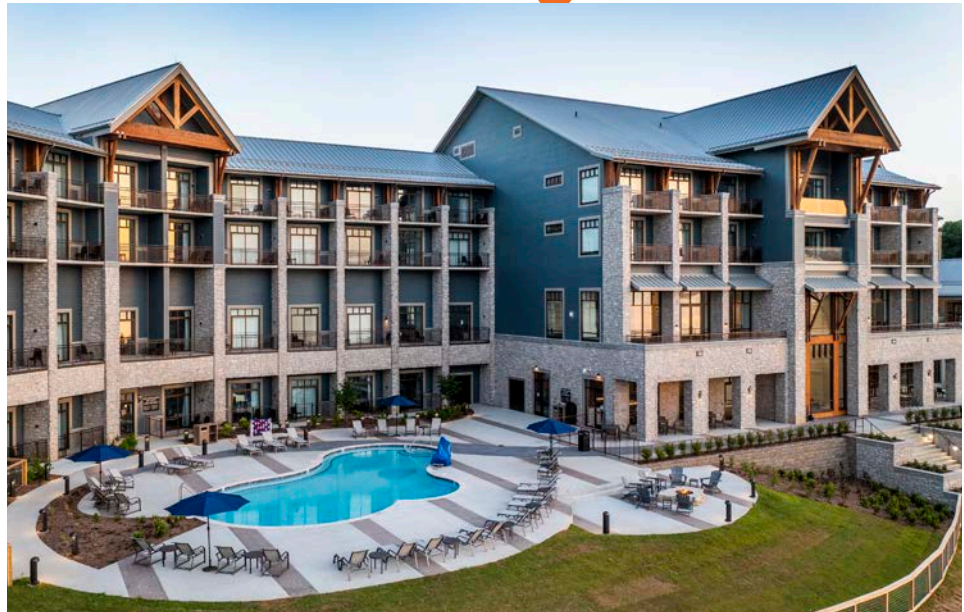
(615) 812-0807

ben.c.dunn@tn.gov

The new 91-room Lodge at Paris Landing State Park provides hotel resort-style vacation rentals on Kentucky Lake near Land Between the Lakes. Features include modern room design, conference space, a full-service restaurant, bar, and lounge overlooking scenic lakes and natural beauty.

The replacement Lodge was part of the state's efforts to revitalize its park system. The scope of work included demolishing the original hotel and surrounding amenities, followed by the design and construction of the new Lodge. The building has a waterfront feel reminiscent of the architectural styles of the coastal northeast and great lakes shoreline communities. This coastal style was blended with rustic and natural elements typically found in traditional state parks to create a unique experience that is inventing, relaxing, light and open. The Lodge also includes a full kitchen designed for efficiency, supporting the restaurant and conferencing facilities

GMC provided architecture, interior design, civil engineering, geotechnical engineering, construction materials testing and landscape architecture services for the project.





## Tab 9 Similar Completed Projects

### b. Commerical Kitchen Renovation

# Sarasota Memorial Hospital Kitchen Renovation

**Location:** Sarasota, FL  
**Status:** Completed 2021

**Contact:**  
John P. Salt  
(941) 917-1741  
john-salt@smh.com

Goodwyn Mills Cawood (GMC) recently completed a significant renovation project for the Sarasota Memorial Hospital. The project focused on the expansion and modification of the hospital's kitchen and On-Premises Laundry (OPL) areas. GMC was tasked with providing comprehensive architectural drawings and overseeing the construction process to ensure seamless integration within the functioning hospital environment.

#### Scope of Work:

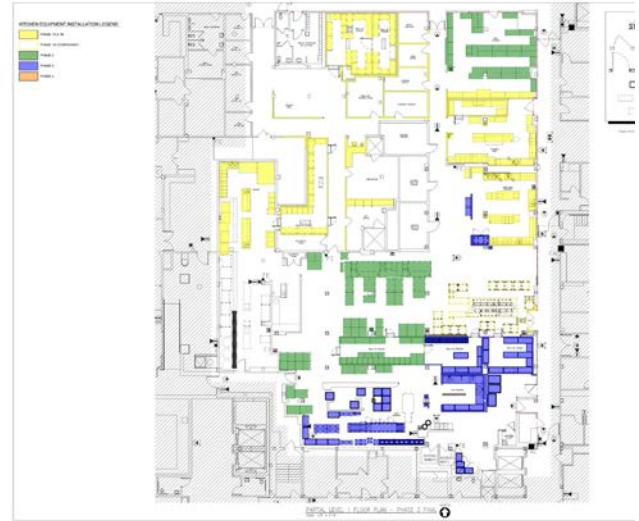
- Expansion and modification of the existing kitchen and OPL storage areas
- Design and construction coordination for new office spaces dedicated to food and nutrition staff
- Integration of new kitchen equipment while ensuring efficient workflow and delivery systems
- Modification of Mechanical, Electrical, Plumbing (MEP), and Fire Protection services to accommodate the expanded kitchen layout

#### Challenges:

- Operating within the confines of a functioning hospital environment required meticulous planning and coordination to minimize disruptions to daily operations.
- Full compliance with the Agency for Health Care Administration (AHCA) regulations was mandatory throughout the project to ensure patient safety and regulatory adherence.

#### Outcome:

Despite the complexities involved, GMC successfully delivered a fully renovated and expanded kitchen facility for Sarasota Memorial Hospital. The project's completion not only enhanced the hospital's operational efficiency but also improved the working environment for food and nutrition staff. GMC's expertise in healthcare facility design and rigorous project management ensured the project's success while meeting all regulatory requirements.



**Tab 9 Similar Completed Projects**  
**c. Renovation Project Large (over 1k sf)**



## Punta Gorda City Hall Preservation and Rehabilitation

Goodwyn Mills Cawood is currently engaged in the design of the Punta Gorda City Hall preservation and rehabilitation project. The project, with an estimated budget of nearly \$10.8 million, focuses on preserving and enhancing the Historic City Hall, built in 1927, and the council chambers, constructed in 1978, located at 326 W. Marion Ave.

Led by project architect Julian Norman-Webb, the design aims to respect the historical significance of City Hall while improving its visibility and providing a clear entry point. Additionally, the council chambers will undergo expansion and renovation to accommodate current and future needs.

The overarching goals of the project encompass expanding the chambers, creating

more office and multipurpose spaces, enhancing ADA accessibility, and upgrading technological infrastructure throughout the building. The design allows for a total of three stories, with the second and third floors offering record storage, additional office space, and flexible areas for future growth.

One notable aspect of the design is the provision of shell office space to accommodate potential future needs, reflecting a forward-looking approach to investment in the community's infrastructure. With the anticipated growth of Southwest Florida over the next several decades, the project seeks to meet the city's requirements for the next 50 years while ensuring adaptability to evolving demands.

**Location:** Punta Gorda Florida  
**Status:** September 2022 - estimate completion 2025  
**Cost:** \$16,000,000

**Contact:**  
Lynne Matthews  
Mayor  
326 W. Marion Ave  
Punta Gorda, FL 33950  
(941) 575-3341  
lmatthews@pgorda.us

**Tab 9 Similar Completed Projects**

**c. Renovation Project Small (under 1k sf)**



# Tennessee Tower 30th Floor Kitchen and Restroom Renovation

Goodwyn Mills Cawood (GMC) spearheaded the renovation of the catering kitchen and restrooms on the 30th floor of the iconic TN Tower. Tasked with modernizing these essential spaces, GMC applied their expertise to seamlessly integrate functionality and aesthetics, enhancing the overall user experience.

The catering kitchen underwent a comprehensive transformation, optimizing workflow efficiency and ensuring compliance with modern safety and hygiene standards. GMC's design approach focused on maximizing space utilization without compromising on quality or accessibility. By carefully selecting materials and implementing ergonomic layouts, the renovated kitchen now offers a streamlined environment conducive to culinary creativity and operational productivity.

In the restrooms, GMC emphasized contemporary design and practicality. Stylish fixtures and finishes were selected to harmonize with the tower's architecture, creating inviting spaces that cater to occupants' needs.

Overall, GMC's intervention revitalized the 30th-floor amenities, enhancing both functionality and aesthetic appeal.

**Location:** Nashville, TN  
**Status:** Completed 2021  
**Size:** 825 sf

**Contact:**  
State of TN Real Estate Asset Management  
Chris Wilkerson  
Sr. Development Manager  
(615) 483 - 0073  
chris.wilkerson.tn.gov

**Tab 9 Similar Completed Projects**

**d. New Vertical Construction**



# Sarasota County Employee Health Facility

Goodwyn Mills Cawood is currently spearheading the design of the Sarasota County Employee Health Facility, a crucial project catering to the healthcare needs of county employees. With a footprint of 5,000+ gross square feet, this facility is meticulously planned to accommodate essential services such as a reception area, lab draw area, urine drug screening capability, exam rooms, offices, and conference spaces. Additionally, it includes amenities like biohazard waste storage and a designated break/lunchroom for staff. This project underscores our commitment to delivering functional and efficient spaces that meet the unique requirements of our clients.

**Location:** Sarasota, FL  
**Size:** 5,000+ sf  
**Status:** Under Construction  
**Cost:** \$3,400,000

**Contact:**  
Daniel Cruz  
Sarasota County  
(941) 861-6187

# Building Communities.



**Sara Butler, AIA, LEED Green Associate**  
*Senior Vice President, Architecture*

(941) 312-5523  
sara.butler@gmcnetwork.com

**GMC**  
Goodwyn Mills Cawood

Building  
Communities



www.gmcnetwork.com

# **University Park Recreation District**

Review and Consideration of  
PFM Financial Advisors  
Bond Anticipation Note (BAN)  
Assessment Consulting Services Proposal



June 14, 2024

Steve Ludmerer  
Treasurer  
University Park Recreation District  
3501 Quadrangle Blvd., Ste 270  
Orlando, FL 32817

Dear Mr. Ludmerer:

**pfm**

---

3501 Quadrangle Blvd  
Suite 270  
Orlando, FL 32817  
407.723.5900

---

[pfm.com](http://pfm.com)

As provided for in Exhibit A and Exhibit B of the Agreement for Financial Advisory Services ("Agreement") between Fishkind and Associates, Inc. ("Fishkind") and the University Park Recreation District (the "Client" and/or "District") dated January 4, 2019 and assigned to PFM Financial Advisors, LLC ("PFM") on April 18, 2019, PFM agrees to provide Financial Advisory ("FA") services associated with the Series 2024 Bond Anticipation Note ("Series 2024 BAN") consistent with Agreement.

**Services to be Provided:**

As requested by the District, PFM agrees to provide assessment consulting services & transaction management services which includes the preparation of an assessment methodology, assessment roll, assistance with the negotiation of legal documents and attendance to the necessary meetings associated with the District's Series 2024 BAN as such services are described in Exhibit A of the Agreement.

**Compensation for Services Provided:**

PFM shall be compensated a fixed fee of \$30,000 plus expenses not to exceed \$500 for the assessment consulting services described above. This represents a combined reduction of \$10,000 from our standard assessment consulting fees and the Transactional Fee Schedule listed in Exhibit B. Such fees are contingent upon the successful issuance of the Series 2024 BAN and payable at closing. However, if the Board adopts the assessment methodology for the Series 2024 BAN but elects not to proceed with the issuance of the Series 2024 BAN, for whatever reason, PFM will be entitled to a minimum fee of \$10,000.

Subject to the receipt and access to information we deem necessary, in our sole discretion, to complete the tasks outlined above, PFM anticipates being able to complete the scope of work within the scheduled timeline as presented by the District.



UPRD  
June 14, 2024

Provided the terms are acceptable, please have an authorized official of the District sign and return a copy of this letter to us to acknowledge acceptance of the terms of this engagement.

Sincerely,  
**PFM FINANCIAL ADVISORS LLC**

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Managing Director

Accepted by:

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(Signature)

---

(Print Name)

---

(Date)



# **University Park Recreation District**

Review and Consideration of Regions Term  
Sheet for the BAN

# REGIONS CAPITAL ADVANTAGE, INC.

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June 7, 2024

Brent Wilder  
PFM Financial Advisors LLC  
200 South Orange Avenue Suite 760  
Orlando, Florida 32801  
CC: [wilderb@pfm.com](mailto:wilderb@pfm.com); [plenzlerk@pfm.com](mailto:plenzlerk@pfm.com); [dennism@pfm.com](mailto:dennism@pfm.com)

**RE:** University Park Recreation District Request for Proposals for Bond Anticipation Note, Series 2024  
(Not to Exceed \$5,000,000) (UPDATED 6/7/24)

Dear Mr. Wilder:

Regions Capital Advantage, Inc. (the “Lender”) is pleased to furnish this Term Sheet (this “Term Sheet”) to the University Park Recreation District, Florida (the “Borrower” or the “District”) for a not-to-exceed \$5,000,000 Draw Note (the “Loan” or “Debt Instrument”) for the purposes set forth below. We understand that the Borrower intends to close the Loan on or before July 17, 2024 (the “Anticipated Closing Date”). Below you will find the proposed set of terms and conditions associated with this Term Sheet:

**Borrower:** University Park Recreation District, Florida

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**Lender:** Regions Capital Advantage, Inc. (the “Lender”)

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**Role of Lender:** The Lender and their representatives are not registered municipal advisors and do not provide advice to municipal entities or obligated persons with respect to municipal financial products or the issuance of municipal securities (including regarding the structure, timing, terms and similar matters concerning municipal financial products or municipal securities issuances) or engage in the solicitation of municipal entities or obligated persons for the provision by non-affiliated persons of municipal advisory services and/or investment advisory services. With respect to this Term Sheet and any other information, materials or communications provided by the Lender: (a) the Lender and their representatives are not recommending an action to any municipal entity or obligated person; (b) the Lender and their representatives are not acting as an advisor to any municipal entity or obligated person and do not owe a fiduciary duty pursuant to Section 15B of the Securities Exchange Act of 1934 to any municipal entity or obligated person with respect to this Term Sheet, information, materials or communications; (c) the Lender and their representatives are acting for their own interests; and (d) the Borrower has been informed that the Borrower should discuss this Term Sheet and any such other information, materials or communications with any and all internal and external advisors and experts that the Borrower deems appropriate before acting on this Term Sheet or any such other information, materials or communications.

---

Rebecca Reynolds-Russell, SVP  
Government & Institutional Banking – Florida  
(407) 310-6074  
[Rebecca.Reynolds@regions.com](mailto:Rebecca.Reynolds@regions.com)

Doras Davila, VP  
Commercial Banking –Sarasota  
(941) 806-5179  
[Doras.Davila@regions.com](mailto:Doras.Davila@regions.com)

# REGIONS CAPITAL ADVANTAGE, INC.

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**Privately Negotiated Loan:** The Borrower acknowledges and agrees that the Lender are purchasing the Debt Instrument in evidence of a privately negotiated loan and in that connection the Debt Instrument shall not be (i) assigned a separate rating by any municipal securities rating agency, (ii) registered with the Depository Trust Company or any other securities depository, (iii) issued pursuant to any type of offering document or official statement or (iv) assigned a CUSIP number by Standard & Poor's CUSIP Service.

---

**Purpose:** Proceeds of the Series 2024 BAN will be used by the District to (i) finance golf course irrigation improvements; (ii) fund capitalized interest through and including the maturity date and (iii) pay the District's related costs of issuance. The District plans to issue long-term bonds to refinance the Series 2024 BAN at or prior to maturity.

---

**Loan Amount:** Up to \$5,000,000

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**Structure:** Option A: Tax-Exempt, NBQ draw facility maturing 364 days from issuance  
Option B: Tax-Exempt, NBQ draw facility maturing 2 years from issuance

---

**Interest Rate:** Option A: Floating at 79% of 1M Term SOFR + 78 basis points  
Option B: Floating at 79% of 1M Term SOFR + 80 basis points  
If a set draw schedule and repayment schedule can be provided, a tax-exempt, NBQ fixed rate term loan is also an option.

---

**Default Rate:** The interest rate otherwise applicable to the Debt Instrument plus 6.00%.

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**Repayment:** Interest will be capitalized through maturity and payable semi-annually based on amounts advanced under the Series 2024 BAN. If not previously repaid by the issuance of long-term debt or other sources of funds, Principal of (and accrued but unpaid interest on) the Series 2024 BAN will be due at maturity. Interest calculated on a 30/360 basis.

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**Maturity Date:** Option A: 364 days from issuance  
Option B: 2 years from issuance

---

**Prepayment:** Prepayment of principal allowed by the Borrower, without penalty, at any time after closing.  
In accordance with Chapter 170, Florida Statutes, the Lender will allow for prepayment by a Property Owner.

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**Origination Fee:** Option A: \$5,000  
Option B: \$10,000

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# REGIONS CAPITAL ADVANTAGE, INC.

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**Other Fees, Costs and Expenses:** The Borrower will be responsible for all out-of-pocket fees, costs and expenses of the Lender (including, without limitation, counsel fees and expenses and costs associated with lien searches, and recordation) incurred in connection with the negotiation, execution, delivery, administration and enforcement of the Loan Documents. In consideration of the undertakings of the Lender hereunder, and recognizing that in connection herewith the Lender will be incurring such fees, costs and expenses, the Borrower agrees to reimburse the Lender for all such fees, costs and expenses, regardless of whether, or to what extent, any of the transactions contemplated hereby are consummated.

The Lender will use Butler Snow as Lender's Counsel, and fees and expenses estimated between \$10,000 to \$15,000, provided Lender's Counsel is only reviewing documentation. Counsel fees may increase if Lender's Counsel is asked to provide other services.

---

**Security:** Non-Ad Valorem Special Assessments levied in accordance with the District's Resolution 2024-01 adopted on November 3, 2023.

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**Determination of Taxability:** Upon the occurrence of a Determination of Taxability of the Loan, the Borrower agrees to pay to the Lender a rate of interest from the date of Loan funding that would provide the Lender with an after-tax yield on the then outstanding principal amount of this Loan at least equal to the after-tax yield the Lender could have received if a Determination of Taxability had not occurred.

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**Representations and Warranties:** Usual and customary for this type of financing.

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**Covenants:** Usual and customary for this type of financing, including but not limited to the following:

- 1) The Borrower shall deliver to the Lender each of the following, in form and substance satisfactory to the Lender:
    - (i) Audited financial statements within 270 days after the end of each of the Borrower's Fiscal Years;
    - (ii) Annual budget within 30 days of adoption (but no later than 30 days after the start of each Fiscal Year) by the Borrower;
    - (iii) Updated capital improvement plans, upon adoption; and,
    - (iv) Such other information as reasonably requested by the Lender from time to time.
  - 2) District will continue to levy and collect the Special Assessments in amount sufficient to pay the debt service on the Series 2024 Note and all parity debt.
- 

**Defaults:** Usual and customary for this type of financing.

---

**Remedies:** The Lender shall have all the rights and remedies set forth in the Loan Documents, and available at law and in equity, for the enforcement thereof.

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# REGIONS CAPITAL ADVANTAGE, INC.

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**Legal Opinions:** As an additional condition precedent to the Lender making the Loan, the Borrower shall provide, among other things, the following opinions to the Lender:

(i) an opinion of bond counsel in form and substance satisfactory to the Lender and its counsel in all respects, which shall include opinions to the effect that (a) the Borrower has the authority under the laws of the State of Florida to issue the Debt Instrument and execute and deliver the Loan Documents, (b) that the Debt Instrument have been duly issued and each of the Debt Instrument and the other Loan Documents to which the Borrower is a party has been duly authorized, executed and delivered by the Borrower, (c) that each of the Debt Instrument and the other Loan Documents to which the Borrower is a party is a valid and binding obligation of the Borrower, duly enforceable in accordance with its terms, and (d) that interest on the Debt Instrument is excludable from gross income of the Lender thereof for federal income tax purposes.

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**Transfer Provisions:** The Lender shall maintain the right to transfer and/or assign, in whole or in part, its rights hereunder, the Debt Instrument and/or the Loan, or, in either case, any interest therein, to any person or entity in its sole and absolute discretion. The Borrower may not assign its rights hereunder or under any of the Loan Documents to any person without the prior written consent of the Lender.

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**Disclaimer:** This Term Sheet describes some of the basic terms and conditions proposed to be included in the documents between the Lender and the Borrower. This Term Sheet does not purport to summarize all the conditions, covenants, representations, warranties, assignments, events of default, cross default, acceleration events, remedies or other provisions that may be contained in documents required to consummate this financing.

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**US Patriot Act:** The Borrower represents and warrants to the Lender that neither it nor any of its principals, shareholders, members, partners, or Affiliates, as applicable, is a Person named as a Specially Designated National and Blocked Person (as defined in Presidential Executive Order 13224) and that it is not acting, directly or indirectly, for or on behalf of any such person. The Borrower further represents and warrants to the Lender that the Borrower and its principals, shareholders, members, partners, or Affiliates, as applicable, are not directly or indirectly, engaged in, nor facilitating, the transactions contemplated by this transaction on behalf of any Person named as a Specially Designated National and Blocked Person.

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**Waiver of Jury Trial:** To the extent permitted by applicable law, each of the Borrower and the Lender irrevocably and voluntarily waives any right it may have to a trial by jury with respect to any controversy or claim between the Borrower and the Lender, whether arising in contract or tort or by statute, including but not limited to any controversy or claim that arises out of or relates to this Term Sheet, the Debt Instrument or any of the other Loan Documents. This provision is a material inducement for the Lender's determination to make the Loan and for the parties to enter into the Loan Documents.

---

**Governing Law:** State of Florida

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Thank you for providing the Lender with this opportunity to be involved in a financial partnership with the Borrower. The Lender is willing to discuss the terms reflected herein through July 31, 2024. After such date, terms, conditions, and pricing may change based on prevailing market conditions and further discussion will be at Lender's sole discretion. We are grateful for your consideration and remain available to promptly respond to any questions that you may have regarding this document. We look forward to hearing from you.

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# REGIONS CAPITAL ADVANTAGE, INC.

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## EXHIBIT A

In the event Borrower requests Lender to move forward with the approval process after discussion of the aforementioned terms and conditions contained in the Term Sheet, Borrower agrees to reimburse Lender on demand for all out-of-pocket expenses incurred by Lender if the transaction fails to close for any reason other than Lender's decision not to approve the transaction. Such expenses shall include, but not be limited to, legal expenses incurred by Lender.

### **ACCEPTANCE:**

Borrower does hereby agree to all provisions contained in Exhibit A, and elects Interest Rate Option \_\_\_.

On behalf of University Park Recreation District, FL  
Borrower Signature:

By: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

# **University Park Recreation District**

## **Review and Consideration of the BAN Methodology Report**

# **University Park Recreation District**

Review and Consideration of Any Additional  
Documents Pertaining to the BAN  
and/or Bond Issuance



# **University Park Recreation District**

Ratification of Payment Authorization No. 118

# University Park Recreation District

5/20/2024

Payment Authorization No. 118

## O&M - General Fund Expenses

<u>Vendor</u>	<u>Invoice</u>	<u>Description</u>	<u>Amount</u>
Blalock Walters	40896-033-4	\$21 Million Bond Validation	\$ 6,300.00
Blalock Walters	40896-000-67	General Representation - April 2024	\$ 12,286.29
Blalock Walters	40896-028-19	Amendment to DRI DEV. Order & GDP	\$ 502.50
Blalock Walters	40896-032-6	ADV. Peter A. Pizzi	\$ 220.00
McClatchy Company, LLC	248044	Notice of Public Meeting - April 2024	\$ 948.04
PFM	130581	Software License	\$ 900.00

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O&M - General Fund Expenses Total

\$ 21,156.83

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Asst. Secretary/Secretary

 5/23/2024  
Asst. Treasurer



WE MAKE A DIFFERENCE

802 11th Street West Bradenton, Florida 34205  
ph: 941.748.0100 fx: 941.745.2093

UNIVERSITY PARK RECREATION DISTRICT  
PFM FINANCIAL ADVISORS, LLC  
3504 LAKE LYNDA DRIVE, SUITE 107  
ORLANDO, FL 32817

Page: 1  
April 30, 2024  
Account # 40896-033  
Invoice # 40896-033-4

ATTN: ACCOUNTSPAYABLE@UNIVERSITYPARK-FL.COM

\$21 MILLION BOND VALIDATION

FEM

***For Professional Services Rendered Thru 04/30/2024***

			HOURS	
04/02/2024	MW	Assist with show cause order issues.	0.30	30.00
04/03/2024	FEM	Pull law and exhibits for hearing; consider judicial notice and elements.	2.60	715.00
04/15/2024	FEM	Prepare initial draft final judgment.	1.20	330.00
04/18/2024	FEM	Review correspondence and other documents from Dean Mat.	0.70	192.50
04/23/2024	MPB	Initial review of Dean Matt's Answer; preparation of Memorandum to the Board; conference with Atty. Fred Moore.	0.70	192.50
04/25/2024	FEM	Prepare for witness preparation call; review case law and exhibits. Review of answer filed by Mat.	4.30	1,182.50
	FEM	Telephone conference with Vivian, Kevin, Sally, Kwame to prepare for hearing.	0.90	247.50
	FEM	Telephone conference with Bob Gang; review of supplement regarding 5.04.	0.40	110.00
	MPB	Work on hearing preparation.	0.20	55.00
04/26/2024	MJP	Aide in preparation of documents for bond validation hearing.	0.20	55.00
04/27/2024	MPB	Preparation for Bond Validation Hearing.	0.30	82.50
04/29/2024	FEM	Final preparation for and attend validation hearing.	5.80	1,595.00
	FEM	Revise draft judgment and communicate with Bob Gang. Prepare bullet points for John Festick regarding hearing outcome.	1.30	357.50
	MPB	Review and respond to Memorandums from David Murphy; preparation for Validation Hearing; telephone conference with Atty . Bob Gang; attend the Bond Validation Hearing; wrap up on Bind Validation issues.	3.90	1,072.50
04/30/2024	MPB	Review draft order with Bob Gang revisions.	0.30	82.50
		TOTAL FOR THE ABOVE SERVICES	23.10	6,300.00

UNIVERSITY PARK RECREATION DISTRICT  
\$21 MILLION BOND VALIDATION  
FEM

Page: 2  
April 30, 2024  
Account # 40896-033  
Invoice # 40896-033-4

TOTAL CURRENT WORK	6,300.00
PREVIOUS BALANCE	\$302.50
<u>PAYMENTS RECEIVED</u>	
04/19/2024      Payment received on account. Thank you!	-302.50
AMOUNT DUE (includes Previous Balance if shown above)	<u>\$6,300.00</u>

If you prefer to receive paperless invoices by email, please complete the information below or email [billing@blalockwalters.com](mailto:billing@blalockwalters.com).

\_\_\_\_\_ Yes, I would prefer paperless billing by email.

Email Address for paperless billing purposes:

\_\_\_\_\_  
**Please Provide Invoice Number With Payment**  
**\*\*Please Note Our Remittance Address Has Changed Effective 5/1/2024\*\***  
**Blalock Walters P A 802 11th Street West Bradenton, FL 34205**  
**Make Check Payable to Blalock Walters, P.A.**  
**Federal Tax ID # 59-1950976**



WE MAKE A DIFFERENCE

802 11th Street West Bradenton, Florida 34205  
ph: 941.748.0100 fx: 941.745.2093

UNIVERSITY PARK RECREATION DISTRICT  
PFM FINANCIAL ADVISORS, LLC  
3504 LAKE LYNDA DRIVE, SUITE 107  
ORLANDO, FL 32817

Page: 1  
April 30, 2024  
Account # 40896-000  
Invoice # 40896-000-67

ATTN: ACCOUNTSPAYABLE@UNIVERSITYPARK-FL.COM

GENERAL REPRESENTATION

MPB

***For Professional Services Rendered Thru 04/30/2024***

			HOURS	
04/02/2024	MPB	Preparation of Memorandum to the Board; preparation of Memorandum to Vivian Carvalho; preparation for and attendance at the Board Workshop; conference with Chair.	3.70	925.00
04/03/2024	MJP	Various communications by and between Michael Beaumier, John Fetsick, Mark Criden, Mark Barnebey and Jennifer Ordonez.	0.80	200.00
	MJP	Review communication from Mike Beaumier, John Fetsick, Mark Criden, Jennifer Ordonez, Mark Barnebey; revise sample contract; prepare communication attaching revised contract.	0.50	125.00
	MPB	Review and respond to Kwame Jackson; finalize Memorandum to Board.	0.40	100.00
04/04/2024	MJP	Various communications with Mike Beaumier, Mark Criden, John Fetsick, Mark Barnebey regarding AIA contract for RFQ.	0.60	150.00
	JO	Email correspondence to Scott Farrington regarding the certification of election results. Review email correspondence from Sharon Stief. Draft resolution 2024-14 regarding ratifying and accepting election results.	0.90	112.50
	MPB	Work on Resolution 2024-14; work on Resolution 2024-15; preparation of Memorandum to Mike Beaumier.	0.80	200.00
04/05/2024	MJP	Various communications by and between Mike Beaumier, John Fetsick, Mark Criden, Mark Barnebey, and Marisa Powers regarding RFQ.	0.60	150.00
	MPB	Review and respond to Vivian Carvalho memorandum. Telephone call with Vivian Carvalho. Prepare memorandum to Board related to Ethics Training requirements. Prepare memorandum to Kwame Jackson on proposed rate change.	1.40	350.00
04/08/2024	MJP	Revise AIA for RFQ for architectural services; prepare		

UNIVERSITY PARK RECREATION DISTRICT  
GENERAL REPRESENTATION  
MPB

Page: 2  
April 30, 2024  
Account # 40896-000  
Invoice # 40896-000-67

			HOURS	
		correspondence to Mike Beaumier; John Fetsick, Mark Criden, and Mark Barnebey regarding the same.	1.40	350.00
	MPB	Review and respond to Memorandum from Vivian Carvalho; review and revise Draft Rules; preparation of Resolution 2024-05 and Rule 2024-01; review and respond to Memorandum from Steve Ludmerer; preparation of Memorandum on Public Records response to Bob Gang.	2.40	600.00
04/09/2024	MJP	Review communications from Mark Criden and Mike Beaumier regarding draft contract for RFQ.	0.20	50.00
	MPB	Preparation of Memorandum to Bob Gang regarding the Second Supplemental Indenture; review and respond to Memorandum from John Fetsick; preparation of Memorandum to Bob Gang; preparation of Memorandum to Kwame Jackson; review and respond to various Memorandums from Bob Gang and Kwame Jackson; preparation of Memorandum to Steve Ludmerer; work on Rules.	2.10	525.00
	MPB	Preparation of Memorandum on Public Records matters to Vivian Carvalho.	0.40	100.00
04/10/2024	MJP	Review PNC Bank lease-purchase agreements; prepare addendum; prepare communication to John Fetsick and Curtis Nickerson.	1.90	475.00
	MPB	Preparation of Memorandum on Second Supplemental to Bob Gang; telephone conference with Steve Ludmerer and John Fetsick regarding rules; telephone conference with Vivian Carvalho; work on Public Records issue.	1.20	300.00
	JO	Work on draft rules and regulations ordinance.	0.80	100.00
04/11/2024	MJP	Review various communications with Mike Beaumier and Mark Criden; Finalize redline of District comments to AIA contract for RFQ.	0.70	175.00
	MPB	Review and respond to Memorandum from John Fetsick; review revised Rules; preparation of Memorandum to Steve Ludmerer; attend Zoom meeting on short term financing; review and respond to Memorandum from Mike Beaumier; telephone conference with Sally Dickson; work on Public Records issues; preparation of Memorandum to Vivian Carvalho; telephone conference with Sally Dickson; forward Memorandums to Sally Dickson.	3.90	975.00
04/12/2024	MJP	Various communications with John Fetsick and Mike Beaumier regarding AIA contract for RFQ.	0.60	150.00
	MJP	Review revisions to AIA agreement made by Mike Beaumier; various communications with Mike Beaumier regarding the same.	0.40	100.00
	MPB	Review and respond to Steve Ludmerer; telephone conference with Vivian Carvalho; telephone conference with Chair; preparation for and attendance at the Board of Supervisors meeting; preparation of Memorandum to the Board on Short Term Financing; preparation of Memorandum to the Board on updated Rules; preparation of Memorandum to Steve Ludmerer; review revised plans; preparation of Memorandum to Rob Engle.	4.90	1,225.00

UNIVERSITY PARK RECREATION DISTRICT  
GENERAL REPRESENTATION  
MPB

Page: 3  
April 30, 2024  
Account # 40896-000  
Invoice # 40896-000-67

			HOURS	
04/15/2024	MJP	Review various communications with Mike Beaumier, Mark Criden, John Fetsick, and Mark Barnebey regarding contract for RFQ.	0.40	100.00
	MJP	Review communication from PNC Bank regarding addendum to lease agreements; review comments; prepare communication to Attorney Barnebey regarding the same.	0.60	150.00
	MPB	Work on Request for Proposals for architect.	0.30	75.00
04/16/2024	MPB	Review Statutes; review and respond to Memorandum from Chair; telephone conference with Vivian Carvalho.	1.60	400.00
04/17/2024	MJP	Various communications by and between John Fetsick and myself regarding PNC comments to addendum to lease agreement.	0.40	100.00
	MJP	Revise addendum to PNC lease agreements.	0.60	150.00
	MPB	Telephone conference with Chair; work on Second Supplemental Trust Indenture; review and respond to Memorandum from Bob Gang; preparation of Memorandum to Chair.	0.90	225.00
04/18/2024	MJP	Review communications by and between John Fetsick and Mike Beaumier regarding addendum to RFQ.	0.40	100.00
	MJP	Review addendum to RFQ; prepare communication to Attorney Barnebey regarding the same.	0.60	150.00
	MPB	Telephone conference with Steve Ludmerer regarding Rules.	0.20	50.00
04/19/2024	MJP	Review various communications by and between Mark Barnebey, Mike Beaumier, and John Fetsick regarding RFQ addendum; prepare communication to John Fetsick.	0.80	200.00
	MJP	Various communications by and between Mike Beaumier, John Fetsick, Mark Barnebey and myself regarding insurance requirements for RFQ.	1.10	275.00
	MJP	Review communication from Mark Criden regarding insurance limits for E&O for RFQ for architect.	0.20	50.00
	MPB	Review and respond to Memorandums on Request for Proposals from Mike Beaumier.	0.40	100.00
04/21/2024	MPB	Review insurance.	0.30	75.00
04/22/2024	MJP	Review various communications by and between John Fetsick, Mike Beaumier, Mark Criden, and Mark Barnebey regarding addendum to RFQ.	0.60	150.00
	MJP	Various communications with Curtis Nickerson relating to PNC addendum.	0.40	100.00
	MPB	Telephone conference with Vivian Carvalho; preparation of Memorandum on Rules, Waivers and Modifications to Steve Ludmerer; preparation of Memorandum to Mike Beaumier; review and respond to Memorandum from John Fetsick.	1.10	275.00
04/23/2024	MJP	Review of communication from Attorney Barnebey to Curtis Nickerson regarding purchase of equipment.	0.20	50.00
	MJP	Review PNC addendum; review communication from PNC; prepare		

UNIVERSITY PARK RECREATION DISTRICT  
 GENERAL REPRESENTATION  
 MPB

Page: 4  
 April 30, 2024  
 Account # 40896-000  
 Invoice # 40896-000-67

			HOURS	
		communication to Curtis Nickerson approving the addendum.	0.60	150.00
	MPB	Review and revised Rules of Procedure; preparation of Memorandum to Steve Ludmerer; preparation of Memorandum to Curtis Nickerson.	0.70	175.00
04/24/2024	MPB	Review update rules.	0.20	50.00
04/25/2024	MPB	Attend Agenda preparation meeting; conference with Steve Ludmerer on rule changes.	1.10	275.00
04/26/2024	MPB	Review recent case law related to notices and District communications; review Florida Bar dismissal to Dean Matt Complaint.	0.50	125.00
04/27/2024	MPB	Preparation of Memorandum to Dean Matt on the Public Records Request; review response from Dean Matt.	0.80	200.00
04/28/2024	MPB	Review and reasons to Memorandums from David Murphy.	0.40	100.00
04/30/2024	MPB	Prepare for and attend workshop. Conference with Chair. PRepare memorandum to John Fetsick. Discuss rules with Steve Ludmerer.	3.90	975.00
		TOTAL FOR THE ABOVE SERVICES	49.90	12,262.50
04/01/2024		Online Legal Research		23.79
		TOTAL EXPENSES		23.79
		TOTAL CURRENT WORK		12,286.29
		PREVIOUS BALANCE		\$5,550.00
		<u>PAYMENTS RECEIVED</u>		
04/19/2024		Payment received on account. Thank you!		-5,550.00
		AMOUNT DUE (includes Previous Balance if shown above)		<u>\$12,286.29</u>



UNIVERSITY PARK RECREATION DISTRICT  
GENERAL REPRESENTATION  
MPB

Page: 5  
April 30, 2024  
Account # 40896-000  
Invoice # 40896-000-67

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Email Address for paperless billing purposes:

\_\_\_\_\_

***Please Provide Invoice Number With Payment***  
***\*\*Please Note Our Remittance Address Has Changed Effective 5/1/2024\*\****  
***Blalock Waters, P.A. 802 11th Street West Bradenton, FL 34205***  
***Make Check Payable to Blalock Walters, P.A.***  
***Federal Tax ID # 59-1950976***



WE MAKE A DIFFERENCE

802 11th Street West Bradenton, Florida 34205  
 ph: 941.748.0100 fx: 941.745.2093

UNIVERSITY PARK RECREATION DISTRICT  
 PFM FINANCIAL ADVISORS, LLC  
 3504 LAKE LYNDA DRIVE, SUITE 107  
 ORLANDO, FL 32817

Page: 1  
 April 30, 2024  
 Account # 40896-028  
 Invoice # 40896-028-19

ATTN: ACCOUNTSPAYABLE@UNIVERSITYPARK-FL.COM

AMENDMENT TO DRI DEV. ORDER & GDP

MPB

***For Professional Services Rendered Thru 04/30/2024***

			HOURS	
04/03/2024	MPB	Revise Ordinance revision draft.	0.40	110.00
04/08/2024	MPB	Work on draft ordinance.	0.40	110.00
04/10/2024	MPB	Revise draft ordinances.	0.70	192.50
04/11/2024	JO	Work on documents. Respond to comments. Email County staff regarding submittal.	<u>0.90</u>	<u>90.00</u>
		TOTAL FOR THE ABOVE SERVICES	2.40	502.50
		TOTAL CURRENT WORK		502.50
		PREVIOUS BALANCE		\$795.00
<u>PAYMENTS RECEIVED</u>				
04/19/2024		Payment received on account. Thank you!		-795.00
		AMOUNT DUE (includes Previous Balance if shown above)		<u>\$502.50</u>

UNIVERSITY PARK RECREATION DISTRICT  
AMENDMENT TO DRI DEV. ORDER & GDP  
MPB

Page: 2  
April 30, 2024  
Account # 40896-028  
Invoice # 40896-028-19

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***Blalock Waters, P.A. 802 11th Street West Bradenton, FL 34205***  
***Make Check Payable to Blalock Walters, P.A.***  
***Federal Tax ID # 59-1950976***



WE MAKE A DIFFERENCE

802 11th Street West Bradenton, Florida 34205  
ph: 941.748.0100 fx: 941.745.2093

UNIVERSITY PARK RECREATION DISTRICT  
PFM FINANCIAL ADVISORS, LLC  
3504 LAKE LYNDA DRIVE, SUITE 107  
ORLANDO, FL 32817

Page: 1  
April 30, 2024  
Account # 40896-032  
Invoice # 40896-032-6

ATTN: ACCOUNTSPAYABLE@UNIVERSITYPARK-FL.COM

ADV. PETER A. PIZZI

CFJ

***For Professional Services Rendered Thru 04/30/2024***

			HOURS	
04/03/2024	MPB	Review and respond to Memorandum from Atty. Daniel Gabuardi.	0.40	110.00
04/17/2024	MPB	Preparation of Memorandum to Atty. Daniel Gabuardi.	<u>0.40</u>	<u>110.00</u>
		TOTAL FOR THE ABOVE SERVICES	0.80	220.00
		TOTAL CURRENT WORK		220.00
		PREVIOUS BALANCE		\$110.00
		<u>PAYMENTS RECEIVED</u>		
04/19/2024		Payment received on account. Thank you!		-110.00
		AMOUNT DUE (includes Previous Balance if shown above)		<u>\$220.00</u>

UNIVERSITY PARK RECREATION DISTRICT  
ADV. PETER A. PIZZI  
CFJ

Page: 2  
April 30, 2024  
Account # 40896-032  
Invoice # 40896-032-6

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Email Address for paperless billing purposes:

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***Blalock Waters, P.A. 802 11th Street West Bradenton, FL 34205***  
***Make Check Payable to Blalock Walters, P.A.***  
***Federal Tax ID # 59-1950976***



The Beaufort Gazette  
 The Belleville News-Democrat  
 Bellingham Herald  
 Centre Daily Times  
 Sun Herald  
 Idaho Statesman  
 Bradenton Herald  
 The Charlotte Observer  
 The State  
 Ledger-Enquirer

Durham | The Herald-Sun  
 Fort Worth Star-Telegram  
 The Fresno Bee  
 The Island Packet  
 The Kansas City Star  
 Lexington Herald-Leader  
 The Telegraph - Macon  
 Merced Sun-Star  
 Miami Herald  
 El Nuevo Herald

The Modesto Bee  
 The Sun News | Myrtle Beach  
 Raleigh News & Observer  
 Rock Hill | The Herald  
 The Sacramento Bee  
 San Luis Obispo Tribune  
 Tacoma | The News Tribune  
 Tri-City Herald  
 The Wichita Eagle  
 The Olympian

UNIVERSITY PARK RECREATION DISTRICT  
 Attn: Accounts Payable  
 7671 THE PARK BOULEVARD  
 UNIVERSITY PARK  
 BRADENTON, FL 34201

APRIL INVOICE	
Invoice No.:	248044
Invoice Date:	04/30/2024
Due Date:	05/30/2024
Bill-To Account:	29585
Sales Rep:	Christy Habony

Print

Date	Ad No.	PO	Description	Size	Notes	Net Amount
04/22/2024	1963221		Architectural/E BRD-Bradenton Herald - Legals ROP Any engineering RFQ	B-Full Page		\$700.00

Dates	Order No.	Description	Product	Size	Billed Units	Times Run	Net Amount
04/23/2024 - 04/23/2024	539154	Print Legal Ad-IPL01676090 IPL0167609	BRD-Bradenton Herald Legal   Legals & Public Notices CLS	1 x 48 L	48 L	1	\$57.33
04/23/2024 - 04/23/2024	542345	Print Legal Ad-IPL01689910 IPL0168991	BRD-Bradenton Herald Legal   Legals & Public Notices CLS	1 x 76 L	76 L	1	\$90.09
04/17/2024 - 04/17/2024	542347	Print Legal Ad-IPL01689920 IPL0168992	BRD-Bradenton Herald Legal   Legals & Public Notices CLS	1 x 36 L	36 L	1	\$43.29
04/29/2024 - 04/29/2024	544042	Print Legal Ad-IPL01696970 IPL0169697	BRD-Bradenton Herald Legal   Legals & Public Notices CLS	1 x 48 L	48 L	1	\$57.33

April Summary	
Amount Due:	\$948.04

Please Return This Portion With Your Payment (Thank You)

McClatchy Company LLC  
 PO Box 510150  
 Livonia MI 48151

ADVERTISING INVOICE

UNIVERSITY PARK RECREATION DISTRICT  
 Attn: Accounts Payable  
 7671 THE PARK BOULEVARD  
 UNIVERSITY PARK  
 BRADENTON, FL 34201

APRIL INVOICE	
Invoice No.:	248044
Account No.:	29585
Account Name:	UNIVERSITY PARK RECREATION DISTRICT
Amount Due:	\$948.04

Email questions to [ssccreditandcollections@mcclatchy.com](mailto:ssccreditandcollections@mcclatchy.com)

McClatchy Company LLC  
 PO Box 510150  
 Livonia MI 48151

0000029585 0000248044 000094804 7



Date	Invoice Number
May 9, 2024	130581
Payment Terms	Due Date
Upon Receipt	May 9, 2024

Bill To:

University Park Recreation District  
c/o PFM Group Consulting District Accounting  
Department  
3501 Quadrangle Blvd., Suite 270  
Orlando, FL 32817  
United States of America

Company Address:

1735 Market Street  
42nd Floor  
Philadelphia, PA 19103  
+1 (215) 5676100

**Remittance Options:**

Via Mail:  
PFM Group Consulting LLC  
PO Box 65126  
Baltimore, MD 21264-5126  
United States of America

**RE:** Billable expenses.

Expenses	\$900.00
<b>Total Amount Due</b>	<b><u>\$900.00</u></b>



Date	Invoice Number
May 9, 2024	130581
Payment Terms	Due Date
Upon Receipt	May 9, 2024

### Expense Supporting Detail

Category	Worker	Transaction Date	Amount Billed
Software Subscriptions	Jennifer Walden	03/26/24	\$900.00
			Software Subscriptions <u>\$900.00</u>
			<b>Total Expenses: \$900.00</b>





# INVOICE

INV11745156

PO Number:

**Sold To:**  
Pfm Asset Management LLC  
Jennifer L Walden

Account Number: B01463525  
Invoice Number: INV11745156  
PO Number:

**Bill To:**  
Pfm Asset Management LLC  
Jennifer Walden  
1735 Market Street  
42nd Floor  
Philadelphia Pennsylvania 19103  
United States

Invoice Date: 03/26/2024  
Payment Due By: 03/26/2024  
Payment Terms: Due Upon Receipt  
Payment Method: CreditCard

Service	Unit Price	Quantity	Subtotal	Tax	TOTAL
Business Plus Account Licenses <i>Service Period: 03/26/2024-03/25/2025</i>	\$300.00	3	\$900.00	\$0.00	\$900.00
				Invoice Subtotal:	\$900.00
				Tax:	\$0.00
				<b>Total:</b>	<b>\$900.00</b>
				<b>Balance Due:</b>	<b>\$0.00</b>
				<b>Currency:</b>	<b>USD</b>

Payments and Adjustments				
Transaction Date	Transaction Number	Transaction Type	Notes	Applied Amount
03/26/2024	P-12948841	Payment		(\$900.00)
			<b>Balance Due:</b>	<b>\$0.00</b>

Please note that failure to pay this invoice by the due date provided may result in suspension of services and the accrual of a late fee as outlined in the Box Service Agreement.

Payments remitted without reference to relevant invoice number(s) will not be processed and will be returned.

Need to Update your Credit Card?  
Submit new billing information securely  
online at: <https://app.box.com/update>  
(be sure to login as the Box  
administrator)

Account Number: B01463525  
Invoice Date: 03/26/2024  
Invoice Number: INV11745156  
Payment Due Date: 03/26/2024  
Total Amount Due: \$0.00  
Amount Enclosed: \_\_\_\_\_

Copy of our W-9: [billing.app.box.com/W-9](https://billing.app.box.com/W-9)

For additional Billing information or to pay via credit card, please visit our support site: [support.box.com](https://support.box.com)