

**PELICAN BAY SERVICES DIVISION**  
**Municipal Services Taxing & Benefit Unit**

**NOTICE OF PUBLIC MEETING**

**WEDNESDAY, OCT. 11, 2023**

**THE PELICAN BAY SERVICES DIVISION BOARD WILL MEET AT 1 PM ON OCT. 11 AT THE COMMUNITY CENTER AT PELICAN BAY, 8960 HAMMOCK OAK DRIVE, NAPLES, FLORIDA, 34108.**

**AGENDA**

1. Pledge of Allegiance
2. Roll Call
3. Agenda approval
4. Approval of 9/13/23 Regular Session meeting minutes
5. Audience comments
6. Administrator's report
  - a. Capital Projects updates
    - i. Sidewalk Phase II status
    - ii. \*Operations Facility bid
    - iii. Clam Pass/beaches post-storm status
  - b. September 30 Financial Report
7. FY2024 budget and financing
8. Chairman's report
9. Old Business
10. New Business/Miscellaneous Correspondence
11. Adjournment

*\*indicates possible action items*

ANY PERSON WISHING TO SPEAK ON AN AGENDA ITEM WILL RECEIVE UP TO THREE (3) MINUTES PER ITEM TO ADDRESS THE BOARD. THE BOARD WILL SOLICIT PUBLIC COMMENTS ON SUBJECTS NOT ON THIS AGENDA AND ANY PERSON WISHING TO SPEAK WILL RECEIVE UP TO THREE (3) MINUTES. THE BOARD ENCOURAGES YOU TO SUBMIT YOUR COMMENTS IN WRITING IN ADVANCE OF THE MEETING. ANY PERSON WHO DECIDES TO APPEAL A DECISION OF THIS BOARD WILL NEED A RECORD OF THE PROCEEDING PERTAINING THERETO, AND THEREFORE MAY NEED TO ENSURE THAT A VERBATIM RECORD IS MADE, WHICH INCLUDES THE TESTIMONY AND EVIDENCE UPON WHICH THE APPEAL IS TO BE BASED. IF YOU ARE A PERSON WITH A DISABILITY WHO NEEDS AN ACCOMMODATION IN ORDER TO PARTICIPATE IN THIS MEETING YOU ARE ENTITLED TO THE PROVISION OF CERTAIN ASSISTANCE. PLEASE CONTACT THE PELICAN BAY SERVICES DIVISION AT (239) 252-1355.

**PELICAN BAY SERVICES DIVISION BOARD REGULAR SESSION  
SEPTEMBER 13, 2023**

The Pelican Bay Services Division Board met on Wednesday, September 13, 2023, at 1:00 p.m. at the Community Center at Pelican Bay, 8960 Hammock Oak Drive, Naples, Florida 34108. In attendance were:

**Pelican Bay Services Division Board**

Michael Fogg, Chairman  
Joe Chicurel, Acting Chair  
Jack Cullen (*absent*)  
Jacob Damouni  
Mark Ferland (*absent*)

Peter Griffith  
Susan Hamilton  
Denise McLaughlin (*absent*)  
Michael Rodburg (*absent*)  
Beth Stein (*by telephone*)  
Rick Swider

**Pelican Bay Services Division Staff**

Neil Dorrill, Administrator  
Dawn Brewer, Ops. Support Spec. II  
Chad Coleman, Ops. Manager  
Darren Duprey, Supervisor – Field I (*absent*)

Dave Greenfield, Supervisor - Field II  
Karin Herrmann, Project Manager I  
Lisa Jacob, Project Manager II  
Barbara Shea, Admin. Support Spec. II

**Also Present**

Mohamed Dabees, Humiston & Moore  
Jim Hoppensteadt, Pelican Bay Foundation

Mike Ruffolo, Pelican Bay Foundation

**APPROVED AGENDA (*AS PRESENTED*)**

1. Pledge of Allegiance
2. Roll Call
3. Agenda approval
4. Approval of 7/12/23 Regular Session meeting minutes
5. Audience comments
6. Administrator's report
  - a. Capital Projects updates
    - i. Sidewalk Phase II status
    - ii. Operations Facility bid update
    - iii. Clam Pass/beaches post-storm status
  - b. August 31 Financial Report
7. Committee Reports
  - a. Landscape & Safety
    - i. \*Street Name Sign Project
8. Chairman's report
  - a. Management services contract
9. Old Business
10. New Business/Miscellaneous Correspondence
11. Adjournment

**ROLL CALL**

Mr. Cullen, Mr. Ferland, Ms. McLaughlin, and Mr. Rodburg were absent and a quorum was established.

**Mr. Griffith motioned, Mr. Damouni seconded to allow Ms. Stein to participate by telephone. The motion carried unanimously.**

**MS. STEIN PARTICIPATED BY TELEPHONE**

**AGENDA APPROVAL**

**Ms. Hamilton motioned, Mr. Griffith seconded to approve the agenda as presented. The motion carried unanimously.**

**APPROVAL OF 7/12/2023 REGULAR SESSION MEETING MINUTES**

**Ms. Hamilton motioned, Mr. Griffith seconded to approve the 7/12/2023 regular session meeting minutes as presented. The motion carried unanimously.**

**AUDIENCE COMMENTS**

Ms. Jill Brader thanked staff for meeting with her to discuss the ambient noise from US 41. She commented on health concerns from carbon monoxide gases drifting into Pelican Bay from US41. She noted that one of our responsibilities, which was included in our approved budget of \$1.9 million, is “ambient noise reduction,” although she was unable to find a specific line item for this responsibility. She suggested that vegetation needs to be added to the US41 berm. Ms. Brader commented that she has scheduled a “ride-around” with Mr. Greenfield to determine what areas on the berm have “holes” which need to be filled in.

Mr. Griffith commented that a major US41 berm planting project was completed after Hurricane Irma. He noted that at that time, the PBF had discussions on adding a fence in this area, but ultimately, it was decided that no fence would be installed. Mr. Griffith suggested that we revisit the post-Irma plantings, in total, to determine if success was achieved and assess if there are areas which could be improved with additional plantings. Mr. Coleman commented that there are sufficient funds in the budget for additional berm plantings.

**ADMINISTRATOR’S REPORT**

**SIDEWALK PHASE II UPDATE**

Mr. Dorrill provided the following updates on our Sidewalk Phase II Project.

- Subsequent to our high-level meeting with QE senior management (three weeks ago), QE productivity has increased substantially. A family member of QE ownership is now onsite daily.
- Through the end of August, 3.25 miles of sidewalk have been installed; \$2.04 million has been earned by QE.
- Progress meetings with QE, Johnson Engineering (our CEI contractor) and staff are held bi-weekly.

**Pelican Bay Services Division Board Regular Session**  
**September 13, 2023**

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- Our engineer has expressed his opinion that the sidewalk on the east side of Crayton Rd. will not be accepted as the finish quality does not meet the specifications of the contract. Special additives are now being added into the concrete mix to improve the finish.
- Any inferior or dead sod installed by QE will need to be replaced by QE. There is a separate allowance for sod and irrigation remediation in the QE contract of \$700,000, which seems adequate. Every line item listed on QE remediation invoices requires review and approval. QE will not be paid for any sod which is replaced by the PBSB.
- So far, no sidewalks or landscape remediation work has been accepted. The County Inspector will make final acceptance determinations for all of QE's product.
- Johnson Engineering maintains daily logs of QE's work and any issues observed, along with photos where appropriate.
- The sidewalk project is under good project management by Ms. Jacob and Ms. Herrmann. Mr. Duprey, who has been on an extended medical leave, is expected to return to work next month. He will once again be a great asset to us as he was a sidewalk inspector for the County's Road Maintenance Dept. before joining the PBSB team.

**OPERATIONS FACILITY BID UPDATE**

Mr. Dorrill reported that we are currently awaiting the final determination by the County's Procurement Dept. of an intended award for our Operations Facility Replacement Project. The lowest and most responsive bid was made by Heatherwood, a local contractor with a good reputation. He noted that the first phase of the project will be to complete regrading and other miscellaneous site work, which will be 50/50 cost shared with the County's Public Utilities Dept. A date for the approval of the project's award by the Board of County Commissioners has not yet been scheduled.

**CLAM PASS/BEACHES POST-STORM STATUS**

Mr. Dorrill reported that several years ago the PBSB completed a beach dune swale drainage project which included removing many years of accumulated debris in the swale, to improve drainage. As a result of Hurricane Ian, a significant amount of sand from the dune was overwashed into the swale. He commented that we are in the process of procuring a contractor to excavate the material out of the swale and placed back on the dune.

Dr. Dabees, Coastal Engineer with Humiston & Moore, provided an update on Clam Pass/beaches post-storm (Hurricane Idalia) conditions which included the following.

- Hurricane Idalia has caused a slight realignment of Clam Pass northward, towards the South Beach Facility. Currently the Pass has good flow, which we will continue to monitor.
- A survey of the Pass will be performed after hurricane season, and a report of physical conditions will be provided to the PBSB for discussion/assessment to determine whether a maintenance dredge may be needed in the winter of 2024. (Mr. Dorrill commented that a hydraulic dredge would be used for this project, if recommended.)
- Large waves produced by Hurricane Idalia caused a flattening of the beach berm. PBSB staff is looking at some potential regrading work on the north side of Clam Pass around the S. Beach Facility.
- The beach width at North Beach looks good.
- We have received the permit modification for Clam Pass which will allow us to place excess sand on the dune between Clam Pass and the North Beach, after the template to the south is filled (as part of a dredging project).

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- Our U.S.A.C.E. permit for Clam Bay/Clam Pass will expire in 2027.
- The U.S.A.C.E. Storm Risk Management Study continues, and now includes a remapped study in which the coastline is now being considered in totality from the northern border of Collier County down to Gordon Pass, without any exclusion of Pelican Bay.

**AUGUST 31 FINANCIAL REPORT**

Mr. Dorrill reviewed the August 31 financial statements and discussed highlights including a current PBSB cash balance of approximately \$11 million. He thanked Mr. Coleman for doing a good job in controlling expenses.

Mr. Dorrill commented that our FY2024 PBSB budget received BCC approval last week at last week's budget hearings (attended by Mr. Dorrill and Mr. Coleman). He noted that some opposition was expressed by a non-resident, and that two of our County Commissioners went out of their way to praise our staff. Commissioner Hall suggested that we need to prepare a multi-year analysis of our fund balance. Mr. Dorrill commented that our annual FY2024 PBSB assessment of \$935 (an increase of \$60 over FY2023) is an incredible value. He commented on our 40-year-old infrastructure, which will require future maintenance and replacement, and suggested that we share a discussion of our capital improvements with Commissioner Hall.

Mr. Fogg questioned why we have over \$1 million available in our operating budget. Mr. Coleman explained that we have two vacant positions, and that the County has a temporary hiring freeze on all positions until after the FY2024 budget is approved. He noted that we also have some unspent day labor funds. Mr. Coleman reported that we have enough funds available to pay sidewalk project invoices at least through the first quarter of FY2024.

**COMMITTEE REPORTS**

**LANDSCAPE & SAFETY**

Dr. Chicurel provided the following updates, included in his "Landscape & Safety Committee Meeting Report," which was provided in the agenda packet.

1. Speeding and stop sign runners: Sgt. Dear and Cpl. Reed of the CCSO attended the L&S Committee meeting and common safety issues were discussed. In addition to CCSO deputy presence, it was suggested that the PBSB consider utilizing stop signs which contain flashing lights around the octagon at all-way stop intersections. The committee and staff will look at this suggestion and report back to the board. Mr. Dorrill asked that the CCSO provide monthly reports on CCSO activities in Pelican Bay to the L&S Committee. After-hour deputies are still not available for an "extra presence" in Pelican Bay (under a per-hour special service fee agreement).
2. US 41 median modification at the right turn only Gulf Park Dr. intersection – "quick curb:" The state of Florida will construct a quick curb as a median modification at this intersection as part of their 2026 resurfacing project. Mr. Dorrill will explore the possibility of moving up the 2026 timeline if the PBSB were to fund the modification. Photos of quick curb examples were included in the agenda packet, and an additional photo was distributed and added to the record.
3. Phase II Sidewalk Project update: Our PBSB Project Managers, our PBSB Operations Manager, Johnson Engineering staff, and our PBSB irrigation and landscape staff are working tirelessly on behalf of the Pelican Bay community to ensure that the final result of this project is commensurate with the quality and appearance we expect.
4. Oakmont Parkway sidewalk feasibility study: An engineering study has been completed to determine if a sidewalk could be constructed along Oakmont Parkway. Oakmont Parkway has

no sidewalk, and therefore residents, guests, joggers, walkers, bicycles, and the disabled are forced to use the vehicular traffic lanes. The committee discussed potential issues and needs regarding this potential future project. The Oakmont Lake pathway is not a substitute for a sidewalk and is not ADA compliant. The committee will continue to explore this long-range potential strategic planning issue.

5. Standardization of street sign fonts and frames (paddles): Staff has asked and the committee has unanimously approved the standardization of street signs so that our signs can be replaced and contracted out easily. The font will be modified to be broader and bolder so that the signs will be more easily read.

Mr. Coleman commented that staff will work on getting a sign contract in place for a contractor to complete the sign replacement work over three to five years. Mr. Griffith noted that no sign poles would be replaced. Mr. Coleman commented that the total replacement cost is unknown as the contract has not yet been put out to bid. The cost will be spread out over several years.

**Mr. Griffith motioned, Ms. Hamilton seconded to approve changing the current glue-on street sign placards, fonts and their frames known as paddles to a standardized form that are easily procured and more easily read. The motion carried unanimously.**

6. Tree Planting: After much discussion, the committee agreed to start the process of delineating a tree/landscape plan of action to begin after the sidewalk project is completed. A future workshop will be scheduled to discuss additional strategic planning.
7. Pelican Bay Foundation Liaison: The PBF has asked Mr. Spencer Marcantonio, PBF Facilities Manager, to be a liaison to our committee.

**AUDIENCE COMMENT**

Ms. Beth Schultz questioned what the cost of the installation of the quick curb median modification will be. Dr. Chicurel responded that if the state of Florida installs the quick curb, then there will be no cost to the PBSB. However, if we obtain permission for the installation to occur sooner, it is unknown what the cost to the PBSB would be.

Ms. Schultz suggested that the U-turn location on US41, south of Gulf Park Dr., needs to be relocated further south on US41 to allow more time for vehicles to traverse three lanes of traffic in order to get into the U-turn lane. Dr. Chicurel commented that he will look into Ms. Schultz's suggestion. Mr. Coleman commented that the state of Florida will hold public meetings prior to making the median modification.

**CHAIRMAN'S REPORT**

**MANAGEMENT SERVICES CONTRACT**

Mr. Fogg reported that the Board of County Commissioners has approved Dorrill Management Group's three-year contract for PBSB management services. Mr. Fogg thanked Mr. Dorrill for his many years of service to the PBSB.

Mr. Fogg asked for an update on installing fountains in the Oakmont Lake. Mr. Hoppensteadt confirmed that the PBF will get this done.

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September 13, 2023

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**ADJOURNMENT**

**The meeting was adjourned at 2:20 p.m.**

\_\_\_\_\_  
Michael Fogg, Chairman

Minutes approved [ ] *as presented* OR [ ] *as amended* ON [ ] *date*

**Pelican Bay Services Division Project Tracking Spreadsheet**

**10/04/2023**

**PBSD New Maintenance Facilities – Project #50211**

Solicitation #23-8096 for “Pelican Bay New Maintenance Facility” was issued on 4/26/2023. A pre-bid meeting occurred on 5/9/2023. Bid deadline was extended until 7/10/2023. Five bids were received ranging in price from approximately \$5.4M – \$7.6M; however, bids are still being evaluated by Procurement Services. Public Utilities Division will pay for 50% of the site work.

**Sidewalk Improvements - Project #50212**

Production has increased greatly and total linear footage as of 10/2/2023 is 31,257 LF. At total of \$2,572,862.35 has been earned and paid to date.

**Bay Colony Beach Dune Swale Maintenance**

Following saltwater intrusion due to high tides/king tides from Hurricane Idalia, Earth Tech cleared approximately 200 LF of shoaled sand from the Bay Colony Beach Dune Swale and reinforced the banks with coconut fiber mesh. Shenandoah performed minor repairs to pipes at the Ritz and other minor repairs will be scheduled at The Carlyle and Trieste.

**Clam Pass**

Permit Modification No. 0296087-008-JN for Clam Pass Maintenance Dredging was issued August 24, 2023 to expand the upland berm and dune disposal area on the north side of Clam Pass to accommodate excess sand at the inlet entrance. Additionally, Specific Conditions were added to ensure that flushing and tidal exchange is maintained in Clam Bay during dredging events.





October 2, 2023

Lisa Oien, FCCM, PPA - Procurement Strategist  
Collier County Procurement Services Division  
3295 Tamiami Trail East  
Bldg. C2  
Naples, FL 34112-5361

**Re:    *Design Entity Letter of Recommended Award  
Solicitation # 23-8096  
Pelican Bay New Maintenance Facility  
Collier County, Florida***

Dear Lisa:

Davidson Engineering, Inc. (EOR) has completed our review of the quotes submitted for the above referenced project and we are pleased to provide the following award recommendation. The scope of the Pelican Bay New Maintenance Facility project includes the demolition and disposal of the existing maintenance facility, construction of approximately 10,000 square feet of a new maintenance building, including a chemical storage accessory building, an equipment storage accessory building, and improvements to the utility/stormwater drainage infrastructure, roadway, and parking lot area

Bids were received on July 10, 2023, from the following contractors:

- Heatherwood Construction Company
- Waypoint Contracting, Inc.
- DEC Contracting Group, Inc.
- DMR Construction Services, Inc.
- Rycon Construction, Inc.

Collier County Procurement's review of the bid tabulations determined that the apparent low bidder is Heatherwood Construction Company with a total base bid + alternates 1-3 of, \$5,340,571.00. Davidson Engineering was provided with the bid schedule and the Heatherwood Construction Company bid is approximately 37.4% higher than the Engineer's Opinion of Probable Construction (OPC) Cost of \$3,885,654.52. We believe this is related to a considerable rise in construction materials and limited availability due to the COVID pandemic.

Four (4) out of the five (5) references provided by Heatherwood Construction Company completed reference forms attached hereto. The project references provided by Heatherwood Construction Company contain sufficient relevant experience with similar projects to demonstrate the required successful experience to complete the project.

Heatherwood Construction Company formed in 2004, active with the State of Florida Division of Corporations and registered with the Florida Department of Business and Professional Regulations as a Construction Business with Walter Mitchell Crawford, IV, as the qualifier of the Certified General Contractor license, both of which registrations are current and active.



Davidson Engineering has worked successfully with Heatherwood Construction Company on projects located in Collier and Lee County. Based on that experience, the favorable performance reviews provided on the Vendor Reference Logs and its current licensing, it appears that it is a qualified firm to conduct the requested work. We, as the design entity, therefore, recommend that Heatherwood Construction Company be awarded the contract for the Pelican Bay New Maintenance Facility Construction in the amount of \$5,340,571.00.

Should there be any questions, please feel free to contact our office.

Sincerely,

A handwritten signature in blue ink, appearing to read 'L. Davidson'.

Lee Davidson, P.E.  
Project Manager

### VENDOR REFERENCE CHECK LOG

Solicitation No.:	23-8096	Reference Check by:	Tocia Hamlin-Rosa, Sr Proj Coord
Solicitation Title:	Pelican Bay New Maintenance Facility	Date:	9/13/2023: Made Initial Contact 9/18/2023: Contact Made & Reference provided
Bidder's Name:	Heatherwood Construction Company	Phone:	239-434-6060
Design Entity:	Davidson Engineering, Inc.		

### REFERENCED PROJECT:

Project Name:	Estero Country Club	Project Location:	19501 Vintage Trace Circle Estero, FL 33967
Project Description:	Complete renovation of clubhouse		
Completion Date:	11/2022	Contract Value:	\$4,392,530
Project Owner/Title:	Estero Country Club, Inc.		
Owner's Address:	19501 Vintage Trace Circle Estero, FL 33967	Phone:	239-267-7000
Owner's Contact Person:	Dan Newman, General Manager	E-Mail:	dnewman@esterocc.com

- Was project completed timely and within budget? (If not, provide detail)  
Yes. See additional information provided in #7 below.  
\_\_\_\_\_
- Was the submittal/review process performed satisfactorily? (If not, provide detail)  
Yes  
\_\_\_\_\_
- Was the construction process performed satisfactorily? (If not, provide detail)  
Yes  
\_\_\_\_\_
- Did the process run smoothly? Were there any changes? Describe below.  
Yes-the process ran smoothly and there were no changes  
\_\_\_\_\_
- Was the contract closeout process performed satisfactorily? (If not, provide detail)  
Yes  
\_\_\_\_\_
- Any warranty issues since closeout? Were they responded to and performed satisfactorily?  
No  
\_\_\_\_\_
- Additional comments:  
They were great to work with and things moved smoothly - we did have delays at the end as items were hard to get due to the pandemic. But I would recommend them.  
\_\_\_\_\_

### VENDOR REFERENCE CHECK LOG

Solicitation No.:	23-8096	Reference Check by:	Tocia Hamlin-Rosa, Sr Proj Coord
Solicitation Title:	Pelican Bay New Maintenance Facility	Date:	9/13/2023: Made Initial Contact 9/18/2023: Contact made & reference provided
Bidder's Name:	Heatherwood Construction Company	Phone:	239-434-6060
Design Entity:	Davidson Engineering, Inc.		

### REFERENCED PROJECT:

Project Name:	Hulett Environmental Corporate Office	Project Location:	3828 White Lake Blvd. Naples, FL 34117
Project Description:	Corporate Headquarters & Warehouse		
Completion Date:	12/2019	Contract Value:	\$1,500,000
Project Owner/Title:	Hulett Environmental Services		
Owner's Address:	3828 White Lake Blvd. Naples, FL 34117	Phone:	239-302-4140
Owner's Contact Person:	Timothy Hulett, President	E-Mail:	<a href="mailto:tim@bugs.com">tim@bugs.com</a>

1. Was project completed timely and within budget? (If not, provide detail)  
Yes  
\_\_\_\_\_
2. Was the submittal/review process performed satisfactorily? (If not, provide detail)  
Yes  
\_\_\_\_\_
3. Was the construction process performed satisfactorily? (If not, provide detail)  
Yes  
\_\_\_\_\_
4. Did the process run smoothly? Were there any changes? Describe below.  
Yes; No  
\_\_\_\_\_
5. Was the contract closeout process performed satisfactorily? (If not, provide detail)  
Yes  
\_\_\_\_\_
6. Any warranty issues since closeout? Were they responded to and performed satisfactorily?  
No  
\_\_\_\_\_
7. Additional comments:  
They were excellent – 5 Star!  
\_\_\_\_\_

### VENDOR REFERENCE CHECK LOG

Solicitation No.:	23-8096	Reference Check by:	Tocia Hamlin-Rosa, Sr Proj Coord
Solicitation Title:	Pelican Bay New Maintenance Facility	Date:	9/13/2023: Made Initial Contact 9/18/2023: Made contact & reference provided
Bidder's Name:	Heatherwood Construction Company	Phone:	239-434-6060
Design Entity:	Davidson Engineering, Inc.		

### REFERENCED PROJECT:

Project Name:	Mason Classical Academy	Project Location:	2647 Professional Circle Naples, FL 34119
Project Description:	School – Second Floor Renovation		
Completion Date:	12/2022	Contract Value:	\$2,007,817
Project Owner/Title:	Mason Classical Academy, Inc.		
Owner's Address:	2647 Professional Circle Naples, FL 34119	Phone:	239-880-7584
Owner's Contact Person:	David Hull	E-Mail:	dhull@masonacademy.com

- Was project completed timely and within budget? (If not, provide detail)  
Yes, this project was completed timely and within budget.  
\_\_\_\_\_
- Was the submittal/review process performed satisfactorily? (If not, provide detail)  
Yes, the submittal/review process was performed satisfactorily.  
\_\_\_\_\_
- Was the construction process performed satisfactorily? (If not, provide detail)  
Yes, the construction process was performed satisfactorily. Heatherwood was very professional, efficient, and positive.  
\_\_\_\_\_
- Did the process run smoothly? Were there any changes? Describe below.  
The process ran very smoothly. We felt very comfortable working with Heatherwood. Any changes were necessary, and Heatherwood handled all situations well.  
\_\_\_\_\_

5. Was the contract closeout process performed satisfactorily? (If not, provide detail)  
Yes, the contract closeout process was performed satisfactorily.

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6. Any warranty issues since closeout? Were they responded to and performed satisfactorily?  
We've had no warranty issues since closeout to my knowledge.

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7. Additional comments:

We were very happy with Heatherwood's performance and have no complaints!

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### VENDOR REFERENCE CHECK LOG

Solicitation No.:	23-8096	Reference Check by:	Tocia Hamlin-Rosa, Sr Proj Coord
Solicitation Title:	Pelican Bay New Maintenance Facility	Date:	9/13/2023: Made Initial Contact 9/18/2023: Made Contact & Received Reference
Bidder's Name:	Heatherwood Construction Company	Phone:	239-434-6060
Design Entity:	Davidson Engineering, Inc.		

### REFERENCED PROJECT:

Project Name:	Van Otterloo Center for Family Learning	Project Location:	3655 Westclox St. Immokalee, FL 34142
Project Description:	New 40,000 sf school		
Completion Date:	12/26/2022	Contract Value:	\$11,496,565
Project Owner/Title:	Guadalupe Center		
Owner's Address:	2640 Golden Gate Parkway Suite 205, Naples, FL 34105	Phone:	239-657-7154
Owner's Contact Person:	Dawn Montecalvo, President	E-Mail:	dmontecalvo@guadalupecenter.org

1. Was project completed timely and within budget? (If not, provide detail)  
Project was completed within budget with a few delays due to Covid related supply issues.  
\_\_\_\_\_
2. Was the submittal/review process performed satisfactorily? (If not, provide detail)  
Yes.  
\_\_\_\_\_
3. Was the construction process performed satisfactorily? (If not, provide detail)  
Yes. They were very attentive to every aspect of the process.  
\_\_\_\_\_
4. Did the process run smoothly? Were there any changes? Describe below.  
They were very proactive and supportive with a few architectural design challenges and made it work.  
\_\_\_\_\_
5. Was the contract closeout process performed satisfactorily? (If not, provide detail)  
Yes.  
\_\_\_\_\_
6. Any warranty issues since closeout? Were they responded to and performed satisfactorily?  
No.  
\_\_\_\_\_
7. Additional comments:  
\_\_\_\_\_

### VENDOR REFERENCE CHECK LOG

Solicitation No.:	23-8096	Reference Check by:	Tocia Hamlin-Rosa, Sr Proj Coord
Solicitation Title:	Pelican Bay New Maintenance Facility	Date:	9/13/2023: Made Initial Contact – No Response 9/18/2023: 2 <sup>nd</sup> Attempt to Contact – No Resposne 9/20/2023: 3 <sup>rd</sup> Attempt to Contact – No Response
Bidder's Name:	Heatherwood Construction Company	Phone:	239-434-6060
Design Entity:	Davidson Engineering, Inc.		

### REFERENCED PROJECT:

Project Name:	Heritage Landing including Maintenance Facility	Project Location:	14500 Heritage Landing Blvd. Punta Gorda, FL 33955
Project Description:	Construction of Amenities and Maintenance Facility		
Completion Date:	9/2022	Contract Value:	\$4,100,000
Project Owner/Title:	Lennar Homes		
Owner's Address:	10481 Ben C Pratt Six Mile Cypress Parkway Fort Myers, FL 33966	Phone:	239-278-1177
Owner's Contact Person:	Darin McMurray, Regional Vice President	E-Mail:	Darin.McMurray@Lennar.com

1. Was project completed timely and within budget? (If not, provide detail)

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2. Was the submittal/review process performed satisfactorily? (If not, provide detail)

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3. Was the construction process performed satisfactorily? (If not, provide detail)

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4. Did the process run smoothly? Were there any changes? Describe below.

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5. Was the contract closeout process performed satisfactorily? (If not, provide detail)

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6. Any warranty issues since closeout? Were they responded to and performed satisfactorily?

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Line No.	Description	Quantity	Unit	Heatherwood Construction Company		Waypoint Contracting, Inc.		DEC Contracting Group, Inc.		DMR Construction Services, Inc.		NON-RESPONSIVE Pylon Construction, Inc.		Engineer's Opinion of Probable	
				Unit Price	Total Price	Unit Price	Total Price	Unit Price	Total Price	Unit Price	Total Price	Unit Price	Total Price	Unit Price	Total Price
<b>General Requirements</b>															
1	Mobilization/	1	LS	\$730,790.86	\$730,790.86	\$355,800.00	\$355,800.00	\$403,939.81	\$403,939.81	\$852,825.25	\$852,825.25	\$952,610.64	\$952,610.64	\$400,000.00	\$400,000.00
2	Geotechnical	1	LS	\$4,910.00	\$4,910.00	\$23,150.00	\$23,150.00	\$27,004.33	\$27,004.33	\$37,217.40	\$37,217.40	\$12,500.00	\$12,500.00	\$44,217.30	\$44,217.30
3	NPDES Pollution	1	LS	\$13,275.00	\$13,275.00	\$20,385.00	\$20,385.00	\$9,938.13	\$9,938.13	\$25,733.38	\$25,733.38	\$15,600.00	\$15,600.00	\$10,680.00	\$10,680.00
<b>Total General Requirements</b>				\$748,975.86	\$748,975.86	\$399,335.00	\$399,335.00	\$59,981.33	\$59,981.33	\$25,733.38	\$25,733.38	\$15,600.00	\$15,600.00	\$10,680.00	\$10,680.00
<b>Site Work</b>															
4	Survey Stake-out/	1	LS	\$36,920.00	\$36,920.00	\$29,700.00	\$29,700.00	\$41,001.58	\$41,001.58	\$15,431.00	\$15,431.00	\$980,710.64	\$980,710.64	\$454,897.30	\$454,897.30
5	Private Utility	1	LS	\$3,500.00	\$3,500.00	\$3,500.00	\$3,500.00	\$11,251.81	\$11,251.81	\$32,722.00	\$32,722.00	Included in Line # 7	Included in Line # 7	\$10,496.11	\$10,496.11
6	Demolition and	1	LS	\$116,591.19	\$116,591.19	\$98,500.00	\$98,500.00	\$80,530.64	\$80,530.64	\$105,739.56	\$105,739.56	\$82,473.24	\$82,473.24	\$65,250.90	\$65,250.90
7	Earthwork -	1	LS	\$194,767.00	\$194,767.00	\$442,275.00	\$442,275.00	\$679,909.12	\$679,909.12	\$1,450,998.69	\$1,450,998.69	\$469,044.42	\$469,044.42	\$94,702.77	\$94,702.77
8	Exterior	1	LS	\$993,807.15	\$993,807.15	\$950,280.00	\$950,280.00	\$1,070,620.93	\$1,070,620.93	\$1,148,702.02	\$1,148,702.02	\$1,039,559.44	\$1,039,559.44	\$394,569.99	\$394,569.99
9	Pavement,	1	LS	\$401,439.75	\$401,439.75	\$374,000.00	\$374,000.00	\$411,917.14	\$411,917.14	\$415,253.14	\$415,253.14	\$259,229.05	\$259,229.05	\$343,174.30	\$343,174.30
10	Landscaping &	1	LS	\$45,484.42	\$45,484.42	\$62,000.00	\$62,000.00	\$80,090.91	\$80,090.91	\$113,701.32	\$113,701.32	\$49,903.80	\$49,903.80	\$83,462.00	\$83,462.00
<b>Total Site Work</b>				\$1,791,009.51	\$1,791,009.51	\$1,960,255.00	\$1,960,255.00	\$2,369,322.13	\$2,369,322.13	\$2,644,732.73	\$2,644,732.73	\$1,894,209.95	\$1,894,209.95	\$1,021,268.22	\$1,021,268.22
<b>Maintenance Building</b>															
11	Concrete	1	LS	\$313,432.40	\$313,432.40	\$310,000.00	\$310,000.00	\$248,381.80	\$248,381.80	\$149,810.24	\$149,810.24	\$463,139.46	\$463,139.46	\$339,000.00	\$339,000.00
12	Masonry	1	LS	Included with line 11	Included with line 11	\$82,000.00	\$82,000.00	\$131,818.72	\$131,818.72	\$82,536.84	\$82,536.84	Included in Line # 11	Included in Line # 11	\$407,430.00	\$407,430.00
13	Miscellaneous	1	LS	\$60,819.00	\$60,819.00	\$85,000.00	\$85,000.00	\$37,424.63	\$37,424.63	\$22,800.00	\$22,800.00	\$40,560.00	\$40,560.00	\$101,800.00	\$101,800.00
14	Wood & Plastic	1	LS	\$137,803.15	\$137,803.15	\$200,000.00	\$200,000.00	\$263,134.35	\$263,134.35	\$168,948.08	\$168,948.08	\$195,067.27	\$195,067.27	\$141,133.00	\$141,133.00
15	Thermal & Moisture	1	LS	\$179,696.00	\$179,696.00	\$302,500.00	\$302,500.00	\$410,804.25	\$410,804.25	\$357,610.02	\$357,610.02	\$217,964.86	\$217,964.86	\$61,020.00	\$61,020.00
16	Doors & Windows	1	LS	\$213,675.36	\$213,675.36	\$215,000.00	\$215,000.00	\$248,743.66	\$248,743.66	\$504,077.16	\$504,077.16	\$296,252.94	\$296,252.94	\$76,918.00	\$76,918.00
17	Finishes	1	LS	\$335,182.72	\$335,182.72	\$350,000.00	\$350,000.00	\$598,369.68	\$598,369.68	\$267,195.86	\$267,195.86	\$878,124.49	\$878,124.49	\$98,713.00	\$98,713.00
18	Specialties	1	LS	\$35,115.00	\$35,115.00	\$94,000.00	\$94,000.00	\$51,292.62	\$51,292.62	\$84,285.40	\$84,285.40	\$54,868.57	\$54,868.57	\$38,667.00	\$38,667.00
19	Fire Protection	1	LS	Included in line 22	Included in line 22	N/A	N/A	\$	\$	\$17,000.00	\$17,000.00	N/A	N/A	\$26,890.00	\$26,890.00
20	Plumbing	1	LS	\$172,800.00	\$172,800.00	\$175,000.00	\$175,000.00	\$226,273.80	\$226,273.80	\$171,000.00	\$171,000.00	\$229,939.09	\$229,939.09	\$78,451.00	\$78,451.00
21	Mechanical - HVAC	1	LS	\$118,500.00	\$118,500.00	\$118,408.00	\$118,408.00	\$138,959.79	\$138,959.79	\$125,058.00	\$125,058.00	\$166,687.04	\$166,687.04	\$89,630.00	\$89,630.00
22	Electrical	1	LS	\$217,606.00	\$217,606.00	\$313,500.00	\$313,500.00	\$271,506.06	\$271,506.06	\$1,140,000.00	\$1,140,000.00	\$375,785.59	\$375,785.59	\$58,640.00	\$58,640.00
23	Fire Alarm/Safety/Securi	1	LS	Included in line 22	Included in line 22	\$35,000.00	\$35,000.00	\$168,535.16	\$168,535.16	\$23,967.36	\$23,967.36	FA Included in Line # 22	FA Included in Line # 22	\$36,170.00	\$36,170.00
<b>Total Maintenance Facility</b>				\$1,784,629.63	\$1,784,629.63	\$2,380,410.00	\$2,380,410.00	\$2,795,344.52	\$2,795,344.52	\$3,154,288.96	\$3,154,288.96	\$2,918,389.31	\$2,918,389.31	\$1,554,462.00	\$1,554,462.00
<b>Total Maintenance Facility</b>				\$4,324,615.00	\$4,324,615.00	\$4,640,000.00	\$4,640,000.00	\$5,595,548.92	\$5,595,548.92	\$6,714,797.72	\$6,714,797.72	\$5,793,309.90	\$5,793,309.90	\$3,030,627.52	\$3,030,627.52
24	Owner's	T&M		\$400,000.00	\$400,000.00	\$400,000.00	\$400,000.00	\$400,000.00	\$400,000.00	\$400,000.00	\$400,000.00	\$400,000.00	\$400,000.00	\$400,000.00	\$400,000.00
<b>TOTAL BASE BID =</b>				\$4,724,615.00	\$4,724,615.00	\$5,040,000.00	\$5,040,000.00	\$5,995,548.92	\$5,995,548.92	\$7,114,797.72	\$7,114,797.72	\$6,193,309.90	\$6,193,309.90	\$3,430,627.52	\$3,430,627.52
<b>Trade Sub-Total +</b>				\$8,783.00	\$8,783.00	\$5,500.00	\$5,500.00	\$8,888.89	\$8,888.89	\$5,244.00	\$5,244.00	\$5,067.00	\$5,067.00	\$91,300.00	\$91,300.00
<b>Owner's Allowance</b>				\$257,900.00	\$257,900.00	\$245,000.00	\$245,000.00	\$391,107.56	\$391,107.56	\$148,256.11	\$148,256.11	TBD	TBD	\$195,011.00	\$195,011.00
<b>Alternates # 1:</b>				\$60,106.00	\$60,106.00	\$58,000.00	\$58,000.00	\$48,950.33	\$48,950.33	\$10,000.00	\$10,000.00	\$60,252.05	\$60,252.05	\$46,900.00	\$46,900.00
<b>Alternates # 2:</b>															
<b>Alternates # 3:</b>															
<b>Alternates # 4:</b>															
*Owners Allowance -- for Owners Use as Directed. This Allowance will be used only at the Owner's discretion to accommodate work due to unforeseen.															
<b>Total:</b>				\$5,400,677.00	\$5,400,677.00	\$5,670,500.00	\$5,670,500.00	\$6,910,980.37	\$6,910,980.37	\$7,529,546.89	\$7,529,546.89	\$5,858,628.95	\$5,858,628.95	\$3,832,554.52	\$3,832,554.52