



Project Leaders

Stamford Westhill High School

Owner's Representative Services

January 10, 2023

Prepared by: Colliers Project Leaders

Accelerating success.



WESTHILL HIGH SCHOOL

Section 1

Key Personnel

Stamford Westhill High School Core Team



CHUCK WARRINGTON ^{PE}

Project Director

Oversight of Services &
OSCG&R expertise



ADAM LEVITUS ^{PE}

Project Manager

Day-to-Day Project Manager



JUDY DENNY

Asst. Project Manager

Document
Management/Move
Management



MARK SCHWEITZER ^{PE}

**Construction
Representative**

Construction
Oversight/Quality Assurance

Stamford Westhill High School Support Team



MARC SKLENKA LEED AP
Managing Director
Overall Management of
Services



BLAIR RICHARDSON PE
Technical Support
Operations and Controls
Specialist



THAO NGUYEN
**Financial Monitoring &
Reporting**
Budget Control &
Reconciliation

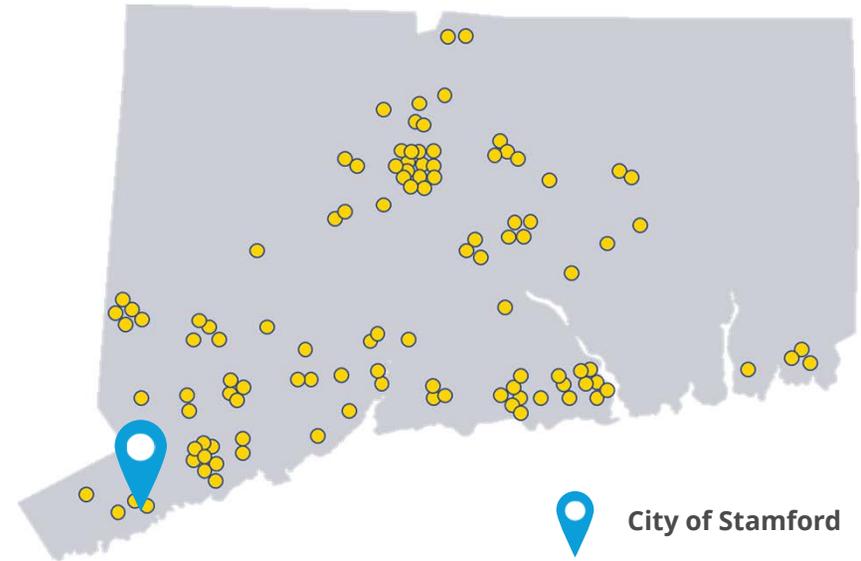
Connecticut Relevant Experience



450+ EDUCATION
PROJECTS



125+ PUBLIC K-12
SCHOOL PROJECTS



City of Stamford

- Madison New Elementary School, Polson MS HVAC Improvements and Brown Intermediate School Modifications
- South Windsor's Elementary School Master Plan (4 new schools)
- Mansfield's New Elementary School (Net Zero)
- ***New Fairfield's New High School*** & Meeting House Hill School
- ***Regional School District 14 Nonnewaug High School***
- ***East Hampton High School***
- ***Windham High School***
- North Haven Middle School
- Branford's Francis Walsh Intermediate School
- Rocky Hill's Moser School
- New London's Bennie Dover Jackson Middle School
- Fairfield's Riverfield, Holland Hill, Mill Hill, and Roger Sherman Elementary Schools
- Stonington's Deans Mill School & West Vine Street School
- CREC's Anna Grace Academy of the Arts



Section 2

Project Understanding

Stamford Westhill High School

Project Understanding

- One of the largest, if not the largest, project in CT
- 8-yr high project enrollment of 2,458 with 10-year high of 2,508
- Original budget of \$258M, updated budget of \$301.3M with 80% reimbursement (reauthorization in 2023 priority list)
- Construction on occupied site
- Retaining turf fields, tennis courts and agri-science building
- Existing building envelope and systems are outdated



Stamford Westhill High School

Confirmation of Data

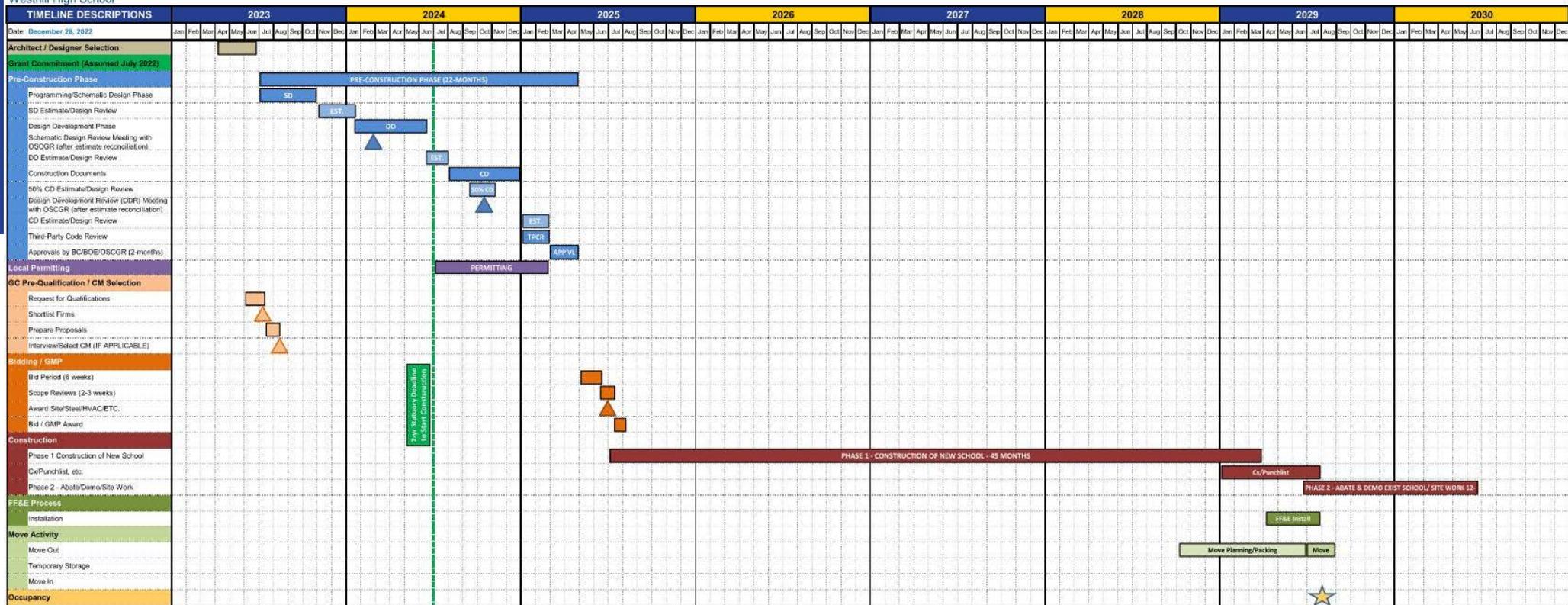
- Confirmation of proper enrollment data
- Confirm program against space standard (currently 428,921 per priority lists)
- Confirm when 2-year construction deadline is applied (2022 or 2023 re-authorization)
- Verify updated budget (construction budget, FF&E budget, fees and expenses, owner's contingency)



Stamford Westhill High School

PROJECT SCHEDULE

City of Stamford
Westhill High School





Section 3

Interview Questions

ESTIMATE ANALYSIS (CSI Format)



South Windsor Public Schools
Pleasant Valley Elementary School

Schematic Design (\$)

11/24/2020 revised

Item	A/E/C Budget	7/20/2020
Renovated Area (GSF)		
New Construction Area (GSF)		
Construction Total Area (GSF)		
Building Construction Current \$/GSF		
Total Construction Current \$/GSF		
I. Building Construction (to 5' beyond perimeter)		
2 Interior Demolition		
3 Concrete		
03 10 00 Concrete Formwork		
03 20 00 Concrete Reinforcing		
03 30 00 Cast in Place Concrete		
Concrete Slab		
4 Masonry		
04 20 00 Unit Masonry Assemblies		
04 71 00 Cast Stone		
5 Metals		
05 12 00 Structural Steel		
05 20 00 Steel Joints		
05 30 00 Metal Decking		
05 40 00 Cold Formed Metal Framing		
05 50 00 Metal Fabrications		
6 Woods & Plastics		
06 10 00 Rough Carpentry		
06 20 00 Finish Carpentry		
06 40 00 Architectural Woodwork		
-Other		
7 Thermal & Moisture Protection		
07 11 00 Below Grade Dampproofing		
07 16 00 Cementitious Waterproofing		
07 21 00 Building Insulation		
07 25 00 Air and Vapor Barrier System		
07 26 19 Topical Moisture Vapor Management System		
07 31 13 Asphalt Shingles		
07 41 50 Aluminum Composite Metal Panels		
07 53 23 EPDM Roofing		

ESTIMATE ANALYSIS (CSI Format)



Schematic Design (\$000's)

11/24/2020 revised

Item	A/E/C Budget	Estimate for Review			Revised at Recon Meeting			Reconciled Estimate
		Gilbane	Tarbell	Difference (A1 - B1)	Gilbane	Tarbell	Difference (A - B)	
A. Sitework (beyond 5' of building)								
31 50 00 Prep and Joints								
31 10 00 Site Clearing								
21 20 00 Earth Moving								
21 20 00 Earth Moving (Polluted soils)								
31 23 10 Structural Excavation								
31 23 10 De-watering								
31 25 00 Soil Erosion & Sediment Control								
31 50 00 Earthwork Protection								
SITE SERVICES								
32 Exterior Improvements								
32 12 16 Bituminous Concrete Paving								
32 13 15 Concrete Pavement and Manhole Curb								
32 14 00 Colored/Imprinted Concrete								
32 14 50 Clay Brick Pavers								
32 17 20 Pavement Markings								
32 17 26 Detachable Warning Systems								
32 30 00 Site Furnishings								
32 30 00 Site Improvement								
32 32 00 Decorative Concrete Retaining Wall								
32 32 00 Turf and Grasses								
32 33 00 Plants								
32 40 00 Traffic Control Signage								
32 61 10 Topsoil								
-Other								
B. Sitework (beyond 5' of building)								
33 Utilities								
a. Water - Fire Protection								
b. Water - Domestic Water								
c. Sanitary Sewer								
d. Storm Sewer								
e. Electric Distribution & Equipment								
f. Generator								
g. Site Lighting								
h. Data & Communications								
i. Security								
j. Fuel Distribution (Gas, Steam, Oil)								
k. Chilled Water								
l. Other								

F. Trade P/P Bonds		included	493.6		493.6		500.0	0.0	500.0	250.0	
G. Design and Pricing Contingency	7%	included	2,657.7	10%	4,599.8	(1,942.1)	2,692.0	2,746.4	(54.4)	2,719.2	
H. Escalation (Based on Trade Costs)		included	2,278.1		1,770.9	507.2	2,307.5	2,354.1	(46.6)	2,330.8	
<i>Subtotal of Escalated Trade Costs (Trade, Deign Cont., Escalation)</i>			44,597.1		48,578.1		43,996.8	44,335.2		44,166.0	
I. CM Contingency (2.5% Max)	2.5%	included	1,114.9		1,214.5	(99.5)	1,099.9	1,108.4	(8.5)	1,104.2	
<i>Subtotal (Trade, Deign Cont., Escalation)</i>			45,712.0		49,792.6		45,096.7	45,443.6		45,270.2	
J. Permits (If by GC or CM)		included	12.5		0.0	12.5	12.6	0.0	12.6	6.3	
K. General Requirements (Per Fee Proposal)		included	2,024.3		2,024.3	0.0	2,024.3	2,024.3	0.0	2,024.3	
<i>Subtotal</i>			47,748.8		51,816.9		47,133.6	47,467.9		47,300.8	
L. Insurance (\$8.65/\$1,000)		included	413.0		448.2	(35.2)	328.0	410.6	(82.6)	369.3	
<i>Subtotal</i>			48,161.9		52,265.1		47,461.6	47,878.5		47,670.1	
M. Payment and Performance Bonds	0.60%	included	289.0		313.6	(24.6)	284.8	287.3	(2.5)	286.0	
<i>Subtotal</i>			48,450.8		52,578.7		47,746.4	48,165.8		47,956.1	
N. Overhead and Profit / Fee	1.85%	included	896.3		972.7	(76.4)	883.3	891.1	(7.8)	887.2	
Total Estimated Construction		Included	49,347.2		53,551.4	(1,164.5)	48,629.7	49,056.8	(27.1)	48,843.3	
Total Estimated Construction			\$ 45,818.3		\$ 49,347.2	\$ 53,551.4	\$ (4,204.2)	\$ 48,629.7	\$ 49,056.8	\$ (427.1)	\$ 48,843.3
<i>Variance to Budget (Over)/Under</i>			(3,528.9)		(7,733.1)		(2,811.4)	(3,238.5)		(3,025.0)	
<i>Markups %</i>			10.6%		10.2%		10.5%	10.6%		10.6%	
<i>Markups Including Design Cont. and Escalation %</i>			19.6%		21.2%		19.6%	20.0%		19.9%	

Q1 - Cost Control Cost Estimating

- SD - DD - 50%CD - 90%CD Estimates
- Sitework
- Subtotal of Trade Costs
- CM General Conditions
- CM Contingency
- CM Insurances, Bonds
- Escalation
- Reconciliation (AOR vs CM) vs. Budget

Q1 - Cost Control Construction Phase

Pay Application

- Thorough Review
- Ensure accuracy
- Don't Overpay

Change Orders

- Confirm CO is legitimate
- Firm But Fair
- Timely Response
- Minimize Schedule Delay

CONTINUATION SHEET		AIA DOCUMENT G703				APPLICATION NO: 06		
AIA Document G702, APPLICATION AND CERTIFICATION FOR PAYMENT, containing Contractor's signed certification is attached.		Use Column I on Contracts where variable retainage for line items may apply.				APPLICATION DATE: 30-Sep-20		
In tabulations below, amounts are stated to the nearest dollar.		Days added by Modification				PERIOD TO: 30-Sep-20		
						P.O.# 20201855		
A ITEM NO.	B DESCRIPTION OF WORK	C SCHEDULED VALUE	D WORK COMPLETED		F MATERIALS PRESENTLY STORED (NOT IN)	G TOTAL COMPLETED AND STORED TO DATE (D+E+F)		H BALANCE TO FINISH (C-G)
			FROM PREVIOUS APPLICATION (D+E)	THIS PERIOD		% (G+C)		
379	UNDERGROUND SITE MATERIAL	6,000.00	3,000.00	2,400.00	-	5,400.00	90.00%	600.00
380	UNDERGROUND SITE LABOR	6,600.00	-	5,940.00	-	5,940.00	90.00%	660.00
381	PANELBOARD / SWITCHGEAR PACKAGE	38,400.00	11,520.00	-	-	11,520.00	30.00%	26,880.00
382	PANELBOARD / SWITCHGEAR MATERIAL	2,400.00	480.00	-	-	480.00	20.00%	1,920.00
383	PANELBOARD / SWITCHGEAR LABOR	16,800.00	5,040.00	-	-	5,040.00	30.00%	11,760.00
384	FEEDER MATERIALS	37,200.00	3,720.00	14,880.00	-	18,600.00	50.00%	18,600.00
385	FEEDER LABOR	28,800.00	2,880.00	11,520.00	-	14,400.00	50.00%	14,400.00
386	GROUNDING MATERIAL	2,844.00	2,280.00	-	-	2,280.00	80.17%	564.00
387	GROUNDING LABOR	4,296.00	3,474.00	-	-	3,474.00	80.87%	822.00
388	LIGHTING PACKAGE	275,000.00	-	-	-	-	0.00%	275,000.00
389	LIGHT PACKAGE WIRING MATERIAL	9,000.00	-	-	-	-	0.00%	9,000.00
390	LIGHTING WIRING ROUGH-IN LABOR	80,000.00	-	12,000.00	-	12,000.00	15.00%	68,000.00
391	TELE/DATA ROUGH-IN MATERIAL	8,160.00	816.00	1,224.00	-	2,040.00	25.00%	6,120.00
392	TELE/DATA ROUGH LABOR	18,000.00	1,800.00	2,700.00	-	4,500.00	25.00%	13,500.00
393	TELE/DATA FINISH LABOR	5,000.00	-	-	-	-	0.00%	5,000.00
394	MECHANICAL EQUIPMENT MATERIAL	9,720.00	-	-	-	-	0.00%	9,720.00
395	MECHANICAL EQUIPMENT LABOR	20,000.00	-	2,000.00	-	2,000.00	10.00%	18,000.00
396	PUBLIC ADDRESS SYSTEM EQUIPMENT	68,000.00	-	-	-	-	0.00%	68,000.00
397	PUBLIC ADDRESS MATERIAL	9,600.00	-	960.00	-	960.00	10.00%	8,640.00
398	PUBLIC ADDRESS SYSTEM ROUGH LABOR	8,400.00	-	840.00	-	840.00	10.00%	7,560.00
399	PUBLIC ADDRESS SYSTEM FINISH LABOR	7,200.00	-	-	-	-	0.00%	7,200.00
400	ACCESS CONTROL EQUIPMENT	7,500.00	-	-	-	-	0.00%	7,500.00
401	ACCESS CONTROL ROUGH LABOR	4,200.00	-	210.00	-	210.00	5.00%	3,990.00
402	ACCESS CONTROL FINISH LABOR	2,400.00	-	-	-	-	0.00%	2,400.00
403	INTRUSION DETECTION EQUIPMENT	5,880.00	-	-	-	-	0.00%	5,880.00
404	INTRUSION DETECTION ROUGH LABOR	9,600.00	-	480.00	-	480.00	5.00%	9,120.00
405	INTRUSION DETECTION FINISH LABOR	3,600.00	-	-	-	-	0.00%	3,600.00
406	VIDEO SURVEILLANCE EQUIPMENT	59,000.00	-	-	-	-	0.00%	59,000.00
407	VIDEO SURVEILLANCE ROUGH LABOR	24,000.00	-	1,200.00	-	1,200.00	5.00%	22,800.00
408	VIDEO SURVEILLANCE FINISH LABOR	9,600.00	-	-	-	-	0.00%	9,600.00
409	FIRE ALARM EQUIPMENT PACKAGE	23,000.00	-	-	-	-	0.00%	23,000.00
410	FIRE ALARM ROUGH MATERIALS	7,080.00	-	-	-	-	0.00%	7,080.00
411	FIRE ALARM ROUGH	24,000.00	-	2,400.00	-	2,400.00	10.00%	21,600.00
412	FIRE ALARM FINISH	8,400.00	-	-	-	-	0.00%	8,400.00
413	ELECTRIC FINISH MATERIAL	12,000.00	-	-	-	-	0.00%	12,000.00
414	ELECTRIC FINISH LABOR	30,000.00	-	-	-	-	0.00%	30,000.00
415	POOL EQUIPMENT WIRING	20,400.00	-	-	-	-	0.00%	20,400.00
416	ELECTRICAL CLOSEOUT (O&M-ASBUILTS)	3,000.00	-	-	-	-	0.00%	3,000.00
417	<u>DIVISION 31-EARTHWORK</u>							
418	MOBILIZATION	18,000.00	18,000.00	-	-	18,000.00	100.00%	-
419	DE-MOBILIZATION	10,000.00	-	-	-	-	0.00%	10,000.00
420	SURVEYING	15,930.00	12,751.00	-	-	12,751.00	80.04%	3,179.00

Reduce to \$0 (typ. of all struck-thru items). Work has not started.

OK -

has any of this started?

Q1 - Cost Control Financial Management

- Manage all Finances
- Approval of Invoices
- Reconcile with General Ledger
- Cash Flow Forecasting
- Reimbursement Requests
- Monthly Reporting

Ensure Project Stays on Budget!

FINANCIAL STATUS REPORT

New Fairfield Public Schools

FINANCIAL STATUS REPORT

New Fairfield Public Schools
New High School, 9-12

Financial Status Report (\$000's)

Date: January 9, 2023

	Budget			Contracted Project Costs			Anticipated Costs		Remaining Balance (C - F)
	Project Budget	Approved Transfers	Approved Budget w/ Transfers	Paid	Unpaid	Total Contract	Planned, but not Contracted	Anticipated Total Costs (D + E)	
Budget developed as of 4/7/2020									
14 Bond/Financing	100.0	86.7	186.7	191.3	-	191.3	-	191.3	(4.6)
15 Site Acquisition	-	-	-	-	-	-	-	-	-
Sub-total Expenses	846.7	86.7	933.4	502.3	72.2	574.5	364.1	938.6	(5.2)
Total Fees and Expenses	6,900.1	106.2	7,006.3	5,229.7	1,014.1	6,243.8	767.8	7,011.6	(5.3)
VI. Contingency									
A. Construction & Owner's Project									
1 Construction	3,400.5	(667.6)	2,732.9	-	-	-	242.7	242.7	2,490.2
2 Owner's Project	1,018.4	(106.2)	912.2	-	-	-	-	-	912.2
B. Additional Need	-	-	-	-	-	-	-	-	-
Total Contingency	4,418.9	(773.8)	3,645.1	-	-	-	242.7	242.7	3,402.4
Total Project	\$ 83,767.2	\$	\$	574.5	364.1	938.6	364.1	938.6	(5.2)
Transfers From:		To:		6,243.8	767.8	7,011.6			(5.3)
VI. Contingency		558.6 I/A Co							
					242.7	242.7			2,490.2
					-	-			912.2
					-	-			-
					242.7	242.7			3,402.4
				76,644.7	\$ 3,725.3	\$ 80,370.0			\$ 3,397.1

Q2 - Consultant Selection Architect Selection

- Request for Qualifications
- Request for Proposal
- Comprehensive Scope & Defined Services
 - Enhanced Construction Administration Services added
- Defined Schedule
- Control Budgets
- Proposal Analysis

**Contracts that protect
YOU!!**

Request for Qualification
ATA Document R2017-2017

IMPORTANT CONSIDERATIONS FOR ARCHITECT SELECTION

- Adequate staffing and capacity to perform the work for a project of this scale
- History of the design team, especially the architect and MEP consultant, successfully completing projects (check references)
- Style of Architecture (does their type of architect fit within the Stamford community?)
- Chemistry with firm

BUDGET WAS APPROVED BY REFERENDUM 5/2022

1	Cabling / Wall Jack / Devices	75.0
2	Specialty Seating	2,618.2
Total FF & E		

Colliers Project Leaders Page 1 of 2 11/22/2021 2021 1026 - New ES Budget

Q3 – GC vs CM

Construction Manager vs General Contractor

- Expertise in phasing, bidding, material supply and labor supply
- Limited access to and from the site, site logistics
- Professional Estimating and Value Management
- CHRO Compliance
- State Change Orders

PROJECT DELIVERY MATRIX CONSTRUCTION MANAGER vs GENERAL CONTRACTOR				
	CONSTRUCTION MANAGER DELIVERY OPTIONS			GENERAL CONTRACTOR
	CM at Risk w/ GMP (CMR) (A133)	CM w/ FEE (A134)	CM as Advisor (CMA) (A132)	G.C. (A101)
Basic Description	<p>CM serves as a pre-construction (design) resource to provide expertise in estimating, constructability, phasing, evaluation of program and budget, and scheduling. Recommended to be brought on board as soon as possible to gain the most value for the project.</p> <p>Upon bidding of the project by the trade contractors (a.k.a. bid packages), the CM essentially becomes a general contractor but with an open-book accounting policy.</p> <p>CM presents a GMP Amendment that includes summary of all the bid packages (openly bid), CMs General Conditions, CM Contingency, Allowances, Fee (Profit), Insurance, Bonds, State Education Fee, and other costs not included in a specific bid package.</p> <p>GMP Amendment cost is presented as a "Guaranteed Maximum Price Amendment" but is only based on the Construction Documents. It does not cover unforeseen field conditions, owner requests, 3rd party requests, or errors and/or omissions by the architect; and the CM is not responsible for design of the project or "filling in the gaps" that are not clear in the construction documents.</p> <p>The Owner has one contract with the CM who holds all the trade contracts under their responsibility. The trade contractors provide bonds to the CM who ultimately bonds 100% with the Owner.</p>	<p>The CM provides the same services as that described under CM at Risk with respect to pre-construction services however their role during construction is much different.</p> <p>The CM provides a construction cost estimate, or "Control Estimate", that includes the summary of all the bid packages (same as CMR). CMs General Conditions (field personnel, trailers, etc.), insurances, bonds, etc., but does not include a CM contingency nor any CM held allowances unless agreed upon by the Owner.</p> <p>Under this delivery the CM is not "guaranteeing" a maximum price and does not hold a CM contingency in their "Control Estimate". As such, the CM's contractual responsibility for scope gaps between trades is minimal, if not zero. Any missed scope gaps are funded through the Owner's Contingency.</p> <p>Under this delivery system, the CM's risk is very minimal and is essentially acting a full-time construction oversight of the trades, manages the construction schedule, is still responsible for coordination of the trades but does not guarantee the price for work shown in the construction documents.</p> <p>The Owner has one contract with the CM as with the CMR method. The CM holds the contracts with the trades and they provide bonds to the CM. The CM bonds 100% with the Owner similar to the CMR method.</p>	<p>The CM as Advisor is purely oversight of trades and essentially acts as another consultant to the Owner. The primary difference between this method and CMR and CM w/ Fee is that the Owner is contracting with each of the individual trade contractors individually.</p> <p>Should a claim by a trade or trades be brought, it will be with the Owner, not the CM as the CM does not hold the contracts with the trades.</p> <p>The Owner would be responsible for approving all the individual requisitions by the trade contractors and issuing individual checks to each versus issuing one check to the CM or G.C. each month.</p> <p>In this option the CM has less "skin in the game" than CMR or CM w/Fee.</p>	<p>General Contractor delivery is the oldest most traditional form of delivery for construction. It's the simplest form of delivery in that the General Contractors provide a lump sum bid for the bid documents (plans, specifications, and addenda thereto) as advertised. The project is awarded to the lowest qualified responsible bidder.</p> <p>Under this option the general contractor does not have to reveal his trade bids that support his bid. This option is not open book and does not contain any contractor contingency or allowances.</p> <p>The bid will still request unit prices for select items.</p> <p>This method does not provide pre-construction services such as estimating, phasing coordination, design reviews, etc. These must be completed by the architect and owner. All front-end bids documents (Notices to Bidder, bonding requirements, CHRO requirements, prevailing wage rates, etc.) will need to be prepared by the architect.</p>
PROS				

Q4 – CM Selection Construction Manager

- Issuance of Contracts with RFP to shortlist firms – SD Phase
- Contractually limiting the CM Contingency
- Restricted use of CM Contingency when A133 is used
- 6-month Rule provisions in our contracts
- Require hourly staffing matrix with proposals based on schedule
- Fee Comparisons

Leveling of Proposals

Town of Madison Public Schools
New PreK to 5 Elementary School
Request for Proposal

DRAFT AIA® Document A133® - 2019
Exhibit B
Insurance and Bonds

This Insurance and Bonds Exhibit is part of the Agreement, between the Owner and the Construction Manager, dated the [] day of [] in the year []
(In words, indicate day, month and year.)

for the following PROJECT:
(Name and location or address)

THE OWNER:
(Name, legal status, and address)

ADDITIONS AND DELETIONS:
The author of this document has added information needed for its completion. The author may also have deleted the text of the original AIA standard form. An Additions and Deletions report that notes added information as well as revisions to the standard form text is available from the author and should be reviewed.
This document has important legal consequences. Consultation with an attorney is recommended.

QUESTIONS MUST BE SUBMITTED BY []
PROPOSALS ARE DUE BY []

FEE PROPOSAL COMPARISON ANALYSIS

Town of Madison
New PreK-5 Elementary School
9/5/2022

Firm Name	PRE-CONSTRUCTION				CONSTRUCTION					TOTAL FEE	GIC's per Month	Bonding Rate	Comments		
	Pre-Con Services (Excl. Reviews & Estimates)	SD Review & Estimate	DD Review & Estimate	CD Review & Estimate	Pre-Con Sub-Total	CM FEE %	Calculated Trade Costs after CM Expenses	Calculated CM FEE	General Conditions					Bonding Costs (based on \$46,000)	Insurance Costs
D&G	\$97,500	\$15,000	\$51,000	\$54,000	\$217,500	1.30%	\$43,845,397	\$996,153	\$1,504,024	\$266,143	\$796,184	\$2,982,003	\$85,000	0.571%	Multiple contract contingencies, including liquidated damages and supply chain considerations. DID NOT PROVIDE REQUESTED STAFF MONTHLY CONSTRUCTION BREAKDOWN. Appears to have full time = 1PM, 1PE, 1 Super. Also PK/Accountant/BIM coordinator/schedule support.
Newfield	\$24,255	\$25,450	\$41,775	\$32,210	\$124,700	1.50%	\$43,882,799	\$698,816	\$1,339,136	\$349,574	\$349,574	\$2,851,801	\$52,500	0.750%	No Exclusions/Contract commentary Listed. \$100k low on Precon Services. Full Time Construction Staffing = 1PM, 1PEs, 2 Super. Also BIM manager support.
Gibane	\$185,342	\$34,673	\$49,357	\$52,432	\$321,804	1.75%	\$43,054,236	\$801,644	\$2,009,668	\$279,659	\$464,692	\$3,877,468	\$102,280	0.600%	Preconstruction Fee discounted \$133k based on subsequent construction GMP contract through Gibane. Multiple requests for contract discussions throughout various sections. Full-time Construction Staffing = 1PM, 2PEs, 2 Super. Also PK/Accountant/BIM manager/Schedule/Precon Mgr/Precon Trng support.
Dimeo	\$142,328	\$24,790	\$24,790	\$24,790	\$216,698	1.95%	\$43,319,411	\$891,509	\$1,099,832	\$256,354	\$442,794	\$3,507,187	\$89,465	0.550%	Contract commentary includes verbiage for costs due to delays, Covid 19, and severer of subcontractor. Some site maintenance costs included in GIC (e.g., temp trash and sanitary = approx. \$100k worth). Appears to have full time = 1PM, 1PE, 2 Super. Also PK/Accountant/schedule support. Higher safety officer time, but no dedicated BIM coordinator.
Construction Budget					CM PreConstruction Fee Budget										
\$ 46,609,800					\$ 175,000										

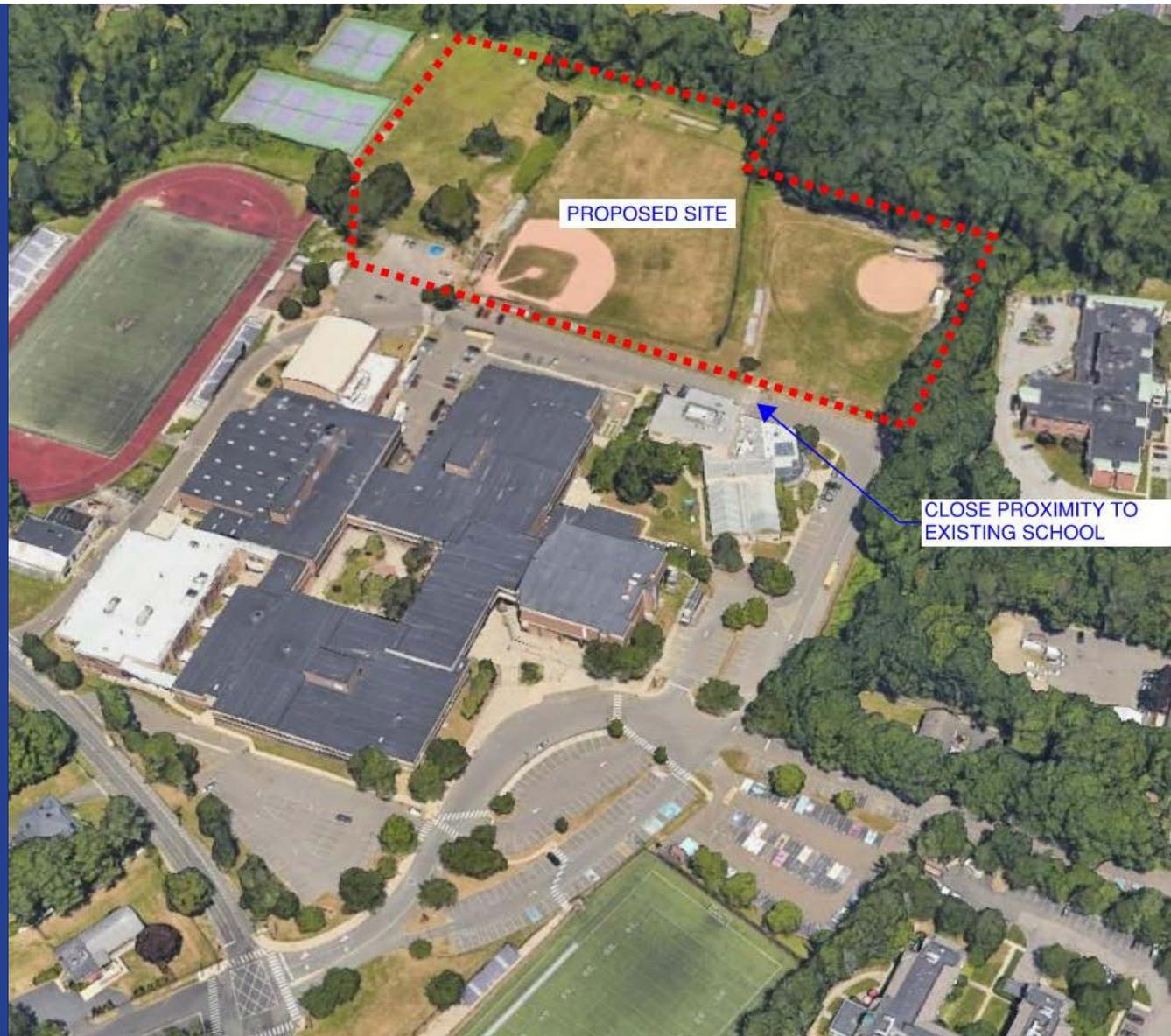
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Q5 – Site Concerns During Construction

Site Understanding

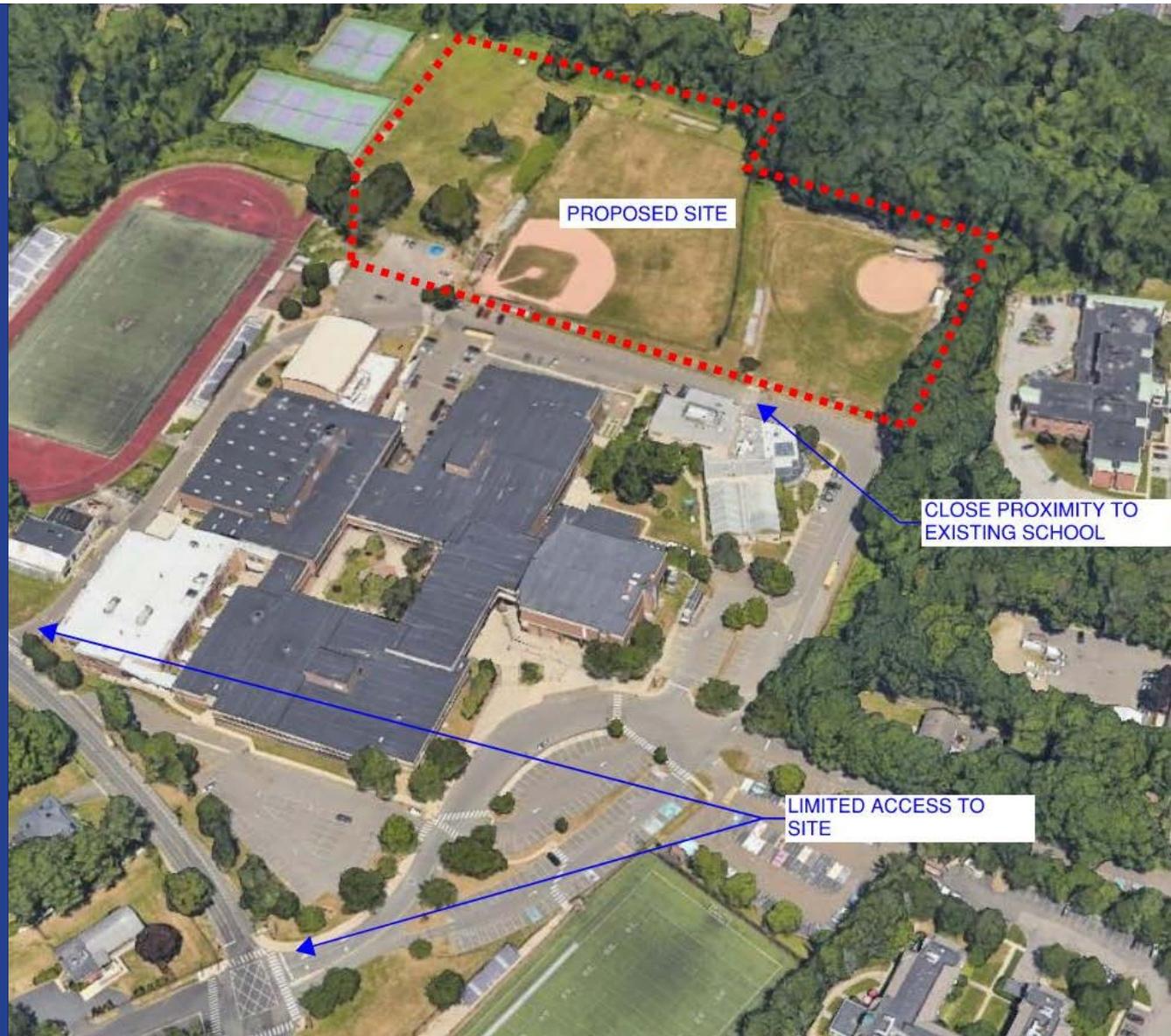
- Tight site
- Residential area, limited access from major highways
- Construction access through active campus requires critical coordination with administration
- 40-feet of grade change from west to east
- Phasing of the foundations, structural steel, envelope and mechanicals vital
- Limited site storage area



Q5 – Site Concerns During Construction

Site Understanding

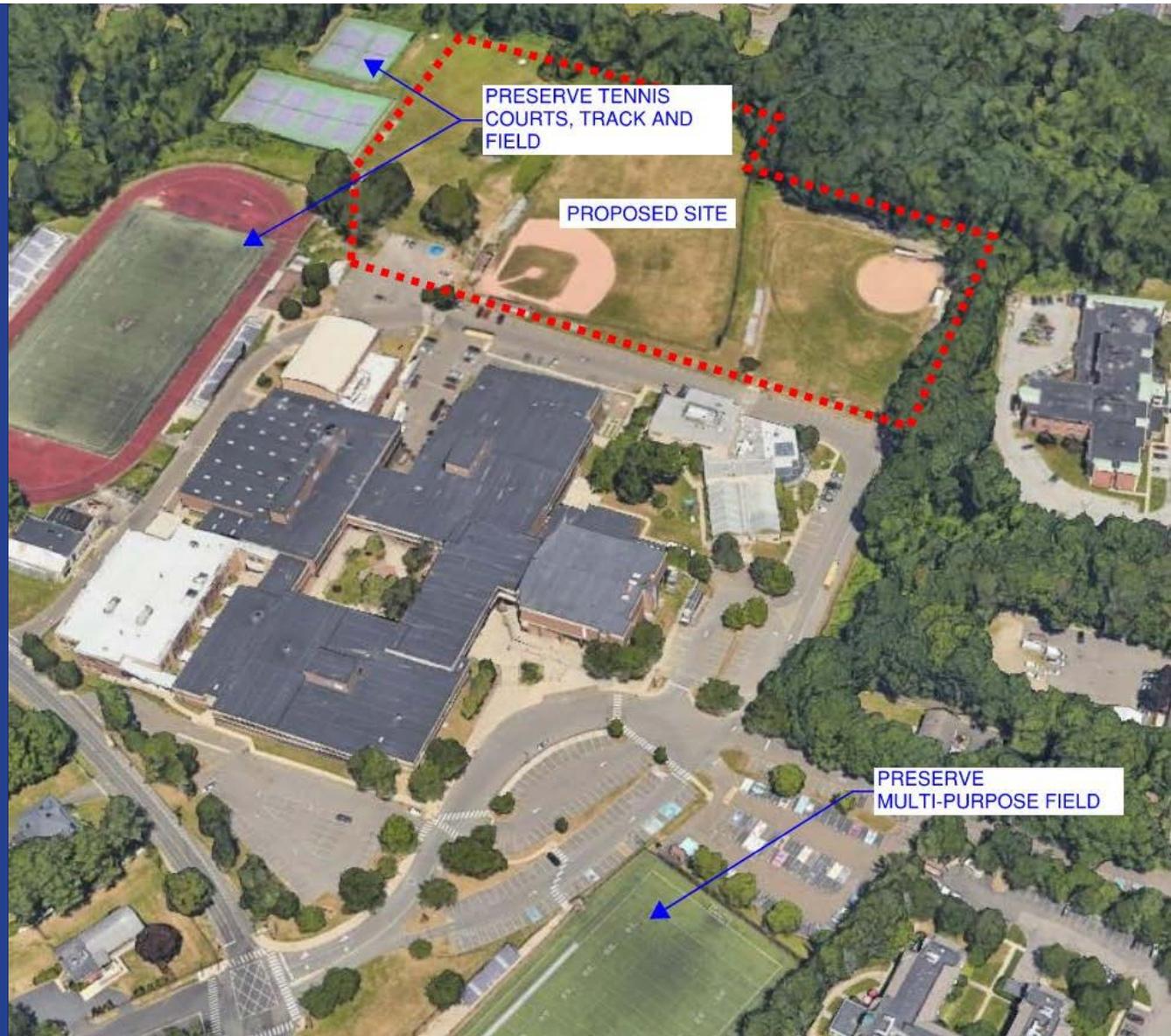
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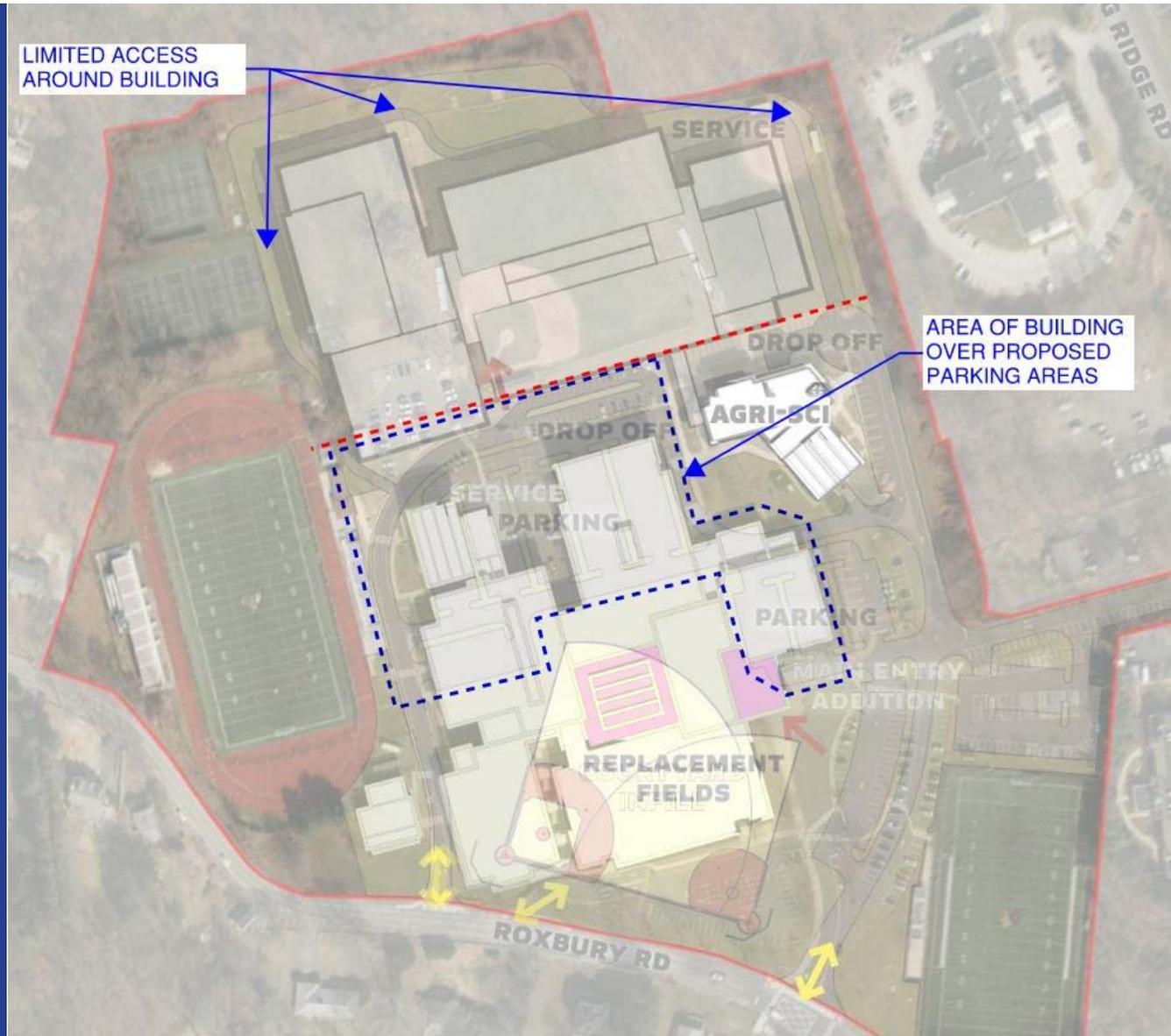
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Owner's Project Requirements Document for High Performance Building Commissioning

Project: M
M
M
E
Project Own
T
OPM: Coll
Approved:

Madison Elementary School

Owner's Project Requirements

components and should be adapted as needed to suit of the High Performance Building guideline intent. The Owner's Project Requirements document should start of design and furnished to the Design Team.

Updates to the Owner's Project Requirements document project delivery shall be made by the Owner/Design agreements coordinated with and agreed to by the Installer.

Owner's Project Requirements Document Commissioning

Table of Contents

1. General Project Information
 - Square Footage
 - Construction Schedule Target
2. Owner and User Requirements
 - Primary Purpose, Program and Use
 - Project History
 - Broad Goals
3. Environmental and Sustainability Goals
 - Energy Efficiency Goals
 - General
 - Siting
 - Building Façade
 - Building Fenestration
 - Building Envelope
 - Roof
 - Other
4. Indoor Environmental Quality Requirements
 - Intended Use
 - Occupancy Schedule
 - Accommodations for After-Hours Use
 - Pools
 - Lighting, Temperature, Humidity, Air
 - Acoustics
 - Occupant Ability to Adjust System Controls
 - Types of Lighting
5. Equipment and Systems Expectations
 - Heating Hot Water Systems
 - Chilled Water Systems
 - Air Handling Systems
 - Split System Air Conditioning Units
 - Air Terminal Units
 - Thermal Heating Units
 - Exhaust Fan Systems
 - ATC Controls
 - Domestic Hot Water
 - Lighting Controls

Overview

The purpose of this document is to provide the Owner with the Commissioning process. The Owner's goal is to utilize this information to inform the design and construction process. The intent of this document is to provide the Owner with the Commissioning process. The intent of this document is to provide the Owner with the Commissioning process.

SOUTH WINDSOR PUBLIC SCHOOLS

DREAM. ACHIEVE. INSPIRE.

Dr. Kate M. Carter
Superintendent of Schools
(860) 291-1205
Tracie D. Peterson
Assistant Superintendent
Curriculum and Instruction
(860) 291-1210
Calle J. McNamee
Assistant Superintendent
Personnel and Administration
(860) 291-1215
Chris M. Chermak
Director of Finance & Operations
(860) 291-1209

September 29, 2021

Director
Department of Administrative Services
Office of School Construction Grants & Review
450 Capitol Avenue – 2nd Floor
MS #520SC
Hartford, CT 06160

Re: Sole Source Request – Pleasant Valley Elementary School, South Windsor Public Schools
Project #132-0093 N, Phase 1 of 3

Dear Director:

South Windsor Public Schools is requesting the sole source procurement of seven (7) items for the Pleasant Valley Elementary School project. The use of specific items and systems listed below is critical to the district's infrastructure in order to be compatible and functional with universal systems already in use throughout the district. The School District had assembled the listed items for consideration and approval by the Public Building Commission (PBC).

1. Direct Digital Control System – Building Management System (Schneider Electric EcoStruxure, as installed by SNE Building Systems).
2. Access Control System (S-2 global software system located at Central office running an S-2 extreme controller and devices at PV access control).
3. Security Cameras – Avigilon Enterprise version.
4. Door Hardware Lock Cylinders (Vulcan Security Technologies).
5. Hardware – Master Key System (Vulcan Security Technologies).
6. Intrusion Detection (Sonitrol).
7. Classroom Teacher Enhancement System, Public Address (FrontRow)

The first five items were previously approved by the OSCG's Sole Source Committee in 2015 for the Orchard Hill project. The sixth item (FrontRow Classroom Teacher Enhancement System with integrated Soundfield, Public Address and Intercom Systems) is currently being installed into other South Windsor school facilities; while much of this item will be installed during the later FF&E phase of the project, the pathways and box locations will be installed during Phase I.

Q6 - Special Construction District Standards and Programs

- Educational Specifications
- Owner's Project Requirements/Basis of Design (Cx Agent)
- Coordination with stakeholders/staff
- Town staff reviews (IT, security, AHJ)
- Sole Source Approvals
- CTDAS Contracts

Q6 – Special Construction FF&E and Move Management Phase

- Budget Management
- Design / Planning
- Procurement
- Vendor Coordination / Storage
- Move Coordination (In And Out)

Communication and Coordination

South Windsor Public Schools

Move and FF&E Schedule

June 2020							July 2020						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6	7	8	9	10	11	12	13
14	15	16	17	18	19	20	21	22	23	24	25	26	27
28	29	30					28	27	28	29	30	31	

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
May 31	Jun 1	2	3	4	5	6
	START PREP FOR ABATEMENT AT ET	TRADES PUNCHLIST				
		ME OBrien - Playground Installation				
7	8	9	10	11	12	13
		TRADES PUNCHLIST				
		ET PHL Delivery		G. Donovan installing floor protection ET/PRS		
				Lakeshore Delivery	PRS PHL Delivery	
		ME OBrien - Playground Installation				
14	15	16	17	18	19	20
	FF&E INSTALLATION - RT & RHL					
	RED THREAD - DELIVER AND INSTALL OF ADMIN OFFICES	School Specialty Delivery			RED THREAD - PRS FURN. DELIV. 3 TRUCKS TO ET	
	MOVE CONTENTS (WB MEYER) (ET)					
	ME OBrien - Playground Installation					
21	22	23	24	25	26	27
	FF&E INSTALLATION					
	RED THREAD - DELIVER AND INSTALL MEDIA CENTER AND CLASSROOMS				RED THREAD - PRS STEEL CASE DELIV. 1 TRUCK TO ET	
				RED THREAD - HALL PUB SEATING		
28	29	30	Jul 1	2	3	4
	FF&E INSTALLATION					
	RED THREAD - FINISH INSTALLS IF NECESSARY					4TH OF JULY HOLIDAY

Project Leaders 3 1/14/2020 8:54 AM

CONNECTICUT STATE FUNDED PROJECTS



Audit Requirements	Responsible Party		
	OWNER	OPM	CM / GC
General Financial Information			
<input type="checkbox"/> General Ledger by Account			
<input type="checkbox"/> General Ledger by Vendor (needs to reconcile with above)			
<input type="checkbox"/> Summarized Cost by Vendor List (Invoice Logs)			
<input type="checkbox"/> Cash Disbursement Journal – Checks Issued			
<input type="checkbox"/> Audited Financial Statements			
Financing Documentation			
<input type="checkbox"/> Official offering statements for all bonds issues (if applicable)			
<input type="checkbox"/> Bank Statements for Loans			
<input type="checkbox"/> Documentation of "Other" funding and refunds associated with the Project.			
<input type="checkbox"/> Rebates			
<input type="checkbox"/> Energy Incentives			
<input type="checkbox"/> Alternate Funding Sources (list all that apply)			
<input type="checkbox"/> Documentation of site or facility acquisition costs (if applicable)			
<input type="checkbox"/> Closing Statements			
<input type="checkbox"/> Land / Building Appraisals			
<input type="checkbox"/> Real Estate Contracts			
<input type="checkbox"/> Purchase Agreements			
Project Costs			
<input type="checkbox"/> Original Bid Documents			
<input type="checkbox"/> All addenda			
<input type="checkbox"/> Rebids			
<input type="checkbox"/> Proof of Bid Withdrawals			
<input type="checkbox"/> Bid Disqualifications Reasons			
<input type="checkbox"/> Evidence of Public bidding (newspaper invoices or ads for anything over \$10,000)			
<input type="checkbox"/> Bidding summaries (bid tabulation) for all sub-contracts			
<input type="checkbox"/> Construction Contract with Bid Specifications (Division 0)			
<input type="checkbox"/> Subcontractor contracts with CM			
<input type="checkbox"/> All Change Orders, with Associated COR's and Backup			
<input type="checkbox"/> State Change Orders with CM Contingency Delineation			
<input type="checkbox"/> Final OSCG&R Eligibility Determination Letters			
<input type="checkbox"/> Contractor's Application for Payment (Contractor Invoices)			
<input type="checkbox"/> Subcontractor invoices (for projects with a CM)			

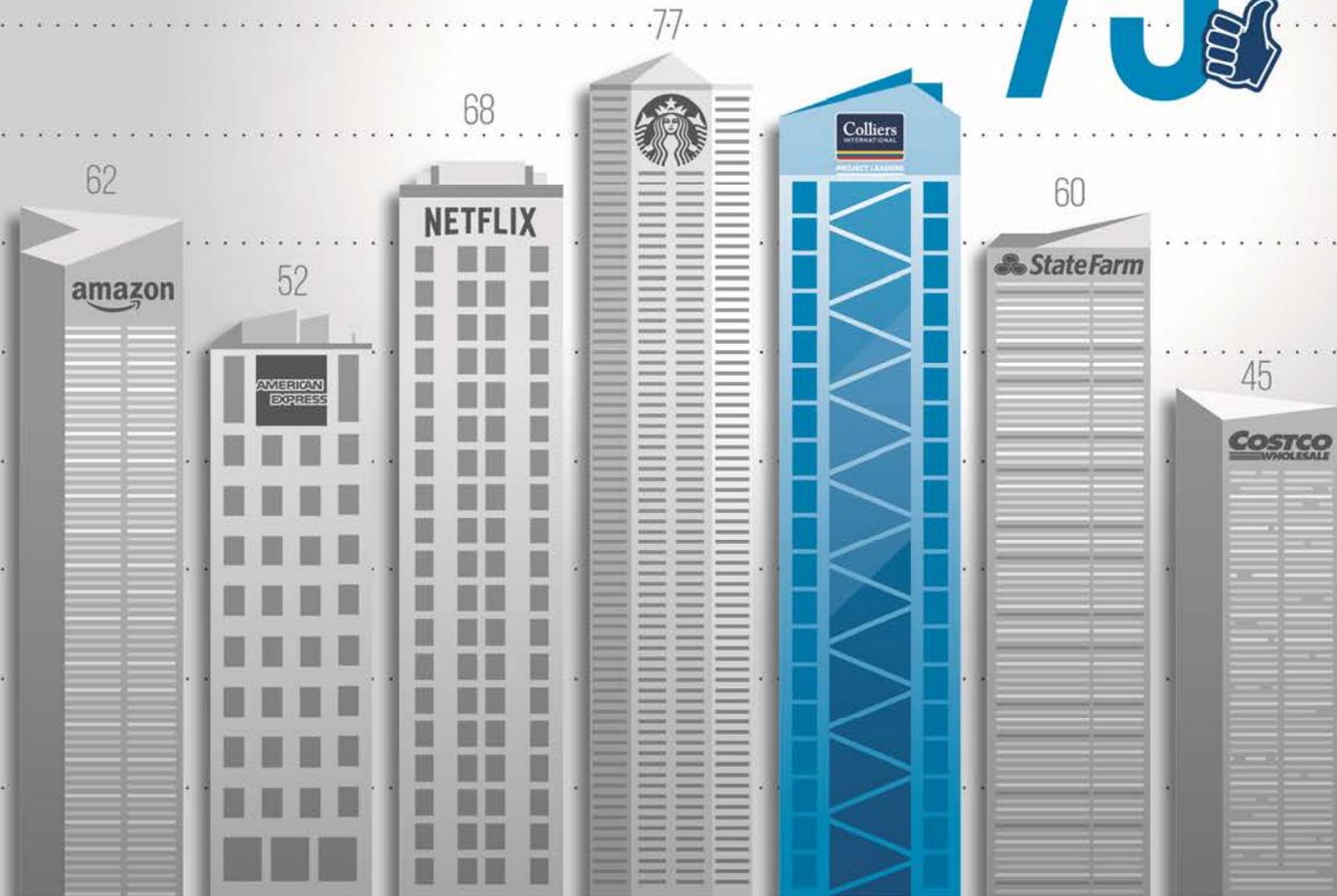
Q6 – Special Construction Closeout and Audit

- Starts at Beginning of the Project
- Punchlists
- Training
- O&M Manuals (by CM)
- As-builts (by CM)
- Final Commissioning Report (CTHPB Requirement)
- General Ledgers

WHY DOES NPS MATTER?

The **Net Promoter Score®** is an index that measures the willingness of customers to recommend a company's products or services to others. It is used as a proxy for gauging the customer's overall satisfaction with a company's product or service and the customer's loyalty to the brand.

75





Section 4

The Colliers Advantage

Expertise The Colliers Advantage



Deep Bench of Professionals

Firm with many qualified professionals to properly manage and complete the project



In-House Subject Matter Expertise

Wide range of services and specialized expertise provided in-house throughout all phases of a project at no additional cost, E&C services at our disposal



OSCG&R Expertise

Experts in the OSCGR process from grant application through audit, guiding Stamford so it can properly closeout in a timely manner and receive the 5% retainage the state withholds



In-House Sustainability Expertise

Reduce your energy costs, utility consumption, and carbon footprint without the need to hire additional consultants



Project Leaders

Questions & Answers