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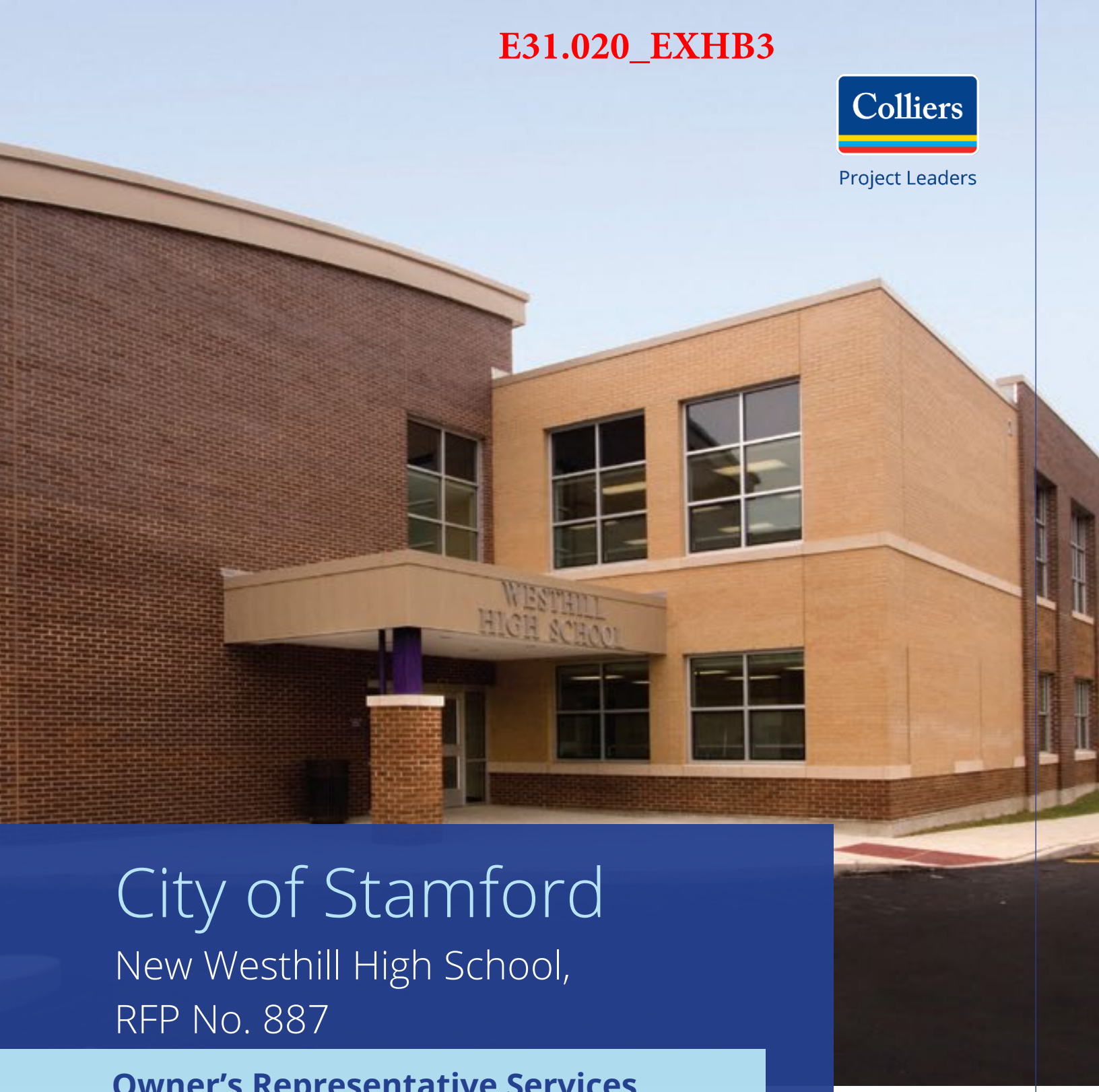

City of Stamford

New Westhill High School, RFP No. 887

Owner's Representative Services

October 27, 2022

Prepared for
Erik J. Larson
Purchasing Agent
City of Stamford

Prepared by
Charles E. Warrington, Jr., PE
Director, Project Management Services
Colliers Project Leaders

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Note: Colliers has provided our Fee Proposal under separate cover accompanying this submission.

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October 27, 2022

Mr. Erik J. Larson
Purchasing Agent
City of Stamford
888 Washington Boulevard
Stamford, CT 06901

Subject: ***Proposal to Provide Owner's Representative Services for the New Westhill High School, RFP No. 887***

Dear Mr. Larson:

Colliers Project Leaders was founded in 1996 and has operated for more than two decades with a fairly simple mission in mind – ***to be the premier provider of owner's representative services***. We strongly believe that our exclusive focus on this mission means that all of our resources, training, and vast experience with the Office of School Construction Grants & Review (OSCG&R) process will directly support the services provided on behalf of the City of Stamford.

As a recognized leader in the industry, Colliers has served numerous educational clients in Connecticut and throughout the Northeast in a variety of capacities, from the establishment of formal project management and financial monitoring processes to the technical review and commissioning of complex buildings. These clients have turned to Colliers for assistance with their capital needs because of our:

- 25+ year history providing comprehensive owner's representative expertise for a wide range of educational clients and building types.
- Portfolio of more than ***450 Education Projects*** including over ***125 Public K-12 School Projects***.
- Extensive experience and knowledge with public K-12 construction, renovation and modernization projects, many high-performance building projects, and several new and/or addition/renovation projects on the site of an occupied school.
- Staff of experienced engineers, architects, construction professionals, and building operators whose complementary perspectives provide leadership and direction at every stage of the capital improvement project.
- Leadership in the field of sustainability which results in streamlined processes for LEED requirements as well as valuable life-cycle cost savings with strong attention to operations and maintenance issues.

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- In-house building commissioning and energy efficiency capability with a sizable staff of engineers well versed in the design of proper and efficient building systems, and the operational aspects of such systems.
- Colliers360® web-portal which will allow real time access to documents, budgets, and schedules from the convenience of any smart device.

Based upon our understanding of the project, our depth of knowledge with the State of Connecticut, and our overall expertise in the public K-12 sector, we are confident in our ability to lead you through the construction process and to a successfully completed project.

We look forward to formally presenting our qualifications, approach, and project team to you in person and are excited about the prospect of partnering with you as you embark upon this exciting project to create the ideal learning environment for your students.

I am personally committed to helping you meet your objectives. Colliers acknowledges that we received and reviewed Addendum No. 1 issued on October 20, 2022. If you have questions or require additional information, you can contact me at charles.warrington@collierseng.com or (860) 235-5313.

Sincerely,

Charles E. Warrington, Jr., PE
Director, Project Management Services

History of the Firm

Colliers Project Leaders

Colliers Project Leaders was formed as Strategic Building Solutions, LLP on December 3, 1996. On January 13, 2000, Strategic Building Solutions discontinued its use of LLP and registered as Strategic Building Solutions, LLC. On April 20, 2015, Strategic Building Solutions, LLC became part of the Colliers' team and conducted business as Strategic Building Solutions, LLC (dba Colliers International). On June 24, 2019, the company changed its name and now operates as Colliers Project Leaders USA NE, LLC.

We have operated for the past two decades with a fairly simple mission in mind – to be ***the premier provider of owner's representative services in the marketplace.*** Our focus upon owner's representation provides our clients with the assurance that they are receiving services which are at the heart and soul of our firm's existence.

Colliers' Project Management team provides clients with managerial, technical and analytical support for the planning, design, construction, and commissioning of major capital school construction projects. Our work has been guided by a belief that many cities and towns do not have the internal resources with the time and/or expertise necessary to fully advocate for the needs of their many stakeholders throughout the planning, design, and construction process. With this reality in mind, we provide clients with the needed expertise to supplement their existing capabilities and to help ensure their building initiatives are professionally planned and managed.

$7+ Billion Under Management

120+ Project Managers In The Northeast

115+ Current Public Sector Projects

Our team of seasoned professionals currently includes more than 120 experts of virtually all aspects of building planning, design and construction. Additionally, with over $7+ Billion in projects currently under management, our team is extremely familiar with the latest trends and issues affecting the design and construction industry.

Relevant Experience

Public K-12 Experience

Colliers has a well-established reputation for providing owner's representative services within the education marketplace and is well-versed in guiding our clients through the complex process of capital construction projects.

For more than two decades, Colliers has provided owner's representative services for numerous clients. Our public-school practice and portfolio of satisfied clients continues to grow because of our reputation for quality service, client satisfaction, and unique expertise working within school environments.

The table below provides a sampling of our many public K-12 school clients. ***In addition, Colliers provided at the end of this section descriptions highlighting projects of similar nature.***

Public K-12 School Experience		
Clients		
Achievement First	Glastonbury Public Schools	Old Saybrook Public Schools
Assabet Valley School District	Granby Public Schools	Oxford Public Schools
Bloomfield Public Schools	Hartford Public Schools	Regional School District 14
Branford Public Schools	Holyoke Public Schools	Rocky Hill Public Schools
Bridgeport Public Schools	Madison Public Schools	Seymour Public Schools
Bristol County Agricultural SD	Mansfield Public Schools	Simsbury Public Schools
Cape Cod Regional Technical HS	Middletown Public Schools	South Windsor Public Schools
Cheshire Public Schools	New Fairfield Public Schools	Stonington Public Schools
Clinton Public Schools	New Haven Public Schools	Toms River Regional Schools
East Hampton Public Schools	New London Public Schools	West Bridgewater Public Schools
Easthampton Public Schools	Newington Public Schools	West Haven Public Schools
Fairfield Public Schools	Newtown Public Schools	West Springfield Public Schools
Farmington Public Schools	North Adams Public Schools	Westbrook Public Schools
Fitchburg Public Schools	North Haven Public Schools	Weston Public Schools
Foxborough Public Schools	Northborough Public Schools	Windham Public Schools
Gardner Public Schools	Norwalk Public Schools	Worcester Public Schools

As requested in the Request for Proposals, we are providing responses for each of the paragraphs listed under "Qualifications/Qualifications Package" in this section.

Colliers Project Leaders

Experience Serving Projects of Similar Size and Scope

Colliers has provided owner's representative services for many projects in multiple school district throughout Connecticut as noted above. With respect to projects similar in size to the Stamford Westhill High School project, there are very few districts in Connecticut that have constructed projects of this specific size and project budget.

Our largest public school construction project was the Branford Francis Walsh Intermediate School that was an extension/alteration project consisting of 169,000 GSF with an $88.2 Million budget. We are currently serving on the New Fairfield High School project that is a 143,000 GSF new high school with an $84.2 Million budget. We also served Region 14 on their Nonnewaug High School renovation project that was 169,827 GSF with a $63.8 Million budget. We are currently serving as the owner's representative (program manager) for three concurrent school renovation projects for the City of Hartford with a total project budget of $144 Million.

Outside of Connecticut Colliers has served as the owner's representatives on larger public-school projects in Massachusetts. Namely, Diman Regional Vocational Technical High School ($293.5 Million) and Cape Cod Regional Technical High School ($128.1 Million). Colliers has also served as the construction administrator for multiple large-scale higher education projects for the Department of Administrative Services Division of Construction Services as well as the University of Connecticut.

In addition to the individual project descriptions provided in this package, we have provided more specific information below as requested in the RFP.

Public K-12 School Experience	
Branford Francis Walsh Intermediate School	
Principal Contact: **Contact Email:** **Contact Phone Number:**	Peter Banca (Building Committee Chair) peterbanca@aol.com (203) 488-1779
Project Architect:	Antinozzi Associates Inc. Michael LoSasso 271 Fairfield Ave. Bridgeport, CT 06604
Total Project Cost:	$88.2 Million (Budget), Projected $84.5 Million
Number of Change Orders:	233 Individual PCOs
Brief Explanation for Number of Change Orders:	Total value of change orders issues was $4,646,498. 35 of the change orders were due to Owner Request with one consisting of $2.7 Million for pool improvements that were not part of the original scope. $1,651,232 in change orders were due to Field Conditions as the project was partially alterations/renovations. 24 PCOs amounting to $587,000 were due to field conditions at the existing pool.

	$141,803 in change orders were due to errors or omissions attributed to the design team. *Note: The value is based solely on Colliers professional opinion as to the cause.*
Time Extensions:	The base bid project was completed per the original schedule. However, the project was extended due to an owner request to do the major upgrades to the pool.
How our services succeeded in advancing the owner's interest:	Colliers leadership in the preliminary planning for the complex phasing of the project as well as our move management lessened the burden on the district. Certain classrooms and functions were required to be moved to temporary locations prior to moving to their final location. Colliers coordinated all the moves as well as the movers ensuring that operations were maintained. Our proactive budget management and diligent review of change orders during the construction phase permitted the owner to make major improvements to their pool at the end of the project as well as come in under budget by approximately $3.7 Million.

Public K-12 School Experience	
Region 14 – Nonnewaug High School Renovations	
Principal Contact: **Contact Email:** **Contact Phone Number:**	George Bauer (Building Committee Chair) gbauer@ctreg14.org 203-558-6994
Project Architect:	The S/L/A/M Collaborative, Inc Kemp Morhardt 80 Glastonbury Boulevard Glastonbury, CT 06033
Total Project Cost:	$63.8 Million
Number of Change Orders:	221 Individual PCOs
Brief Explanation for Number of Change Orders:	Total value of change orders issues was $3,606,091. $2,315,346 was due to owner requests consisting of 84 individual PCOs. $1,230,245 were attributed to field conditions. This consisted of 91 individual PCOs. $580,270 in change orders were due to errors or omissions attributed to the design team. *Note: The value is based solely on Colliers professional opinion as to the cause.*
Time Extensions:	The project is still ongoing due to problems with the MEP design issues which Colliers facilitated 26 major trade meetings to resolve and we are still facilitating the final resolution of them. The issues are close to being resolved.
How our services succeeded in advancing the owner's interest:	The project is complex phased occupied renovation project approximately 135,000 GSF. Colliers managed all the phase moves during construction which can be very stressful on the school administration and staff. Due to our budget management the client was able to procure a new synthetic turf field, lighting and bleachers within the project budget. Colliers also led the process of replacing the existing on-site septic tanks that were not originally intended to be replaced.

Public K-12 School Experience	
East Hampton High School	
Principal Contact: **Contact Email:** **Contact Phone Number:**	Paul Smith (Superintendent) Psmith@easthamptonct.org (860) 539-5959
Project Architect:	The S/L/A/M Collaborative, Inc Kemp Morhardt 80 Glastonbury Boulevard Glastonbury, CT 06033
Total Project Cost:	$51.7 Million (Original Budget), $50.8 Million (Final Cost)
Number of Change Orders:	365 Individual PCOs
Brief Explanation for Number of Change Orders:	Total value of change orders issues was $1,544,585. $330,260 were attributed to owner's request. This consisted of 67 individual PCOs. $657,113 were attributed to field conditions. This consisted of 91 individual PCOs. $418,274 in change orders were due to errors or omissions attributed to the design team. *Note: The value is based solely on Colliers professional opinion as to the cause.*
Time Extensions:	The base project was completed per the original schedule however due to elevated lead and copper levels in the domestic water, the project extended approximately one-year to resolve the issue. The school is served by a private well system thus the potable water systems was governed by CTDPH and CTDEEP regulations. This was at no fault from the construction manager.
How our services succeeded in advancing the owner's interest:	Colliers detailed and proactive budget management aided the owner in delivering the project on schedule (with exception of water issues noted above) and under budget by $880,000. Colliers saved the owner money on a major masonry change order estimated to cost $200,000 via change order. We recommended bidding the change order in lieu of a change order to the masonry contractor that resulted in a savings of approximately $107,000. Additionally, we helped improve the health and safety of the occupied construction by supporting a proposal by the construction manager to utilize CM contingency to add another superintendent to the project. Although the building committee was hesitant to approve $93,000 for such expenditure, within weeks they agreed that the addition of the superintendent was in the best interest of the students and staff but overall, the project as a whole. Finally, we believe our expertise in the OSCG&R process and relationships with their staff has led to successful closeout. Note, this project is still awaiting audit.

Public K-12 School Experience	
Stonington Deans Mill School Addition & Renovation Project	
Principal Contact: **Contact Email:** **Contact Phone Number:**	James Sullivan (Director of Finance) jsullivan@stonington-ct.gov (860) 535-5070
Project Architect:	Drummey Rosane Anderson (DRA Architects) Jim Barrett

	225 Oakland Rd South Windsor, CT 06074
Total Project Cost:	$35.9 Million (Original Budget), $33.4 Million (Final Cost)
Number of Change Orders:	132 Individual PCOs
Brief Explanation for Number of Change Orders:	Total value of change orders issues was $3,553,839. $2,315,346 was due to owner requests consisting of 84 individual PCOs. $2,918,775 were attributed to field conditions. This consisted of 87 individual PCOs. Of the $2.9 Million, $2 Million was due to abatement of PCBs that were not identified prior to budget development. *(Note: Colliers was not involved with the project at budget development.)* PCBs primarily from window caulk and caulk between structural concrete columns and CMU walls was the major culprit. Many options were explored to address than as this was required by the Environmental Protection Agency. Other major field conditions were due to unforeseen rock in the expanded site area. Borings were taken in the area but did not indicate the individual boulders that were uncovered during excavation. $256,557 (1.02% of the GMP) in change orders were due to errors or omissions attributed to the design team. *Note: The value is based solely on Colliers professional opinion as to the cause.*
Time Extensions:	A one-year time extension was granted due to the abatement of PCBs required by the EPA. The construction manager did complete the project within the time extension. The existing portion of the building is now asbestos and PCB safe. The existing structural columns were encapsulated due to the leaching of PCBs into them. They could not be removed due to structural considerations.
How our services succeeded in advancing the owner's interest:	Upon retaining Colliers, we immediately identified a schedule flaw to the project. The town had already passed the referendum for the project which made all costs eligible for reimbursement moving forward subject to the grant commitment. The building committee was going to wait one-year to start the design of the project when they received the grant commitment. Colliers evaluated the escalation cost of waiting one year for the project and it exceeded $1 Million for this project. As such, the owner proceeded immediately saving $1 Million in calculated escalation. The owner was in the midst of hiring the design team and signing a contract when Colliers was brought on board. The contract provided by the architect lacked the depth of protection that Colliers modified AIA contracts possess. In addition, the contract did not reference any project schedules or control budgets for the architect to be held to. The owner ended up using Collier's modified AIA contracts that provided them better protection. The same applies to the construction manager's contracts as well. At the completion of the project the building committee chair expressed his appreciate for our efforts and the expertise we brought to their project specifically noting our diligent efforts to manage and protect their budget but also to facilitate solutions during construction (e.g. PCB issue) and bring the right professionals to the table to resolve issues.

Assistance with Procurement of Professional Services, Cost Estimating, Value Management and Constructability Reviews

Later in our package we provide our Project Approach to our projects. Contained within this section we reference all the services and attributes listed in the Request for Proposal, but we'll opine further here.

With respect to procurement of professional services, Colliers has successfully assisted many municipalities procure professional services under the requirements of C.G.S. §10-287. This includes architectural design services, construction manager services, commissioning services, hazardous materials consultant, third party peer reviews, third party code reviews, storm water monitoring, move services, materials testing services. We're also very familiar with the Connecticut state contracts that municipalities may use for procurement of services as well.

We believe that the level of detail and thoroughness of scope sets us apart from our competitors. Specific to the architect and construction manager (assumed) selection, we recommend utilizing a two-phase selection process given the importance that these two entities play in the project. We recommend solicitation of qualifications through an RFQ (Request for Qualification) first. Through this first phase submitting firms are shortlisted to no more than four firms to invite proposals from via the RFP (Request for Proposals) process.

The drafting of the Request for Proposals is vital in securing comprehensive services from the architect and construction manager. We pride ourselves on developing comprehensive scopes of services that the architect and construction manage can respond with quality proposals that reduce additional services later in the project.

In addition to providing a clear scope of the project, our RFPs include a baseline schedule, an A/E and CM control budget for the construction budget and FF&E (Furniture, Fixtures and Equipment) budget (applied to the architect only), our customized AIA contracts for the respective services, a common AIA A201 General Conditions of Construction, insurance requirements and any other specialty design services required. We provide them as much information on the project as possible so that they can provide a comprehensive proposal. Failure to have a detailed RFP for these services may lead to add services that can be avoided. Colliers can provide multiple samples of our RFQs and RFPs upon request.

Through the design phase, and as noted in the RFP, our contracts require cost estimates to be provided at the schematic design (30%), design development (60%), and construction documents (90%) phases. As required in the RFP for our services, we'll require a 100% construction cost estimate to be provided as well.

At each of these phases we'll conduct and manage an estimate reconciliation process that pairs the architect's professional estimate to the construction manager's estimate. *(Note, should a construction manager delivery not be utilized, we would recommend hiring of a third-party estimator which we can facilitate.)* We hold an all-day reconciliation meeting comparing and contrasting the estimates in detail while identifying value management opportunities throughout the process. We compile a list of value management items for the owner's consideration and ultimate approval, and we do not remove any items from the list unless requested to do so by the owner.

In our package we are providing a sample of a design review. We believe that our in-house, multi-disciplined design reviews provide valuable improvements to the construction documents ultimately leading to reduced change orders.

Colliers will also develop a simple macro-schedule (Gantt style) and detailed milestone schedule to manage the project schedule to. These schedules are updated and shared with the project team. Once in construction the contractor or construction manager is responsible for preparing the construction schedule which we'll review monthly to ensure the project maintains on schedule.

Office of School Construction Grants & Review (OSCG&R) Experience

As the owner's project manager for multiple public-school districts in Connecticut, Colliers is well versed with the constantly evolving process of the OSCG&R. Providing services from pre-referendum, planning and studies through project closeout, we are knowledgeable in all aspects of the OSCG&R process. Coupled with our personal relationships with the OSCG&R staff, this has led to our success in the Connecticut K-12 public sector as owner's representatives. Our in-depth knowledge of submitting grant applications, space standard waivers, grant reimbursement requests, notwithstanding legislation, as well as an in-depth understanding of eligible and ineligible costs allow us to identify pitfalls in the grant process and maximize reimbursement to municipalities.

Experience Working on LEED Silver or greater certified buildings

Contained later in this package is page highlighting our experience in LEED certified buildings. One advantage that Colliers Project Leaders has in addition to LEED AP accredited professionals on staff, we also have our own in-house Commissioning and Energy Services division at our disposal. We understand that a commissioning agent will be retained separately but we have this resource available to our project management team 24/7.

Experience Working with "At Risk" Construction Managers & Guaranteed Maximum Price (GMP) Contracts

Colliers has extensive experience working with Construction Managers (CM), where the CM is at risk with a GMP. In fact, almost all of our current Connecticut school projects are being delivered by a CM with a GMP. For each of our CM projects, Colliers has developed and negotiated the Owner/Contractor contracts for our clients. Utilizing our modified AIA agreements, our clients have a very "Owner" friendly agreement with their CM's. Once the agreement is in place, and bids have been received, Colliers has extensive experience reviewing GMP amendments. Our review of the amendments has saved our clients' time and money.

Through the review of many GMPs but practically every construction manager in the state who performs Connecticut K-12 work, we have become intimately familiar with how each of them packages their GMP. It's

vital to ensure that the CM is not double-dipping on services or including exceptions or clarifications for work that they own by contract. Eliminating allowances or costs that are deemed ineligible by OSCG&R is also important to identify during the review of the GMP. By asking for their general conditions early in the RFP stage, we can compare them to those included in the GMP and ensure they are not overcharging the owner.

We're also very familiar with awarding of early packages. The delivery of early packages versus approval of early awards are two distinct topics. The primary consideration between them is understanding where the bids stand versus the construction budget. We caution owners of awarding early packages without understanding the full impact to the construction budget. Once contracts are awarded, it's very difficult to stop them once they've started. If the full GMP proposal comes in over budget after awarding early packages, difficult decisions must be made to bring the project back into budget.

Working with Communities and Government on the Local and State Level

Colliers has been working with many municipalities for over two decades to ensure their construction projects are successful. Generally, it starts with gaining local support, through pre-referendum support services and carries through grant application submissions and the many local and state regulatory approvals. We know how important it is for all stakeholders to feel involved in the process. Colliers often leads public information sessions to help citizens understand where we are in the process and what it may mean to them.

While easing the minds of citizens of the Town, we are also working with the local and state regulatory agencies to ensure our projects receive all the necessary approvals. During the design phase of all of our projects, we create very detailed "Milestone Schedule" to denote when specific approvals are needed. Most Towns require multiple agency approvals, and a regimented series of steps need to be followed. We outline those steps with our milestone schedule and manage the parties required to meet with the timely submissions. This level of management also carries through with any required state or federal approvals. ***On the state level, most approvals need to go through the OSCG&R or DEEP. Having worked very closely with both departments, and knowing the key personnel within each office, we have successfully shepherded all our projects through their approval processes.***

Claims and Financial Conditions

Colliers has provided statements regarding any claims and our financial conditions later in this proposal.

LEED Public K-12 Experience

From the early days of the "green building" movement, Colliers has positioned itself as a forerunner within the industry and has been an active participant in supporting its clients as they endeavor to create functional and sustainable facilities. Our experience on LEED projects has helped us master the process and save owners time and money going through the certification process.

As active members of the U.S. Green Building Council (USGBC), Colliers has been a leader in the advocacy of the sustainable building movement. Our professional staff has received formal LEED training with a significant number having achieved LEED Accredited Professional Certification.

Colliers' LEED Project experience includes more than 200 LEED Certified Buildings

We are pleased to provide below an overview of the LEED project experience as a sample of the breadth and depth of our experience as well as highlights of projects similar to the New Westhill High School Project.

Basic Certification	Silver Certification	Gold Certification	Platinum Certification
40+ Buildings	70+ Buildings	70+ Buildings	15+ Buildings

- West Springfield High School — LEED Silver
- Southwick-Tolland Regional School District's High School — LEED Certified
- North Adams' Colegrove Park Elementary School — LEED Gold
- Narragansett RSD's Templeton Elementary School — LEED Silver
- Granby's East Meadow Elementary School — LEED Silver

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New Fairfield Public Schools

New High School & Meeting House Hill School

New Fairfield, CT

Project Overview

Colliers provided pre-referendum support and architectural selection services for the new High School and Meeting House Hill School Project.

The New Fairfield Public Schools passed referendum to build a $84.2 Million High School on the site of the existing campus and construct a $29.2 Million addition onto Meeting House Hill School with Colliers engaged to provide project management services.

The project calls for additions to Meeting House Hill School to accommodate the Consolidated Early Learning Academy (CELA) for PreK-1 and for conversion of the existing facility to serve Grades 2 through 5. The new CELA will encompass approximately 44,000 square feet and the high school is planned to be 143,000 square feet of new construction.

Services Overview

As part of our pre-referendum services, Colliers provided project data and counseling to the District for inclusion into materials prepared to support and substantiate the proposed project.

Colliers also assisted the District with the Office of School Construction Grants & Review (OSCG&R) grant application process.

In addition, Colliers worked collaboratively with the district and the permanent building committee to retain professional architectural services through a quality-based selection process.

After referendum, Colliers was engaged to provide comprehensive project management services for the life of the project.

Completion

CELA – 2022
High School – September 2023

Project Size

CELA – 44,000 gsf
High School – 143,000 gsf

Project Budget

CELA – $29.2 Million
High School – $84.2 Million

Certification

CT High Performance

Services Provided

Project Management

Architect

JCJ Architecture
120 Huyshope Avenue
Hartford, CT 06106

Contractor

O&G Industries, Inc.

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www.cplusa.com

Client Contact

Dr. Richard Sanzo

Director of Business and Operations

203 312 5770

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Regional School District 14

Nonnewaug High School

Woodbury, CT

Project Overview

Colliers provided project management services for the addition and renovate-as-new alterations for the Nonnewaug High School. The high school is also home to the Ellis Clark Regional Agriscience and Technology Program that includes students from surrounding towns. The project included programmatic improvements to areas including Liberal Arts, Visual & Performing Arts, STEM and Athletic areas as well as the creation of flexible classroom spaces. Also included were operational improvements such as energy-efficient HVAC, electrical, and plumbing systems, as well as upgraded safety and security features and improved traffic flow that all meet ADA compliance and codes.

Services Overview

As project manager, Colliers served as the owner's representative for the entire school construction project. Colliers provided consultation services and advice by working closely with Region 14's architects/engineer, construction manager, Board of Education staff, relevant Town and State offices and officials, and the community at large.

Colliers was also responsible for reviewing and overseeing schedules for design and construction, project budgets, and cash flow projections. Colliers oversaw and coordinated detailed cost estimating and any required reconciliation between estimates and budgets.

During construction, Colliers monitored and reported on the contract manager, contractor, and subcontractor for compliance with all local, state, and federal requirements. Colliers also coordinated the completion and construction phase closeout of all projects.

Completion
November 2020

Project Size
159,827 gsf

Project Budget
$63.8 Million

Certification
CT High Performance

Services Provided
Project Management

Architect
The S/L/A/M Collaborative
80 Glastonbury Boulevard
Glastonbury, CT 06033

Contractor
O&G Industries, Inc.

www.cplusa.com

Client Contact
Anna Cutaia-Leonard
Superintendent of Schools
203 263 4339

John Chapman
Building Committee Member
203 395 6347

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East Hampton Public Schools

High School

East Hampton, CT

Project Overview

Colliers provided project management services for the additions and renovate-as-new project at the East Hampton High School.

This multi-phase project furnished dynamic space for 21st century learning within an existing single-story high school, while also meeting current life-safety and accessibility codes, providing appropriate levels of security, and improving building energy efficiency, indoor air quality, and acoustics.

The building includes approximately 93,000 gsf of academic, student and community space renovation and an addition of approximately 28,000 gsf. The addition consists of a new science wing, a lecture hall, and expanded cafeteria and gymnasium areas. The renovation includes abatement of hazardous materials, completely new building systems, and reconfiguration of the interior to create a more efficient and effective use of space.

Services Overview

As project manager, Colliers managed and provided oversight of the construction phase including conducting weekly site visits during construction, assisting in the coordination and smooth transition of the school operations process, and facilitating problem solving and communication among the project team.

In addition, Colliers reviewed and provided comments and recommendations to the construction manager (CM) baseline and progress schedule submittals, provided detailed reviews of CM and architect requests for change orders, and reviewed and approved monthly CM and architect applications for progress payments.

Completion
Summer 2017

Project Size
121,000 gsf

Project Budget
$51.7 Million

Certification
CT High Performance

Services Provided
Project Management

Architect
The S/L/A/M Collaborative
80 Glastonbury Boulevard
Glastonbury, CT 06033

Contractor
Downes Construction Company, LLC

www.cplusa.com

Client Contact
Paul Smith
Superintendent
860 365 4000

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Town of Windham

Windham High School

Windham, CT

Project Overview

Colliers has been engaged to provide project management services for the renovate-as-new project at Windham High School.

The three-story masonry-faced steel building, which has not been renovated since its construction in 1970, will feature a new front façade and secure building entrances. In addition, the multi-phased project will create spaces for Windham's Early Childhood Program as well as the Windham Board of Education's Central Office.

The project will meet Connecticut High Performance Building requirements as well as current life-safety and accessibility codes while providing appropriate levels of security and improving building energy efficiency.

Services Overview

Colliers will provide project management services throughout the Project, including turnover, closeout (including during the warranty period), and State audit compliance.

As project manager, Colliers' responsibilities include, but are not limited to, analyzing constructability, advising the Town on project delivery systems and forms of contracts, serving as a single point of contact between contractors and designers, representing the Town at key meetings, monitoring the project schedule and budget, auditing quality assurance/quality control procedures, assisting in evaluating contractor payment requests, providing monthly reporting, and facilitating issue resolution.

Completion

December 2024

Project Size

222,568 gsf

Project Budget

$112 Million

Services Provided

Project Management

Architect

Friar Architecture, Inc.
21 Talcott Notch Road
Farmington, CT 06032

Contractor

Downes Construction Company

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www.cplusa.com

Client Contact

Dawn Thomacos

Director of Facilities

860 465 2335

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Town of Branford

Francis Walsh Intermediate School

Branford, CT

Project Overview

Colliers was engaged to provide project management services for the renovate-as-new and construction of a new academic addition to the Francis Walsh Intermediate School.

The alteration and extension of the school was subdivided into a commons building (existing) and an academic building (new). The commons building, consisting of approximately 53,000 gsf of renovated and repurposed existing space, contains the school's administration offices, school nurse's office, the school-based health suite, and shared athletic facilities including the natatorium and auditorium.

The new academic building, comprised of the new three-story 116,000 gsf addition, consists of shared classrooms, art classrooms, a family consumer science classroom, and specialized instructional spaces for special education. The addition's first floor also incorporates the cafeteria, kitchen, and service space for the technology workshop and storage. Construction of the school was phased and the school remained in operation throughout the construction process.

Services Overview

Colliers' responsibilities as project manager included: analyzing constructability, advising the town of project delivery systems and forms of contracts, managing the state grant process, serving as a single point of contact between contractors and designers, representing the town at key meetings, monitoring the project schedule and budget, auditing quality assurance/quality control procedures, providing monthly reporting, and facilitating issue resolution.

Completion
July 2022

Project Size
169,000 gsf

Project Budget
$88.2 Million

Certification
CT High Performance

Services Provided
Project Management
Commissioning

Architect
Antinozzi Associates
271 Fairfield Avenue
Bridgeport, CT 06604

Contractor
Fusco Corporation

www.cplusa.com

Client Contact
Hamlet Hernandez
Superintendent
203 488 7276

Colliers
Project Leaders

Town of North Haven

North Haven Middle School

North Haven, CT

Project Overview

Colliers provided project management services for the North Haven Middle School renovate-as-new and new academic addition project. The North Haven Middle School accommodates 773 students and consists of approximately 90,000 gsf of additions, 56,000 gsf of like new renovations and demolition of approximately 84,000 gsf of existing spaces.

The addition includes academic classrooms, a media center, science and art classrooms, as well as athletic fields. The renovations included two gyms, a cafeteria, a kitchen, and auditorium spaces as well as the outdoor track. The existing school remained operational during all phases of construction and the project was designed to meet the Connecticut High Performance Building Standards.

Services Overview

Colliers provided comprehensive project management services from the project's design through construction phases. Colliers worked with the Town, the Board of Education, the Building Committee, the Architect, and the Construction Manager to provide oversight, consultation, and advice in the development, planning, project management, design, estimating, construction, commissioning, and closeout of the project. In addition, Colliers oversaw the Construction Manager and Architect's development of programs, policies and procedures in order to maximize project reimbursement from the State of Connecticut.

Completion

August 2017

Project Size

146,000 gsf

Project Budget

$70 Million

Certification

CT High Performance

Services Provided

Project Management

Architect

Perkins Eastman
677 Washington Boulevard
Stamford, CT 06901

Contractor

Gilbane Building Company

www.cplusa.com

Client Contact

Gary Johns
Chairman, School Building Committee
203 239 5321

Edward Swinkoski, CPA
Director of Finance/Administration
203 239 5321

Colliers
Project Leaders

Capitol Region Education Council (CREC)

Ana Grace Academy of the Arts

Bloomfield, CT

Project Overview

Colliers was engaged to provide project management services, under contract with the Connecticut Department of Administrative Service (CT DAS), for the new CREC – Ana Grace Academy of the Arts Elementary & Middle School.

The state-of-the-art facility is a Pre-Kindergarten to eighth-grade school that combines two current CREC schools – CREC Ana Grace Academy of the Arts Elementary School and CREC Greater Hartford Academy of the Arts Middle School.

The new building is located on a 29-acre site and will accommodate 876 students. The East portion of the site will host a grass playfield, while the West portion will host playscapes, adjacent to the elementary school program. Plans also include middle school science labs, magnet-themed classrooms, and a combined lobby and art gallery space, which will surround a Black Box Theater for student performances.

Services Overview

As project manager, Colliers' responsibilities included, but were not limited to: reviewing the initial construction schedule; inspecting all work of the Construction Manager at Risk (CMR), subcontractors and any additional service providers; attending project meetings as well as reviewing and commenting on meeting minutes; preparing and providing to the CT DAS, CREC, and the Architect/Engineer monthly progress reports; reviewing, logging, and monitoring all the approval processes for the requests for change orders; updating the construction budget on a weekly basis; reviewing as-built drawings; and identifying potential problems, evaluating the conditions involved, and coordinating to prevent or minimize problems.

Completion
November 2021

Project Size
156,800 gsf

Project Budget
$108 Million

Services Provided
Project Management

Architect
Friar Architecture, Inc.
21 Talcott Notch Road
Farmington, CT 06032

Contractor
Bartlett Brainard Eacott, Inc.
70 Griffin Road South,
Bloomfield, CT 06002

www.cplusa.com

Client Contact
Steven Longo
Project Manager
860 713 5751

Colliers
Project Leaders

City of New London

Bennie Dover Jackson Middle School

New London, CT

Project Overview

Colliers has been engaged to provide project management services for the renovation and expansion of the Bennie Dover Jackson Middle School. The campus will be designed to house Grades 6 through 8 of the STEM Middle School and the International Education with Dual Language Middle School. The project will embrace a responsible environmental stewardship and be designed and constructed for energy efficiency and ease of maintenance, using sustainable materials and systems where possible, as required by the State of Connecticut High Performance Building Standards.

Services Overview

As project manager, Colliers' responsibilities include:

- Leading the City of New London through the OSCG&R Process
- Overseeing project budgets, schedules, and cash flow projections
- Overseeing and coordinating cost estimating and any required reconciliation between estimates and budgets
- Providing oversight for efficient and comprehensive communications and tracking of critical project elements
- Assisting in the monitoring and reporting on contract manager, contractor, and subcontractor compliance with all local, state, and federal requirements
- Attending and, where required, representing the City of New London at all project meetings
- Coordinating with the Commissioning Agent in conducting inspections and testing to determine conformance with design documents
- Assisting with the State of Connecticut High Performance Building Certification Process

Completion

August 2024

Project Size

126,000 gsf

Project Budget

$49.5 Million

Services Provided

Project Management

Architect

Perkins Eastman
677 Washington Boulevard
Stamford, CT 06901

Contractor

TBD

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www.cplusa.com

Client Contact

Kate H. McCoy

Executive Director for Strategic Planning, Government and Media Relations

860 271 4005

Town of Mansfield

New Elementary School

Mansfield, CT

Project Overview

Colliers has been engaged to provide project management services for the construction of the new Mansfield Elementary School, which will replace the Town's existing three elementary schools and bring all students together into one building.

The school's net-zero status will be accomplished mainly via geothermal and solar technologies. The building will be equipped to generate as much energy as it consumes by using 1,009 photovoltaic cells on its roof, 60 geothermal wells on the property, and other technology. When completed, the project will be one of the first Net Zero energy public schools in New England.

Services Overview

As project manager, Colliers will be the owner's representative for the entire school construction project, including turnover, closeout, and commissioning. Colliers' responsibilities include, but are not limited to:

- Analyzing constructability
- Advising the Town on project delivery systems and forms of contracts
- Serving as a single point of contact between contractors and designers
- Representing the Town at key meetings
- Monitoring the project schedule and budget
- Auditing quality assurance/quality control procedures
- Assisting in evaluating contractor payment requests
- Providing monthly reporting
- Facilitating issue resolution

Completion

December 2022

Project Size

80,000 gsf

Project Budget

$50 Million

Services Provided

Project Management

Architect

TSKP Studio
146 Wyllys Street, #1-203
Hartford, CT 06106

Contractor

Newfield Construction

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www.cplusa.com

Client Contact

Kelly M. Lyman
Superintendent
860 429 3350

South Windsor Public Schools

Elementary Schools Master Plan

South Windsor, CT

Project Overview

Colliers has been engaged to provide project management services for the South Windsor Public Schools' 10-Year Elementary Schools Master Plan.

Phase I included the construction of a new PK-5 school building for Orchard Hill Elementary School, which occurred on site while the original building remained in operation.

Phase II included the construction of two new school buildings to replace the Philip R. Smith and Eli Terry Elementary Schools. The students and staff of Eli Terry remained in their original building during construction. The occupants of Philip R. Smith relocated to the former Orchard Hill facility during construction of their new school and moved back upon completion of their new school in 2020.

Phase III calls for the construction of a new elementary school for Pleasant Valley. The existing school will remain in operation while the new school is constructed but ultimately be abated and demolished.

Services Overview

As the project manager since 2014, Colliers has provided comprehensive project management services for the Elementary Schools Master Plan. Colliers' services have included coordination with the Office of School Construction Grants & Review, pre-referendum studies, grant application development and submission, space waiver requests, budget development and management, and overall project oversight.

As the project manager for all three phases of the master plan, Colliers has provided consistent oversight for all four school projects. Phase I and II have been completed on time and under budget. Phase III is currently in the design phase and is tracking on schedule and within budget.

Completion

Phase I – September 2017
Phase II – Summer 2020
Phase III – September 2023

Project Size

Phase I – 75,600 gsf
Phase II – 125,000 gsf
Phase III – 101,288 gsf

Project Budget

Phase I – $33.5 Million
Phase II – $69.9 Million
Phase III - $58.5 Million

Services Provided

Project Management

Architect

Phase I – DRA Architects
Phase II – Moser Pilon Nelson Architects
Phase III – DRA Architects

Contractor

Gilbane Building Company

www.cplusa.com

Client Contact

Dr. Kate Carter
Superintendent of Schools
860 291 1205

Colliers
Project Leaders

Madison Public Schools

Capital Improvement Plan

Madison, CT

Project Overview

Colliers was engaged to provide project management for the 10-Year Capital Improvement Plan for the Madison Board of Education for long-range planning of maintenance and improvements to the existing school facilities and associated properties. The Plan addresses long term deferred maintenance issues, equipment replacement, re-programming of facilities, and proposed security upgrades.

Services Overview

Colliers' project management services included:

- Assisting the Madison Board of Education with the compilation of existing engineering studies and conditions assessments to create a 10-Year Capital Improvement Plan
- Creating a master planning spreadsheet that simplified project inputs to capture hard and soft costs, as well as escalation costs associated with each project
- Assisting with creating criteria for prioritizing projects within the 10-year plan
- Assisting the Board of Education with the presentation of the proposed plan to town boards and governing bodies

Colliers is currently assisting the Madison Board of Education with finalizing educational specifications, budgets, and schedules for an alternative program to the 10-Year Capital Improvement Plan.

Completion
Ongoing

Project Size
All BOE Facilities

Project Budget
$100 Million

Services Provided
Project Management

Planning

Architect
N/A

Contractor
N/A

www.cplusa.com

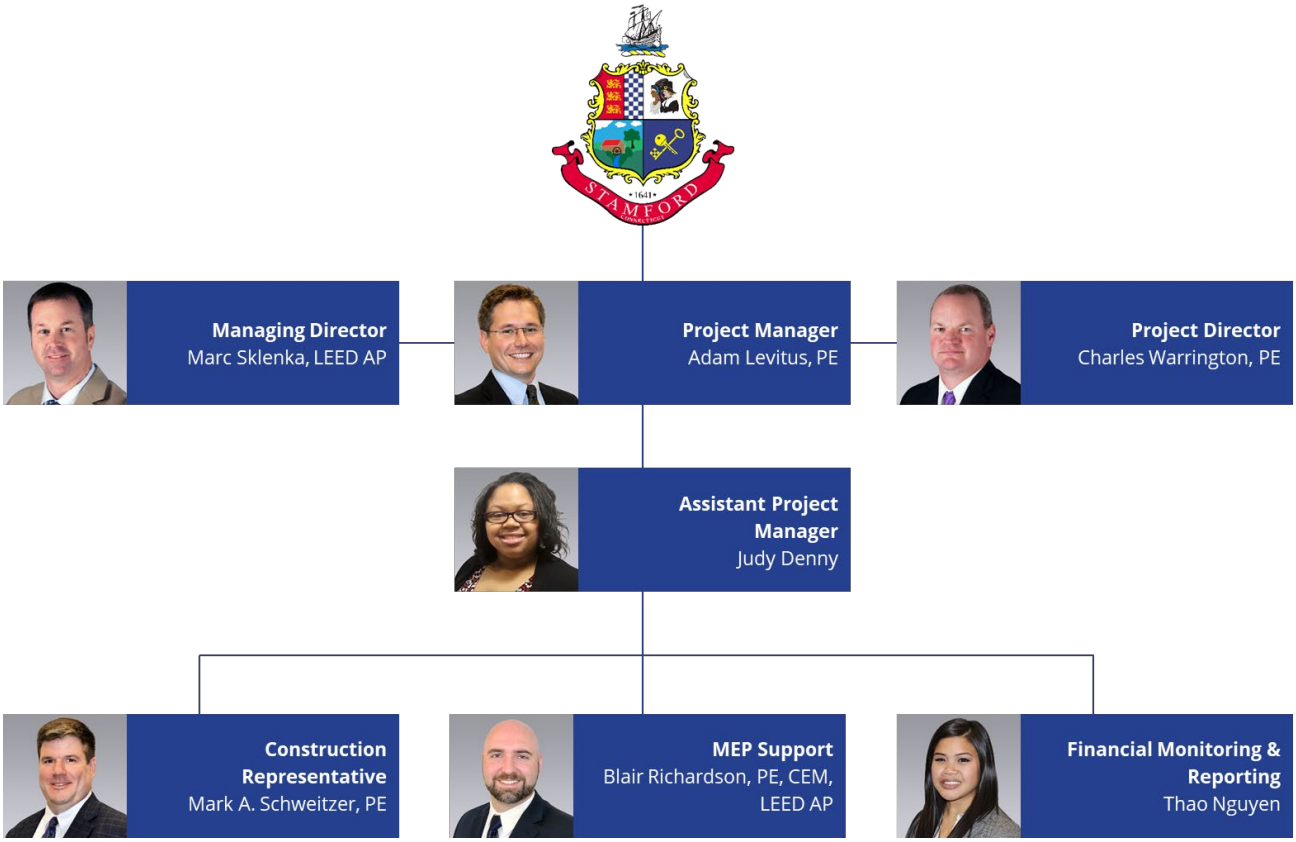
Client Contact
William McMinn

Facilities Director

203 245 6470

Key Personnel

Colliers is confident that we are uniquely qualified to deliver the necessary owner's representative services for the City of Stamford's New Westhill High School Project as outlined within the RFP and as may be required. We firmly believe you will be hard pressed to find another team with the local project experience matched with the depth of talent and resources that Colliers is proposing for this project.



Colliers is committed to serving the City of Stamford with a team approach that allows the strengths of our individuals to complement each other and provide a superior level of service. Charles "Chuck" Warrington has been assigned as the Project Director who will lead and manage our overall services throughout the life of the project. Chuck is a licensed professional engineer with 28 years of experience in the public sector and leads our Connecticut Public K-12 team. He has specialized in the OSCG&R process over the last eight years with Colliers and will provide expertise to the project team.

Adam Levitus is assigned as the Project Manager and is also a licensed professional engineer. Adam's thoroughness and attention to detail and his expeditious follow-up to our clients and team members lend themselves to a well-managed project. We believe you will be hard-pressed to find a project manager as comprehensive as Adam.

Adam will be supported by an assistant project manager, Judy Denny. Judy is being assigned to this project to assist with the heavy lift that is anticipated for this project. Collectively, Chuck, Adam and Judy will make up your day-to-day pre-construction phase team.

Once the project enters into the bidding and construction phase, Mark Schweitzer will join the team as our construction representative. Mark is also a licensed professional engineer. Mark's background in engineering and construction management provides a high level of expertise as our boots on the ground. Mark's primary role will be that of quality assurance in the field as well as reviewing change orders, construction schedules and assisting Adam and Judy with the FF&E procurement and move management phases. Mark will also assist with design reviews and estimate reconciliations during the pre-construction phase.

Supporting our day-to-day team will be Blair Richardson and Thao Nguyen. Blair will as provide MEP (mechanical, electrical, and plumbing) technical expertise as well as assist with any commissioning trouble shooting if required. Blair and his team will assist with design reviews also. Thao is our financial analyst who will ensure our financial management systems are being well maintained and that they reconcile with city's general ledger throughout the project.

Our team is backed by a multi-disciplined team of over 120 professionals. Colliers possesses the proper resources to properly manage a project of this magnitude.

Resumes detailing the proposed project team's experience can be found on the following pages.

Marc Sklenka LEED AP, MCPPO

Managing Director

marc.sklenka@collierseng.com

Colliers Project Leaders

Education and Qualifications

Bachelor of Science Architectural Engineering – Wentworth Institute of Technology

Accreditations and Memberships

LEED Accredited Professional (LEED AP)

Massachusetts Certified Public Purchasing Official (MCPPO)

Contract Document Specialist

Construction Management Certificate

Member, Construction Specifications Institute

Years of Experience

29 years

Years with Firm

20 years

www.cplusa.com

Area of Expertise

Mr. Sklenka has more than 25 years of experience in providing project management services within the construction and renovation industry. Marc has developed a diverse background in such areas as architectural design, construction administration, document coordination, contract development and negotiations, materials testing and inspections, owner's representation, and project management. As one of Colliers' LEED Accredited Professionals, Marc brings a sustainable approach to both LEED and non-LEED registered projects alike. In his role as Managing Director, Marc leads overall service delivery, quality control, and management for building projects throughout the Northeast.

Relevant Experience

Town of Windham – Windham High School – Windham, CT
Project management services for the renovate-as-new project. The three-story masonry-faced steel building will feature a new front façade and secure building entrances. In addition, the multi-phased project will create spaces for Windham's Early Childhood Program as well as the Windham Board of Education's Central Office. The project will meet Connecticut High Performance Building requirements.

Town of North Haven – Middle School – North Haven, CT
Project management services for the renovate-as-new and new academic addition that accommodates 773 students and consisted of approximately 90,000 gsf of additions, 56,000 gsf of like new renovations and demolition of approximately 84,000 gsf of existing spaces. The addition included academic classrooms, a media center, science and art classrooms as well as athletic fields. The renovations included two gyms, a cafeteria, a kitchen, and auditorium spaces as well as the outdoor track.

Town of Branford – Francis Walsh Intermediate School – Branford, CT
Project management services for the $88.2 Million addition and renovation project that includes occupied renovation, demolition and the construction of a new academic addition to the Francis Walsh Intermediate School.

Town of Mansfield – New Elementary School – Mansfield, CT
Project management services for the construction of the $50 Million Mansfield Elementary School, which will replace the Town's existing three elementary schools and bring all students together into one building. The school's net-zero status will be accomplished mainly via geothermal and solar technologies. When completed, the project will be one of the first Net Zero energy public schools in New England.

Capitol Region Education Council (CREC) – Ana Grace Academy of the Arts – Bloomfield, CT
Project management services, under contract with the Connecticut Department of Administrative Service (CT DAS), for the new $108 Million, 156,800 gsf CREC – Ana Grace Academy of the Arts Elementary & Middle School. The state-of-the-art facility will be a Pre-Kindergarten to eighth-grade school that will combine two current CREC schools – CREC Ana Grace Academy of the Arts Elementary School and CREC Greater Hartford Academy of the Arts Middle School.

Charles E. Warrington, Jr. PE, MCPPO

Director

charles.warrington@collierseng.com

Colliers Project Leaders

Education and Qualifications

Bachelor of Science Civil Engineering – Worcester Polytechnic Institute

Accreditations and Memberships

Licensed Professional Engineer (CT)

Massachusetts Certified Public Purchasing Official (MCPPO)

Years of Experience

28 years

Years with Firm

9 years

www.cplusa.com

Area of Expertise

Mr. Warrington is a professional civil engineer with more than 25 years of experience in the construction industry. As a member of the Colliers Project Leaders team, Chuck lends the benefit of his extensive facility knowledge and experience towards the provision of comprehensive project management services. Chuck's previous responsibilities include serving as construction administrator and liaison with general contractors in the field, oversight and inspection of construction, coordination with testing agencies, review of schedules, RFIs, change order proposals and submittals, and review of consultant designs and specifications.

Relevant Experience

New Fairfield Public Schools – High School & Meeting House Hill School – New Fairfield, CT
Project management services during the pre-referendum and architectural selection phases for the new High School and Consolidated Schools Project. The New Fairfield Public Schools passed referendum to build a $84.2 Million High School on the site of the existing campus and construct a $29.2 Million addition onto Meeting House Hill School with Colliers engaged to provide project management services for the life of the project.

Regional School District 14 – Nonnewaug High School – Woodbury, CT
Project management services for the $63.8 Million, 159,827 gsf addition and renovate-as-new alterations that included the reconstruction of the athletic fields, site traffic reconfiguration, phased construction, and fire alarm, sprinkler, HVAC controls, electrical services and emergency generator upgrades to the entire complex.

East Hampton Public Schools – High School – East Hampton, CT
Project management services for the additions and renovate-as-new project which included additions for a science wing on the east side and gymnasium of the west side of the building as well as renovations to the fitness center, locker rooms and the learning center.

Town of North Haven – North Haven Middle School – North Haven, CT
Project management services for the renovate-as-new and academic addition project that accommodates 773 students and consisted of 90,000 gsf of additions, 56,000 gsf of like new renovations, and demolition of approximately 84,000 gsf of existing spaces. Additions included classrooms, a media center, science and art rooms, and athletic fields. Renovations included two gyms, a cafeteria, a kitchen, auditorium spaces, and outdoor track. The school remained operational during construction and the project was designed to meet Connecticut High Performance Building Standards.

Town of Branford – Francis Walsh Intermediate School – Branford, CT
Project management services for the $88.2 Million addition and renovation project that includes occupied renovation, demolition and the construction of a new academic addition to the Francis Walsh Intermediate School.

Adam Levitus PE

Project Manager

adam.levitus@collierseng.com

Colliers Project Leaders

Education and Qualifications

Master's Degree Public Administration – California State University, San Bernardino

Bachelor of Science Civil Engineering – Purdue University

Accreditations and Memberships

Licensed Professional Engineer (MA, RI, CT, IL)

Years of Experience

11 years

Years with Firm

1 year

www.cplusa.com

Area of Expertise

Mr. Levitus is a professional engineer with more than 10 years of leadership experience in the construction industry. As a member of the Colliers' Project Management team, Mr. Levitus lends the benefit of his extensive facility knowledge and experience to provide comprehensive project management services for both public and private institutions. Adam can expertly analyze and identify key project needs during all phases of the project including planning, design, construction, and close-out. Prior to joining Colliers, Adam managed a variety of projects for California State University, including the design and construction of over 120,000 gsf of student spaces totaling about $95 Million in value.

Relevant Experience

Town of Madison – School Renewal Plan – Madison, CT

Comprehensive project management services for Madison's School Renewal Plan, consisting of new construction, renovations, the demolition of three existing schools and site restoration. Projects include:

- **New PreK-5 School:** $89.3 Million, 88,000 gsf new school will incorporate sustainability, energy and water conservation, and greenhouse gas emission reduction.

Wethersfield Public Schools – Elementary School Master Plan – Wethersfield, CT

Project management services to assist Wethersfield Public Schools in planning the elementary school modernization program. A multi-phase program has been established to address all schools and possibly re-district from five to four schools.

Town of Willington – PreK-8 Consolidated School – Willington, CT

Project management services to assist the Town with identifying the best solution for a consolidated PreK-8 school from two existing school buildings. Options include a new or renovated school on existing school/town property or on a private parcel to be purchased. Services include option analysis, budget development, and coordination tasks leading to referendum and OSCG&R grant application submission.

Town of Mansfield – New Elementary School – Mansfield, CT

Project management services for the construction of the $50 Million Mansfield Elementary School, which will replace the Town's existing three elementary schools and bring all students together into one building. The school's net-zero status will be accomplished mainly via geothermal and solar technologies. When completed, the project will be one of the first Net Zero energy public schools in New England.

Greenwich Country Day School – New Upper School Campus – Greenwich, CT

Project management services for Phase II of Greenwich Country Day School's New Upper School at the former Stanwich School. Phase II involves a 120,000 gsf expansion, which will include a Performing Arts Center with seating for 525, theater sound, projection & performance systems; administrative & counseling offices; classroom & science labs, team lockers & fitness spaces; and art studios and display gallery space.

Judy Denny

Assistant Project Manager

judy.denny@collierseng.com

Colliers Project Leaders

Education and Qualifications

Master of Architecture – University of Hartford

Bachelor of Science Architectural Engineering Technology and Psychology – University of Hartford

Years of Experience

14 years

Years with Firm

1 year

www.cplusa.com

Area of Expertise

Ms. Denny has more than 10 years of experience in facilities operations with a specific focus in managing and maintaining buildings, staff, and property assets. With an educational background in architecture and psychology, Judy has a unique perspective of connecting the user experience of operators with the physical environment within facilities. On behalf of Colliers, Judy works as an Assistant Project Manager providing project management services to both public and private institutions throughout the Northeast. Prior to joining Colliers, she served in a variety of roles within the University of Hartford's Facilities Department, supervising teams and managing fixtures, furniture, and equipment (FF&E) as well as handling renovation and repair programs for various campus buildings.

Relevant Experience

Town of Branford – Francis Walsh Intermediate School – Branford, CT
Project management services for the $88.2 Million addition and renovation project that includes occupied renovation, demolition and the construction of a new academic addition to the Francis Walsh Intermediate School.

South Windsor Public Schools – Pleasant Valley Elementary School – South Windsor, CT
Project management services for the construction of a new $58.5 million, 101,288 gsf elementary school as part of the district's multi-phased 10-Year Master Plan.

Westport Public Schools – Saugatuck Elementary Roofing – Westport, CT
Project management services for the re-roofing project at Saugatuck Elementary School as part of the District's Capital Maintenance Plan.

Miss Porter's School – 60 Main Street – Farmington, CT
Project management services for the 60 Main Street Historic Renovation & Addition Project. The $22 Million project will consist of renovation and expansion of the dining hall, renovation of the existing kitchen and server, and construction of a new lower lounge and covered colonnade porch. The lounge will double as an art gallery.

University of Hartford – C&D Complex Basement Revitalization – West Hartford, CT
Project management services for a $200,000 basement project at the University's Buildings C&D residence halls. The project included painting, foundational leak repairs, sanding, and applying a slip resistant epoxy to the floors.

University of Hartford – Residential Halls Summer Recovery – West Hartford, CT
Project management services for the recovery of the University's 16 residential buildings from the end of May to the beginning of August. This project included damage and routine repairs, painting, carpet replacement, carpet cleaning, stripping and waxing, furniture repairs, and replacements and deep cleaning.

Mark A. Schweitzer PE

Project Manager

mark.schweitzer@collierseng.com

Colliers Project Leaders

Education and Qualifications

Master of Science Civil Engineering – Worcester Polytechnic Institute

Bachelor of Science Civil Engineering – Worcester Polytechnic Institute

Accreditations and Memberships

Licensed Professional Engineer (CT)

OSHA 30 Certified

Years of Experience

32 years

Years with Firm

4 years

www.cplusa.com

Area of Expertise

Mr. Schweitzer is a professional engineer with more than 30 years of experience in the management and design of multimillion-dollar educational, industrial, and commercial building projects. Prior to joining Colliers, Mark served as a Project Manager and most recently as a Group Manager of Systems and Cost Control. As a member of the Colliers' Project Management team, Mark lends the benefit of his extensive facility knowledge and experience to provide comprehensive project management services for both public and private institutions.

Relevant Experience

Town of Fairfield – Multiple Projects – Fairfield, CT

Project management services for multiple projects on behalf of the Town of Fairfield including:

- **Holland Hill Elementary School:** $18.5 Million temporary expansion and proposed renovation/addition to the 42,732 gsf school.
- **Mill Hill Elementary School:** $22 Million renovation and addition to the Mill Hill Elementary School.
- **Riverfield Elementary School:** multi-phased, $17 Million renovation and new addition project that encompassed a total of 45,140 gsf on 20-acres as well as five modular classrooms located on-site to provide an additional 4,000 gsf of classroom space.
- **Roger Sherman Elementary School:** third phase of the $3.2 Million renovations and additions to the Roger Sherman Elementary School.

New Fairfield Public Schools – High School & Meeting House Hill School – New Fairfield, CT

Project management services during the pre-referendum and architectural selection phases for the new High School and Consolidated Schools Project. The New Fairfield Public Schools passed referendum to build a $84.2 Million High School on the site of the existing campus and construct a $29.2 Million addition onto Meeting House Hill School with Colliers engaged to provide project management services for the project.

South Windsor Public Schools – Multiple Projects – South Windsor, CT

Project management services for multiple projects on behalf of the South Windsor Public Schools including:

- **Eli Terry Elementary School:** New 63,750 gsf school constructed on the existing site while the school remain in operation. New school will house grades K-5 and be designed for a 437-student enrollment.
- **Philip R. Smith Elementary School:** New school for grades K-5 for 390 students encompassing 55,660 gsf.

Springfield Central High School – Springfield, MA

Project management services for a $22 Million major renovations project to a 264,000-sf occupied high school as well as construction of a new three-story 30,000 sf science wing, including new laboratories and preparation rooms.

Blair Richardson PE, CEM, LEED AP

Director

blair.richardson@collierseng.com

Colliers Project Leaders

Education and Qualifications

Master of Business Administration, Sustainability Concentration – University of Maine

Bachelor of Science Mechanical Engineering Technology – University of Maine

Accreditations and Memberships

Licensed Professional Engineer (CA, CT, NY, OH, ME, VT) – NCEES Records Holder

Certified Energy Manager (CEM)

LEED Accredited Professional (LEED AP)

Member, National Society of Professional Engineers (NSPE)

Member, American Society of Heating, Refrigeration, and Air Conditioning Engineers (ASHRAE)

Years of Experience

14 years

Years with Firm

Less than 1 year

www.cplusa.com

Area of Expertise

Mr. Richardson is a professional engineer with more than 14 years of experience in building design, construction, HVAC/mechanical engineering, project management, and commissioning in a variety of market sectors including retail and commercial, education, residential, municipal, and industrial. Blair has experience collaborating with teams, managing projects across multiple disciplines, and supporting sustainable design practices. Prior to joining Colliers, Blair's responsibilities included business and relationship development; corporate environmental, social, and governance; capital planning; facilitation of quality assurance/control processes; construction administration; and commercial, multi-family, and university building energy auditing.

Blair was one of the National Society of Professional Engineers' (NSPE) Emerging Leaders in 2022. In addition to his role, he teaches continuing education classes to industry professionals, regularly participates in engineering conferences and seminars, and attends trade shows to maintain and share relevant knowledge. Blair leverages his knowledge and resources to provide sustainable solutions for his clients.

Relevant Experience

Stamford Public Schools – Valve Replacement & Boiler Modernization – Stamford, CT
Senior Mechanical Engineer and Project Manager for the boiler modernization project. Work included detailed demolition documents for the existing central steam boiler plant, heat exchangers, peripheral steam systems, and hot water heating pumps; new construction drawings and specifications for new high efficiency hot water boiler; a standalone domestic hot water plant; high efficiency variable speed pumps; and new control valves throughout the building. The project was submitted to the utility company for incentive financing and rebates.

Stillmeadow Elementary School – HVAC Replacement – Stamford, CT
Senior Mechanical Engineer and Project Manager for the HVAC replacement project. Work included detailed demolition plans for existing heating/ ventilating units, new work plans and specifications for packager gas/ electric heating/cooling RTUs, coordinated structural and electrical design, and coordination with client.

Connecticut Department of Administrative Services (CT DAS) – Platt Technical High School – Milford, CT
Commissioning services for the new technical high school which was built on the existing high school site and consisted of approximately 227,000 gsf. The project also included the demolition of the existing school, the construction of new athletic fields, parking for approximately 250 cars, and a 15-bay maintenance bus garage.

Town of Guilford – Baldwin Middle School – Guilford, CT
Commissioning services for the HVAC system and other mechanical upgrades at Guilford's Baldwin Middle School. Scope of work includes, but is not limited to, the removal of select mechanical, electrical power and lighting systems and the installation of new air handling units, hot and chiller water piping and pumps, piping and ductwork, steel framing, etc.

Thao Nguyen

Project Accountant

thao.nguyen@collierseng.com

Colliers Project Leaders

Education and Qualifications

Bachelor of Arts Accounting – Emmanuel College

Accreditations and Memberships

Board of Directors, Edward Street Child Services

Years of Experience

10 years

Years with Firm

4 years

www.cplusa.com

Area of Expertise

Ms. Nguyen has more than 10 years of financial and business experience. Thao lends the benefit of her strong analytical skills, audit experience, and client management skills to the development, implementation and summary of budgets and expenses for Colliers' client portfolio. In her role as Project Accountant, Thao utilizes her financial acumen to assist Colliers' Project Managers with the financial tracking of their projects and to interact with clients to reconcile the tracking of expenses within their own internal systems.

Relevant Experience

Town of North Haven – North Haven Middle School – North Haven, CT
Financial, cost estimating and schedule support services for the North Haven Middle School renovate-as-new and new academic addition project that accommodates 773 students and consisted of approximately 90,000 gsf of additions, 56,000 gsf of like new renovations, and demolition of approximately 84,000 gsf of existing spaces.

Town of Fairfield – Multiple Projects – Fairfield, CT
Financial, cost estimating and schedule support services for multiple projects on behalf of the Town of Fairfield including:

- **Holland Hill Elementary School – Fairfield, CT**
  Financial, cost estimating and schedule support services for the $18.5 Million temporary expansion and proposed renovation / addition to the 42,732 gsf Holland Hill Elementary School.
- **Mill Hill Elementary School – Fairfield, CT**
  Financial, cost estimating and schedule support services for the $22 Million renovation and addition to the Mill Hill Elementary School.
- **Roger Sherman Elementary School – Fairfield, CT**
  Financial, cost estimating and schedule support services during the third phase of the $3.2 Million renovations and additions.

Town of Branford – Francis Walsh Intermediate School – Branford, CT
Financial, cost estimating and schedule support services for the $88.2 Million addition and renovation project that includes occupied renovation, demolition and the construction of a new academic addition to the Francis Walsh Intermediate School.

Cape Cod Regional Technical High School – Harwich, MA
Financial, cost estimating and schedule support services for the new 228,000 gsf high school which is configured in an asymmetrical "H" shape with the academic area shops integrated with classrooms on two stories in the long leg of the "H", and the Gymnasium, administration and Hospitality Academy located in the short leg.

Town of Windham – Windham High School – Windham, CT
Financial, cost estimating and schedule support services for the renovate-as-new project at Windham High School. In addition, the multi-phased project will create spaces for Windham's Early Childhood Program as well as the Windham Board of Education's Central Office.

Project Approach

Colliers' philosophy in the management of capital projects has been shaped by more than two decades of experience representing owners in the design, construction, and management of educational facilities. The design and construction industry has evolved from an era in which a Master Builder designed and personally directed tradesmen in the construction of a project, to the present where complicated and sophisticated processes involving numerous designers, consultants, managers, contractors, and regulatory authorities all play important roles. The result of this evolution is not always positive – construction projects with major cost overruns, expensive mechanical systems that don't operate properly, and spaces that don't meet the owner's expectations.

Colliers has assembled a team of talented professionals with varied backgrounds and competencies from across the design and construction industry to help municipalities and school districts navigate through this complex and risky environment. Our approach is proactive and highly collaborative. With this perspective in mind, Colliers has adopted the following core objectives for delivering our services:

Protect the interests of the City of Stamford through careful oversight to ensure that newly created and/or renovated spaces are ***functionally*** appropriate for the occupants, ***aesthetically*** conforming to design standards, and ***financially*** managed to the established budget.

Reduce costs and maximize value throughout the project with ***design critiques*** that provide options for best value, avoid high-cost change orders, and utilize ***bidding and contracting strategies*** that reap benefits from a competitive marketplace.

Preserve the project schedule by establishing ***critical milestones*** throughout the design and construction process, facilitating meetings and document reviews, and ***identifying critical path*** issues that can create delays before they materialize.

Maintain construction quality assurance throughout the process by ***confirming the proper design and construction*** of materials and equipment, and ***verifying the performance*** of installed systems.

Provide visibility to real time project data regarding costs and schedule through our proprietary, web-based client dashboard – ***Colliers360.***

With these objectives as our foundation, we follow a phased management plan which is described in detail on the following pages.

Feasibility / Pre-Design Phase

Review Project Budget

We understand the project budget is currently $261 Million and there is a revised grant request (SCG-049R) to increase it $301 Million. Should Colliers be awarded this project, we would work with the city to distribute the budget in major categories to manage. Colliers utilizes a proprietary budget management system where the total project budget broken down into the following categories:

- Building construction
- Site/related construction
- Furniture, Fixtures & Equipment (FF&E)
- Fees and expenses
- Contingency
- Escalation

The distribution of the budget is fully subject to the approval of the city. The budget is YOUR budget, not ours. With the project budget established, our job is two-fold:

1. Ensure the design team designs to the budget
2. Ensure the contractor constructs to the budget
3. Manage all project costs to the budget
4. Proactively forecast all project expenditures

Through our Financial Status Report, we will review, recommend for approval, and track every invoice associated with the project and provide a detailed summary report every month.

Please find attached an example of a Budget Development Document.

Establish Financial Management Reporting

Over the past two decades, Colliers has developed a comprehensive financial system for managing large scale projects. This system includes all aspects of project financial management including:

- Budgeting
- Cash Flow Analysis
- Preparation of grant reimbursement requests (SCG-046)
- cost estimating
- bid analysis
- construction cost tracking and forecasting
- contingency management
- change order tracking
- project cost monitoring, forecasting, and budget comparisons

Colliers works closely with the Owner to establish the project budget which can only be approved and modified by the Owner. Colliers records and manages the project financials in relation to the budget throughout the duration of the project. Project financial updates are provided through the use of various Colliers' standardized reports:

- Financial Status Report
- Invoice Logs for project costs
- Contingency Status Report to track charges against the contingency budget line

Review and Manage Project Schedule

Concurrent to reviewing the total project budget, Colliers will also review the ***project schedule with both macro (big picture overview) and develop milestone (detailed break-outs) summaries***. These schedules are used on a daily/weekly basis, continually updated as needed, and distributed at all meetings.

Working off the macro schedule, the milestone schedule identifies the key project deliverables during the design, bidding, move/relocation, construction, and closeout phases in concert with the unique attributes of the project.

This proactive approach to schedule management ensures our projects remain on schedule from the moment we are engaged.

Manage Consultant Selection

As noted, prior, Colliers will lead and facilitate the process of engaging high-quality consultants as needed on the project including:

- Architect
- Construction Manager
- Geotechnical Engineers
- Hazardous Material Consultants
- Environmental Site Consultants
- Wetland Delineation Consultants
- Site Survey Consultants

Colliers will lead and manage the consultant selection process which for an important hire like an architect, typically involves the following activities:

- Meet with the City of Stamford to discuss the process for consultant selection
- Develop a milestone schedule outlining the selection process
- Develop, issue, and manage the RFQ process for desired services
- Review and level the qualification submissions
- Facilitate a meeting with the City of Stamford to review and discuss qualification submissions
- Develop, issue, and manage the RFP process for desired services
- Coordinate/facilitate a pre-proposal briefing with the short-listed firms
- Review and level the proposal submissions

- Facilitate a meeting with the City of Stamford to review and discuss the proposal submissions
- Coordinate/facilitate interviews
- Develop, working with the City of Stamford attorney, the Owner/Consultant Agreement
- Negotiate the terms and conditions of the contract with the selected consultant in collaboration with the City of Stamford attorney

This selection process ensures the most qualified firm or consultant is hired at a competitive rate.

Phase 2

Design Phase

Coordinate the Design Process

The design of a building project is an interactive process involving multiple designers, specialists, and Owner stakeholders, each with their own, and sometimes competing, perspectives.

Communications with and presentations by the design team must be facilitated to manage the logistics and political dynamics, while simultaneously ensuring the appropriate level of input and critique. The leadership and facilitation provided by the project manager are critical in keeping all design meetings and discussions productive and on track.

Participate and Report on Meetings

Colliers understands the importance of effectively facilitating and leading project meetings. Nothing slows down a project quicker than matters left unresolved. Colliers will work with the City of Stamford to:

- Develop agendas for all design phase meetings
- Schedule the necessary participants
- Document and distribute the meeting minutes

In addition, Colliers will create and use an action item agenda as a management tool. The action item agenda captures all actionable items from the meeting and is managed on a daily basis. ***This allows the project team members to actively pursue their open items and confirm they are resolved to the satisfaction of the client.***

Reporting is provided on a cadence that is appropriate for the project (daily, weekly, monthly, etc.) and includes:

- Status of all open items
- The project schedule
- Project financials
- Any major issues encountered and the proposed solution

Control Quality of Design Documents

Another key component we manage during design is ensuring the quality and feasibility of the design documents. Through experience, we know that the quality of the design drawings/specifications have a direct relationship to the amount of erroneous change orders during construction. ***The less issues there are with the drawings up-front, the less likely unnecessary change orders will occur during construction.***

During times when we are facilitating the estimates (at the end of various design phases), our detailed design review will include:

- Extensive reviews of the drawings and specifications to ensure what is proposed is constructible

- Identification of any items in question to be shared with the design team for discussion

In addition to our own in-house review, we facilitate a review of the drawings and specifications with the City of Stamford officials. This review includes facilities representatives, end users, and any other key project stakeholders. We once again document the findings and share them with the design team. This effort repeats itself three times over the design period.

Please find attached an example of a Design Review.

Manage Construction Phasing/Logistics

Colliers will facilitate the construction phasing and logistics efforts. ***Colliers will work with the building committee, school administration, architect, construction manager, city staff and other stakeholders to establish a phasing plan that is clear and well communicated.*** We will identify what will impact the day-to-day operations of the existing school and surrounding neighborhood, and work with you to share this information with the school community and surrounding residents.

We typically discuss issues that include, but are not limited to, the following:

- Impact to utilities and roadways
- Contractor parking areas
- Staging areas
- Pedestrian paths around the site
- Work hours and non-work hours

These decisions are then tracked by Colliers to ensure the design team is properly tracking them on the drawings/specifications.

Monitor Construction Costs During Design

During the design phase, Colliers tracks both the project budget and schedule very aggressively. ***During each design phase, we proactively facilitate an estimate reconciliation effort.*** We ask the design team and construction manager to issue a detailed estimate which we use as the basis for the reconciliation meeting. During this meeting, we:

- Analyze the estimate in detail, so we have a comprehensive understanding of the projected construction costs
- Identify a value over budget
- Facilitate a value engineering effort to ideate ways to control costs and maximize the value of the project

At each step, we will communicate an accurate assessment of the financial standing of the project and put City of Stamford in a position to make informed, responsible decisions. ***The goal of this effort is to make sure the project remains on budget and reduce the risk for bids over budget.***

Please find attached an example of an Estimate Reconciliation Form.

Schedule Management

To properly execute the project, a detailed master schedule will be developed and managed by Colliers. Working off of the project timeline developed by the City of Stamford, ***Colliers will establish and identify key deliverables during the life of the project.***

Starting as soon as we are engaged, the work plan notes all meetings and activities to be scheduled during the course of the planning and design phase. Suggested topics and ultimate goals are identified for each meeting and activity. Specific dates for the early regulatory engagement process will be identified, as they become known, including:

- Early introductory meetings
- Submission parameters
- Phasing strategies
- City of Stamford approval dates (prior to submission)
- Hearing dates and appeal periods, etc.

Additionally, we will include key milestone dates for the estimating and design review process with time for value management and package revisions. At each meeting, the master work plan is reviewed and updated as necessary.

Colliers will also review and analyze construction timeline parameters prepared by City of Stamford, operators and facilities to develop a Master Schedule which will be critical in developing estimates and phasing strategies. ***Our team of in-house business continuity and scheduling experts will be able to analyze and critique all schedules provided by all vendors and contractors.***

Coordinate Permitting Process

The majority of projects, whether new construction or renovation, require regulatory approvals. This can be confusing and time-consuming for those unfamiliar with the process and regulations. ***During the permitting process, we take the necessary steps so you can focus on your school's operation.***

We will work with the project team, including your legal counsel, to attain all governmental approvals from the State of Connecticut and the City of Stamford to allow the Westhill High School Project to move forward. We then assist the construction manager to:

- Secure all required permits, providing information required by the team
- Secure the issuance of required permits to start construction as well as any other municipal approvals regarding traffic control or other contingencies

Manage Project Costs

With the project budget established, ***our job is to manage all projects costs (fees, expenses, expenditures) to the budget***. Through our Financial Status Report, we will review, recommend for approval, and track every invoice associated with the project and provide a detailed summary report every month.

Phase 3

Construction Phase

Coordinate Construction Activities

If not properly managed, construction activities can significantly disrupt existing school operations and the immediate neighborhood. Ongoing construction will likely require transportation of materials, demolition and/or installation of major building components, and a large number of construction personnel on the site.

As your project manager, ***Colliers will carefully coordinate these construction activities to account for daily traffic patterns and local events***, making alternate plans as needed. We'll ensure the contractor or construction manager is keenly aware of any potential impacts.

Additionally, we typically recommend bi-weekly meetings with school administration and the contractor to review a two-week look ahead and understand what activities are coming up so that all parties can plan accordingly.

Facilitate Owner / Architect / Contractor (OAC) Meetings

At every OAC meeting, we cover the following topics and make sure that each of them has an actionable deadline:

- Schedule status including tracking of bi-weekly look ahead schedule to make sure we are tracking towards a successful construction completion
- Financial status
- Quality measures
- New/old business

In addition, we review the status of the submittal and request for information (RFI) process.

- A submittal schedule will be provided and will include submission dates, lead times of materials for procurement, required on job dates, etc.
- The submittal schedule is consistently reviewed against the project baseline schedule for fidelity
- RFI logs are reviewed at all meetings to ensure they are responded to in a timely fashion

Safety is paramount when working within an active school campus and needs to be continuously discussed. As part of the weekly OAC meeting agendas, the topic of safety will be brought to the forefront for discussion.

As the project progresses, the safety of the students, staff, campus visitors, and community residents will be reviewed to ensure that all safety precautions are being implemented and modified as required. Colliers will continually review the safety plan and bring to the team's attention any deficiencies noted in the field to ensure a safe environment for everyone. ***All of this ensures the project is moving forward in a positive direction.***

Coordinate On-Site Consultants

Colliers will coordinate the on-site activities of all hired consultants, including: the moving company, furniture supplier, commissioning agent, materials testing lab, geotechnical engineer, building official, special inspector, etc.

Our job is to make sure each consultant is engaged appropriately. We typically develop a detailed RFP for each required service, level the proposals, recommend for approval, then schedule the service. Since we actively participate with each consultant, we fully understand and are the communicators of any issues to the contractor, designer or City of Stamford representatives.

By fully engaging ourselves and coordinating the activities of all the consultants, ***we can ensure that the entire team is working harmoniously with one another and that each of their activities have been coordinated with the contractor's overall schedule to avoid conflicts.***

Manage Change Orders and Pay Applications

Colliers will thoroughly review all proposed change orders submitted by the contractor. We know contractors historically inflate change order costs during construction. Our reviews seek to minimize those added costs by verifying the legitimacy of the change order submissions. Colliers will:

- Monitor and manage any project changes as well as the contracts and payments to the various contracted entities.
- Track for possible financial exposures to the Owner's contingency. This is done by continuously monitoring RFI responses and flagging any direction provided to the contractor or Owner that may have financial implications.
- Document discussions had in the field that relate to possible scope gaps in the design documents. We add these possible exposures to a contingency log with an estimated value to provide the City of Stamford a thorough status snapshot of project finances at any given time. ***This process ensures we have an accurate account of all possible financial exposures.***

  Please see attached to this section an example of a Contingency Log.
- Ensure we are not approving pay applications for work not yet complete. With the architect, we will review every line item of the pay application and verify completion of work. We also ensure subcontractors and vendors are being paid. By requiring and reviewing on a monthly basis all lien waivers, we are assured a lien will not be placed on the property. Should this happen, we will work aggressively with the CM and respective vendors to ensure the lien is removed.

Monitor Construction Quality

Throughout the construction phase, ***our on-site construction representative will walk the site multiple times a day to ensure the work is being executed per the plans, specifications, and***

schedule. The construction representative will also serve as an ongoing quality assurance representative.

Any changes in schedule or construction deficiencies observed on-site will be noted within a construction observation report. The observation report is discussed at every OAC meeting to ensure deficiencies are corrected in a timely fashion.

Please find attached an example of a Daily Report and an Observation Report.

With a focused effort on proactive quality control and schedule maintenance throughout the construction phase, Colliers will limit the amount of punch list items at project completion making for a more efficient closeout process.

Oversee Construction Schedule

Colliers takes a proactive approach to managing the contractor's construction schedule. We will monitor the schedule beginning with a thorough review of the initial baseline schedule. Any areas of concern will be identified in a schedule review memo.

Once an approved schedule is in place, Colliers will require the contractor to provide a two-week look ahead schedule at every OAC meeting. These two-week forecasts are reconciled to the baseline schedule to ensure the contractor remains on schedule.

Colliers will manage the flow of information (RFIs, Submittals, etc.) to ensure the contractor is not allowed additional time to complete the work. Colliers will also track the schedule during our daily onsite presence. If a certain task is scheduled to commence, or conclude, on any given day, and our onsite construction representative sees an altering condition, we will immediately notify the contractor and seek to understand why the project is falling behind, and what is being done to correct the situation.

Phase 4

Closeout, Training, and FF&E Phase

Closeout Project

Project closeout is key to the successful completion of a project. There are many steps that need to be taken for a successful and expeditious closeout process which we will manage for the City of Stamford:

- Monitor all punch-list items to the closeout of each item
- Schedule Owner training on MEP systems
- Facilitate the MEP commissioning process
- Track submission of all Owner attic stock materials, as-builts, operation and maintenance manuals, and warranty information and ensure that all materials are being provided in the format(s) necessary

In addition to the management of construction closeout, Colliers will actively manage the move, furniture, fixtures, and equipment (FF&E), and equipment startup/operation process for the City of Stamford in coordination with the third-party operator. Our detailed Master schedule will outline the sequencing of the work.

Train Operating Staff

Any new system will require training for the operations and maintenance staff. Frequently, the mechanical systems installed in modern buildings are significantly more complicated to operate and maintain than those in older buildings. Without proper training, those responsible for the regular troubleshooting and preventative maintenance of the newly installed systems will likely compromise the systems' operations or life through either the bypass of procedures or the improper usage of components.

Colliers will ensure the operations staff are properly trained on all new systems. This process starts with field visits during construction and concludes with physical training once the building is completed.

Test Systems Performance

Ultimately, the responsibility for the operation and maintenance of installed building systems will fall to the Owner's staff. Therefore, prior to accepting the newly installed systems and delivering final payments to the contractors, Colliers will test the various systems under operating conditions. Testing under these conditions will reveal for certain if systems will operate as intended while there is still financial incentive for the contracted parties to remedy any problems.

Phase 4

Manage the Master Move Plan

To maintain an accurate and up-to-date Master Move Plan, Colliers will attend many regularly scheduled meetings. Our role within each of the meetings may differ – from that of leader to collaborator to observer. We will lead all relocation and Furniture, Fixtures, & Equipment (FF&E) team meetings using an action agenda to maintain accountability and visibility into all efforts. In our role, we will:

- Identify key project milestones and installation sequences
- Distribute regular communication updates
- Collaborate with City of Stamford move coordinators to share key needs, disseminate information, and serve as a point of contact

Procure Movers

Colliers will develop comprehensive statements of work and RFP packages for the procurement of FF&E, move vendors, and specialty vendors. The generated move plan, phasing, and schedule will be included in all RFPs to get more accurate responses.

We will be diligent about determining the new building rules and regulations as they pertain to building protection, including the information in the FF&E and mover RFPs.

Colliers will manage the FF&E and mover procurement process including pre-qualifying companies, developing the RFP, documenting inventories and floor plans, conducting site walk-throughs, leading interviews, analyzing bids, creating a bid summary, and making a final recommendation based on the RFP responses.

Coordinate Furniture, Fixtures & Equipment (FF&E)

Colliers will work with the new furniture specifications developed by the designer and approved by the City of Stamford, and will develop a matrix of all new FF&E that will provide the basis for the procurement packages. Our team will work with the City of Stamford purchasing team to coordinate FF&E procurement as approved in the FF&E bid packages. We will then work with the vendors to validate the orders.

Monitor & Manage Contractor Correction of Problems

Every building is a prototype, therefore problems are likely to occur. Once identified, Colliers will monitor the contractor's troubleshooting efforts to address any problems. Depending upon the type of system being corrected, additional performance testing may be the only means of insuring proper operation.

Web-Based Data Sharing System – Colliers360

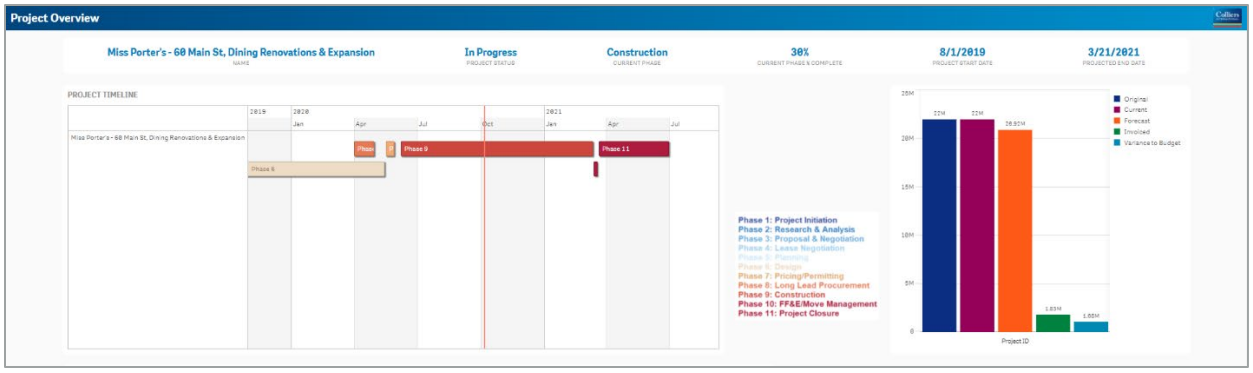
Colliers Project Leaders has our own proprietary, web-based project management platform, Colliers360, for use by our project teams and our clients at no added cost to the overall project. Our platform makes real-time project data always available for client viewing with user-friendly, flexible dashboards.

From a single site we can manage project financials and schedules, store key documents in our document storage portal, and create meeting minutes and daily reports, as well as manage project related risks. Multiple team members can log in and understand exactly what stage of the process a current project is in, along with any critical path issues or risks, and make informed decisions on the best next steps. Colliers360 is mobile-optimized for easy viewing on all mobile devices to get project visibility in the office or on-the-go.

Key features of the platform include:

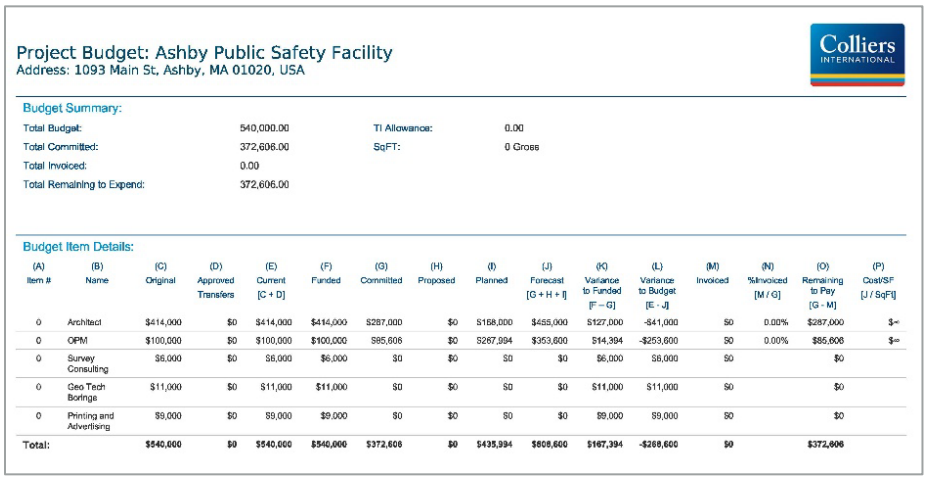
Dashboard Viewing

The user-friendly, flexible dashboards make real-time project data available for easy client viewing. The platform is mobile-optimized so that data can be viewed on all mobile device types to get project visibility in the office or on-the-go.



Financial and Schedule Management

The integration of formerly disparate spreadsheets and tracking tools allows for easy management of both project financials, including the total project budget and budget reconciliations, and the overall project schedule, including both macro and milestone timelines.



Project Budget: Ashby Public Safety Facility
Address: 1093 Main St, Ashby, MA 01020, USA

Budget Summary:

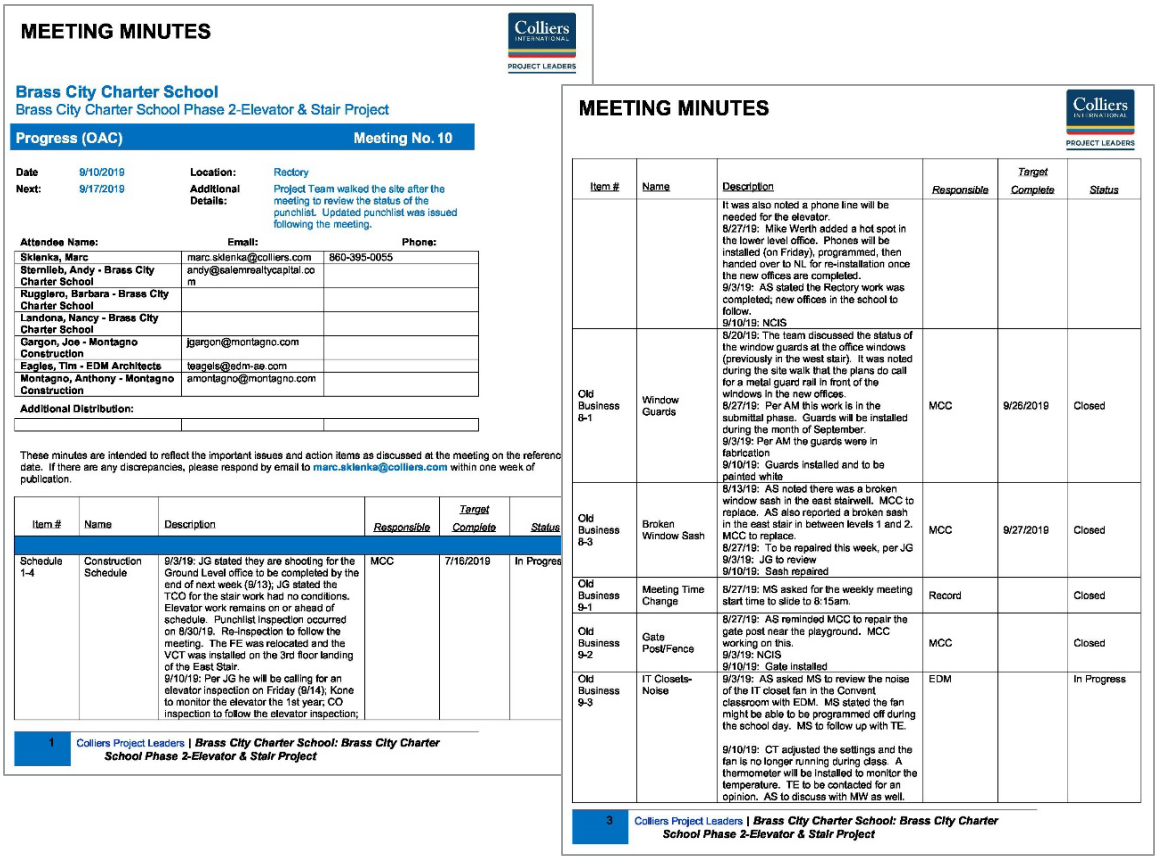
Total Budget:	540,000.00	TI Allowance:	0.00
Total Committed:	372,606.00	SqFT:	0 Gross
Total Invoiced:	0.00		
Total Remaining to Expend:	372,606.00		

Budget Item Details:

(A) Item #	(B) Name	(C) Original	(D) Approved Transfers	(E) Current [C + D]	(F) Funded	(G) Committed	(H) Proposed	(I) Planned	(J) Forecast [G + H + I]	(K) Variance to Funded [F – G]	(L) Variance to Budget [E - J]	(M) Invoiced	(N) %Invoiced [M / G]	(O) Remaining to Pay [G - M]	(P) Cost/SF [J / SqFt]
0	Architect	$414,000	$0	$414,000	$414,000	$287,000	$0	$168,000	$455,000	$127,000	-$41,000	$0	0.00%	$287,000	$-∞
0	OPM	$100,000	$0	$100,000	$100,000	$85,606	$0	$267,994	$353,600	$14,394	-$253,600	$0	0.00%	$85,606	$-∞
0	Survey Consulting	$6,000	$0	$6,000	$6,000	$0	$0	$0	$0	$6,000	$6,000	$0		$0	
0	Geo Tech Borings	$11,000	$0	$11,000	$11,000	$0	$0	$0	$0	$11,000	$11,000	$0		$0	
0	Printing and Advertising	$9,000	$0	$9,000	$9,000	$0	$0	$0	$0	$9,000	$9,000	$0		$0	
Total:		**$540,000**	**$0**	**$540,000**	**$540,000**	**$372,606**	**$0**	**$435,994**	**$808,600**	**$167,394**	**-$268,600**	**$0**		**$372,606**	

Daily Reports, Meeting Minutes, Tracking of Issues

Daily reports and meeting minutes are created and stored in one centralized hub along with the tracking of any issues. This visibility makes it easy to manage communication flow to avoid any stalls or delays, proactively identify and manage any potential risks, and confidently make decisions.



MEETING MINUTES

Colliers INTERNATIONAL PROJECT LEADERS

Brass City Charter School
Brass City Charter School Phase 2-Elevator & Stair Project

Progress (OAC) **Meeting No. 10**

Date 9/10/2019 **Location:** Rectory
Next: 9/17/2019 **Additional Details:** Project Team walked the site after the meeting to review the status of the punchlist. Updated punchlist was issued following the meeting.

Attendee Name:	Email:	Phone:
Sklenka, Marc	marc.sklenka@colliers.com	860-395-0055
Sternlieb, Andy - Brass City Charter School	andy@salemrealtycapital.com	
Ruggiero, Barbara - Brass City Charter School		
Landona, Nancy - Brass City Charter School		
Gargon, Joe - Montagno Construction	jgargon@montagno.com	
Eagles, Tim - EDM Architects	teagels@edm-ae.com	
Montagno, Anthony - Montagno Construction	amontagno@montagno.com	

Additional Distribution:

These minutes are intended to reflect the important issues and action items as discussed at the meeting on the referenc date. If there are any discrepancies, please respond by email to marc.sklenka@colliers.com within one week of publication.

Item #	Name	Description	Responsible	Target Complete	Status
Schedule 1-4	Construction Schedule	9/3/19: JG stated they are shooting for the Ground Level office to be completed by the end of next week (9/13); JG stated the TCO for the stair work had no conditions. Elevator work remains on or ahead of schedule. Punchlist inspection occurred on 8/30/19. Re-inspection to follow the meeting. The FE was relocated and the VCT was installed on the 3rd floor landing of the East Stair. 9/10/19: Per JG he will be calling for an elevator inspection on Friday (9/14); Kone to monitor the elevator the 1st year; CO inspection to follow the elevator inspection;	MCC	7/16/2019	In Progres

1 Colliers Project Leaders | *Brass City Charter School: Brass City Charter School Phase 2-Elevator & Stair Project*

MEETING MINUTES

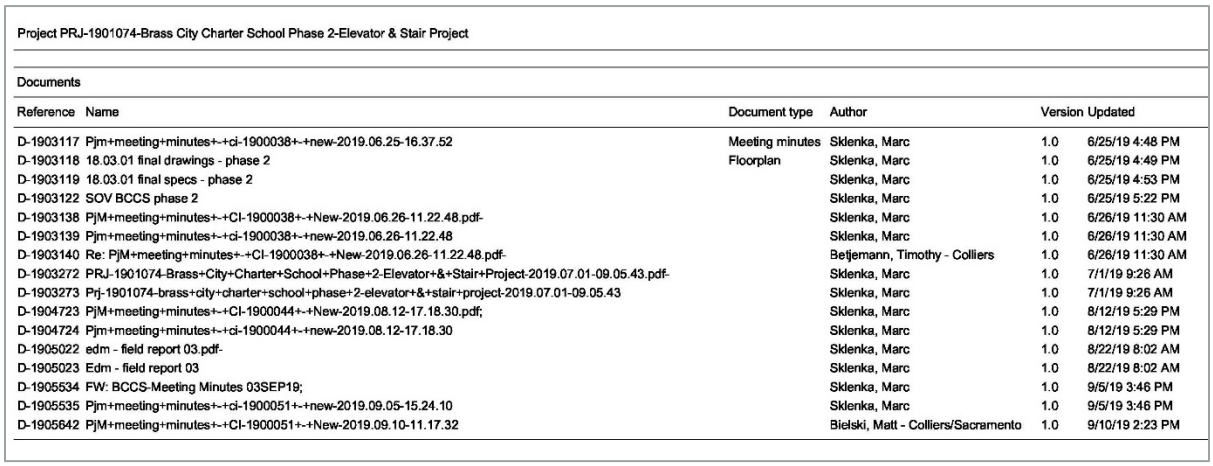
Colliers INTERNATIONAL PROJECT LEADERS

Item #	Name	Description	Responsible	Target Complete	Status
		It was also noted a phone line will be needed for the elevator. 8/27/19: Mike Werth added a hot spot in the lower level office. Phones will be installed (on Friday), programmed, then handed over to NL for re-installation once the new offices are completed. 9/3/19: AS stated the Rectory work was completed; new offices in the school to follow. 9/10/19: NCIS			
Old Business 8-1	Window Guards	8/20/19: The team discussed the status of the window guards at the office windows (previously in the west stair). It was noted during the site walk that the plans do call for a metal guard rail in front of the windows in the new offices. 8/27/19: Per AM this work is in the submittal phase. Guards will be installed during the month of September. 9/3/19: Per AM the guards were in fabrication 9/10/19: Guards installed and to be painted white	MCC	9/26/2019	Closed
Old Business 8-3	Broken Window Sash	8/13/19: AS noted there was a broken window sash in the east stairwell. MCC to replace. AS also reported a broken sash in the east stair in between levels 1 and 2. MCC to replace. 8/27/19: To be repaired this week, per JG 9/3/19: JG to review 9/10/19: Sash repaired	MCC	9/27/2019	Closed
Old Business 9-1	Meeting Time Change	8/27/19: MS asked for the weekly meeting start time to slide to 8:15am.	Record		Closed
Old Business 9-2	Gate Post/Fence	8/27/19: AS reminded MCC to repair the gate post near the playground. MCC working on this. 9/3/19: NCIS 9/10/19: Gate installed	MCC		Closed
Old Business 9-3	IT Closets-Noise	9/3/19: AS asked MS to review the noise of the IT closet fan in the Convent classroom with EDM. MS stated the fan might be able to be programmed off during the school day. MS to follow up with TE. 9/10/19: CT adjusted the settings and the fan is no longer running during class. A thermometer will be installed to monitor the temperature. TE to be contacted for an opinion. AS to discuss with MW as well.	EDM		In Progress

3 Colliers Project Leaders | *Brass City Charter School: Brass City Charter School Phase 2-Elevator & Stair Project*

Document Storage Portal

The document storage portal provides clients access to a centralized hub to create, store and file all key documents related to a project for easy access at any point in the project.



Project PRJ-1901074-Brass City Charter School Phase 2-Elevator & Stair Project

Documents

Reference	Name	Document type	Author	Version	Updated
D-1903117	Pjm+meeting+minutes+-+ci-1900038+-+new-2019.06.25-16.37.52	Meeting minutes	Sklenka, Marc	1.0	6/25/19 4:48 PM
D-1903118	18.03.01 final drawings - phase 2	Floorplan	Sklenka, Marc	1.0	6/25/19 4:49 PM
D-1903119	18.03.01 final specs - phase 2		Sklenka, Marc	1.0	6/25/19 4:53 PM
D-1903122	SOV BCCS phase 2		Sklenka, Marc	1.0	6/25/19 5:22 PM
D-1903138	PjM+meeting+minutes+-+CI-1900038+-+New-2019.06.26-11.22.48.pdf-		Sklenka, Marc	1.0	6/26/19 11:30 AM
D-1903139	Pjm+meeting+minutes+-+ci-1900038+-+new-2019.06.26-11.22.48		Sklenka, Marc	1.0	6/26/19 11:30 AM
D-1903140	Re: PjM+meeting+minutes+-+CI-1900038+-+New-2019.06.26-11.22.48.pdf-		Betjemann, Timothy - Colliers	1.0	6/26/19 11:30 AM
D-1903272	PRJ-1901074-Brass+City+Charter+School+Phase+2-Elevator+&+Stair+Project-2019.07.01-09.05.43.pdf-		Sklenka, Marc	1.0	7/1/19 9:26 AM
D-1903273	Prj-1901074-brass+city+charter+school+phase+2-elevator+&+stair+project-2019.07.01-09.05.43		Sklenka, Marc	1.0	7/1/19 9:26 AM
D-1904723	PjM+meeting+minutes+-+CI-1900044+-+New-2019.08.12-17.18.30.pdf;		Sklenka, Marc	1.0	8/12/19 5:29 PM
D-1904724	Pjm+meeting+minutes+-+ci-1900044+-+new-2019.08.12-17.18.30		Sklenka, Marc	1.0	8/12/19 5:29 PM
D-1905022	edm - field report 03.pdf-		Sklenka, Marc	1.0	8/22/19 8:02 AM
D-1905023	Edm - field report 03		Sklenka, Marc	1.0	8/22/19 8:02 AM
D-1905534	FW: BCCS-Meeting Minutes 03SEP19;		Sklenka, Marc	1.0	9/5/19 3:46 PM
D-1905535	Pjm+meeting+minutes+-+ci-1900051+-+new-2019.09.05-15.24.10		Sklenka, Marc	1.0	9/5/19 3:46 PM
D-1905642	PjM+meeting+minutes+-+CI-1900051+-+New-2019.09.10-11.17.32		Bielski, Matt - Colliers/Sacramento	1.0	9/10/19 2:23 PM

PROJECT BUDGET

Colliers INTERNATIONAL
PROJECT LEADERS

Town of Cheshire

New Norton Elementary School

Project Budget

Date: May 13, 2022

		PROBABLE BUDGET
	Enrollment	661
	$(000) except $/GSF	
	New Construction GSF	96,058
	Renovation GSF	
	Total GSF	96,058
	New Construction $/GSF - Current	$ 400.00
	Renovation $/GSF - Current	$ -
	New Construction $/GSF - Escalated	$ 503.90
	Renovation $/GSF - Escalated	$ -
	Total Construction w/ site $/GSF	$ 648.49
	Total Project $/GSF	$ 798.02
I.	**Building Construction**	
A.	New Building Construction	$ 38,423.4
B.	Existing Building Renovations	
C.	Other Construction	$ -
	Total Building Construction	38,423.4
II.	**Related Construction**	
A.	Sitework	
1	Earthwork / Site Prep	7,684.7
2	Exterior Improvements	
a.	Paving - Asphalt / Concrete / Other	w/ site prep
b.	Sidewalks / Paths	w/ site prep
c.	Wetlands Mitigation	w/ site prep
d.	Landscape & Planting	w/ site prep
e.	Athletic / Recreational Surfaces	w/ site prep
f.	Fencing / Gates	w/ site prep
g.	Retaining Walls	w/ site prep
h.	Misc Site Improvements	w/ site prep
B.	Site Utility Systems	
1	Water & Wells	w/ site prep
a.	Fire Protection	w/ site prep
2	Sanitary Sewage	w/ site prep
3	Storm Drainage	w/ site prep
4	Gas	1,000.0
5	Steam	w/ site prep
6	Chilled Water	w/ site prep
7	Electric	w/ site prep
8	Data & Communications	w/ site prep
9	Site Lighting	w/ site prep
	Total Site Construction	8,684.7
C.	Building Demolition (NORTON)	1,342.1
D.	Hazardous Materials Removal	W/ BUILD DEMO
E.	Sustainable Elements	
1	Solar Panels / PV Array-Power Purchasing Agreement	Assume a PPA
2	Wind Power Generation	NIC
3	Geothermal Wells	1,000.0
4	Rain Garden	NIC
5	Waste Water Treatment Plants-on City Sewer	NOT REQUIRED
F.	GC / CM Mark-ups	w/ construction
	Total Related Construction	11,026.8
	Subtotal Construction - Current $	49,450.2
III.	**Escalation 8% (2025 Construction)**	12,842.8
	Total Construction - Escalated	$ 62,293.0
IV.	**Furniture, Fixtures & Equipment (FF&E)**	
A.	Loose Furnishings	1,057.6
B.	Program Related Equipment	100.0
C.	Data / Telecomm Equipment	991.5
1.	Cabling / Wall Jack / Devices	w/ construction
D.	Audio/Visual Equipment	w/ construction
E.	Security Equipment	-
1.	Cabling / Wall Jack / Devices	w/ construction
F.	Playground Equipment	600.0
G.	Specialty Signage	50.0
	Total FF & E	$ 2,799.1

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Town of Cheshire

New Norton Elementary School

Project Budget

Date: **May 13, 2022**

		PROBABLE BUDGET
Enrollment		661
$(000) except $/GSF		
V.	**Fees and Expenses**	
A.	Fees	
1	Existing Conditions & Space Program	-
2	Architect	4,556.4
a	Civil Engineering	w/ architect
b	Landscape Architect	w/ architect
c	Structural Engineering	w/ architect
d	MEP/FP Engineering	w/ architect
e	Interior / Furniture Designer	w/ architect
f	Lighting Consultant	w/ architect
g	Acoustical Consultant	w/ architect
h	Signage Consultant	w/ architect
i	LEED Designer	w/ architect
j	Referendum Services	w/ architect
k	Code Consultant	w/ architect
l	Designer's Cost Estimator	w/ architect
3	Special Consultants	
a	Haz. Mat. Consultant	125.0
b	Audio / Visual	w/ architect
c	Technology / Security Systems Design	w/ architect
d	Geo-Tech Engineering	w/ architect
e	Traffic Engineer	w/ architect
f	Ecologist / Soil Sample	w/ architect
g	Peer Reviews	45.0
h	Green Building Consultant	w/ architect
i	Storm Water Monitoring	30.0
4	Project Management	600.0
5	Building Commissioning	150.0
6	Owner's Cost Estimator	W/ CM
7	CM Preconstruction Fee	200.0
8	Owner's Legal Fees	50.0
9	Site Survey	w/ architect
10	Utility Assessment	50.0
11	Utility Usage prior to occupancy	50.0
	Sub-total Fees	5,856.4
B.	Expenses	
1	Owner's Insurance	93.4
2	Permits	w/ Construction
a.	Building	w/ Construction
b.	Town / Site	assumed waived
3	Printing	25.0
4	Construction Utilities Use	50.0
5	Site Borings	w/ architect
6	Materials Testing	150.0
7	Special Inspections	40.0
8	Consultant Reimbursables	50.0
9	Moving / Relocation	150.0
10	Temporary Space / Operations	25.0
11	Advertising	15.0
12	Physical Plant Expenses	20.0
13	Misc. Expenses	20.0
14	Financing Costs / Bond Origination	161.1
15	Site Acquisition	not appicable
a.	Real Estate Fees	-
b.	Closing Costs	-
	Sub-total Expenses	799.5
	Total Fees and Expenses	**6,655.9**
V.	**Contingency**	
A.	Construction	3,114.6
B.	Owner's Project	1,793.7
	Total Contingency	**4,908.3**
	Total Project	**$ 76,656.2**
	Construction Cost vs. Total Project Cost	81%
	Soft Cost vs. Total Project Cost	19%

OWNERS DESIGN REVIEW

Colliers Project Leaders

South Windsor Public Schools

Pleasant Valley E.S.

Construction Documents

CPL Review Comments

Review Date: 8/23/2021

Reviewer Name: Kate Turner

Designer Response Comments

Date of Designer Response: 9/30/2021

Date of Documents: 7/30/2021

DISCIPLINE CODES		DWGS / SPECS	REVIEW COMMENTS	PHASE / DATE	SOURCE	DESIGN TEAM RESPONSE	DATE	STATUS
C	1.0	C-UT1	Confirm that the fire line and sewer line directly east of the cafeteria/kitchen do not interfere with each other. Both appear to be 48" below grade.	2-Apr	CPL-CEW	Note is already on the plans to deflect the fire line below the sanitary and storm line crossings		
C	2.0	C-UT1	Locate natural gas line that is indicated on dwg PS1-1-1. Need fenced enclosure for regulator, etc.	2-Apr	CPL-CEW	Natural gas line is shown on C-UT1. SLR to add fence for equipment.		
C	3.0	C-DM1	Leased modular classrooms to be removed by Lessor prior to demolition. Coordinate with district which portables may be owned by the district.	2-Apr	CPL-KT	Coordinated with District and added notes to the plans as to which modulars are to be removed by the leasing companies prior to demolition. Other modulars are to be demolished with the building.		
L	1.0	MA	Provide callouts for benches.	6-May-21	CPL-CEW	Callouts will be added to the drawings		
L	2.0	MA	Provide detail number for timber guiderail	6-May-21	CPL-CEW	Detail number is on the detail sheet		
L	3.0	MA	Remove sidewalk at north of staff parking lot ILO sidewalk along E/W connector	30-Aug-21	CPL-KT	Sidewalk has been removed		
L	4.0	MA	Confirm if storage shed is to be bid as part of base contract or alternate	30-Aug-21	CPL-KT	Storage shed is currently listed as add Alternate #1		
L	5.0	MA	Fenced in generator	19-Apr	SWPS-DC	Coordinating with CES		
L	6.0	MA	Indicate materials at entrances	30-Aug-21	CPL-KT	Only material at all entrances is scored concrete sidewalk		
L	7.0	MA	remove timber guardrail island between parking and parent drop off	3-Sep-21	SWPS-DC	This has been completed		
L	8.0	MA	add fence to right of paved playground so balls do not go into loading dock	3-Sep-21	SWPS-DC	This has been completed		
L	9.0	MA	swap loaction of Basketball court outside	3-Sep-21	SWPS-DC	This has been completed		
L	10.0	MA	fence enclosure for generator	3-Sep-21	SWPS-DC	This has been completed		
L	11.0	MA	# of planting increased since DD there are too many safety and maintenance concerns reduce drastically	3-Sep-21	SWPS-DC	This has been completed - total number of trees is now 181		
L	12.0	LA	Correct dimensions on the reinforced paved parking in the rear. Should be 120-ft wide.	30-Aug-21	CPL-CEW	This has been completed		
L	13.0	LA	Indicate detail for timber guardrail	30-Aug-21	CPL-KT	Steel-backed Timber Guiderail Detail is on Detail Sheet		
L	14.0	SPM	Clarify crosswalks along Ellington Rd	30-Aug-21	CPL-KT	Plans still show the two existing crosswalks (near the existing school). A single new crosswalk is shown on the site plan and Signage, Pavement and Marking Plan, as requested by the P&Z commission		
L	15.0	SD-2	Detail 01 Refuse Enclosure - identify location on plan. No fencing indicated on LA	30-Aug-21	CPL-KT	Vinyl Clad fence detail has been added. As requested, there will be no swing gates at the paved side of the pad		
L	16.0	ENL-2	Courtyard needs re-design to simplify materials. Not maintenance friendly.	30-Aug-21	CPL-CEW	Courtyard has been redesigned as directed		
L	17.0	ENL-2	reduce brick pavers in courtyard	3-Sep-21	SWPS-DC	Done		

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DISCIPLINE CODES		DWGS / SPECS	REVIEW COMMENTS	PHASE / DATE	SOURCE	DESIGN TEAM RESPONSE	DATE	STATUS
L	18.0	ENL-2	reduce of eliminate all planting in courtyard , grass only	3-Sep-21	SWPS-DC	All shrubs and trees have been removed. Besides an increased quantity of lawn, the landcape beds will only include evergreen ground cover in the beds. After a year or two there should be no additional maintenace required for these beds		
L	19.0	ENL-2	confirm separate shut off/ isoltion valves for water fountain / bottle filler stations	3-Sep-21	SWPS-DC	Confirmed		
L	20.0	ENL-2	Note #5 - Stump seating - Please provide a detail on how these get installed. Are they loose sitting on the concrete and movable or are they set in the ground. The edges should be chamfered and the ends sealed. A note should be placed on the appropriate Demolition Drawing to make the contractor aware of the need to cut the seating from existing trees on site.	July 30, 2021 Pricing Set	CPL-TJC	Stump seating in courtyard has been eliminated, but remain at the Outdoor Classroom. Appropriate notes will be added to the plans to depict source of stump seating to be from trees removed on-site, with ends appropriately sealed		
A	1.0	A1-01-1	Discuss a set of separation doors from Area D to A - the Gymnasium Lobby to the First Grade Classroom wing. If the gym is used for extra curricular activates it may be nice to separate the public access from the school.	July 30, 2021 Pricing Set	CPL-TJC	There currently is a set of doors which separates Gym Lobby from first grade wing.		
A	2.0	A1-0-2	Stair 2 & 3 - The light well has a guard rail. The placement of the rail will need to be carefully located to avoid projecting into or reducing the path of travel.	July 30, 2021 Pricing Set	CPL-TJC	The current projection into the stair is 3". This is a standard projection. There is no reducing the path of travel.		
A	3.0	A1-1-1A	Add door tag at Stair S1-1	30-Aug-21	CPL-KT	Door tag has been added		
A	4.0	A1-1-1A	Where is media center sliding glass partition system indicated?	30-Aug-21	CPL-KT	The media center sliding glass partition will be replaced with a pair of interior storefront doors		
A	5.0	A1-1-1A	Confirm with SWPS that a double-door to the courtyard is required. Confirm threshold is correct threshold to prevent water intrusion. Door 110.2.	30-Aug-21	CPL-CEW	For notes on threshold see the response below to Item #6		
A	6.0	A1-1-1A	Door L1-2.4: Verify that the threshold design will prevent water intrusion.	30-Aug-21	CPL-CEW	Refer to wall section 5/A3-2-4. This does show a 1/2" metal threshold which is maximum per ADA. Threshold is specified under door hardware spec. Specification also call for weather and perimeter seals.		
A	7.0	A1-1-1A	Confirm where the dowspout from the vesitbule roof ties into 6" leader.	30-Aug-21	CPL-CEW	Not sure which downspout you are reffering to.		
A	8.0	A1-1-1B	Align wall with window mullions between 104B and 104C	9-Apr-21	CPL-CW	The three windows in that location cannot move as they just barely fit underneath the brace frame		
A	9.0	A1-1-1B	Add sink in OT/PT	30-Apr-21	PV-Faculty	Sink has been added to OT/PT		
A	10.0	A1-1-1B	Media Center - Sliding Glass Partition System. Is there a mechanism for emergency exiting if the partition is closed and there is an emergency?	July 30, 2021 Pricing Set	CPL-TJC	The media center sliding glass partition will be replaced with a pair of interior storefront doors		

OWNERS DESIGN REVIEW

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DISCIPLINE CODES		DWGS / SPECS	REVIEW COMMENTS	PHASE / DATE	SOURCE	DESIGN TEAM RESPONSE	DATE	STATUS
A	11.0	A1-1-1B	Confirm if there's supposed to be a secure records room for files.	30-Aug-21	CPL-CEW	Refer to Educational Specifications		
A	12.0	A1-1-1B	Provide eleavtion on south wall of room 101F. Show millwork, monitor, etc. Cabinetry should be in base contract of project, not FF&E. EQ drawings show 8'mb. AV is going on the south walll according to the technology drawings.	30-Aug-21	CPL-CEW	There is a flat screen TV above the cabinetry (which is FF&E) along the south wall. There is an 8' markerboard along the east wall and a 6' tackboard along the north wall.		
A	13.0	A1-1-1B	Room 101F: Confirm if whiteboard/tackboard should be noted on east wall.	30-Aug-21	CPL-CEW	See note above		
A	14.0	A1-1-1B	Provide exterior elevation of wall on CL Y10 (along media center).	30-Aug-21	CPL-CEW	Exterior elevation along CL Y10 (along media center) is 3/A2-1-1		
A	15.0	A1-1-1B	Must move wall between office 104B and 104C so that it's not framing to a window.	30-Aug-21	CPL-CEW	Refer to item 8.0 above		
A	16.0	A1-1-1B	Appears to be a column on CL Y10 between 104C and 105. Should be concealed in wall. Designer to check this wall vs window as well.	30-Aug-21	CPL-CEW	It's not a column but a brace frame. Refer to drawing S2-1-2, brace frame VB-B4.		
A	17.0	A1-1-1B	Room 158: Confirm if enough room between door fram and FSTV for light switch.	30-Aug-21	CPL-CEW	The location of the FSTV has been moved to the east wall and 6'MB has been placed along south wall - there is enough room for the light switch		
A	18.0	A1-1-1B	Confirm with SWPS if a hook is required to be in structural steel above the ceiling for swing.	30-Aug-21	CPL-CEW	We are providing misc metals in the ceiling to hang the swing from. The hook would come with the swing which is purchased under FF&E.		
A	19.0	A1-1-1B	Confirm if wall cavity at door C1-7.1 (btwn math intervention and storage) is required. Appears to be extra framing that is not required.	30-Aug-21	CPL-CEW	These door are on hold openers which the chase is there for them yo mount to.		
A	20.0	A1-1-1C	Room 145: Confirm if a smartTV or other AV device is to be located on the north wall.	30-Aug-21	CPL-CEW	There is currently a flat screen TV along the west wall		
A	21.0	A1-1-1C	AV Closet 136B is not proximal to location of AV in Cafeteria.	30-Aug-21	CPL-KT	There weren't a lot of options as to where to place this space. It is located out of the Cafeteria.		
A	22.0	A1-1-1C	Trench drain note @ loading dock is in conflict with site drainage plan. Confirm which is correct	30-Aug-21	CPL-KT	Note has been modified to refer to site utilities plan		
A	23.0	A1-1-1D	Relocate teacher desk and associated power to west wall of Music Room 141	30-Apr-21	PV-Faculty	Thereis no space on the west wall to relocate the teacher's desk and associated power.		
A	24.0							
A	25.0	A1-1-1D	Dimensions of partial height wall at cubbies varies from 3 5/8" to 4 1/4" in width.	30-Aug-21	CPL-CEW	Dimensioning has been updated		
A	26.0	A1-1-1D	Confirm if the two columns on CL 1 between CL J and K are false columns. If not, confirm if footings are required.	30-Aug-21	CPL-CEW	There is a steel column in the northern most enclosure. All 3, including the two false columns sit on footings per the structural drawings.		
A	27.0	A1-1-2A	Recommend that door V2-1 be solid metal doors versus storefronts. Also, need to confirm the thresholds and weatherstrips are correctly specified to keep rain out given that they open inwards.	30-Aug-21	CPL-CEW	Door V2-1 is changed to hollow metal. The door is elevated in this room (see interior elevation 5/A2-2-1). This door does call for wether and perimeter seals.		

OWNERS DESIGN REVIEW

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Review Date: 8/23/2021

Reviewer Name: Kate Turner

Date of Designer Response: 9/30/2021

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DISCIPLINE CODES		DWGS / SPECS	REVIEW COMMENTS	PHASE / DATE	SOURCE	DESIGN TEAM RESPONSE	DATE	STATUS
A	28.0	A1-2-1A	The Asphalt Shingle roofing is a little difficult to follow as three assemblies are shown; shingles on plywood and shingles on composite roof insulation both 6-1/2" and 2-1/2". This is clarified in the building sections A3-2-7 and Elev 1 A3-2-9. However understanding how the vertical insulation transition from the horizontal insulation vertically to the composite insulation is not shown on the drawings. The composite roof insulation is also referred to as Roof System C on A3-2-7 & 9 but not on the legend.	July 30, 2021 Pricing Set	CPL-TJC	Additional wall section and details will be included at the transition between C & Type D roof systems. Also, Roof system C will be added to the roof legend.		
A	29.0	A1-2-1A	Please provide Section call outs for the wall assembly at the transition from the peak of the sloped roof the low slope roof.	July 30, 2021 Pricing Set	CPL-TJC	Yes, additional sections will be included in the Bid Set.		
A	30.0	A1-2-1A & B	The Roof Legend and the plan call out indicate different assemblies.	July 30, 2021 Pricing Set	CPL-TJC	Legend and plan now coordinated		
A	31.0							
A	32.0	A2-1-1	Elevations 1 and 3 in the key plan appear to be transposed.	30-Aug-21	CPL-CEW	Building elevation tags have been corrected.		
A	33.0	A2-0-1	In general the gutters are shown perfectly horizontal. Is it the intention that the gutters be sloped to the downspouts?	July 30, 2021 Pricing Set	CPL-TJC	The gutters will be installed as horizontal.		
A	34.0	A2-2-7	Detail 9: Provide height of partial wall at cubbies and advise if hardwood cap is specified to be finished, etc.	30-Aug-21	CPL-CEW	Dimension has been added to detail 9 - finish for wood caps is specified under spec section 06 40 20 Interior Architectural Woodwork		
A	35.0							
A	36.0	A-2-2-2	Include open display shelving at west elev 6 of STEM	30-Apr-21	PV-Faculty	This has been updated to include open display shelving		
A	37.0	A-2-2-2	Add u/c freezer in STEM west elev 6	30-Apr-21	PV-Faculty	U/C refrigerator/freezer has been added		
A	38.0	A-2-2-2	Reverse location of teacher wardrobe and teacher cabinet in west elev 6 of STEM	30-Apr-21	PV-Faculty	The drawings have been updated to reflect this change.		
A	39.0	A-2-2-2	Remove of markerboards on west elevation 2 of Media - request additional storage	30-Apr-21	PV-Faculty	The area where you are talking about is the teaching area within the media center which includes the flat screen TV and markerboard.		
A	40.0	A-2-2-2	Add refrigeration required in Health Office	30-Aug-21	CPL-KT	The plans currently include a refrigerator in the Health Office - what else needs to be added?		
A	41.0	A-2-2-2	Add lockable storage cabinet required in Health Office	30-Aug-21	CPL-KT	All of the cabinets above the counter are lockable		
A	42.0	A2-2-8	Remove vinyl cushion from lobby benches	30-Aug-21	CPL-KT	This note has been removed from the interior elevation - the bench maybe removed as part of VE		

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DISCIPLINE CODES		DWGS / SPECS	REVIEW COMMENTS	PHASE / DATE	SOURCE	DESIGN TEAM RESPONSE	DATE	STATUS
A	43.0	A3-2-1	Section 4 - The note at the wall with the roof membrane appears to indicate that the roof membrane terminates mid-wall height and the upper half of the wall is exposed plywood. I understand that this is a method to stabilize the membrane but bidders may interpret this as a termination point if the note does not indicate Roof Membrane Flashing full heigh of the wall.	July 30, 2021 Pricing Set	CPL-TJC	Added to roof membrane note - "full height of wall"		
A	44.0	A3-2-1	Sections 4 - 6 do not show ventilation of the roof space. Will ventilation be provided?	July 30, 2021 Pricing Set	CPL-TJC	Ventilated ridge vent has been added to the section/details & specifications		
A	45.0	A3-2-12	Section 2 at the transition from the roof to the flashing on the wall - a minimum dimension of 8" should be shown to the top of the term bar. It appears to be more than that graphically but the direction for the installer is needed.	July 30, 2021 Pricing Set	CPL-TJC	Added 8" minimum dimension to the wall flashing detail		
A	46.0	A4-1-1	The dimensioning of the toilet rooms from the CL of the steel has been an issue in the past. For example Detail 1 - The layout starts at the CL of Col 13 the a 3" offset from the steel. The finishes are not included in the 5'-0" dimension. This will cause a problem with the turning radius in the accessible stall. Can the dimension strings be checked?	July 30, 2021 Pricing Set	CPL-TJC	This has been updated. Dimensions between parttions have been enlraged to allow for tolerances around the wall finishes		
A	47.0	A5-1-2	Typically compressible filler is shown between columns and masonry. Details 4 & 5 do not show this. Can a compressible filler be added to the detail?	July 30, 2021 Pricing Set	CPL-TJC	After correspondence with the structural engineer, we see no requirement for premolded filler at this condition, however, we do note use of sealant and backer rod t these joints when they are exposed to view		
A	48.0	A5-1-5	Entire sheet is not notated. Incomplete.	30-Aug-21	CPL-CEW	These sheets will be completed for the bid set		
A	49.0	A5-1-6	Entire sheet is not notated. Incomplete.	30-Aug-21	CPL-CEW	These sheets will be completed for the bid set		
A	50.0	A5-3-2	I'm having trouble following the ACM panel line at the transition from the vertical panel to the roof. Sections 7 & 7 on 3-2-3 appear to show one transition below the metal roof edge and another under the roof membrane.	July 30, 2021 Pricing Set	CPL-TJC	The roof membrane is terminated behind the roof edge clamping plate, ACM terminates with continuous ACM "trim" behind the roof edge cover. ACM is a rainscreen system thus provide a path for water to exit.		
A	51.0	A5-3-3	Detail 2 appears to show a pathway for water to get into the ACM panel system at the top horizontal transition. And the top edge extend over the vertical face to prevent water infiltration?	July 30, 2021 Pricing Set	CPL-TJC	See previous response.		
A	52.0	A5-3-4	Roof system D is called out on section 3. This is not included on the roof legend.	July 30, 2021 Pricing Set	CPL-TJC	Added "Roof Type D" to legend for asphalt shingle roofing.		

OWNERS DESIGN REVIEW

Colliers Project Leaders

South Windsor Public Schools

Pleasant Valley E.S.

Construction Documents

CPL Review Comments | **Designer Response Comments**

Review Date: 8/23/2021

Reviewer Name: Kate Turner

Date of Designer Response: 9/30/2021

Date of Documents: 7/30/2021

DISCIPLINE CODES		DWGS / SPECS	REVIEW COMMENTS	PHASE / DATE	SOURCE	DESIGN TEAM RESPONSE	DATE	STATUS
A	53.0	A5-3-4	Section 3 - A roof membrane is not indicated for the floor of the Cupola. This is called to be a pre-manufactured unit but it should be confirmed that the floor is watertight and has a method for drainage.	July 30, 2021 Pricing Set	CPL-TJC	Comments noted, will add roof membrane notation, pitching insulation and drainage.		
A	54.0	A6-1-1	Clean up on door schedule required	30-Aug-21	CPL-CEW	Door schedule has been updated		
A	55.0	A6-1-1	Advise if card readers should be noted in hardware schedule	30-Aug-21	CPL-KT	The card readers are indciated in the hardware sets which are specified under 08 70 00 Door Hardware.		
A	56.0	A6-3-5	The details at the windows should be reviewed. For example the window head appears to show the flashing behind the lintel channeling water into the window frame with no primary weather seal shown. The jambs show the transition membrane over the wood blocking with no primary weather seal between the transition membrane and window. The sill has a big gap between the transition membrane and the window at both the blocking and the shim and then the window.	July 30, 2021 Pricing Set	CPL-TJC	Comments noted, will comply.		
A	57.0	A6-3-5	The translucent wall panel details do not show a weather seal at the head, jamb or sill. These details should be reviewed.	July 30, 2021 Pricing Set	CPL-TJC	Manufacturers detailing requires base extrusion to be set in sealant only, our detailing pins the transition membrane below that continuous base extrusion thus provinding a continuous closure of the AVB system.		
A	58.0	A8-1-1B	Confirm if linear fixture count in Main Street is accurate. Seems to be double counted	30-Aug-21	CPL-KT	See response to electical item 1.0		
A	59.0	A8-1-1C	Reference detail for ceiling type in Cafeteria Lobby L1-3	30-Aug-21	CPL-KT	Ceiling tag as been added		
A	60.0	A9-0-1	Note grommets to be located in field	30-Aug-21	CPL-KT	General note is being added to A9-0-1		
A	61.0	A9-2-2	Indicate mounting detail for typical classroom to be applied on tackable surface	30-Aug-21	CPL-KT	There is no tackable surface outside of the typical classroom		
A	62.0	AF1-1-1C	Consider Carpet in office 150A	30-Aug-21	CPL-KT	Carpet will be added to this space		
A	63.0	EQ-3.6	Consider prefabricated music storage units	30-Aug-21	CPL-KT	This is identified on the VE Log - need direction from Owner		
A	64.0	FS-01	Swap hinge side and open into hall for dry storage. Will increase storage ability	3-Sep-21	SWPS-DC	Door placement has been modified		
A	65.0	FS-02	Confirm ventilation requirements for warming kitchen with no open heat source	30-Aug-21	CPL-KT	Design of the kitchen was completed in an earlier phase		
A	66.0	FS-02	Verify convenience outlets are suffiecient at prep surfaces	30-Aug-21	CPL-KT	Design of the kitchen was completed in an earlier phase		
A	67.0	FS-02	Confirm with Food Service department any countertop appliance requirements. Verify utility requirements and electrical load	30-Aug-21	CPL-KT	Design of the kitchen was completed in an earlier phase		
S	1.0	S1-1-1C	Confirm recessed area for coolers in slab as noted in FS-04	30-Aug-21	CPL-KT	Slab depression is being added at the area of the freezer and cooler.		

OWNERS DESIGN REVIEW

Colliers Project Leaders

South Windsor Public Schools

Pleasant Valley E.S.

Construction Documents

CPL Review Comments | **Designer Response Comments**

Review Date: 8/23/2021

Reviewer Name: Kate Turner

Date of Designer Response: 9/30/2021

Date of Documents: 7/30/2021

DISCIPLINE CODES		DWGS / SPECS	REVIEW COMMENTS	PHASE / DATE	SOURCE	DESIGN TEAM RESPONSE	DATE	STATUS
P	1.0	PS1-1-1	Identify irrigation on Landscape and Plumbing Plans as required by P&Z	30-Aug-21	CPL-KT	Irrigation is covered on the landscape drawings and is specified under section 32 97 45 Courtyard Irrigation		
P	2.0		Need to change the condensate lines from VRF units to PVC from the specified copper per estimate reconciliation meeting.	30-Aug-21	CPL-CEW	CES RESPONSE: CES would not recommend PVC as it tends to sag with the small piping required for condensate but this can be updated in our specs if required.		
P	3.0	P-1-1-2A	Confirm the elevation of the roof overlow drain outlets in the couryard area to ensure they do not interferw with the precast belt course.	30-Aug-21	CPL-CEW	CES RESPONSE: DRA & CES have coordinated this but elevations can be added for clarification.		
P	4.0	P1-1-2B	There doesn't appear to be any cold water supply to this floor from the fisrt floor plan. Need to extend CW up to second floor. TYP all of 2nd floor.	30-Aug-21	CPL-CEW	CES RESPONSE: There are cold water feeds to all sinks on this floor from below.		
E	1.0	EL1-1-B	Confirm fixture K count in main Street. QTY seems excessive	30-Aug-21	CPL-KT	CES RESPONSE: Type K is a very low profile pendant fixture, only 1-1/2" in width, with a relatively low lumen output. Quantity of fixtures specified will give consistent light levels across the "main street" area.		
E	2.0	EP1-1A	Identify casework in classrooms to coordinate receptacle height. TYP all classrooms.	30-Aug-21	CPL-KT	CES RESPONSE: Electrical General Note #8 on Drawing E0-1-1 covers this. However, we will add a receptacle description for the charging stations to ensure coordination.		
E	3.0	E4-1-1	Receptacles shown on FS plans do ont coordinate with these locations. Confirm who owns this	30-Aug-21	CPL-KT	CES RESPONSE: CES will overlay FS background onto E4-1-1. Exact locations of all receptacles shall be dictated by FS rough-in plans, per Kitchen Equipment schedule, general note #2.		
E	4.0	EP1-1-1B	101F: Show floor junction box for conference table. Low voltage contractor may be different that electrical.	30-Aug-21	CPL-CEW	CES RESPONSE: Floor box is specified on both electrical and technology plans. Refer to E0-1-1 and T0-1-1 legends sheets.		
M	1.0	M1-1-2A	Confirm if an expansion sleeve/joint is required on the supply air from room 218 to room 220.	30-Aug-21	CPL-CEW	CES RESPONSE: Expansion requirements are documented with Section 23 05 48.		
M	2.0	M5-1-4	Detail 1 has filter in wrong location	3-Sep	SWPS-DC	CES RESPONSE: This detail has been updated. The return grilles are scheduled to receive filter frames and filters for each ducted VRF unit as discussed.		

Colliers Project Leaders

South Windsor Public Schools

Pleasant Valley Elementary School

Construction Documents ($000's)

9/10/2021

	A/E Control Budget	A1 Estimate for Review: Gilbane	B1 Estimate for Review: Tarbell/DRA	C1 Difference (A1 - B1)	A Revised at Recon Meeting: Gilbane	B Revised at Recon Meeting: Tarbell/DRA	C Difference (A - B)	D Reconciled Estimate
	7/20/2020	8/23/2021	8/23/2021		9/7/2021	9/1/2021		
Renovated Area (GSF)		0	0	0	0	0	0	0.0
New Construction Area (GSF)	101,288	102,784	102,350	434	102,784	102,784	0	102784.0
Construction Total Area (GSF)	101,288	102,784	102,350	434	102,784	102,784	0	102,784
Building Construction Current$/GSF	$ 408.00	$ 333.83	$ 331.74	$ 2.09	$ 333.80	$ 332.81	$ 0.98	$ 341.86
Total Construction Current $/GSF	$ 452.36	$ 467.63	$ 458.27	$ 9.36	$ 460.71	$ 455.28	$ 5.43	$ 458.00
I. Building Construction (to 5' beyond perimeter)								
2 Interior Demolition		$ -	$ -	0.0	$ -	$ -	0.0	$ -
3 Concrete			$ 1,724.0	(1,724.0)		$ 1,760.0	(1,760.0)	$ 1,760.00
03 10 00 Concrete Formwork				0.0	0.0	0.0	0.0	0.0
03 20 00 Concrete Reinforcing				0.0	0.0	0.0	0.0	0.0
03 30 00 Cast in Place Concrete		996.9		996.9	1005.0	0.0	1005.0	502.5
Concrete Slab		787.0		787.0	793.4	0.0	793.4	396.7
4 Masonry				0.0			0.0	$ -
04 20 00 Unit Masonry Assemblies		1537.2	1939.9	-402.7	1549.7	1939.9	-390.1	1744.8
04 71 00 Cast Stone		611.1	247.5	363.6	650.8	247.5	403.3	449.2
5 Metals				0.0			0.0	$ -
05 12 00 Structural Steel		2936.6	2426.2	510.4	2960.4	2907.4	53.0	2933.9
05 20 00 Steel Joists		272.4	70.0	202.4	274.6	104.5	170.1	189.5
05 30 00 Metal Decking		543.6	486.7	56.9	478.4	520.8	-42.3	499.6
05 40 00 Cold Formed Metal Framing		510.6	808.3	-297.7	514.9	808.3	-293.4	661.6
05 50 00 Metal Fabrications		376.0	423.3	-47.3	394.7	299.6	95.0	347.2
6 Woods & Plastics				0.0			0.0	$ -
06 10 00 Rough Carpentry		351.4	353.4	-2.0	353.9	353.4	0.5	353.6
06 20 00 Finish Carpentry			227.0	-227.0	0.0	227.0	-227.0	113.5
06 40 00 Architectural Woodwork				0.0	0.0	0.0	0.0	0.0
-Other				0.0	0.0	0.0	0.0	0.0
7 Thermal & Moisture Protection				0.0			0.0	$ -
07 11 00 Below Grade Damproofing		23.6		23.6	2.5	0.0	2.5	1.3
07 16 00 Cementitious Waterproofing				0.0	0.0	0.0	0.0	0.0
07 21 00 Building Insulation		320.0	337.6	-17.6	579.5	337.6	241.9	458.5
07 25 00 Air and Vapor Barrier System		254.7	325.1	-70.4	0.0	325.1	-325.1	162.6
07 26 19 Topical Moisture Vapor Management System		189.0	196.0	-7.0	0.0	196.0	-196.0	98.0
07 31 13 Asphalt Shingles		174.9	173.3	1.6	176.4	173.3	3.1	174.8
07 41 50 Aluminum Composite Metal Panels		769.2	632.8	136.4	757.1	632.8	124.4	695.0
07 53 23 EPDM Roofing		1165.3	1160.7	4.6	1174.7	923.1	251.5	1048.9
07 54 19 Adhered PVC Roofing System		0.0	0.0	0.0	0.0	0.0	0.0	0.0
07 62 00 Sheet Metal Flashing and Trim		40.6	0.0	40.6	40.9	237.6	-196.7	139.2
07 72 00 Roof Accessories		53.6	14.0	39.6	54.0	14.0	40.0	34.0
07 72 33 Roof Hatches		0.0	0.0	0.0	5.0	2.5	2.5	3.8
07 72 34 Roof Hatch Safety Rails		5.0	2.5	2.5	0.0	0.0	0.0	0.0
07 84 00 Firestopping		74.4	72.4	2.0	80.7	72.4	8.4	76.6
07 90 00 Joint Sealers		128.4	141.4	-13.0	129.5	141.4	-11.9	135.4
07 95 13 Interior Expansion Joint Covers		0.0	12.7	-12.7	0.0	12.7	-12.7	6.3
8 Doors & Windows				0.0			0.0	$ -
08 11 13 Steel Doors and Frames		199.1	135.7	63.4	200.7	135.7	65.0	168.2
08 14 16 Flush Wood Doors			103.2	-103.2	0.0	103.2	-103.2	51.6
08 31 00 Access Doors and Panels			8.0	-8.0	0.0	8.0	-8.0	4.0
08 33 00 Rolling Service Doors		8.0	43.1	-35.1	8.1	43.0	-34.9	25.5
08 34 73 Sound Control Door Assemblies			5.0	-5.0	0.0	5.0	-5.0	2.5
08 41 13 Aluminum Framed Storefronts & Entrances - Exterior		114.0	278.4	-164.4	239.8	302.0	-62.2	270.9
08 41 14 Aluminum Framed Storefronts & Entrances - Interior		192.2	282.8	-90.6	181.1	282.8	-101.6	231.9
08 44 14 Glazed Aluminum Curtain Wall		1337.5	1694.6	-357.1	1463.3	1413.1	50.2	1438.2
08 45 00 Insulated Translucent Wall Panel System (Kalwal)			32.6	-32.6	0.0	32.6	-32.6	16.3
08 51 13 Aluminum Windows		462.8	497.6	-34.8	466.5	497.6	-31.1	482.1
08 71 00 Door Hardware		214.4	188.8	25.6	216.1	188.8	27.3	202.5
08 71 13 Automatic Door Openers			8.0	-8.0	0.0	8.0	-8.0	4.0
-Other				0.0	0.0	0.0	0.0	0.0
08 80 00 Glazing		350.2	53.6	296.6	352.8	53.6	299.2	203.2
08 90 00 Louvers & Vents		7.5	1.1	6.4	7.6	1.1	6.5	4.3

ESTIMATE ANALYSIS (CSI Format)

Colliers Project Leaders

Construction Documents ($000's)

9/10/2021

	A/E Control Budget	A1 Estimate for Review: Gilbane	B1 Estimate for Review: Tarbell/DRA	C1 Difference (A1 - B1)	A Revised at Recon Meeting: Gilbane	B Revised at Recon Meeting: Tarbell/DRA	C Difference (A - B)	D Reconciled Estimate
	7/20/2020	8/23/2021	8/23/2021		9/7/2021	9/1/2021		
9 Finishes				0.0			0.0	$ -
09 22 00 Metal Support Assemblies				0.0	0.0	0.0	0.0	0.0
09 29 00 Gypsum Board		1757.0	1970.1	-213.1	1880.9	1919.6	-38.6	1900.2
09 29 10 Gypsum Sheathing			144.7	-144.7	0.0	144.7	-144.7	72.3
09 30 13 Ceramic Tile		238.4	268.8	-30.4	240.4	256.6	-16.2	248.5
09 30 19 Porcelain Tile		106.2	129.7	-23.5	107.1	129.7	-22.6	118.4
09 51 00 Acoustical Ceiling		550.7	515.7	35.0	555.4	566.3	-10.9	560.8
09 64 50 Stage Wood Flooring		17.1	18.3	-1.2	0.0	0.7	-0.7	0.3
09 65 19 Resilient Tile Flooring		541.9	417.2	124.7	513.8	404.2	109.6	459.0
Moisture Mitigation				0.0	0.0	0.0	0.0	0.0
09 65 60 Rubber Flooring			2.6	-2.6	0.0	2.6	-2.6	1.3
09 67 23 Resinous Flooring			27.2	-27.2	0.0	27.2	-27.2	13.6
Wood Flooring				0.0	0.0	0.0	0.0	0.0
09 68 00 Carpet		86.4	81.0	5.4	87.1	81.0	6.1	84.0
09 72 00 Wall Coverings		11.8	22.9	-11.1	82.1	22.9	59.3	52.5
09 73 00 Synthetic Sports Flooring		98.4	114.5	-16.1	98.9	114.5	-15.6	106.7
09 77 00 FRP Wall Panels		61.7	202.1	-140.4	0.0	31.1	-31.1	15.6
09 80 00 Acoustical Plaster Systems		0.0	0.0	0.0	0.0	0.0	0.0	0.0
09 84 14 Fabric Wrapped Acoustical Wall Panels		48.1	19.0	29.1	48.5	19.0	29.5	33.7
09 84 20 Wood Fiber Acoustic Panels		0.0	23.0	-23.0	0.0	23.0	-23.0	11.5
09 77 05 Phenolic Resin Wall Panel		0.0	0.0	0.0	0.0	171.0	-171.0	85.5
09 91 00 Painting		230.3	220.4	9.9	232.2	220.4	11.8	226.3
09 96 00 High Performance Coating			10.0	-10.0	0.0	10.0	-10.0	5.0
Allowances		58.7		58.7	61.1	0.0	61.1	30.5
10 Specialties				0.0			0.0	$ -
10 11 00 Visual Display Surfaces		175.5	175.5	0.0	177.0	175.5	1.4	176.2
10 12 00 Display Cases			42.0	-42.0	0.0	42.0	-42.0	21.0
10 14 00 Signage		41.1	32.5	8.6	41.5	85.8	-44.3	63.6
10 21 13 Toilet and Dressing Compartments		25.2	35.5	-10.3	25.4	35.5	-10.0	30.4
10 21 23 Cubicle and Walk-Draw Curtains			1.9	-1.9	2.9	1.9	1.0	2.4
10 26 13 Wall and Corner Guards			0.0	0.0	0.0	0.0	0.0	0.0
10 28 13 Toilet Accessories		44.2	27.3	16.9	44.6	27.3	17.3	35.9
10 41 16 Emergency Key Cabinets			1.4	-1.4	0.0	1.4	-1.4	0.7
10 43 13 Automated External Defebrillator		0.6	6.6	-6.0	0.6	6.6	-6.0	3.6
10 44 00 Fire Protection Specialties		6.6	5.3	1.3	6.7	5.3	1.3	6.0
10 51 13 Metal Lockers		101.3	108.0	-6.7	102.1	108.0	-5.9	105.1
10 65 20 Operable Partitions		112.6	67.2	45.4	113.5	67.2	46.3	90.4
10 74 23 Cupola		65.0	60.0	5.0	65.5	60.0	5.5	62.8
10 82 00 Rooftop Screening			60.8	-60.8	0.0	60.8	-60.8	30.4
10 10 00 Photoluminescent Safety Products			12.8	-12.8	0.0	12.8	-12.8	6.4
10 71 13 Exterior Sun Control Devices			56.5	-56.5	0.0	56.5	-56.5	28.2
11 Equipment (Fixed to Building Only)				0.0			0.0	$ -
11 06 20 Platform Curtains		15.8	19.4	-3.6	16.0	19.4	-3.4	17.7
11 13 00 Loading Dock Equipment		3.0	2.5	0.5	3.0	2.5	0.5	2.8
11 40 00 Food Service Equipment		251.9	249.5	2.4	253.9	255.9	-2.0	254.9
11 48 40 Basketball Backstops / Gym Equip		91.0	43.0	48.0	153.4	43.0	110.4	98.2
11 48 60 Gym Curtains		25.1	14.1	11.0	0.0	14.1	-14.1	7.0
11 49 40 Gymnasium Wall Padding		16.3	14.9	1.5	0.0	14.9	-14.9	7.4
11 52 13 Projection Screens		18.2	26.0	-7.8	18.3	26.0	-7.7	22.1
11 60 00 Fixed Casework and Equipment		1151.1	963.3	187.8	1160.4	963.3	197.1	1061.8
-Other		2.9		2.9	0.0	10.0	-10.0	5.0
12 Furnishings (Fixed to Building Only)				0.0			0.0	$ -
12 24 13 Window Shades		49.5	45.1	4.4	49.9	45.1	4.9	47.5
12 48 26 Entrance Tile		28.5	55.0	-26.5	28.7	55.0	-26.3	41.9
12 28 42 Foot Grilles			10.0	-10.0	0.0	10.0	-10.0	5.0
-Other (Kiln, Bleachers)		28.7	80.0	-51.3	9.0	47.0	-38.0	28.0
13 Special Construction				0.0	$ -	$ -	0.0	$ -
13 34 23 Fabricated Structures			Alternate	0.0	0.0	0.0	0.0	0.0
-Other				0.0	0.0	0.0	0.0	0.0
14 Conveying System				0.0			0.0	$ -
14 20 00 Electric Traction Elevators		130.0	130.0	0.0	131.0	130.0	1.0	130.5
-Other				0.0	0.0	0.0	0.0	0.0

ESTIMATE ANALYSIS (CSI Format)

Colliers Project Leaders

Construction Documents	($000's)							
9/10/2021		A1	B1	C1	A	B	C	D
		Estimate for Review			Revised at Recon Meeting			
	A/E Control Budget	Gilbane	Tarbell/DRA	Difference (A1 - B1)	Gilbane	Tarbell/DRA	Difference (A - B)	Reconciled Estimate
	7/20/2020	8/23/2021	8/23/2021		9/7/2021	9/1/2021		
21 Fire Protection		$ 485.80	$ 486.90	(1.1)	$ 489.63	$ 486.94	2.7	$ 488.30
Firepump				0.0	0.0	0.0	0.0	0.0
Standpipe and Fire Main				0.0	0.0	0.0	0.0	0.0
21 13 13 Wet-Pipe Sprinkler Systems				0.0	0.0	0.0	0.0	0.0
-Other				0.0	0.0	0.0	0.0	0.0
22 Plumbing		$ 1,852.00	$ 1,704.60	147.4	$ 1,866.59	$ 1,783.49	83.1	$ 1,825.00
22 07 00 Plumbing Insulation				0.0	0.0	0.0	0.0	0.0
22 10 06 Plumbing Piping				0.0	0.0	0.0	0.0	0.0
22 12 05 Natural Gas Piping				0.0	0.0	0.0	0.0	0.0
22 30 00 Plumbing Specialties				0.0	0.0	0.0	0.0	0.0
22 40 00 Plumbing Fixtures				0.0	0.0	0.0	0.0	0.0
22 34 00 Domestic Water Heater				0.0	0.0	0.0	0.0	0.0
23 HVAC		$ 5,749.60	$ 4,981.20	768.4	$ 5,462.23	$ 5,044.07	418.2	$ 5,253.10
23 21 13 Hydronic Piping				0.0	0.0	0.0	0.0	0.0
23 21 16 Hydronic Specialties				0.0	0.0	0.0	0.0	0.0
23 21 23 Hydronic Pumps				0.0	0.0	0.0	0.0	0.0
23 23 00 Refrigerant Piping				0.0	0.0	0.0	0.0	0.0
23 25 00 HVAC Water Treatment				0.0	0.0	0.0	0.0	0.0
23 21 00 HVAC Ducts and Casing				0.0	0.0	0.0	0.0	0.0
23 52 34 Condensing Hot Water Boilers				0.0	0.0	0.0	0.0	0.0
23 74 13 Packages Rooftop Units				0.0	0.0	0.0	0.0	0.0
23 81 37 VRF Zoning Systems				0.0	0.0	0.0	0.0	0.0
23 83 00 Radiant Heating Units				0.0	0.0	0.0	0.0	0.0
23 81 27 VRV Split System				0.0	0.0	0.0	0.0	0.0
-Other				0.0	0.0	0.0	0.0	0.0
25 Automated Control Systems				0.0			0.0	$ -
26 Electrical		$ 5,026.50	$ 3,953.70	1,072.8	$ 5,067.36	$ 3,868.72	1198.6	$ 4,468.00
26 09 19 Enclosed Contactors				0.0	0.0	0.0	0.0	0.0
26 09 23 Lighting Control Devices				0.0	0.0	0.0	0.0	0.0
26 21 00 Low-Voltage Electrical Service Entrance				0.0	0.0	0.0	0.0	0.0
26 24 13 Switchboards				0.0	0.0	0.0	0.0	0.0
26 24 16 Panelboards				0.0	0.0	0.0	0.0	0.0
26 27 17 Equipment Wiring				0.0	0.0	0.0	0.0	0.0
26 27 26 Wiring Devices				0.0	0.0	0.0	0.0	0.0
26 28 13 Fuses				0.0	0.0	0.0	0.0	0.0
26 28 17 Enclosed Circuit Breakers				0.0	0.0	0.0	0.0	0.0
26 28 18 Enclosed Switches				0.0	0.0	0.0	0.0	0.0
26 29 13 Enclosed Controllers				0.0	0.0	0.0	0.0	0.0
26 31 00 Photovoltaic Collectors				0.0	0.0	0.0	0.0	0.0
26 31 13 Engine Generators				0.0	0.0	0.0	0.0	0.0
26 34 00 Transfer Switch				0.0	0.0	0.0	0.0	0.0
-Other				0.0	0.0	0.0	0.0	0.0
27 Communications & Low Voltage		w/ 26	$ 765.10	(765.1)	$ -	$ 765.09	-765.1	$ 382.50
27 11 00 Communication and Equipment Room Fittings				0.0	0.0	0.0	0.0	0.0
27 13 00 Communications Backbone Cabling				0.0	0.0	0.0	0.0	0.0
27 13 13 Communications Copper Backbone Cabling				0.0	0.0	0.0	0.0	0.0
27 13 23 Communications Optical Fiber Backbone Cabling				0.0	0.0	0.0	0.0	0.0
27 15 00 Communications Horizontal Cabling				0.0	0.0	0.0	0.0	0.0
27 51 00 Public Address and Intercom System				0.0	0.0	0.0	0.0	0.0
27 51 16 Specialized Local Sound System				0.0	0.0	0.0	0.0	0.0
27 61 13 Technology Procurement				0.0	0.0	0.0	0.0	0.0
Audio Visual				0.0	0.0	0.0	0.0	0.0
Bi-Directional Amplifier				0.0	0.0	0.0	0.0	0.0
-Other				0.0	0.0	0.0	0.0	0.0
28 Security & CCTV		w/ 26	$ 421.40	(421.4)	$ -	$ 421.41	-421.4	$ 210.70
28 13 00 Access Control				0.0	0.0	0.0	0.0	0.0
28 13 33 Video Intercom				0.0	0.0	0.0	0.0	0.0
28 23 00 Video Surveillance				0.0	0.0	0.0	0.0	0.0
28 31 00 Fire Detection and Alarm				0.0	0.0	0.0	0.0	0.0
-Other				0.0	0.0	0.0	0.0	0.0
Total Building Construction	33,237.9	34,311.9	33,953.5	358.5	34,308.8	34,207.7	101.1	35,137.9
II. Related Construction								
A. Sitework (beyond 5' of building)								
31 Site Prep and Demo				0.0			0.0	$ -
31 10 00 Site Clearing		482.5	361.2	121.3	486.8	395.2	91.6	441.0
31 20 00 Earth Moving		875.8	1543.2	-667.4	882.9	1559.7	-676.9	1221.3
31 20 00 Earth Moving (Polluted soils)		209.9	0.0	209.9	192.6	0.0	192.6	96.3
31 23 10 Structural Excavation		205.1	0.0	205.1	206.8	0.0	206.8	103.4
31 23 19 Dewatering		0.0	30.0	-30.0	0.0	30.0	-30.0	15.0
31 23 20 Structural Fill		681.5	661.0	20.5	188.1	661.0	-472.9	424.6
31 25 00 Soil Erosion & Sediment Control		205.4	223.2	-17.8	206.7	216.2	-9.5	211.4
31 50 00 Earthwork Protection		0.0	0.0	0.0	0.0	0.0	0.0	0.0
SITE SERVICES (These are part of GCs)		750.5	0.0	750.5	609.2	653.3	-44.1	631.3
32 Exterior Improvements				0.0			0.0	$ -
32 12 16 Bituminous Concrete Paving		577.0	578.5	-1.5	768.4	578.5	189.9	673.5
32 13 13 Concrete Pavement and Monolithic Curb		526.2	464.7	61.5	720.5	336.4	384.1	528.5
32 14 00 Colorized Imprinted Concrete		0.0	0.0	0.0	0.0	0.0	0.0	0.0
32 14 50 Clay Brick Pavers		70.2	89.3	-19.1	70.2	89.3	-19.1	79.7

ESTIMATE ANALYSIS (CSI Format)

Colliers Project Leaders

Construction Documents		($000's)							
9/10/2021			A1	B1	C1	A	B	C	D
			Estimate for Review			Revised at Recon Meeting			
		A/E Control Budget	Gilbane	Tarbell/DRA	*Difference (A1 - B1)*	Gilbane	Tarbell/DRA	*Difference (A - B)*	Reconciled Estimate
		7/20/2020	8/23/2021	8/23/2021		9/7/2021	9/1/2021		
32 17 23 Pavement Markings			6.4	35.5	-29.1	6.5	35.5	-29.0	21.0
32 17 26 Detectable Warning Systems			0.0	0.0	0.0	0.0	0.0	0.0	0.0
32 30 00 Site Furnishings			259.7	0.0	259.7	58.8	0.0	58.8	29.4
32 30 00 Site Improvement			154.3	313.3	-159.0	206.5	355.0	-148.6	280.7
32 32 00 Decorative Concrete Retaining Wall			118.0	87.0	31.0	119.8	87.0	32.8	103.4
32 92 00 Turf and Grasses			259.0	91.5	167.5	259.1	106.5	152.7	182.8
32 93 00 Plants			278.8	257.3	21.5	296.2	274.1	22.1	285.1
32 40 00 Traffic Control Signage			22.9	53.3	-30.4	23.1	0.0	23.1	11.5
32 91 10 Topsoil					0.0	0.0	0.0	0.0	0.0
-Other					0.0	0.0	0.0	0.0	0.0
B. Sitework (beyond 5' of building)									
33 Utilities					**0.0**			**0.0**	$ -
a. Water - Fire Protection			257.4	279.6	-22.2	259.4	279.6	-20.1	269.5
b. Water - Domestic Water				w/ FP	0.0	0.0	0.0	0.0	0.0
c. Sanitary Sewer			121.0	120.6	0.4	122.0	120.6	1.4	121.3
d. Storm Sewer			802.3	704.4	97.9	808.8	704.4	104.4	756.6
e. Electric Distribution & Equipment			150.7	148.8	1.9	151.9	148.8	3.2	150.4
f. Generator					0.0	0.0	0.0	0.0	0.0
g. Site Lighting			33.8		33.8	34.1	0.0	34.1	17.1
h. Data & Communications					0.0	0.0	0.0	0.0	0.0
i. Security					0.0	0.0	0.0	0.0	0.0
j. Fuel Distribution (Gas, Steam, Oil)			19.5	34.5	-15.0	19.7	34.5	-14.8	27.1
k. Chilled Water					0.0	0.0	0.0	0.0	0.0
l. Other				26.6	-26.6	0.0	0.0	0.0	0.0
C. Building Demolition								**0.0**	**0.0**
a. Selective Building Demolition					0.0	$ -	$ -	0.0	$ -
b. Entire Building Demolition / Raising			$ 644.70	$ 638.90	5.8	$ 649.72	$ 653.30	-3.6	$ 651.50
D. Hazardous Materials								**0.0**	**0.0**
a. Selective Site Remediation - Soils					0.0	$ -	$ -	0.0	$ -
b. Facility Remediation			$ 805.00	$ 575.70	229.3	$ 580.38	$ 575.72	4.7	$ 578.10
- Asbestos Abatement					0.0	0.0	0.0	0.0	0.0
- Lead Abatement					0.0	0.0	0.0	0.0	0.0
- PCB Abatement					0.0	0.0	0.0	0.0	0.0
- Mold Abatement					0.0	0.0	0.0	0.0	0.0
Total Related Construction		8,087.6	8,517.6	7,318.1	1,199.5	7,928.1	7,894.5	33.6	7,911.5
Total Construction before Markups		41,325.5	42,829.5	41,271.6	1,558.0	42,237.0	42,102.2	134.7	43,049.4
F. Trade P/P Bonds	1%	included	556.8	275.5	281.3	534.4	0.0	534.4	267.2
G. Design and Pricing Contingency		included	0% 0.0	2.5% 206.4	(206.4)	0.0	.50% 211.2	(211.2)	105.6
H. Escalation (Based on Trade Costs)		included	0% 0.0	549.0	(549.0)	0.0	0.0	0.0	0.0
Subtotal of Escalated Trade Costs (Trade, Deign Cont. , Escalation)		included	43,386.3	42,302.5		42,771.4	42,313.4		42,542.4
I. CM Contingency (2.5% Max)	2.5%	included	1,084.7	1,057.6	27.1	1,069.3	1,057.8	11.4	1,063.6
Subtotal (Trade, Deign Cont. , Escalation)			44,471.0	43,360.0		43,840.7	43,371.3		43,606.0
J. Permits (If by GC or CM)		included	12.5		12.5	12.3	0.0	12.3	6.2
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
Subtotal			46,507.7	45,384.3		45,877.2	45,395.5		45,636.4
L. Insurance ($8.65/$1,000)		included	402.3	392.6	9.7	317.2	279.9	37.3	298.5
Subtotal			46,910.0	45,776.9		46,194.4	45,675.4		45,934.9
M. Payment and Performance Bonds	0.60%	included	281.5	274.7	6.8	283.9	278.2	5.6	281.0
Subtotal			47,191.5	46,051.5		46,478.3	45,953.6		46,216.0
N. Overhead and Profit / Fee	1.85%	included	873.0	852.0	21.1	875.2	842.2	33.0	858.7
Total Estimated Construction		**Included**	**48,064.5**	**46,903.5**	*(396.9)*	**47,353.5**	**46,795.9**	*422.9*	**47,074.7**
Total Estimated Construction		$ 45,818.3	$ 48,064.5	$ 46,903.5	$ 1,161.0	$ 47,353.5	$ 46,795.9	$ 557.7	$ 47,074.7
Variance to Budget (Over)/Under			**(2,246.2)**	**(1,085.2)**		**(1,535.2)**	**(977.6)**		**(1,256.4)**
Variance to Budget %						***-3.24%***	***-2.09%***		***-2.67%***
Markups %			***10.8%***	***10.9%***		***10.7%***	***10.6%***		***10.6%***
Value of Possible VE items									***$931.1***
Variance to Budget (Over)/Under with Possible VE									***-$325.3***
% over Budget after Possible VE									***-0.69%***

FINANCIAL STATUS REPORT

Colliers INTERNATIONAL
PROJECT LEADERS

South Windsor Public Schools
Pleasant Valley Elementary School

Contingency Status Report

Date: 9/9/2022

														SOURCES				APPROVALS			A - Construction		B - Owner's Project	
Item #	Description	Vendor	Change Order Request	Change Order Number	Submitted State CO	State CO#	State Submission Date	Budget Block Code	Requested By	Origination Date	Estimated Cost	Additional Schedule Days	Status	Field Conditions	Owner Request	3rd Party/ AHJ	Errors & Omissions	Date Approved	Approved By	Approved Funding	Actual Cost	Balance	Actual Cost	Balance
													Approved, Pending-C, Pending-O, Rejected, Deferrable									2,419,400.00		-
1.00	Replacing walkway at Longhill Road	Gilbane		???				I.A			15,000.00		Deferrable	Yes								2,419,400.00		-
2.00				X									Deferrable	Yes								2,419,400.00		-
3.00	Removal of Portable Classrooms			X				V.B.10	SWPS	12/7/2021	200,000.00		Deferrable		Yes							2,419,400.00		-
4.00	HBM Alternate #3 - Electrical Insulation non-asbestos in Barn Allowance (RETURNED ALLOWANCE, CREDIT)	Gilbane	ATP-001r1	1				I.A	GBC	1/7/2022	(60,000.00)		Approved	Yes				2/9/2022	SWPBC	(60,000.00)	(60,000.00)	2,479,400.00		-
5.00	Relocation of Utility Poles on Long Hill & Ellington Roads			X				I.A		2/1/2022	10,000.00		Rejected	Yes								2,479,400.00		-
6.00	PR- 003 - CREDIT - delete Water Meter within Bldg. one exists in meter pit @ along Ellington Rd.	DiRienzo Mechanical	ATP-008	2	Yes	1		I.A	SWPS	2/21/2022	(1,500.00)		Approved			Yes		4/13/2022	SWPBC	(1,572.00)	(1,572.00)	2,480,972.00		-
7.00	PR-004 - CREDIT - Brick shelf deleted Subm. #032000-1; footings revised Area A	Gilbane		X				I.A	Architect	2/21/2022	(250.00)		Rejected			Yes						2,480,972.00		-
8.00	PR-005 - RFI 015 - rev catch basin & invert	Gilbane	ATP-019	???				I.A	Architect	2/21/2022	3,000.00		Pending-C			Yes						2,480,972.00		-
9.00	PR-006 - RFI 046 - Add Shunt Trip Breaker at FS-16 Kitchen	Gilbane		X				I.A	Field	2/21/2022	1,500.00		Rejected	Yes								2,480,972.00		-
10.00	PR-007 - Bulletin #07 Add hand sink Kitchen 138 and FS-07 rack to move to Dry Storage	Gilbane	ATP-011	3	Yes	1		I.A	Field	2/21/2022	4,500.00		Approved	Yes				5/9/2022	SWPBC	4,182.00	4,182.00	2,476,790.00		-
11.00	PR-008 - RFI 048 Rated Shaft Clg. At corridor C1-1	Gilbane	ATP-028	X				I.A	Field	2/21/2022	1,000.00		Rejected	Yes								2,476,790.00		-
12.00	PR-010 - Bulletin 008 - Rev. clg. Media Ctr. 104	Gilbane	ATP-029	???				I.A	Field	2/21/2022	7,500.00		Pending-C	Yes								2,476,790.00		-
13.00	PR-011 - Bulletin 009 - Change to Fixture Type N	Gilbane	ATP-022	5	Yes	1		I.A	Architect	2/21/2022	1,500.00		Approved			Yes		6/8/2022	PBC	1,123.00	1,123.00	2,475,667.00		-
14.00	Additional Trees along Southern Border	Gilbane		X				I.A	Field	3/7/2022	10,000.00		Rejected	Yes								2,475,667.00		-
15.00	Acceptance of Bid Alt #2 - EXPIRED	Gilbane	ATP-005	X				I.A	SWPS	3/7/2022	90,944.00		Rejected		Yes							2,475,667.00		-
16.00	Acceptance of Bid Alt #3 - EXPIRED	Gilbane	ATP-006	X				I.A	SWPS	3/7/2022	12,805.00		Rejected		Yes							2,475,667.00		-
17.00	Acceptance of Bid Alt #4 - EXPIRED, Formally rejected on 4/13/2022.	Gilbane	ATP-007	X				I.A	SWPS	3/7/2022	74,162.00		Rejected		Yes							2,475,667.00		-
18.00	RFI 53 Knee Wall Supports	GDS	ATP-009	2	Yes	1		I.A	Field	3/15/2022	3,000.00		Approved	Yes				4/13/2022	SWPBC	3,308.00	3,308.00	2,472,359.00		-
19.00	PR-015RFI 86 Add'l steel for Cupola and modifications (STEEL ONLY)	Gilbane	ATP-018	3	Yes	1		I.A	Architect	3/15/2022	28,000.00		Approved	Yes				5/9/2022	SWPBC	27,852.00	27,852.00	2,444,507.00		-
20.00	PR-002 - CREDIT - delete fire suppression at Exhaust not needed - error	Gilbane	ATP-004	2	Yes	1		I.A	Field	3/15/2022	(3,500.00)		Approved		Yes			4/13/2022	SWPBC	(3,500.00)	(3,500.00)	2,448,007.00		-
21.00	PR-009 Elevator Pit Ladder - in 2 scopes	Steeltech	ATP-010	2	Yes	1		I.A	Gilbane	3/15/2022	(800.00)		Approved	Yes				4/13/2022	SWPBC	(557.00)	(557.00)	2,448,564.00		-
22.00	ASI 003 - RFI 18 - Rev Structural at Corridor C1	Steeltech	ATP-014	2	Yes	1		I.A	Field	3/15/2022	10,000.00		Approved	Yes				4/13/2022	SWPBC	9,963.00	9,963.00	2,438,601.00		-

FINANCIAL STATUS REPORT

Colliers INTERNATIONAL
PROJECT LEADERS

South Windsor Public Schools
Pleasant Valley Elementary School

Contingency Status Report

Date: 9/9/2022

														SOURCES				APPROVALS			A - Construction		B - Owner's Project	
Item #	Description	Vendor	Change Order Request	Change Order Number	Submitted State CO	State CO#	State Submission Date	Budget Block Code	Requested By	Origination Date	Estimated Cost	Additional Schedule Days	Status	Field Conditions	Owner Request	3rd Party/ AHJ	Errors & Omissions	Date Approved	Approved By	Approved Funding	Actual Cost	Balance	Actual Cost	Balance
23.00	Stair 2 - addl steel beams	Steeltech	ATP-015	2	Yes	1		I.A	Field	3/15/2022	2,500.00		Approved	Yes				4/13/2022	SWPBC	2,227.00	2,227.00	2,436,374.00		-
24.00	PR-012 Fur out wall at Elevator 2nd fl.	Gilbane	ATP-020	X				I.A	Field	3/15/2022	CM Cont.		Rejected	Yes								2,436,374.00		-
25.00	PR-013 RFI 78 added fire/smoke damper betw. Rm. 116A & 118	Gilbane	ATP-033R1	6	Yes	2		I.A	Field	3/15/2022	3,000.00		Approved				Yes	7/21/2022	SWPBC	3,149.00	3,149.00	2,433,225.00		-
26.00	PR-014 Add'l Fire Ext./Cabinets	Scope Construction	ATP-012	2	Yes	1		I.A	Architect	3/15/2022	1,500.00		Approved				Yes	4/13/2022	SWPBC	1,450.00	1,450.00	2,431,775.00		-
27.00	PR-016 Roof Details Rev.	Gilbane		???				I.A	Field	3/25/2022	7,000.00		Pending-C	Yes								2,431,775.00		-
28.00	PR-017 Delete Primary Hand Hole - per Eversource	Gilbane	ATP-013	7	Yes	2		I.A	Field	3/25/2022	(5,000.00)		Approved			Yes		8/10/2022	SWPBC	(5,882.00)	(5,882.00)	2,437,657.00		-
29.00	PR-019 Casework Material Change to Melamine	Gilbane		X				I.A	Field	3/25/2022	-		Rejected	Yes								2,437,657.00		-
30.00	PR-015R1 Revisions at Cupola INCL ALL TRADES EXCEPT STEEL	Gilbane	ATP-037R1	6	Yes	2		I.A	Field	3/25/2022	6,492.00		Approved	Yes				7/21/2022	SWPBC	6,492.00	6,492.00	2,431,165.00		-
31.00	Credit for Wood Sprung Stage Floor price was incl. wrong at ramp	Floor Sanders & Finishers	ATP-002	1	Yes	1		I.A	Owner	2/3/2022	(12,000.00)		Approved	Yes				2/9/2022	SWPBC	(12,000.00)	(12,000.00)	2,443,165.00		-
32.00	PR-001 Deflection Requirement for CFMP revised	GDS	ATP-003	1	Yes	1		I.A	Architect	2/3/2022	(14,555.00)		Approved	Yes				2/9/2022	SWPBC	(14,555.00)	(14,555.00)	2,457,720.00		-
33.00	ASI-004 Food Service Equipment Requirements (spec drwg discrepancy)	Wayne J Griffin Electric	ATP-023	5	Yes	1		I.A	Field	3/22/2022	1,200.00		Approved				Yes	6/8/2022	PBC	1,078.00	1,078.00	2,456,642.00		-
34.00	PR-018 Add'l Flat Panel at English Rm. 111	Gilbane	ATP-036	6	Yes	2		I.A	Owner	4/6/2022	3,900.00		Approved		Yes			7/21/2022	SWPBC	3,410.00	3,410.00	2,453,232.00		-
35.00	ASI-014 Rev. Locations of Light Fixtures	Wayne J Griffin Electric	ATP-021	5	Yes	1		I.A	Architect	4/7/2022	2,000.00		Approved				Yes	6/8/2022	PBC	1,882.00	1,882.00	2,451,350.00		-
36.00	Structural Steel Seq. 1-4 Submittal Review	Gilbane	ATP-016	???				I.A	Architect	4/8/2022	20,000.00		Pending-C				Yes					2,451,350.00		-
37.00	ASI-013 Architectural & Structural Clarifications	Gilbane	ATP-017	???				I.A	Architect	4/8/2022	4,000.00		Pending-C				Yes					2,451,350.00		-
38.00	PR-021 Modifications to casework Areas B&D	Gilbane		???				I.A	Architect	4/22/2022	5,000.00		Pending-C	Yes								2,451,350.00		-
39.00	PR-022 Slab on Grade Radiant Flooring	Gilbane	ATP-024	4	Yes	1		I.A	Owner/Architect	4/12/2022	30,000.00		Approved		Yes			5/19/2022	PBC	39,879.00	39,851.00	2,411,499.00		-
40.00	PR-023 Custom Color Sprinkler Heads at LMC in Media Ctr. 104	Gilbane	ATP-027	4	Yes	1		I.A	Architect	4/12/2022	1,500.00		Approved		Yes			5/19/2022	PBC	706.00	706.00	2,410,793.00		-
41.00	Structural Steel Seq. 5-6 Submittal Review	Gilbane		???				I.A	Architect	4/12/2022	7,500.00		Pending-C				Yes					2,410,793.00		-
42.00	PR-024 Revisions to Power - Operable Partition	Gilbane	ATP-026	6	Yes	2		I.A	Architect	4/14/2022	1,500.00		Approved				Yes	7/21/2022	SWPBC	1,364.00	1,364.00	2,409,429.00		-
43.00	PR-028 Light Fixture Qty reductions	Gilbane	ATP-038	???				I.A	Architect	4/27/2022	(3,500.00)		Pending-C	Yes								2,409,429.00		-
44.00	PR-025 Add'l light & revisions Monumental Sign	Scope Construction	ATP-040	6	Yes	2		I.A	Architect	4/27/2022	1,500.00		Approved				Yes	7/21/2022	SWPBC	1,021.00	1,021.00	2,408,408.00		-
45.00	PR-026 Add'l Landscaping at South end	Gilbane	ATP-025	???				I.A	Architect	4/27/2022	15,000.00		Pending-C			Yes						2,408,408.00		-
46.00	PR-027 Rev. East Wall SPED Resources	Gilbane	ATP-032	???				I.A	Owner	4/27/2022	1,500.00		Pending-C	Yes								2,408,408.00		-
47.00	PR-030 Light Pole Base Clarifications	Gilbane	ATP-034	4	Yes	1		I.A	Architect	4/27/2022	1,500.00		Approved				Yes	5/19/2022	PBC	1,401.00	1,401.00	2,407,007.00		-
48.00	PR-029 Vented General Storage Cabinets	Gilbane		???				I.A	Owner	5/4/2022	29,000.00		Pending-C				Yes					2,407,007.00		-
49.00	PR-031 Add'l Light Fixtures, Tag, door clarification	Gilbane	ATP-042	6	Yes	2		I.A	Architect	5/4/2022	7,000.00		Approved				Yes	7/21/2022	SWPBC	4,850.00	4,850.00	2,402,157.00		-
50.00	PR-035 Digital Signage moving to FF&E Package	Gilbane	ATP-051	???				I.A	Owner	5/11/2022	(14,218.00)		Pending-C		Yes							2,402,157.00		-

FINANCIAL STATUS REPORT

Colliers INTERNATIONAL
PROJECT LEADERS

South Windsor Public Schools
Pleasant Valley Elementary School

Contingency Status Report

Date: 9/9/2022

														SOURCES				APPROVALS			A - Construction		B - Owner's Project	
Item #	Description	Vendor	Change Order Request	Change Order Number	Submitted State CO	State CO#	State Submission Date	Budget Block Code	Requested By	Origination Date	Estimated Cost	Additional Schedule Days	Status	Field Conditions	Owner Request	3rd Party/ AHJ	Errors & Omissions	Date Approved	Approved By	Approved Funding	Actual Cost	Balance	Actual Cost	Balance
51.00	PR-034 RFI 132 Fire Protection add'l piping & ext. mtd. Backflow test header	Sound Mechanical	ATP-039R1	6	Yes	2		I.A	Fire Marshall	5/11/2022	6,500.00		Approved			Yes		7/21/2022	SWPBC	6,226.00	6,226.00	2,395,931.00		-
52.00	PR-032 Add'l Blocking / soffit	Gilbane	ATP-044	???				I.A	Architect	5/11/2022	2,500.00		Pending-C	Yes								2,395,931.00		-
53.00	Fire Rated Glazed Assemblies Profile width - subm. Review comments 088050-1	Acorn Glass	ATP-030	6	Yes	2		I.A	Architect	5/19/2022	3,500.00		Approved				Yes	7/21/2022	SWPBC	3,095.00	3,095.00	2,392,836.00		-
54.00	ASI-016 Mod to indirect drain routing for Condensate piping (coord. Issue) Code Requirement	Gilbane		???				I.A	Architect	5/19/2022	35,000.00		Pending-C				Yes					2,392,836.00		-
55.00	PR-020 Rev Storefront & Curtain wall details & specs	Gilbane	ATP-031	TBD				I.A	Architect	5/19/2022	50,000.00		Approved	Yes			No	7/21/2022	SWPBC	47,123.00	47,123.00	2,345,713.00		-
56.00	MAU-1 CFM increase	Gilbane		X				I.A	Architect	5/19/2022	700.00		Rejected			Yes						2,345,713.00		-
57.00	Structural Steel Seq. 11 - Subm. Changes	Gilbane		???				I.A	Engineer	5/19/2022	3,500.00		Pending-C				Yes					2,345,713.00		-
58.00	Add'l ESC (Env. Sediment Controls)	Gilbane		X				I.A	Field	5/19/2022	5,000.00		Rejected	Yes								2,345,713.00		-
59.00	PR-036 Access Control Mfr.	Gilbane	ATP-041	6	Yes	2		I.A	Field	5/19/2022	20,000.00		Approved		Yes			7/21/2022	SWPBC	20,871.00	20,871.00	2,324,842.00		-
60.00	PR-037 Volleyball Sleeves	Gilbane		???				I.A	Field	5/19/2022	2,500.00		Pending-C		Yes							2,324,842.00		-
61.00	PR-038 Revisions to Door 142.1 RFI 139 & Bldg. Official req	Gilbane	ATP-055	???				I.A	Field	5/19/2022	14,000.00		Pending-C			Yes						2,324,842.00		-
62.00	PR-039r1 Add Light at Roof Hatch - per Bldg. Official due to gas piping in location	Gilbane	ATP-043	6	Yes	2		I.A	Bldg. Official	5/19/2022	2,500.00		Approved			Yes		7/21/2022	SWPBC	1,888.00	1,888.00	2,322,954.00		-
63.00	PR-044 CTDOT DCC Improvements (Added by CEW)	Gilbane		???				I.A	CTDOT	5/26/2022	25,000.00		Pending-C			Yes						2,322,954.00		-
64.00	PR-033 Water Line for Irrigation System	Gilbane	ATP-045	???				I.A	Field	6/1/2022	8,500.00		Pending-C				Yes					2,322,954.00		-
65.00	RFI 148 GL-2 Security Glass Color & Frame	Gilbane	ATP-035	6	Yes	2		I.A	Field	6/1/2022	7,500.00		Approved				Yes	7/21/2022	SWPBC	5,768.00	5,768.00	2,317,186.00		-
66.00	PR-040 Theatrical Lighting Modifications	Gilbane	ATP-046	???				I.A	Field	6/1/2022	(10,000.00)		Pending-C	Yes								2,317,186.00		-
67.00	RFI 146 Truss Girder at Cupola	Gilbane	ATP-047	???				I.A	Field	6/1/2022	2,500.00		Pending-C				Yes					2,317,186.00		-
68.00	PR-041 Conduit for future storage shed	Gilbane		???				I.A	Field	6/1/2022	25,000.00		Pending-C		Yes							2,317,186.00		-
69.00	Pathway to Church Parking	Gilbane		???				I.A	P&Z	6/2/2022	90,000.00		Pending-C			Yes						2,317,186.00		-
70.00	School Zone indicators at Ellington and Long Hill Rd	Gilbane		???				I.A	TOSW	6/1/2022	45,000.00		Pending-C			Yes						2,317,186.00		-
71.00	HVAC Roof Curb Heights descrepancy	Gilbane		X				I.A	GBC	6/7/2022	75,000.00		Rejected	Yes								2,317,186.00		-
72.00	PR-049R1 VCT Pattern simplification	Gilbane		???				I.A	DRA	6/7/2022	(5,000.00)		Pending-C	Yes								2,317,186.00		-
73.00	PR-042 Delete Louvered Roof Vent at Elev. Penthouse (not req'd)	Silktown		???				I.A	DRA	6/22/2022	(1,800.00)		Pending-C	Yes								2,317,186.00		-
74.00	PR-043 Roof Ridge Modification	Colossale	ATP-049	???				I.A	DRA	6/22/2022	4,000.00		Pending-C				Yes					2,317,186.00		-
75.00	Interior Signage Changes	Scope	ATP-048	???				I.A	Owner	6/22/2022	2,000.00		Pending-C		Yes							2,317,186.00		-
76.00	Clips for Tie off angles at Cupola	Steeltech		???				I.A	Field	6/22/2022	2,500.00		Pending-C	Yes								2,317,186.00		-
77.00	ASI-029 Loading Dock Stair Mod cheek wall and Bumpers	Steeltech/MT Ford		X				I.A	DRA	6/22/2022	1,500.00		Rejected	Yes								2,317,186.00		-
78.00	PR-045 Revisions at Vertical Operable Partition			???				I.A	DRA	7/11/2022	3,500.00		Pending-C				Yes					2,317,186.00		-
79.00	PR-046 Revisions to Steel Framing at North side of Entrance Canopy	Eastern		???				I.A	DRA	7/11/2022	7,000.00		Pending-C				Yes					2,317,186.00		-

FINANCIAL STATUS REPORT

Colliers INTERNATIONAL
PROJECT LEADERS

South Windsor Public Schools
Pleasant Valley Elementary School

Contingency Status Report

Date: 9/9/2022

														SOURCES				APPROVALS			A - Construction		B - Owner's Project	
Item #	Description	Vendor	Change Order Request	Change Order Number	Submitted State CO	State CO#	State Submission Date	Budget Block Code	Requested By	Origination Date	Estimated Cost	Additional Schedule Days	Status	Field Conditions	Owner Request	3rd Party/ AHJ	Errors & Omissions	Date Approved	Approved By	Approved Funding	Actual Cost	Balance	Actual Cost	Balance
80.00	PR-047 Add'l lighting at Walkway at North side of site	Griffin		???				I.A	Owner/DOT	7/11/2022	10,000.00		Pending-C			Yes						2,317,186.00		-
81.00	PR-048 RFI 173 Eliminate Differential Pressure Sensors in 5 DOAS units - not req'd	DiRienzo Mechanical	ATP-050	7	Yes	2		I.A	Field	7/11/2022	(1,500.00)		Approved	Yes				8/10/2022	SWPBC	(1,476.00)	(1,476.00)	2,318,662.00		-
82.00	ASI 31 Relocate Access Points	J.E. Shea		X				I.A	Owner	7/11/2022	1,500.00		Rejected		Yes							2,318,662.00		-
83.00	Metal Locker Revisions (submittal)	Gilbane		???				I.A	Field	7/19/2022	8,500.00		Pending-C	Yes								2,318,662.00		-
84.00	Roof edge Blocking Revisions	GDS		???				I.A	Field	7/19/2022	8,700.00		Pending-C	Yes								2,318,662.00		-
85.00	Delete Built-in combination locks on Lockers	Gilbane		???				I.A	Gilbane	7/19/2022	(7,500.00)		Pending-C		Yes							2,318,662.00		-
86.00	Priming Steel Beams that were called out not to be primed	Schenectady/Eastern		???				I.A	DRA	7/19/2022	5,500.00		Pending-C				Yes					2,318,662.00		-
87.00	Bldg Official requested Hilti Top of wall Details be incorporated into drawings	GDS		???				I.A	Bldg. Official	7/19/2022	2,500.00		Pending-C	Yes								2,318,662.00		-
88.00	PR-051 Fence at Site Retaining Wall	Gilbane		???				I.A	Owner	7/19/2022	5,700.00		Pending-C		Yes							2,318,662.00		-
89.00	PR-050 Fall Protection in lieu of rails	Schenectady/Eastern		???				I.A	Owner	7/28/2022	1,000.00		Pending-C		Yes							2,318,662.00		-
90.00	ASI-032 Area D Ceiling mod.	GDS		???				I.A	Architect	7/28/2022	4,200.00		Pending-C				Yes					2,318,662.00		-
91.00	PR-052 Bollards at Transformer	Schenectady /Eastern/Colossale		???				I.A	Architect	7/28/2022	2,500.00		Pending-C				Yes					2,318,662.00		-
92.00	PR-053 Fire Alarm - 3 speaker strobes	Sound Mechanical	ATP-056	???				I.A	CES	7/28/2022	3,500.00		Pending-C	Yes								2,318,662.00		-
93.00	Evergreen screening Faculty Parking Lot	Gilbane		???				I.A	Owner	8/10/2022	12,000.00		Pending-C		Yes							2,318,662.00		-
94.00	Added sidewalk to Church Parking Lot	MT Ford		???				I.A	Owner	8/10/2022	20,000.00		Pending-C		Yes							2,318,662.00		-
95.00	ASI-035 Supplemental & Rev Door & Roof Details	Gilbane		???				I.A	Architect	8/10/2022	2,500.00		Pending-C				Yes					2,318,662.00		-
96.00	RFI 213 Masonry Veneer Expansion Joints	Acranom		???				I.A	Field	8/10/2022	10,000.00		Pending-C				Yes					2,318,662.00		-
97.00	RFI 210 CWS HDS Stud vs CW Mullion Alignment	GDS		???				I.A	Field	8/10/2022	5,500.00		Pending-C	Yes								2,318,662.00		-
98.00	PR-054 Flashing Detils at Cupola Access Door	Gilbane		???				I.A	Field	8/18/2022	2,000.00		Pending-C	Yes								2,318,662.00		-
99.00	PR-056 Reduction in Moisture Mitigation Scope	Gilbane		???				I.A	Architect	8/18/2022	(2,500.00)		Pending-C	Yes								2,318,662.00		-
100.00	PR-057 Revision to Detail for Pavers on Concrete Base	Gilbane		???				I.A	Architect	8/23/2022	3,500.00		Pending-C	Yes								2,318,662.00		-
101.00	PR-058 credit Type Y Light Fixtures at Display Cases incl.with Display cases dbl scope	Griffin		???				I.A	Architect	8/23/2022	(1,500.00)		Pending-C	Yes								2,318,662.00		-
102.00	RFI 215 PR-059 Revise Waste Piping for Kitchen Disposer FS-12	DiRienzo Mechanical		???				I.A	Architect	8/23/2022	7,500.00		Pending-C	Yes								2,318,662.00		-
103.00	Angles to close off roof transitions	Schenectady		???				I.A	Field	8/25/2022	8,200.00		Pending-C				Yes					2,318,662.00		-
104.00	PR-060 Add'l undertrain at Bus Loop	Colossale		???				I.A	Tristate	8/31/2022	8,500.00		Pending-C			Yes						2,318,662.00		-
105.00	Additional Classroom	Gilbane		???				I.A	SWPS	9/14/2022	1,200,000.00		Pending-C		Yes							2,318,662.00		-
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										

FINANCIAL STATUS REPORT

South Windsor Public Schools
Pleasant Valley Elementary School

Contingency Status Report

Date: 9/9/2022

														SOURCES				APPROVALS			A - Construction		B - Owner's Project	
Item #	Description	Vendor	Change Order Request	Change Order Number	Submitted State CO	State CO#	State Submission Date	Budget Block Code	Requested By	Origination Date	**Estimated Cost**	**Additional Schedule Days**	Status	Field Conditions	Owner Request	3rd Party/ AHJ	Errors & Omissions	Date Approved	Approved By	**Approved Funding**	**Actual Cost**	**Balance**	**Actual Cost**	**Balance**
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
				X										Yes										
		Planned "TBD"=		***47,123.00***																**TOTAL USED TO DATE:**	**100,738.00**		**-**	

	Sources		
	Field Conditions	**Owner Request**	**3rd Party/ AHJ**
Approved	12,559.00	61,338.00	1,783.00
Pending	43,400.00	1,246,482.00	210,500.00
TOTAL	**55,959.00**	**1,307,820.00**	**212,283.00**

Errors & Omissions	
Contract Limit	**Actual**
$ -	25,058.00
	157,400.00
-	**182,458.00**

Contingency Status			
	Total Contingency Budget	**Less Approved Expenditures**	**Less Pending Issues**
Construction	**2,419,400.00**	**(100,738.00)**	**(1,657,782.00)**
Owners	**-**	**-**	**-**
Total	**2,419,400.00**	**(100,738.00)**	**(1,657,782.00)**
		Additional Deferrable Items	***(215,000.00)***

DAILY CONSTRUCTION REPORT

3/21/2022

Project: Bennie Dover Jackson Middle School

Job No:

Report No: 16

Colliers Representative: Robin Mantzaris

Date: 3/21/2022

Weather

Time:

Type: Good

Temperature: 54 °F

Wind Chill: 0 °F

Hours on Site

Arrive: 8:30 AM

Leave: 11:00 AM

Time on Site: 2.5 hours

Primary Contacts

Construction Manager:

Construction Manager Activities:

O&G

Please refer to O&G's Daily Reports for exact manpower count

Phase # 3B

Materials Testing / Inspections:

Materials Testing / Inspections Activities:

* See CM/CG report for official record of tasks and manpower

Company	People on Site *(Observed)**		Activities *(Observed)**
	Foreman	Other	
Concrete **Marguerite Concrete**	0	0	
HVAC **P&D Mechanical**	1	3	Rough-in and Installing hangers 2nd fl.
HVAC **LK Sheetmetal**	1	2	Ductwork 4th fl.
Electrical **Dicin**	1	2	Electrical rough-in
Telecomm / Data / Security **Consolidated Electrical**	0	0	
Fire Protection **Blackwater**	0	0	
Other **Noble (General Trades)**	1	2	Demo concrete in Storage Area
Painting **Professional Painting**	0	0	
Flooring **R&B Tile**	0	0	
Millwork **Pursuit Milwork**	0	0	
Demo **American**	0	0	
Total contractors on Site:	**4**	**9**	**= 13**

Visitors / Telephone Discussions:

Contact Party	Communication Method	Comment / Description
General contractor		Maps and old window screens - it has been asked by contractor if they are to be demo'd in Phase 3B Email sent to Miguel - O&G is saving in the mean time
Owner		Bathrooms in phase 2&3A - keys were issued - no locks have been specified. O&G is gettting a price from Noble. Item still pending
Owner		Existing condition - Entrance Door (level (1) off of stairs has damaged glass lite and wood trim. The school would like to get pricing for this. Pricing request pending

Safety Items:

Comments / Violations / Notices Issued	
Construction Area Signs are on both sides of door on both levels. Doors locked at access points	

Progress Photos: See attached.

Progress Photos (General):

Entering Locker Rm. Area

Locker Rm. Area

Locker Rm. Area

Locker Rm. Area

Locker Rm. Area

Exiting Locker Rm. Area

	Construction Entrance to Locker Rm. Area

End of Report ~

References

Colliers is pleased to provide the following references for its key team members. The references provided below have experience with both Colliers as a firm and with the proposed project team. Colliers strongly encourages the City of Stamford to further explore these examples through direct contact to gain a firsthand account of our approach, capabilities, value, and integrity. ***In addition, we have provided in Section III of this proposal detailed project descriptions for the references listed below with information specifically requested in the RFP.***

Town of Branford

Francis Walsh Intermediate School

Peter Banca
Public Building Commission Chair
203-488-1779
peterbanca@aol.com

Town of Mansfield

Mansfield Elementary School

Randy Walikonis
School Building Committee Chair
860-933-5770
MSBC@mansfield.org

South Windsor Public Schools

South Windsor Elementary School Master Plan

Dr. Kate Carter
Superintendent
860-291-1205
kcarter@swindsor.k12.ct.us

Legal Proceedings

There have been no claims against Colliers from our client on any of the municipal projects we worked on during the last five years. Furthermore, there have been no municipal project in which the owner has terminated Colliers for cause.

Financial Stability

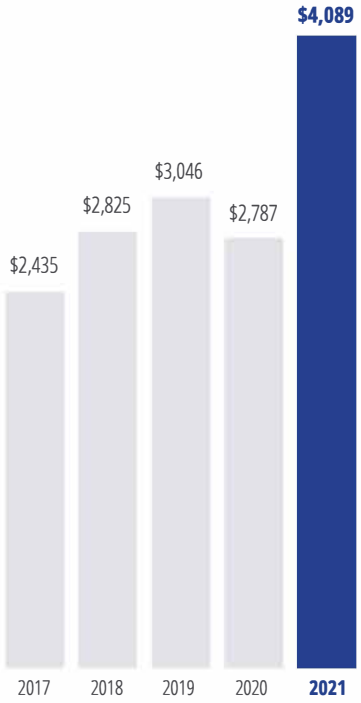
Colliers Project Leaders USA NE, LLC is a majority owned subsidiary of Colliers Engineering & Design, Inc. Colliers Project Leaders has been in business since 1996 and became part of Colliers International Group Inc in 2015. Since our inception, we have experienced significant financial growth and stability as is reflected in the below overview of our financial performance over the past five years.

Total Dollar Value of Work Performed

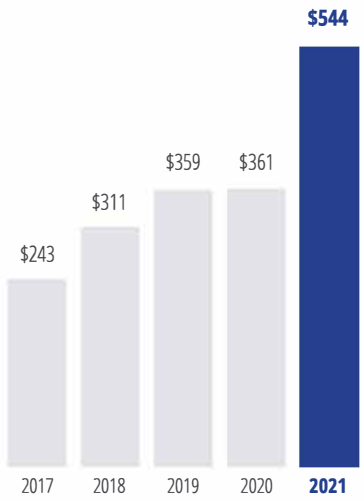
2021	2020	2019	2018	2017
$28 Million	$27.3 Million	$29.8 Million	$24.6 Million	$23.9 Million

Provided on the following page is an overview of the financial stability of Colliers International Group Inc. Copies of our consolidated financial statements for the most recent fiscal years can be provided upon request.

Financial Highlights



Revenues US$ millions



Adjusted EBITDA US$ millions

Adjusted EPS US$

(US$ thousands, except per share amounts)	Year ended December 31				
	2021	**2020**	**2019**	**2018**	**2017**
Operations					
Revenues	**$4,089,129**	$2,786,857	$3,045,811	$2,825,427	$2,435,200
Operating earnings (loss) [1]	**(131,501)**	164,578	218,197	201,398	167,376
Net earnings (loss) [1]	**(237,577)**	94,489	137,585	128,574	94,074
Financial Position					
Total assets	**$3,873,730**	$3,292,167	$2,892,714	2,357,580	$1,507,560
Long-term debt [2]	**531,054**	479,895	611,404	672,123	249,893
Financial leverage [3]	**0.3**	1.0	1.4	1.6	0.6
Shareholders' equity	**585,269**	586,109	517,299	391,973	303,014
Earnings Data					
Adjusted EBITDA [4]	**$544,338**	$361,442	$359,476	$311,435	$242,824
Diluted net earnings (loss) per common share	**($9.09)**	1.22	2.57	2.45	1.31
Adjusted EPS [5]	**6.18**	4.18	4.67	4.09	3.16
Diluted weighted average common shares outstanding (thousands)	**42,920**	40,179	39,981	39,795	39,308
Cash dividends per common share	**0.20**	0.10	0.10	0.10	0.10

[1] Includes $471.9 million settlement of Long-Term Incentive Arrangement (LTIA) with the Company's Chairman & CEO.
[2] Excluding warehouse credit facilities and convertible notes.
[3] Financial leverage expressed in terms of (long term debt less cash) / pro forma adjusted EBITDA.
[4] Adjusted EBITDA is defined as net earnings before income tax, interest, depreciation, amortization, gains attributable to mortgage servicing rights, acquisition-related items, restructuring costs, stock-based compensation expense and settlement of LTIA.
[5] Adjusted EPS is defined as diluted net earnings per common share, adjusted for the effect, after income tax, of non-controlling interest redemption increment, amortization, gains attributable to mortgage servicing rights, acquisition-related items, restructuring costs, stock-based compensation expense and settlement of LTIA.

Required Forms & Certifications

Colliers is pleased to provide on the following pages the required forms and certifications listed below as requested in the City of Stamford's Request for Proposals:

- Contractor's Statement
- Non-Collusion Affidavit
- City of Stamford State of Connecticut Contractor Verification
- A Certification as to Contract Signatory for Limited Liability Companies (LLCs)
- Proposer's Information and Acknowledgement Form
- Department of the Treasury Internal Revenue Service Form W-9
- Commission on Human Rights and Opportunities Contract Compliance Regulations Notification to Bidder Form

Contractor's Statement

Pursuant to Section 103.1 of the Stamford Code of Ordinances, I hereby provide the following:

If a joint venture, trustee, partnership, limited liability company or partnership, the names and addresses of all joint ventures, beneficiaries, partners or members:

Jonathan F. Winikur, Division Director | 135 New Road, Madison, CT 06443

If a corporation, the names and addresses of all officers, and the names and addresses of all parties owning over 10% of its common stock or over 10% of its preferred stocks. If any of said stockholders is a holding corporation, the names and addresses of all persons owning a beneficial interest in over 10% if the common or preferred stock of said holding company.

Colliers Project Leaders USA NE, LLC is a Limited Liability Company, not a Corporation.

The names and positions of all persons listed hereinabove who are elected or appointed officers or employees of the City of Stamford.

Not Applicable.

Name of Bidder/Proposer: Jonathan F. Winikur

Signature of Bidder/Proposer: _____

Title: Division Director

Company Name: Colliers Project Leaders USA NE, LLC

Address: 135 New Road, Madison, CT 06443

Indicate if company submitting this proposal is: _____MBE _____WBE _____DBE

Non-Collusion Affidavit

The undersigned, having been duly sworn, affirms and says that to the best of his/her knowledge and belief:

1. The prices in this Proposal have been arrived at independently without collusion, consultation, communication, or agreement with any other Proposer or with any competitor for the purpose of restricting competition.

2. Unless otherwise required by law, the prices, which have been quoted in this Proposal, have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by the Proposer prior to opening, directly or indirectly, to any other Proposer or to any competitor.

3. No attempt has been made or will be made by the Proposer to induce any other person, partnership or corporation to submit or not to submit a Proposal for the purpose of restricting competition.

Name of Proposer: Colliers Project Leaders USA NE, LLC

By: _____

Print Name: Jonathan F. Winikur

Title: Division Director

ACKNOWLEDGMENT

STATE OF Connecticut

COUNTY OF New Haven ss. Madison

Date: October 26, 2022

Personally appeared Jonathan F. Winikur, as Division Director of the above named firm, and attested that the foregoing statements are true and accurate to the best of his/her knowledge and belief.

_____
Signature of Notary Public
My Commission Expires: 7-31-2026

EFFECTIVE: 2/24/09

SHARON L. GAY
NOTARY
PUBLIC
CONNECTICUT

City of Stamford
State of Connecticut Contractor Verification (in accordance with Public Act 16-67)

Compliance Affidavit

I, the undersigned, personally and on behalf of Colliers Project Leaders USA NE, LLC, having
(Contractor)
been duly sworn, affirm and say that I have read, understand and am in compliance with Public Act 16-67 Concerning the Disclosure of Certain Education Personnel Records, Criminal Penalties for Threatening in Educational Settings and the Exclusion of a Minor's Name from Summary Process Complaints, and that neither I nor said Contractor, to the best or my knowledge, is in possession of any information indicating a finding of abuse or neglect or sexual misconduct, or otherwise have knowledge of such a condition(s) for any employees working on the project identified in RFQ/RFP or Bid S-887. Further, if I or said Contractor
(RFQ/RFP or Bid Number)
become aware of any information indicating such a finding, or otherwise gain knowledge of such a condition, I and/or said Contractor will immediately forward such information to the City of Stamford.

Contractor Name: Colliers Project Leaders USA NE, LLC

Street Address: 135 New Road

City, State, Zip: Madison, CT 06443

Title of person completing this form: Division Director

Signature:

Printed Name: Jonathan F. Winikur

Date: October 26, 2022

ACKNOWLEDGMENT

STATE OF Connecticut

COUNTY OF New Haven ss. Madison

Date: October 26, 2022

Personally appeared Jonathan F. Winikur, as Division Director of the above named Contractor, and attested that the foregoing statements are true and accurate to the best of his/her knowledge and belief on behalf of himself and said Contractor.

Signature of Notary Public

My Commission Expires: 7/31/2026

SHARON L. GAYLORD NOTARY PUBLIC CONNECTICUT

CERTIFICATION AS TO CONTRACT SIGNATORY

For Limited Liability Companies (LLCs)

(Effective 9/1/2011)

I, Jonathan F. Winikur (name of member or manager) a Division Director (Member or Manager) of Colliers Project Leaders USA NE (name of LLC),

LLC, a limited liability company organized and existing under the laws of the State of Connecticut (hereinafter the "Company"), hereby certify that:

1. that Colliers Project Leaders USA NE, LLC (name of LLC) is run by Jonathan F. Winikur (Members or Managers)

2. that Jonathan F. Winikur (name of contact signatory) is a Division Director (Member/Manager) of Colliers Project Leaders USA NE, LLC (name of LLC)

   and

3. that as such Jonathan F. Winikur (name of Member/Manager who is contract signatory) is not prohibited from or limited by the articles of organization from binding the LLC.

IN WITNESS HEREOF, the undersigned has affixes his/her signature this 26th day of October, 2022.

(LLC Seal)
(Circle this L.S. if there is no seal)

Brian E. Curtis, Esq.
Secretary (name of Secretary)

PROPOSER'S INFORMATION AND ACKNOWLEDGEMENT FORM

RFP No: 887

Date: October 26, 2022

Proposer's Name: Colliers Project Leaders USA NE, LLC

Street Address: 135 New Road

Madison	CT	06443
City	State	Zip

Business Telephone: (860) 395-0055

Email: charles.warrington@collierseng.com (contact person)

Unique Entity ID: XNPCJQR7VL49 Tax Id. No.: 06-1468602

Indicate (Yes/No) if company submitting this proposal is:

No MBE No WBE No DBE

(If yes, attach relevant certification)

Signature: Date: October 26, 2022

Printed Name: Jonathan F. Winikur

Title: Division Director

Addenda Acknowledgement – check and note date of addendum

☑ Addenda No. 1	☐ Addenda No. 2
☐ Addenda No. 3	☐ Addenda No. 4
☐ Addenda No. 5	☐ Addenda No. 6
☐ Addenda No. 7	☐ Addenda No. 8
☐ Addenda No. 9	☐ Addenda No. 10
☐ Addenda No. 11	☐ Addenda No. 12

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* for instructions and the latest information.

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

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.
Colliers Project Leaders USA NE, 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) ▶ P

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.
135 New Road

Requester's name and address (optional)

6 City, state, and ZIP code
Madison, CT 06443

7 List account number(s) here (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
☐☐☐ – ☐☐ – ☐☐☐☐

or

Employer identification number
0 6 – 1 4 6 8 6 0 2

Part II Certification

Under penalties of perjury, I certify that:

1. 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
2. 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
3. I am a U.S. citizen or other U.S. person (defined below); and
4. 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 ▶ Sharon L Kay Date ▶ October 26, 2022

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.*

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.*

3) Definition of Racial and Ethnic Terms (as used in Part IV Bidder Employment Information) (Page 3)

White (not of Hispanic Origin)-All persons having origins in any of the original peoples of Europe, North Africa, or the Middle East. Black (not of Hispanic Origin)-All persons having origins in any of the Black racial groups of Africa. Hispanic- All persons of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.	Asian or Pacific Islander- All persons having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands. This area includes China, India, Japan, Korea, the Philippine Islands, and Samoa. American Indian or Alaskan Native- All persons having origins in any of the original peoples of North America, and who maintain cultural identification through tribal affiliation or community recognition.

BIDDER CONTRACT COMPLIANCE MONITORING REPORT

PART 1 – Bidder Information

Company Name: Colliers Project Leaders USA NE, LLC Street Address: 135 New Road City & State: Madison, CT 06443 Chief Executive: Jonathan F. Winikur, Division Director	Bidder Federal Employer Identification Number: 06-1468602 Or Social Security Number:
Major Business Activity: (brief description) Colliers Project Leaders provides multiple services that go beyond management – to project leadership. Colliers has assembled a multi-disciplined team of experts to provide services for a variety of needs including: • Project & Program Management • Planning & Advisory Services • Development Management • Commissioning & Energy Services	Bidder Identification (response optional/definitions on page 1) -Bidder is a small contractor? Yes ☐ No ☑ -Bidder is a minority business enterprise? Yes ☐ No ☑ (If yes, check ownership category) Black ☐ Hispanic ☐ Asian American ☐ American Indian/Alaskan Native ☐ Iberian Peninsula ☐ Individual(s) with a Physical Disability ☐ Female ☐ -Bidder is certified as above by State of CT? Yes ☐ No ☑
Bidder Parent Company: (If any) Colliers Engineering & Design, Inc.	
Other Locations in CT: (If any) 1055 Washington Boulevard, Stamford, CT 069(	

PART II - Bidder Nondiscrimination Policies and Procedures

1. Does your company have a written Affirmative Action/Equal Employment Opportunity statement posted on company bulletin boards? Yes ☑ No ☐	7. Do all of your company contracts and purchase orders contain non-discrimination statements as required by Sections 4a-60 & 4a-60a Conn. Gen. Stat.? Yes ☑ No ☐
2. Does your company have the state-mandated sexual harassment prevention in the workplace policy posted on company bulletin boards? Yes ☑ No ☐	8. Do you, upon request, provide reasonable accommodation to employees, or applicants for employment, who have physical or mental disability? Yes ☑ No ☐
3. Do you notify all recruitment sources in writing of your company's Affirmative Action/Equal Employment Opportunity employment policy? Yes ☑ No ☐	9. Does your company have a mandatory retirement age for all employees? Yes ☐ No ☑
4. Do your company advertisements contain a written statement that you are an Affirmative Action/Equal Opportunity Employer? Yes ☑ No ☐	10. If your company has 50 or more employees, have you provided at least two (2) hours of sexual harassment training to all of your supervisors? Yes ☑ No ☐ N/A ☐
5. Do you notify the Ct. State Employment Service of all employment openings with your company? Yes ☑ No ☐	11. If your company has apprenticeship programs, do they meet the Affirmative Action/Equal Employment Opportunity requirements of the apprenticeship standards of the Ct. Dept. of Labor? Yes ☑ No ☐ N/A ☑
6. Does your company have a collective bargaining agreement with workers? Yes ☐ No ☑ 6a. If yes, do the collective bargaining agreements contain non-discrimination clauses covering all workers? Yes ☐ No ☐ 6b. Have you notified each union in writing of your commitments under the nondiscrimination requirements of contracts with the state of CT? Yes ☐ No ☐	12. Does your company have a written affirmative action Plan? Yes ☑ No ☐ If no, please explain. 13. Is there a person in your company who is responsible for equal employment opportunity? Yes ☑ No ☐ If yes, give name and phone number: Allison Colantuoni, Chief People Officer (732) 704-5031

1. Will the work of this contract include subcontractors or suppliers? Yes ☐ No ☑

1a. If yes, please list all subcontractors and suppliers and report if they are a small contractor and/or a minority business enterprise. (defined on page 1 / use additional sheet if necessary)

1b. Will the work of this contract require additional subcontractors or suppliers other than those identified in 1a. above? Yes ☐ No ☐

PART IV - Bidder Employment Information Date: October 26, 2022

JOB CATEGORY *	OVERALL TOTALS	WHITE (not of Hispanic origin)		BLACK (not of Hispanic origin)		HISPANIC		ASIAN or PACIFIC ISLANDER		AMERICAN INDIAN or ALASKAN NATIVE	
		Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
Management	95	70	12		1	3		6	2	1	
Business & Financial Ops	7	5	1			1					
Marketing & Sales	9	3	3		2		1				
Legal Occupations											
Computer Specialists	2	1						1			
Architecture/Engineering											
Office & Admin Support	10	1	5			1			3		
Bldg/ Grounds Cleaning/Maintenance											
Construction & Extraction	9	8	1								
Installation , Maintenance & Repair											
Material Moving Workers											
Production Occupations											
TOTALS ABOVE	132	88	22	0	3	5	1	7	5	1	0
Total One Year Ago											
FORMAL ON THE JOB TRAINEES (ENTER FIGURES FOR THE SAME CATEGORIES AS ARE SHOWN ABOVE)											
Apprentices											
Trainees											

*NOTE: JOB CATEGORIES CAN BE CHANGED OR ADDED TO (EX. SALES CAN BE ADDED OR REPLACE A CATEGORY NOT USED IN YOUR COMPANY)

1. Which of the following recruitment sources are used by you? (Check yes or no, and report percent used)

SOURCE	YES	NO	% of applicants provided by source
State Employment Service	☑	☐	1
Private Employment Agencies	☐	☑	
Schools and Colleges	☑	☐	5
Newspaper Advertisement	☐	☑	
Walk Ins	☐	☑	
Present Employees	☑	☐	20
Labor Organizations	☐	☑	
Minority/Community Organizations	☑	☐	1
Others (please identify)	☑	☐	
Online Job Boards	☑	☐	68
	☐	☐	

2. Check (X) any of the below listed requirements that you use as a hiring qualification

(X)	
X	Work Experience
	Ability to Speak or Write English
	Written Tests
X	High School Diploma
X	College Degree
	Union Membership
X	Personal Recommendation
	Height or Weight
	Car Ownership
	Arrest Record
	Wage Garnishments

3. Describe below any other practices or actions that you take which show that you hire, train, and promote employees without discrimination

Colliers hires and promotes throughout the year based on qualifications, aptitude, and performance. All employees are trained based on job requirements.

Certification (Read this form and check your statements on it CAREFULLY before signing). I certify that the statements made by me on this BIDDER CONTRACT COMPLIANCE MONITORING REPORT are complete and true to the best of my knowledge and belief, and are made in good faith. I understand that if I knowingly make any misstatements of facts, I am subject to be declared in non-compliance with Section 4a-60, 4a-60a, and related sections of the CONN. GEN. STAT.

(Signature)	(Title)	(Date Signed)	(Telephone)
	Jonathan F. Winikur	10/26/2022	(860) 395-0055