## E31.020\_EXHB7





## Stamford Westhill High School Core Team



CHUCK WARRINGTON PE
Project Director
Oversight of Services &
OSCG&R expertise



ADAM LEVITUS<sup>PE</sup>
Project Manager
Day-to-Day Project Manager



JUDY DENNY
Asst. Project Manager
Document
Management/Move
Management



Construction
Representative
Construction
Oversight/Quality Assurance

MARK SCHWEITZER PE

## Stamford Westhill High School Support Team



MARC SKLENKALEED AP
Managing Director
Overall Management of
Services



BLAIR RICHARDSON PE
Technical Support
Operations and Controls
Specialist



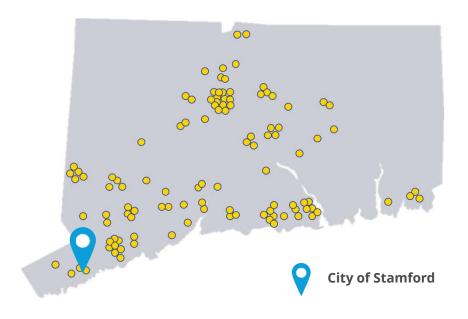
THAO NGUYEN
Financial Monitoring & Reporting

Budget Control & Reconciliation

## Relevant Experience







- Madison New Elementary School, Polson MS HVAC
   Improvements and Brown Intermediate School Modifications
- South Windsor's Elementary School Master Plan (4 new schools)
- Mansfield's New Elementary School (Net Zero)
- New Fairfield's New High School & Meeting House Hill School
- Regional School District 14 Nonnewaug High School
- East Hampton High School
- · Windham High School

- North Haven Middle School
- Branford's Francis Walsh Intermediate School
- Rocky Hill's Moser School
- New London's Bennie Dover Jackson Middle School
- Fairfield's Riverfield, Holland Hill, Mill Hill, and Roger Sherman Elementary Schools
- Stonington's Deans Mill School & West Vine Street School
- CREC's Anna Grace Academy of the Arts



#### Stamford Westhill High School

### Project Understanding

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- Existing building envelope and systems are outdated



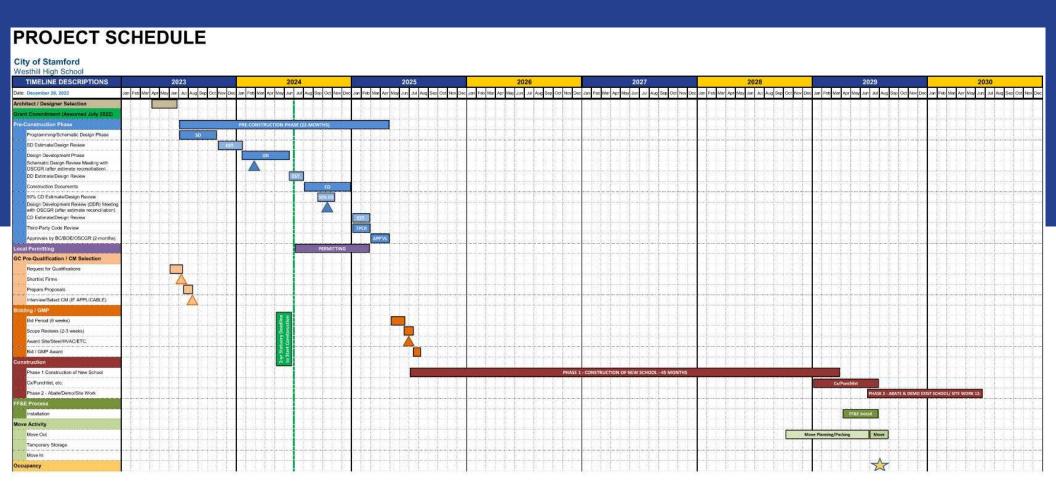
#### Stamford Westhill High School

#### Confirmation of Data

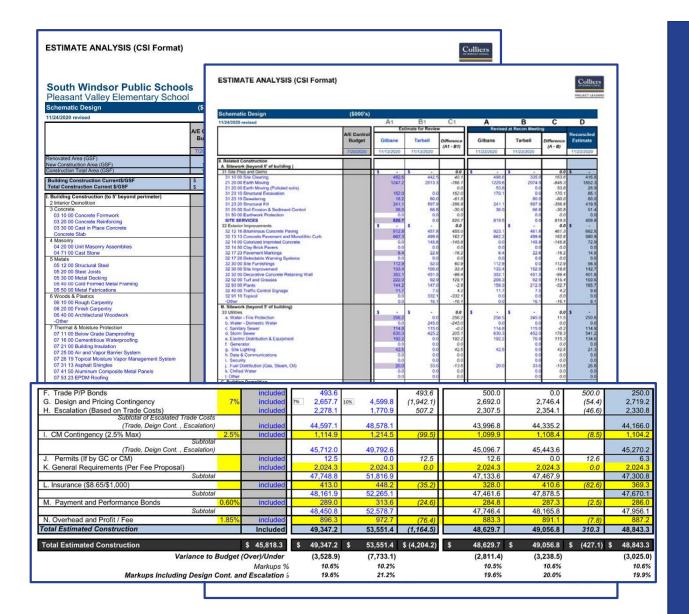
- Confirmation of proper enrollment data
- Confirm program against space standard (currently 428,921 per priority lists)
- Confirm when 2-year construction deadline is applied (2022 or 2023 reauthorization)
- Verify updated budget (construction budget, FF&E budget, fees and expenses, owner's contingency)



## Stamford Westhill High School







## Q1 - Cost Control Cost Estimating

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

## Q1 - Cost Control Value Management

- Generates Ideas from Multiple Sources
- Facilitates Sharing & Problem Solving
- Focused on Budget
- Addresses Aesthetics, MEP & Constructability

Colliers PROJECT LEADERS South Windsor Public Schools Pleasant Valley Elementary School Schematic Design **VALUE MANAGEMENT** Colliers PROJECT LEADERS **South Windsor Public Schools** SD Pleasant Valley Elementary School SD Schematic Design Description Status Rejected PL does not recommend as an alternate as the Bleachers in gym as an alterna \$ 178.30 \$ 1,691.10 \$ 134.50 COL Mark-Up % 19.00% For CM GCs, Fee, Insurance, Bonds, etc Reconciled Cost Estimate \$ Value Engineering Required

Page 3 of 4

Estimate Analysis\_SWPV\_2020 1125

**VALUE MANAGEMENT** 

COLLIERS PROJECT LEADERS

You Decide What's Accepted!

#### Q1 - Cost Control Construction Phase

#### Pay Application

- Thorough Review
- Ensure accuracy
- Don't Overpay

#### Change Orders

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

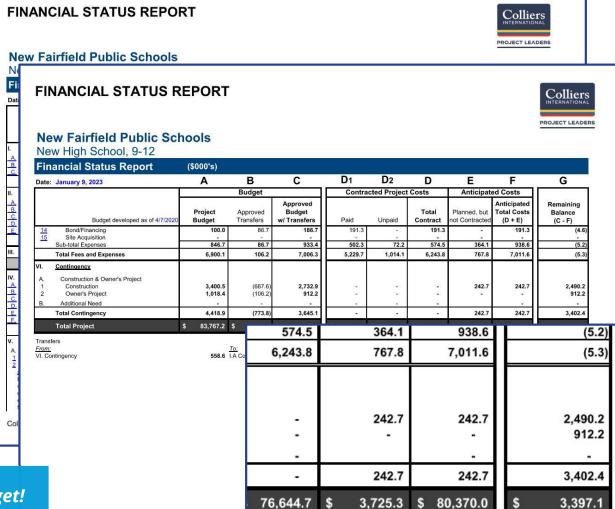
CONTINU	ATION SHEET		AIA DO	CUMENT G703					
	ment G702, APPLICATION AND CERTIFICATION FOR PAYMENT.		AIA DOL	JUMENT G703		A DDI TO ATTOX	NO	25	
		containing				APPLICATION		06	
	r's signed certification is attached. ons below, amounts are stated to the nearest dollar.					APPLICATION PERIOD TO:	DATE:	30-Sep-20 30-Sep-20	
	ons below, amounts are stated to the hearest dollar. nn I on Contracts where variable retainage for line items may apply.		Dave added	by Modification		P.O. #			
Ose Colui	nin i on Contracts where variable retainage for line items may apply.		Days added	by Woollication		P.O. #		20201855	
ΓΛ	В	С	D	E	F		9	Н	
İTEM	В	·	WORK COM		MATERIALS	TOTAL	J	BALANCE	
NO.	DESCRIPTION OF WORK	SCHEDITED	FROM PREVIOUS			COMPLETED	%	TO FINISH	
NO.	DESCRIPTION OF WORK	VALUE	APPLICATION	THIS PERIOD	STORED	AND STORED	(G ÷ C)	(C - G)	
		VALUE	(D+E)		(NOT IN	TO DATE	(0.0)	(0-0)	
			(5,2)		11101 111	(D+E+F)			
379	UNDERGROUND SITE MATERIAL	6,000,00	3,000.00	2,400,00	-	5,400.00	90.00%	600.00	
380	UNDERGROUND SITE LABOR	6,600.00	3,000.00	5,940.00		5,940.00	90.00%	660,00	
381	PANELBOARD / SWITCHGEAR PACKAGE	38,400.00	11,520.00	2,7 10100	2	11,520.00	30.00%	26,880.00	
382	PANELBOARD / SWITCHGEAR MATERIAL	2,400.00	480.00	- 1	2	480.00	20.00%	1,920.00	
383	PANELBOARD / SWITCHGEAR LABOR	16,800.00	5,040,00	-	-	5,040,00	30.00%	11,760.00	
384	FEEDER MATERIALS	37,200.00	3,720,00	14,880.00		18,600,00	50.00%	18,600.00	
385	FEEDER LABOR	28,800.00	2,880.00	11,520.00	<u> </u>	14,400.00	50.00%	14,400.00	
386	GROUNDING MATERIAL	2,844.00	2,280.00		2	2,280.00	80.17%	564.00	
387	GROUNDING LABOR	4,296.00	3,474.00	120		3,474.00	80.87%	Reduce to \$	0 (typ. of all
388	LIGHTING PACKAGE	275,000.00	-		2		0.00%	struck-thru it	ems). Work has
389	LIGHT PACKAGE WIRING MATERIAL	9,000.00			2	4	, 0.00%	not started.	25090808 H2896080808080
390	LIGHTING WIRING ROUGH-IN LABOR	80,000.00		12,000.00	-	12,000.00	T5.00%	68,000.00	
391	TELE/DATA ROUGH-IN MATERIAL -	8,160.00	816.00	1,224.00	OK-	2,040.00	25.00%	6,120.00	
392	TELE/DATA ROUGH LABOR -	18,000.00	1,800.00	2,700.00		4,500.00	25.000	13,500.00	
393	TELE/DATA FINISH LABOR	5,000.00	-			-	0/00/4	5,000.00	
394	MECHANICAL EQUIPMENT MATERIAL	9,720.00				-	0.90%	9,720.00	
395	MECHANICAL EQUIPMENT LABOR —	20,000.00	$\rightarrow$	2,000.00	4 .	2,000.00	10/00%	18,000.00	
396	PUBLIC ADDRESS SYSTEM EQUIPMENT	68,000.00		-	-	- 1	/ 1.00%	68,000.00	
397	PUBLIC ADDRESS MATERIAL ————————————————————————————————————	9,600.00	$\rightarrow$	960.00	_	960.00	/ //0/.90%	8,640.00	
398	PUBLIC ADDRESS SYSTEM ROUGH LABOR ————————————————————————————————————	8,400.00		840.00		840.00	- //0.00%	7,560.00	
399	PUBLIC ADDRESS SYSTEM FINISH LABOR	7,200.00	-	-	* 1	-	///0/00%	7,200.00	
400	ACCESS CONTROL EQUIPMENT	7,500.00		and the			/// \$.00%	7,500.00	
401	ACCESS CONTROL ROUGH LABOR —	4,200.00	$\rightarrow$	210.00	+	210.00	5.00%	3,990.00	
402	ACCESS CONTROL FINISH LABOR	2,400.00	-		-	-	// /0.00%	2,400.00	
403	INTRUSION DETECTION EQUIPMENT	5,880.00			-		// 0.00%	5,880.00	
404	INTRUSION DETECTION ROUGH LABOR	9,600.00		-480.00	<del>-</del>	480.00	5.00%	9,120.00	
405	INTRUSION DETECTION FINISH LABOR	3,600.00		-			0.00%	3,600.00	
406	VIDEO SURVEILLANCE EQUIPMENT	59,000.00		1 200 00			0.00%	59,000.00	
407 408	VIDEO SURVEILLANCE ROUGH LABOR	24,000.00		1,200.00	<b>—</b> •	1,200.00	5.00%	22,800.00	
408	VIDEO SURVEILLANCE FINISH LABOR	9,600.00 23,000.00					0.00%	9,600.00	
410	FIRE ALARM EQUIPMENT PACKAGE FIRE ALARM ROUGH MATERIALS	7,080.00				1 1	0.00%	23,000.00 7,080.00	
410	FIRE ALARM ROUGH MATERIALS  FIRE ALARM ROUGH	24,000.00		2,400,00	1 1	2 400 00	10.00%	21,600,00	
411	FIRE ALARM FINISH	8,400.00		2,410,00		2,400,00	0.00%	8,400.00	
412	ELECTRIC FINISH MATERIAL	12,000,00			7		0.00%	12,000.00	
	ELECTRIC FINISH LABOR	30,000.00				Y ( )	0.00%	30,000.00	
415	POOL EQUIPMENT WIRING	20,400.00	[ ]		1	1	0.00%	20,400.00	
	ELECTRICAL CLOSEOUT (O&M-ASBUILTS)	3,000.00			1	_ 1	0.00%	3,000.00	
417	DIVISION 31-EARTHWORK	3,000.00	9 1	has any	of this	7	0.0076	3,000.00	
	MOBILIZATION	18,000,00	18,000.00	started?		18,000.00	100.00%		
	DE-MOBILIZATION	10,000.00	10,000.00	starteu?		10,000.00	0.00%	10,000.00	
	SURVEYING	15,930.00	12,751.00		-	12,751.00	80.04%	3,179.00	
70								2,2,2,00 [	

### Q1 - Cost Control Financial Management

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

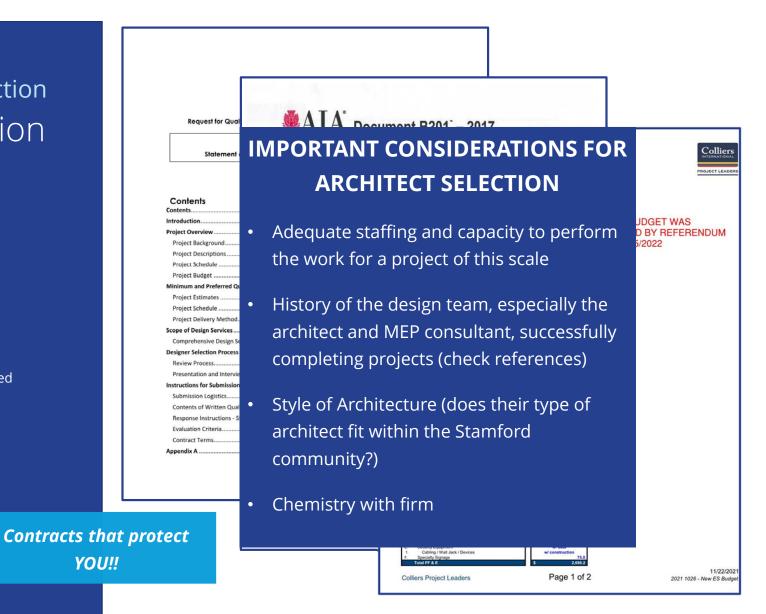
**Ensure Project Stays on Budget!** 

iers International



### Q2 - Consultant Selection Architect Selection

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



## Q3 – GC vs CM Construction Manager vs General Contractor

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

#### PROJECT DELIVERY MATRIX CONSTRUCTION MANAGER VS GENERAL CONTRACTOR

	COI	NSTRUCTION MANAGER DELIVERY OPT	IONS	GENERAL CONTRACTOR
	CM at Risk w/ GMP (CMR) (A133)	CM w/ FEE (A134)	CM as Advisor (CMA) (A132)	G.C. (A101)
Basic Description	CM serves as a pre-construction (design) resource to provide expertise in estimating, constructability, phosing, evaluation of program and budget, and scheduling, Recommended to be brought on board as soon as possible to gain the most value for the project.  Upon bidding of the project by the trade contractors (a.k.a. bid packages), the CM essentially becomes a general contractor but with an open-book accounting policy.  CM presents a GMP Amendment that includes summary of all the bid packages (popenly bid), CMS General Conditions, CM Contingency, Allowances, Fee (Profit), Insurance, Bonds, State Education Fee, and other costs not included in a specific bid package.  GMP Amendment cost is presented as a "Guaranteed Maximum Price Amendment" but is only based on the Construction Documents. It does not cover unforeseen field conditions, owner requests, 3 <sup>rd</sup> party requests, or errors and/or omissions by the architect: and the CM is not responsible for design of the project or "filling in the gaps" that are not clear in the construction documents.  The Owner has one contract with the CM who holds all the trade contracts under their responsibility. The trade contractors provide bonds to the CM	The CM provides the same services as that described under CM at Risk with respect to pre-construction services however their role during construction is much different.  The CM provides a construction cost estimate, or "Control Estimate", that includes the summary of all the bid packages (same as CMR), CMS General Conditions (field personnel, trailers, etc.), insurances, bonds, etc., but does not include a CM contingency nor any CM held allowances unless agreed upon by the Owner.  Under this delivery the CM is not "guaranteeing" a maximum price and does not hold a CM contingency in their "Contractual responsibility for scope gaps between trades is minimal, if not zero. Any missed scope gaps are funded through the Owner's	The CM as Advisor is purely oversight of trades and essentially acts as another consultant to the Owner. The primary difference between this method and CMR and CM w/ Fee is that the Owner is contracting with each of the individual trade contactors individually. Should a claim by a trade or trades be brought, it will be with the Owner, not the CM as the CM does not hold the contracts with the trades.  The Owner would be responsible for approving all the individual requisitions by the trade contractors and issuing individual checks to each versus fissuing one check to the CM or G.C.	General Contractor delivery is the oldest most traditional form of delivery for construction. It's the simplest form of delivery in that the General Contractors provide a lump sum bid for the bid documents (plans, specifications, and addenda thereto) as advertised. The project is awarded to the lowest qualified responsible bidder.  Under this option the general contractor does not have to reveal his trade bids that support his bid. This option is not open book and does not contain any confractor contingency
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### Q4 – CM Selection Construction Manager

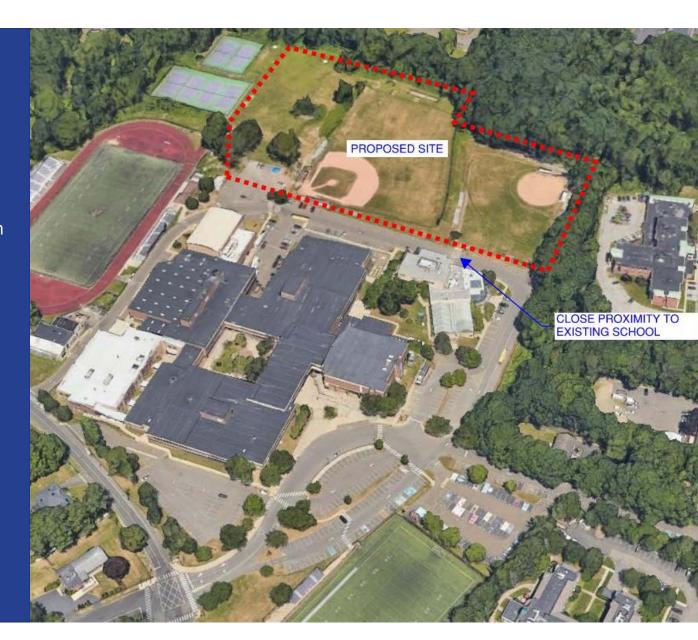
- Issuance of Contracts with RFP to shortlist firms – <u>SD Phase</u>
- Contractually limiting the CM Contingency
- Restricted use of CM
   Contingency when A133 is used
- 6-month Rule provisions in our contracts
- Require hourly staffing matrix with proposals based on schedule

Leveling of Proposals

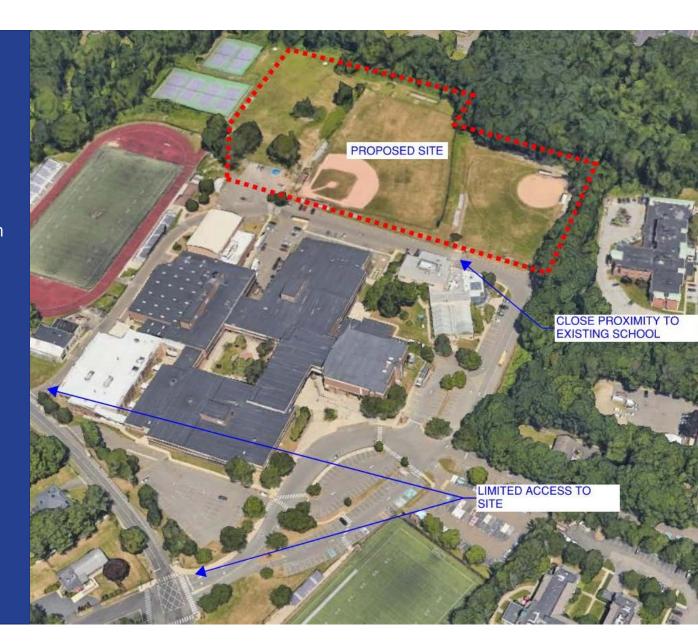
Town of Madison Public Schools New PreK to 5 Elementary School Request for Proposal DRAFT AIA Document A133 - 2019 Exhibit B Insurance and Bonds This Insurance and Bonds Exhibit is part of the Agreement, between the Owner and the Construction Manager, dated the \* \* day of \* \* \* in the year \* \* (In words, indicate day, month and year.) DITIONS AND DELETIONS Regi for the following PROJECT: (Name and location or address. evised the text of the giginal ATA standard form Questions must Proposals are D THE OWNER: (Name, legal status, and address) FEE PROPOSAL COMPARISION ANALYSIS Town of Madison **New PreK-5 Elementary School** \$34,673 \$142,328 \$24,790 \$24,790

Fee Comparisons

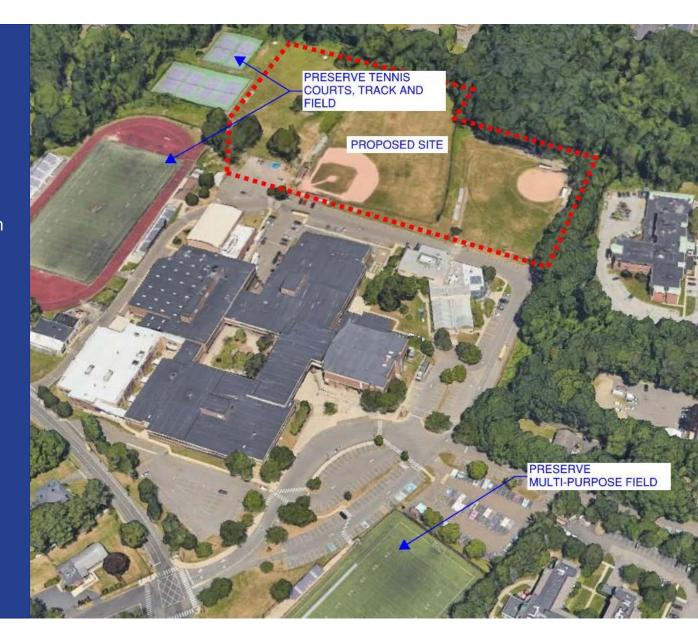
- Tight site
- Residential area, limited access from major highways
- Construction access through active campus requires critical coordination with administration
- 40-feet of grade change from west to east
- Phasing of the foundations, structural steel, envelope and mechanicals vital
- Limited site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



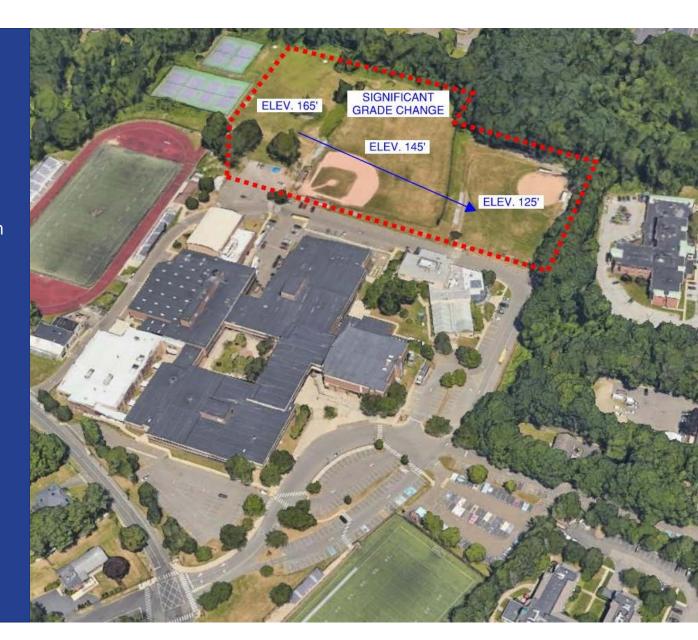
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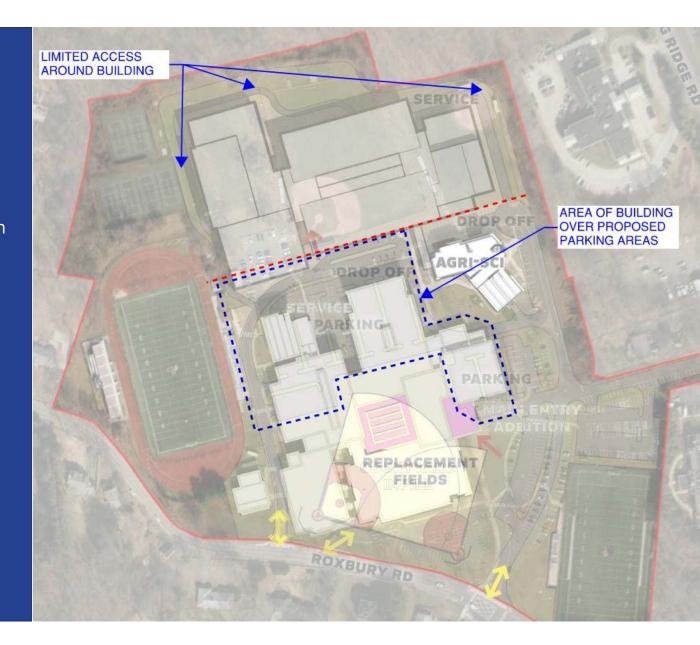
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- Limited site storage area



Madison Elementary School

Owner's Project Requirements

#### Owner's Project Requirements Document for **High Performance Building Commissioning**

Project:

Project Ow

OPM:

Approved:

The purpo utilized the The Owne

with the C

Use of this is provided requireme

The intent relates to Madison Elementary School

components and should be adapted as needed to sui of the High Performance Building guideline intent.

The Owner's Project Requirements document should start of design and furnished to the Design Team. Updates to the Owner's Project Requirements docur

project delivery shall be made by the Owner/Design agreements coordinated with and agreed to by the Ins Owner's Project Requirements Document Commissioning

#### **Table of Contents**

- 1. General Project Information
  - Square Footage
     Construction Schedule Target
- 2. Owner and User Requirements
- Primary Purpose, Program and Use
- Project History Broad Goals
- 3. Environmental and Sustainability Goals
  - Energy Efficiency Goals
  - General
  - Siting Building Façade
  - Building Fenestration
  - Building Envelope
  - Other
- 4. Indoor Environmental Quality Requirements
  - Intended Use
  - Occupancy Schedule
  - Accommodations for After-Hours Us
  - Pools
  - Lighting, Temperature, Humidity, Ai

  - Occupant Ability to Adjust System Co Types of Lighting
- 5. Equipment and Systems Expectations
  - Heating Hot Water Systems Chilled Water Systems
  - Air Handling Systems
  - Split System Air Conditioning Units Air Terminal Units
  - Thermal Heating Units
  - Exhaust Fan Systems
  - ATC Controls
  - Domestic Hot Water Lighting Controls

Owner's Project Requirements

SOUTH WINDSOR PUBLIC SCHOOLS

DREAM. ACHIEVE. INSPIRE.

September 29, 2021

Department of Administrative Services Office of School Construction Grants & Review

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

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

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

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

1737 MAIN STREET, SOUTH WINDSOR, CT 06074-1028 • (860) 291-1200 • FAX: (860) 291-1291

## Q6 - Special Construction District Standards and Programs

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

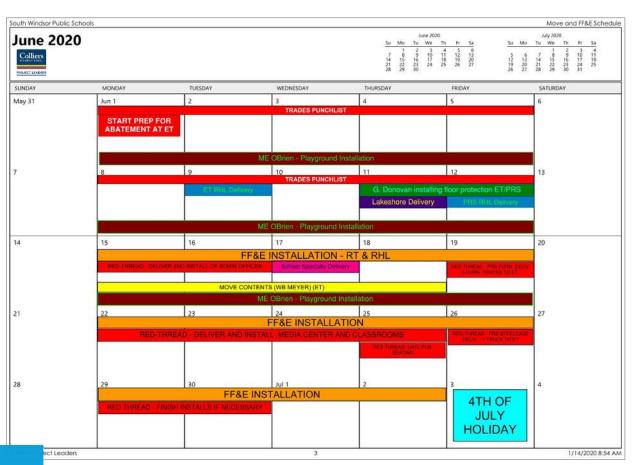
Overview

Owner's go informed b and enviro

completed Installation.

### Q6 - Special Construction FF&E and Move Management Phase

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



**Communication and Coordination** 

#### CONNECTICUT STATE FUNDED PROJECTS



Δι	idit Requirements	Resp	onsible	Party		
	iuit Requirements	OWNER	OPM	CM/G		
Ger	neral Financial Information					
	General Ledger by Account					
Ш	General Ledger by Vendor (needs to reconcile with above)					
	Summarized Cost by Vendor List (Invoice Logs)					
	Cash Disbursement Journal – Checks Issued					
	Audited Financial Statements					
	Financing Documentation					
П	Offical offering statements for all bonds issues (if applicable)					
	Bank Statements for Loans					
	Documentation of "Other" funding and refunds associated with the Project.					
	Rebates					
	Energy Incentives					
П	Alternate Funding Sources (list all that apply)					
	Documentation of site or facility acquistition costs (if applicable)					
	Closing Statements					
	Land / Building Appraisals					
	Real Estate Contracts					
Ш	Purchase Agreements					
Pro	ject Costs					
Ш	Original Bid Documents		1			
	All addenda					
	Rebids					
	Proof of Bid Withdrawals					
	Bid Disqualifications Reasons					
П	Evidence of Public bidding (newspaper invoices or ads for anything over \$10,000)					
	Bidding summaries (bid tabulation) for all sub-contracts					
	Construction Contract with Bid Specifications (Division 0)					
	Subcontractor contracts with CM					
	All Change Orders, with Associated COR's and Backup					
П	State Change Orders with CM Contigency Delineation					
	Final OSCG&R Eligibility Determination Letters					
	Contractor's Application for Payment (Contractor Invoices)					
П	Subcontractor invoices (for projects with a CM)					

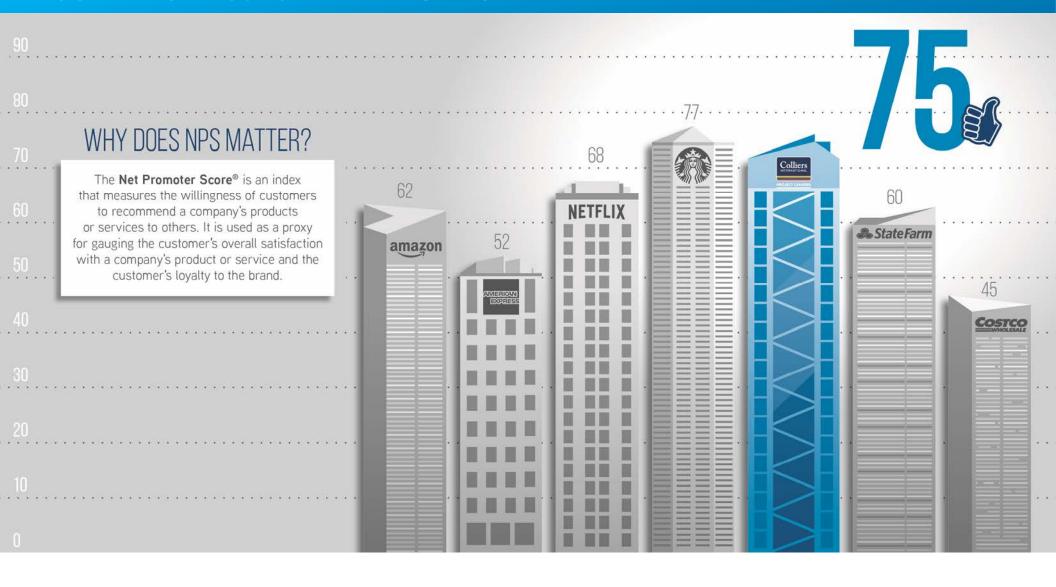
COLLIERS INTERNATIONAL Page 1 of 3 8/30/2021

#### Q6 - Special Construction Closeout and Audit

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

### > COLLIERS PROJECT LEADERS NPS

#### Q1 – Performance Evaluation





# Expertise The Colliers Advantage





#### **Deep Bench of Professionals**

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



#### **In-House Subject Matter Expertise**

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



#### **OSCG&R Expertise**

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



#### **In-House Sustainability Expertise**

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



## Questions & Answers