

January 25, 2023

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

Subject: *New Westhill High School, RFP No. 887*
Post Interview Questions from January 19, 2023 Email

Dear Mr. Larson:

Per your email dated January 19, 2023, Colliers Project Leaders offers the following responses to each question. We've also enclosed the completed Post-Interview Follow-Up Question Table. Please feel free to reach out to me should you require any further information regarding our answers.

1. Please explain the process you would employ to review a Change Order proposed by the contractor and how you determine the legitimacy of the scope in question and the proposed cost?

Upon receipt of any change order from the contractor (CM/GC) Colliers first reviews the nature of the change against the **advertised** bid documents and posted addenda to ascertain if the scope of the work is already owned. We stress the "advertised" bid documents as there are typically many modifications to the documents between the 90% construction documents and the advertised documents resulting from addressing comments by building officials, project team members, owners, OSCGR and other parties. Comparing to documents other than the advertised documents could lead to misinterpretations.

Should Colliers determine that the scope is in fact owned already in the bid, we'll advise the contractor (copying the architect and building committee) of such understanding expecting that the contractor will most likely want to discuss it. Ultimately, the City of Stamford has the final determination on whether the work is included or not.

If the work is determined to be legitimate, we then analyze if there's any partial work owned or if credits are due back in the event of a change to the work and not simply an add (or deletion). We also need to evaluate if any work on the subject change order has been completed or not by the trade contractor (s) should re-work be required.

We'll compare the cost of materials to that which was submitted in the final estimate by the CM or independent cost estimator. We'll also review labor rates against the posted prevailing wage rates which will be required for this project. Additionally, we'll verify any applicable markups to the trade costs to ensure they agree with the contractual terms for overhead and profit markup.

In some cases, unit prices may have been established with the bids or there may be allowances incorporated into the contract. If so, those will also need to be considered as well. Colliers will also ensure the design team is reviewing the change orders as well to ensure they concur it is legitimate, and the cost is reasonable.

2. *With regard to a CO, what steps will you need to take to obtain an efficient review and approval by the State to maximize the CO amount as an eligible cost?*

Monitoring Change Orders Against 6-Month Rule: As a result of our experience with many projects in Connecticut under the OSCGR requirements, Colliers has established a standard protocol for managing and monitoring the submission of change orders throughout the project. The number one priority for maximizing eligibility is to ensure all trade change orders, both in-scope (using CM Contingency under GMP contracts) and out-of-scope (using Owner's Contingency), are submitted to OSCGR within the requisite six months.

Within our financial management system, Colliers will manage and track every out-of-scope change order that is approved by the City of Stamford. We document the date of approval, by whom, the amount, and the source of the change order (e.g., field condition, design team error or omission, owner request, or authority having jurisdiction request). We also track when the change order was submitted to OSCGR as well as which number state change order (SCO) it was. We review our contingency log monthly to ensure that change orders are being submitted to the state within the six-months.

Submission of In-Scope Changes: Although Colliers manages and tracks the out-of-scope change orders, the Construction Manager is also responsible for submitting the in-scope change orders as well. Colliers will review the CM's in-scope contingency usage and ensure those trade changes are submitted as well.

In our experience, we have found that most change orders that have been determined to be ineligible are in-scope change orders. This is a result of CMs not submitting them in a timely manner or not having sufficient backup (time and material tickets) to support the usage. Other uses of CM contingency may include premium time usage. The state deems this usage ineligible unless an authority having jurisdiction request such for the safety of the building occupants.

Monitoring Verbiage of Change Order Language: It's imperative that the construction manager draft the cause of the change order in such a way ensure the change orders maintain their eligibility. This is not always possible however they should attempt to do so as much as possible to minimize ineligible change orders. Words such as "rework", "repair", "replace", etc. are key words that will trigger OSCGR to deem a change order ineligible.

Appropriate Backup for Change Orders: In addition to ensuring a change order is legitimate and fair, Colliers will review the change orders for proper detailed backup supporting such costs of the change orders. Lump sum line items and lack of detail in the change order will also trigger ineligibility by OSCGR.

Efficient Reviews by OSCGR: The Office of School Construction Grants and Review has a limited staff. In our experience, this has led to the review of state change orders taking longer than expected. Colliers offers to review state change orders with their staff (with the CMs assistance as well) in order to reduce the review time. We believe doing so provides much needed assistance to their staff in understanding the scope. Given the number of projects that office manages, it's difficult to know every project in detail like we or the construction manager does. In our experience, uncertainty on the part of the reviewer can lead to scope being conservatively marked as ineligible. As such, we try to assist, when possible, to expedite the review process. Ultimately the timeliness of the review lies with OSCGR.

3. *What can be done on the project to control and minimize the CMR's holds and allowances?*

Holds and allowances (and if applicable, CM contingency) are incorporated into a project to facilitate the construction schedule or to encumber potential additional or missed scope items that may be required during construction. They are also sometimes used to encumber contract value for potential increases in material costs. Regardless of the intent, these items can encumber cost during the project that can used for other required scope. Aside from developing clear construction documents and owner's requirements to reduce uncertainty, the methods of controlling and minimizing the CM's holds and allowances all stem from the CM's contract. This includes the negotiation of the GMP (in which case holds and allowances will be reviewed by the Owner), but also through 1) the determination of the type of contract, 2) the establishment of limits within the contract, and 3) managing the use of hold and allowances once the contract is established. Below are our recommended steps for controlling and/or minimizing the CM's holds and allowances.

Step 1 – Determine Best Contract to Use: The first step to control and minimize the CMR's holds and allowances is to determine whether or not the City wants to use a contract that allows the contractor to incorporate them into their contract or not. Colliers mentioned this briefly in our presentation.

There are two primary AIA (American Institute of Architects) contracts that would allow for a single contract with a construction manager. The **AIA A133** – Standard Form of Agreement Between Owner and Contractor as Construction where the basis of payment is the Cost of the Work plus a Fee with a Guaranteed Maximum Price (aka CMR), and the **AIA A134** – Standard Form of Agreement Between Owner and Contractor where basis of payment is the Cost of the Work plus a Fee without a Guaranteed Maximum Price.

Utilizing the A134 eliminates the “Guaranteed Maximum Price” and the “at-risk” aspects of the contract. Under this contract the CM will not have a construction manager contingency in their contract (typically 2.5 to 3 percent of trade costs). The Owner will hold all contingency funding for the project and the construction manager will be required to request formal approval of any scope changes that are not in the contract documents (including addenda). The positive aspect of the A134 is that the Owner holds all contingency dollars. However, the owner will need to review and approve change orders on a more frequent basis than under an A133 contract that allows the CM to use CM contingency under contractual limits.

The fact that the A134 does not have a “Guaranteed Maximum Price” may be considered undesirable to some owners. We recommend discussion with professional counsel possessing expertise in construction law.

Step 2 – Contractual Limit for CM contingency under the A133

Should the A133 contract be used, the contractor does have a CM contingency that they are permitted to use for certain uses. This is primarily used for missed scope that is shown in the construction documents or reasonably implied to be owned by the CM. It’s also been used for overtime to maintain schedule, but OSCGR deems this as an ineligible use by default. Colliers has limited the contractual percentage for CM contingency in the contract which is issued with the Request for Proposal in our recommended process.

Step 3 – Limiting Holds/Allowance under the A133 & A134

OSCGR currently allows construction managers to incorporate a maximum of six CM held allowances and two allowances for each trade. As such, the state is already limiting the use of allowances. However, it’s vital to understand how the allowances are reconciled at the completion of the project as well as ensuring the contract is clear that all unused allowances (and CM contingency) are returned to the Owner.

With respect to monitoring the use of allowance and CM contingency, we recommend review of such uses on a monthly basis. Additionally, contractual requirements could be incorporated into the contract with use of such subject to approval by the Owner. This should be discussed with legal counsel in order to understand any contractual restrictions this may

cause. Colliers modified AIA contracts limit the use of CM contingency to \$5,000 without owner's pre-authorization. This of course can be modified as the city of Stamford requires.

4. *Please indicate your understanding of what the State is looking for to ensure the use of a CMR allowance and contingency is an eligible project cost? What process will you put in place to limit the use of the CMR allowance and/or contingency and ensure State acceptance as an eligible cost?*

Detailed Backup: In our experience the State is looking for proper backup supporting the expended cost against an allowance or CM contingency item. This applies to all changes to trade contractors even when using owner's contingency. They'll be looking to see if it's re-work or repairs based on the nature of how the change orders is drafted. In some cases, they may consider the cost to be a back charge which means the trade contractor is paid by another trade contractor that caused the damage or delay resulting in additional work. If so, OSCGR may deem the use ineligible.

6-Month Rule: As mentioned earlier, they'll review time and material tickets to see when the work started and if the state change order was submitted within the six-month time frame. They also look at costs for small tools and any premium time that may be associated with the change which are both ineligible.

Use of CM Contingency: With respect to the process of limiting use of the CMR allowances and contingencies, Collier's standard A133 contract will limit the percentage of the CM contingency the CM can reserve in their GMP amendment, but it also provides a \$5,000 limit for use of CM contingency without owner approval. This limit can be modified as the City of Stamford would like. We certainly recommend holding a discussion on the contracts used and the intricacies of each prior to issuing the RFP to the shortlisted firms. The state limits the amount allowances permitted for the CM and the trades.

Limits on Use of CM Contingency/Allowances: To minimize the amount of ineligible change orders in the project, it's vital to first contractually limit the CM on what it can use CM contingency for. We would also recommend enhancing our contract further requiring review of all CM contingency expenditures on a monthly basis and incorporating a clause stating the Owner reserves the right to protest any CM contingency uses after reviewing such use by the CM.

Using the A134 contract removes the CM contingency from their contract all together and requires them to submit change orders for every change. However, as noted prior, this will require a higher degree of frequency for the building committee to approve such changes and it could potentially delay the project at times.

5. Will you carry a fee for cost estimator is in the proposal? If not, how will you provide estimating cost assessment throughout the life of the project?

Colliers did not carry the cost to provide a professional cost estimator in its proposal. Typically, the construction manager and architect are required to provide professional cost estimates at each phase. Our proposal does include maintaining the project budget, facilitating the cost estimating reconciliation and analysis spreadsheet, value management and assistance drafting the uniformat cost estimates by OSCGR. Colliers would be happy to provide a cost proposal for professional estimating services via a third-party estimator if required by the city.

6. Please explain where all staff assigned to the project will work on a daily basis and how you plan to work together as a team. How often will you be meeting as a team? Do you meet remotely or in-person? For the team assigned, list each person's number of years in the industry, number of years with your firm and detail prior experience working together on significant projects.

Staff Working Locations: Our team generally works out of Madison office but depends on their role on the project. Mr. Levitus primarily works out of our Madison headquarters but is on site at various times for projects in their construction phase. Ms. Judy Denny and Mr. Schweitzer primarily work remotely either on site or from home as they are assigned to various projects. Although we encourage our staff to work from the office, when possible, we also allow them the flexibility to work from home based on their project assignments. Some staff live over an hour away from our office thus we'd prefer they spend time working on their assignments versus driving when possible. As the director for the project, I am based in our Madison office and attend on site meetings as required to support our projects.

Working Together as a Team: Our project teams typically meet on a weekly basis anywhere from a half hour to an hour to review the project status, upcoming milestones, deliverables, financials, and to ensure all requirements for the project are being met. During construction multiple team members will attend the OAC (Owner-Architect-Contractor) meetings typically held on site.

The majority of our meetings are held remotely due to having multiple project assignments in various locations. We've found this to more cost effective and efficient for us as well as our clients.

Experience of Team: Each of our resumes submitted in our original qualifications package contains the number of years in the industry and the number of years with the firm. We kindly

refer you back to our proposal starting on page 28 of the pdf. As one minor clarification, Ms. Denny will be with us for two years on March 1, 2023. As the director of the team, Mr. Warrington has worked with all team members in the past. He's currently working with Mr. Levitus on the new Madison Elementary School project. He's worked on multiple projects with Mr. Schweitzer including three in Fairfield, Connecticut, two in New Fairfield, and other various assignments during Mr. Schweitzer's four years with the firm.

This will be the first project that Mr. Levitus, Mr. Schweitzer and Ms. Denny work on together.

7. *Confirm your fee is based on the timeline as presented in Addendum No. 1. If the project schedule changes how are changes reflected in your fee proposal? If you believe the timeline proposed is unrealistic or not sufficient, please provide in detail your best estimate for anticipated project development, construction and closeout to occupancy.*

As noted in our fee cover letter dated October 27, 2022, our fee is based on a two-year pre-construction phase, a 42-month construction phase, and a 6-month FF&E/closeout phase. Note, our fee proposal letter had construction as a 24-month duration noted in the header of our breakdown but the fee for the construction phase did account for 42 months as required.

Addendum #1 did not specify the FF&E/closeout phase but given our experience with many school projects in Connecticut, we included this in our fee. This phase doesn't include the final OSCGR closeout once all state change orders have been reviewed which can be many months after construction is complete. Our fee included a lump sum cost of \$20,000 for final OSCGR and pre-audit closeout.

In response to question #10 in your email dated December 14, 2022, Colliers has already provided what we believe is a realistic project schedule based on our experience with other projects as well as with discussions with construction managers whom we are currently working with. This schedule is being enclosed again for your reference. To clarify, our original fee proposal, nor our updated fee resulting from the increased coverage, reflect that elongated schedule.

8. *You will be expected to provide a monthly report (executive summary and detail) that will capture key issues and written record of what has happened in each area, such as design, construction, financing to provide insight into the overall status of the project.*

Colliers typically provides such a report to our clients on a monthly basis. This is included as part of our standard service on all public K-12 projects. We also recommend updates from the design team and construction manager as well.

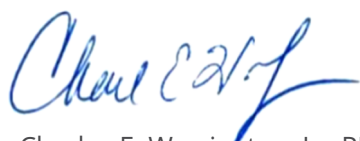
Enclosed per your request is the Post-Interview Follow-Up Question Table. We have accounted for the equivalent of one full-time person during pre-construction and the equivalent of two full-time people during construction (including demolition and site reconstruction phase) as requested. My time has increased to one-day per week (20%) for duration of the project to provide increased oversight. Mr. Levitus' and Ms. Judy Denny will constitute 80% for the duration of the project. Mr. Schweitzer has been increased to 100% coverage during construction to provide the two FTE equivalent requested.

Our original fee proposed 0.7 full-time equivalent personnel during pre-construction and 1.25 full-time equivalent personnel during construction. To provide the increased coverage requested for the project duration specified in Addendum #1 (24-months pre-construction and 42-months construction) and including plus the 6-months of FF&E/closeout and still including the \$20,000 final OSCGR and pre-audit closeout, our revised total fee will be \$4,205,612. This does not include costs for Multi-Vista. To further clarify, this is not the fee associated with the schedule submitted in response to question #10 on December 28, 2022, and re-enclosed here addressing question #7.

Should the project schedule substantially change from that specified in Addendum #1, Colliers would kindly request to increase its fee based on our average monthly forecast for the applicable phase, i.e., pre-construction versus construction phase versus closeout. This of course is negotiable with the City of Stamford.

I hope that this letter has sufficiently addressed the questions transmitted to us on January 19, 2023. Should the committee have any questions or require clarification to a question, please do not hesitate to reach out to me directly. We appreciate the opportunity to provide the owner's representative services for the Westhill High School project and are committed to helping you meet your objectives. you have questions or require additional information you can contact me at charles.warrington@collierseng.com or (860) 235-5313.

Sincerely,

A handwritten signature in blue ink, appearing to read "Charles E. Warrington, Jr.", written in a cursive style.

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

Enclosure – Colliers Table of Construction Contracts
Macro-Schedule Submitted on December 28, 2022
Post-Interview Follow-Up Question Table

PROJECT DELIVERY MATRIX
CONSTRUCTION MANAGER vs GENERAL CONTRACTOR

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

PROJECT DELIVERY MATRIX CONSTRUCTION MANAGER vs GENERAL CONTRACTOR

When Best to Utilize	Recommended for complex phasing projects that consist of occupied renovations, complex renovations, phased renovations, complex site phasing and modifications. Recommended when owner is seeking construction expertise for estimating, phasing and insight on market trends. Pre-Construction Services are the primary difference for CM services (all) and G.C. method.	Similar to CMR method. Primary difference is in construction and providing a "Control Estimate" versus a Guaranteed Maximum Price (GMP). CM does not hold any CM contingency.	Not applicable. Not recommended for use.	Recommended for very simple projects. Projects that have simple phasing and not occupied by owner. Ideal for smaller projects (less than \$10M but this is subjective on the value).
CONTRACTUAL/LEGAL ISSUES				
Contracts Held	One contract with CM. Trade Contracts held by CM		Trade contracts held by Owner.	Only one contract with G.C.
Bonding	CM provides full payment and performance and Materials bonds to the Owner. Trades will provide bonds to the CM.	CM provides full payment and performance and Materials bonds to the Owner. Trades will provide bonds to the CM.	Bonds issued to Owner directly by trade contractors.	G.C. provides full payment and performance and Materials bonds to the Owner.
Builders Risk	May be carried by CM or Owner	May be carried by CM or Owner	May be carried by CM or Owner	Carried by Owner
Commission on Human Rights and Opportunities Management	CM responsible for CHRO oversight.	CM responsible for CHRO oversight.	Oversight depends on contract.	Owner responsible.
Prevailing Wage Rates & Certified Payrolls	CM is responsible for collecting.	CM is responsible for collecting.	CM is responsible for collecting.	Owner responsible for collecting.
PRE-CONSTRUCTION ISSUES				
Estimating	Included	Included	Included	By independent estimator hired by Owner.
Review of Documents through Design	CM required per Colliers A133 contract.	CM required per Colliers A134 contract.	CM required per Colliers A132 contract.	Not applicable since there is not any pre-construction services.
Coordination with Designer	Included	Included	May or may not be included	Not included
Phasing Plans	CM prepares the phasing plans and responsible for all changes thereto. Any modifications to the plan typically funded by CM contingency.	CM prepares the phasing plans and responsible for all changes thereto. Any modifications to the plan as requested by the Owner most likely will be a change order funded from Owner's Contingency.	CM prepares the phasing plans and responsible for all changes thereto. Any modifications to the plan as requested by the Owner most likely will be a change order funded from Owner's Contingency.	Architect/OPM will work collaboratively with owner to prepare phasing for construction. Any changes to the phasing plan or errors due to incorrect assumption in the execution of the work is paid for by Owner Contingency.
BIDDING ISSUES				
General Conditions	General conditions are submitted at the time the RFP is issued during the pre-construction phase. A detailed list of general conditions is requested by Colliers and must be submitted by the CMs. This includes staffing hours based on the project schedule included in	Same as CMR.	Same as CMR.	General Conditions are contained within the lump sum at the time of bid.

PROJECT DELIVERY MATRIX
CONSTRUCTION MANAGER vs GENERAL CONTRACTOR

	the RFP. General Conditions expenses are based on actual costs expended, not lump sum. Any unused General Conditions are returned to the Owner.			
Front End Bid Documentation Prep	CM prepares front-end bid docs and assists town purchasing agent with advertising, bid opening, etc.	CM prepares front-end bid docs and assists town purchasing agent with advertising, bid opening, etc.	CM prepares front-end bid docs and assists town purchasing agent with advertising, bid opening, etc.	Architect/OPM prepares front-end bid documents.
Bidding by Trades	<p>Bid packages (e.g. site work, concrete, steel, masonry, windows, doors, elevator, plumbing, HVAC, electrical, etc.) are created by the CM and advertised for bid as separate bids. Bid packages can range from 15 package up to 30. All bids are publicly opened, read, and available for review by the public.</p> <p>Award of trade packages must be to the lowest qualified responsible bidder per state statute as recommended by the CM. These bids are NOT negotiated.</p>	Same as CMR. However, discussion regarding trade allowances must be held. The state allows up to two trade allowances per bid package.	Same as CMR.	Not applicable. Bids from the general contractor are one complete lump sum for the base bid of the work. The Owner will not see the GC's trade contractor's bids as they are not required to. This is not open book like a CM.
Bid Alternates	May be included in bid docs.	May be included in bid docs.	May be included in bid docs.	May be included in bid docs.
Scope Reviews	Open scope reviews of the apparent low bidder(s) occur after bidding. CM facilitate the review with the architect, OPM, and Owner in attendance. Subconsultants to the architect participate also. Reviews occur prior to submission of the GMP.	Same as CMR.	Same as CMR.	Only held with the CM, not trade contractors unless CM agrees to.
CHANGE ORDERS AND CONTINGENCIES				
CM Contingencies in Contract?	<p>YES</p> <p>CM Contingency is used for scope missed by the CM during bidding that is shown in the Construction Documents, schedule adjustment, phasing modifications, etc. Any unused CM contingency as the completion of the project is returned to the owner.</p>	<p>NO</p> <p>Only contingency is the Owner's Contingency.</p>	<p>NO</p> <p>Only contingency is the Owner's Contingency</p>	Not applicable however the GC will build in their own "contingency" within their general requirements that the owner will not be privy to. This "contingency" supports their assumptions for phasing, cold weather work, mobilization and other possible unforeseen or unpredictable costs in the project that may arise. Any remaining "contingency" becomes profit to the G.C. under the Lump Sum bid.
CM Contingency Authorizations required?	Yes, any in-scope (CM contingency use) change that exceeds \$5,000 must	Not applicable	Not applicable	Not applicable

PROJECT DELIVERY MATRIX
CONSTRUCTION MANAGER vs GENERAL CONTRACTOR

	be approved by the Owner prior to execution. This is only under Colliers Project Leaders contracts, not the base AIA contract.			
Missed Scope in Bid	CM Contingency covers missed scope that is not bought out by a bid package. Where documents may not be clear, possible to have the CM contingency cover it. CM, under Collier's A133, are required to seek approval for any in-scope change orders over \$5k.	Owner's contingency required to cover since there is not any CM contingency.	Owner's contingency required to cover since there is not any CM contingency.	GC owns all scope in the contract documents (plans, spec and addenda). Where documents are not clear, change orders occur and may be difficult to negotiate.
SCHEDULING/PHASING				
Schedule Management	CM responsible	CM responsible	CM responsible	G.C. responsible based on duration of construction in contract
Phasing Plans	CM prepares the phasing plans and responsible for all changes thereto. Any modifications to the plan typically funded by CM contingency.	CM prepares the phasing plans and responsible for all changes thereto. Any modifications to the plan as requested by the Owner most likely will be a change order funded from Owner's Contingency.	CM prepares the phasing plans and responsible for all changes thereto. Any modifications to the plan as requested by the Owner most likely will be a change order funded from Owner's Contingency.	Architect/OPM will work collaboratively with owner to prepare phasing for construction. Any changes to the phasing plan or errors due to incorrect assumption in the execution of the work is paid for by Owner Contingency.
Effects of change to phasing due to Owner requests during construction	CM can mitigate changes better with less cost impact	Same as CMR	Involved but much less impact than CMR as they do not hold the contracts with the trades	Significant potential for cost increase.

City of Stamford
Westhill High School

City of Stamford
Westhill High School

TIMELINE DESCRIPTIONS		28					2029												2030												2031														
Date: December 28, 2022		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Architect / Designer Selection																																													
Grant Commitment (Assumed July 2022)																																													
Pre-Construction Phase																																													
	Programming/Schematic Design Phase																																												
	SD Estimate/Design Review																																												
	Design Development Phase																																												
	Schematic Design Review Meeting with OSCGR (after estimate reconciliation)																																												
	DD Estimate/Design Review																																												
	Construction Documents																																												
	Design Development Review (DDR) Meeting with OSCGR (after estimate reconciliation)																																												
	CD Estimate/Design Review																																												
	Third-Party Code Review																																												
	Approvals by BC/BOE/OSCGR (2-months)																																												
Local Permitting																																													
GC Pre-Qualification / CM Selection																																													
	Request for Qualifications																																												
	Shortlist Firms																																												
	Prepare Proposals																																												
	Interview/Select CM (IF APPLICABLE)																																												
Bidding / GMP																																													
	Bid Period (6 weeks)																																												
	Scope Reviews (2-3 weeks)																																												
	Award Site/Steel/HVAC/ETC.																																												
	Bid / GMP Award																																												
Construction																																													
	Phase 1 Construction of New School																																												
	Cx/Punchlist, etc.																																												
	Phase 2 - Abate/Demo/Site Work																																												
FF&E Process																																													
	Installation																																												
Move Activity																																													
	Move Out																																												
	Temporary Storage																																												
	Move In																																												
Occupancy																																													

Proposer Name: Colliers Project Leaders (1/25/2023)

Use the table below to identify the specific key personnel, such as Principal, Sr. Project Manager, Project Manager, etc. and their time allocation, by project phase.

We anticipate the equivalent of full time project management during the pre-construction phase and the equivalent of two full time management personnel to provide oversight during construction phase. The FTEs assigned should be project manager level staff and provide continuity between design and construction.

Add or subtract rows as necessary.

Staff Position	% of time Preconstruction	% of time Construction	% of time Demolition and Site Reconstruction	% of time Close Out
Director	20% (1 day per week)	20% (1 day per week)	20% (1 day per week)	10% (1 day per week)
Project Manager	50% (2.5 days per week)	50% (2.5 days per week)	50% (2.5-days per week)	30% (1.5 days per week)
Assistant Project Manager	30% (1.5 days per week)	30% (1.5 days per week)	30% (1.5 days per week)	20% (1.5 days per week)
Construction Representative	221 estimated hours, primarily design review, attend trade scope reviews	100% (5 days per week)	100% (5 days per week as request but may be able to reduce coverage when activities are lighter)	0-5% (minimal)
Financial/Admin Support	15 estimated hours	36 estimated hours		Relatively minor hours to assist with reconciliation with general ledger, finances, etc.
MEP/Technical Support	85 estimated hours	85 estimated hours		Support as reasonably necessary to assist

				closing out commissioning items, etc.