

**BOARD OF SELECTMEN REGULAR MEETING**  
**Monday, May 15, 2023, 4:00 pm**  
**Via Webex & In-Person in the**  
**First Floor Conference Room, Independence Hall**  
**725 Old Post Road, Fairfield, CT 06824**

A recording of this meeting can be found here: [BOS Regular Meeting 5/15/2023](#).

**DRAFT MINUTES**

MEMBERS PRESENT: First Selectwoman Brenda L Kupchick, Selectman Thomas M. Flynn, Selectwoman Nancy E. Lefkowitz

OTHERS PRESENT: Bob Ellwanger, David Dembowski, Joe DeMartino, Buildings Manager James Ryan, Human and Social Services Director Julie DeMarco, Purchasing Director Adam Tulin, Engineering Manager Bill Hurley, Engineer Megha Jain, Superintendent FPS Mike Testani, BOE Chairwoman Jennifer Jacobsen, CFO Jared Schmitt, CAO Tom Bremer, WPCF Superintendent John Bodie, Town Attorney James Baldwin, Attorney Rick Aiken

1) **CALL TO ORDER**

First Selectwoman Kupchick called the meeting to order at 4:00 pm.

2) **PLEDGE OF ALLEGIANCE**

First Selectwoman Kupchick led the Pledge of Allegiance.

3) **MINUTES**

To consider and act upon the minutes of March 6, 2023, March 27, 2023, April 17, 2023, May 1, 2023

Selectwoman Lefkowitz made a motion to approve the minutes in Item 3. Selectman Flynn seconded the motion which carried unanimously.

4) **RESIGNATIONS (*for information only*)**

a) Affordable Housing Committee

Joanne T. Romano-Csonka (R) 694 Jennings Road, term 11/19-11/23  
(resigned on May 3, 2023)

b) Bike and Pedestrian Committee

Jay F. Behan (R) 503 Fairfield Woods Road, term 11/20-11/24  
(resigned on May 1, 2023)

c) Land Acquisition Commission (*Alternate*)

Christopher A. Verras (R) 243 Fairchild Avenue, term 11/20-11/24  
(resigned on May 1, 2023)

The Selectpersons thanked the members for their service to the Town.

5) **APPOINTMENTS**

a) Affordable Housing Committee

Robert J. Ellwanger, Jr. (U) 85 Sasapequan Road, term 11/19-11/23  
(to replace Joanne T. Romano-Csonka (R) who resigned)

- b) Bicycle and Pedestrian Committee  
David E. Dembowski (R) 300 Sturges Road, term 11/20-11/24  
(to replace Jay F. Behan (R) who resigned)
- c) Land Acquisition Commission (Alternate)  
Joseph M. DeMartino (R) 379 Wormwood Road, term 11/20-11/24  
(to replace Christopher A. Verras (R) who resigned)

Selectman Flynn made a motion to approve Item 5 a-c. Selectwoman Lefkowitz seconded the motion, but also said she would be abstaining from the vote as she did not have a chance to contact the appointees.

The appointees expressed their thanks for being selected and look forward to this opportunity.

The motion carried 2-0-1 (Lefkowitz abstained).

6) **PURCHASING AUTHORITY**

To hear and consider authorizing the Purchasing Authority to enter into the proposed contract with Wernert Construction Management, LLC to provide all labor, materials, equipment, and all else necessary to perform the Bigelow Senior Center Renovations as detailed in Bid #2023-53 in an amount not to exceed \$459,042.00 with additional authority to execute change orders to said contract in an amount not to exceed \$45,904.00 for a combined grand total amount not to exceed \$504,946.00. (Account #14501010-59996-81028 - ARPA – Senior Center Renovation).

Selectman Flynn made a motion to approve Item 6. Selectwoman Lefkowitz seconded the motion.

ARPA funds have already been approved for this project. Purchasing Director Adam Tulin said this went through the normal bidding process and there were six responses. Buildings Manager James Ryan said there are three sets of bathrooms included in the contract that will be done one at a time as to not disrupt the programs and services at the Bigelow Senior Center. Selectman Flynn expressed his support for this project.

The motion carried unanimously.

7) **PURCHASING AUTHORITY**

To hear and consider authorizing the Purchasing Authority to enter into the proposed contract with RACE Coastal Engineering to provide consulting services and all else necessary to perform the inventory of tide gate and flood control structures as detailed in RFP #2023-107 in an amount not to exceed \$59,750.00 with additional authority to execute change orders to said contract in an amount not to exceed \$5,975.00 for a combined grand total amount not to exceed \$65,725.00. (Account #22809010-57000-023T1-Underwater Bridge Inspection-10-Year).

Selectman Flynn made a motion to approve Item 7. Selectwoman Lefkowitz seconded the motion.

Purchasing Director Adam Tulin told the BOS that this contract had been reviewed and accepted by Town Attorney James Baldwin.

Engineering Manager Bill Hurley said this job has been split between RACE Engineering and GZA GeoEnvironmental. He said the Town has worked with both firms before.

The motion carried unanimously.

8) **PURCHASING AUTHORITY**

To hear and consider authorizing the Purchasing Authority to enter into the proposed contract with GZA GeoEnvironmental, Inc to provide consulting services and all else necessary to perform the underwater bridge inspections as detailed in RFP #2023-107 in an amount not to exceed \$15,800.00 with additional authority to execute change orders to said contract in an amount not to exceed \$1,580.00 for a combined grand total amount not to exceed \$17,380.00. (Account #22809010-57000-023T1-Underwater Bridge Inspection-10-Year).

Selectman Flynn made a motion to approve Item 8. Selectwoman Lefkowitz seconded the motion.

There was no discussion on this Item as it was in conjunction with Item 7.

The motion carried unanimously.

9) **CHIEF FISCAL OFFICER**

To hear, consider and adopt a resolution appropriating \$355,370 in FEMA reimbursement funds to the Board of Education and authorizing the expenditure of such funds on school security.

WHEREAS, the Town of Fairfield, Connecticut (the “Town”) received grant funds from the Federal Emergency Management Agency (“FEMA”) in the amount of \$355,370 (the “Grant Funds”) as reimbursement for money spent by the Town’s Board of Education (“BOE”) in fiscal year 2021 related to the purchase of personal protective equipment; and

WHEREAS, the Town desires to appropriate the Grant Funds to the BOE and authorizes said Grant Funds to be used for school security purposes; and

NOW, THEREFORE, BE IT RESOLVED:

The Town hereby appropriates the Grant Funds to the BOE and authorizes the Grant Funds to be used for school security purposes.

Selectman Flynn made a motion to approve Item 9. Selectwoman Lefkowitz seconded the motion.

This Item was approved by the BOF on May 4<sup>th</sup> and will go before the RTM on Monday 5/22/23.

BOE Chairwoman Jennifer Jacobsen gave some background on this Item. She explained that the BOE received recommendations and estimated associated costs through the Fairfield Police Department and other organizations and companies. All have been vetted and are through a State contract.

The motion carried unanimously.

10) WATER POLLUTION CONTROL AUTHORITY

To hear, consider and authorize the Water Pollution Control Authority to enter into a contract with Woodward & Curran for services to include the measurement of the WPCF wastewater facilities' performance relative to technical management, operational efficiency, organization, finances, capital asset protection and other relevant and meaningful focal points and an evaluation of the physical condition of the WPCF's current assets, including an Organizational Evaluation as detailed in the April 27, 2023 proposal in an amount not to exceed \$104,000. [\$84,000 from Acct # 13013010-53200 and \$20,000 from Acct # 01005030-53200]

Selectwoman Lefkowitz made a motion to approve Item 10. Selectman Flynn seconded the motion.

Town Attorney James Baldwin wanted to note for the record that there was a Scribner's error in the agenda. He said the name of the contracted firm is Woodard & Curran. He said there was no need for an amendment as it was Scribner's error.

CAO Tom Bremer addressed this Item. The proposal from Woodard & Curran from 4/27/23 is included in the backup. Mr. Bremer said WPCF needs to have an organizational and operational audit to reviewing replacing everything at the plant. He said facilities and buildings will be reviewed to see what work needs to be done and to learn the timeframe. Mr. Bremer said the team reviewing the results will be: Matt Manchisi, WPCA member, Tom Bremer and DPW Interim Director John Marsilio. Mr. Bremer said the study will result in a written report for the WPCF Superintendent and WPCA to focus on. He said it will take 4-6 weeks for the audit/review, but the WPCA and administration will have a good idea where to go from there. He said the study/audit will be looking into issues like are there enough people or should there be more people hired, job descriptions and how things are being done. Mr. Bremer wanted to state that this is not a study or focus on saving money, but it's about efficiency. Town Attorney Baldwin said he has proposed changes to the contract. Mr. Baldwin clarified that there will be no added fees for a presentation of the audit findings and backup.

There was a discussion.

The motion carried unanimously,

11) To hear, consider and act upon any other business which shall properly come before this meeting

First Selectwoman Kupchick went through her announcements. The First Selectwoman stated:

- I hope everyone had a nice Mother's Day!

Last week, I presented to the Ukraine Aid International representative our Town Flag and a letter to give to the Mayor of Fairfield's sister city in Ukraine, Kostiantynivka. I have convened a group of caring community service-oriented residents and business owners to serve on the Sister City Committee to bring together the many people in our Town who want to help in various ways. I had the privilege of speaking to the Mayor of Fairfield's Sister City which was eye-opening. I also was on a call this morning with the Sister City Committee.



- If you are over the age of 45, we strongly encourage you to take the Age Friendly Fairfield survey by June 15<sup>th</sup>. Younger residents may also want to take the survey on behalf of any older family member or friend - or just to weigh in on your hopes for Fairfield in the future. Tell us what's important to you as you age, share your experiences, and let us know the extent to which our community is supporting the needs of Fairfield residents. For information about Age Friendly Fairfield and to take the survey, visit my May 12<sup>th</sup> newsletter or the Town's website.
- The Town is continuing to accept applications for the Fairfield COVID-19 Recovery Fund with ARPA funding. The Fund was established in 2022 to provide limited, one-time assistance to Fairfield residents who have been adversely impacted by the pandemic. Applicants must also demonstrate that they have exhausted any other assistance funds or available resources for which they may be eligible. For information about the application process and eligibility requirements for the COVID Recovery Fund call Fairfield Social Services at 203-256-3170 or go to [www.fairfieldct.org/covidrecoveryfund](http://www.fairfieldct.org/covidrecoveryfund).

12) TOWN ATTORNEY

Executive Session – Discuss Settlement Proposal Regarding Joseph Bienkowski v. Town of Fairfield with Town Attorney Jim Baldwin and Attorney Rick Aiken

Selectman Flynn made a motion to go into Executive Session at 4:41 pm. Selectwoman Lefkowitz seconded the motion which carried unanimously.

Selectwoman Lefkowitz made a motion to end Executive Session at 4:52 pm. Selectman Flynn seconded the motion which carried unanimously.

Selectman Flynn made a motion to accept the settlement agreement as recommended per the attorneys. Selectwoman Lefkowitz seconded the motion which carried unanimously.

13) Adjourn

Selectman Flynn made a motion to adjourn. Selectwoman Lefkowitz seconded the motion which carried unanimously.

The meeting adjourned at 4:53 pm.

Respectfully submitted,

Pru O'Brien  
Recording Secretary

**BOARD OF SELECTMEN REGULAR MEETING**  
**Monday, June 5, 2023, 4:00 pm**  
**Via Webex & In-Person in the**  
**First Floor Conference Room, Independence Hall**  
**725 Old Post Road, Fairfield, CT 06824**

A recording of this meeting can be found here: [BOS Regular Meeting 6/5/2023.](#)

**DRAFT MINUTES**

MEMBERS PRESENT: First Selectwoman Brenda L Kupchick, Selectman Thomas M. Flynn, Selectwoman Nancy E. Lefkowitz

OTHERS PRESENT: Samuel Cargill, Sam Goldstein, Lou Heumann, Kathleen Lang, Charlie McDonald, Matthew Oestreicher, Christine Orlando, George Harris, Director of Community & Economic Development Mark Barnhart, Assistant Director of DPW John Cottell, Engineering Manager Bill Hurley, CFO Jared Schmitt, Police Chief Robert Kalamaras, Fairfield Museum and History Center Executive Director Mike Jehle, Attorney John Stafstrom, WPCF Superintendent John Bodie

- 1) **CALL TO ORDER**  
First Selectwoman Kupchick called the meeting to order at 4:00 pm.
- 2) **PLEDGE OF ALLEGIANCE**  
First Selectwoman Kupchick led the Pledge of Allegiance.
- 3) **RESIGNATIONS (*for information only*)**
  - a) FairTV Commission
    - i. Mark Joyella (D) 340 Merwins Lane, term 07/20-07/23  
(Resigned April 18, 2023)
    - ii. Anne Marie Lagnese (R) 60 Steep Hill Road, term 07/20-07/23  
(Resigned May 22, 2023)
  - b) Harbor Management Commission  
Samuel W. Cargill (R) 144 Westway Road, Spt, term 11/19-11/23  
(Resigned June 2, 2023)
  - c) Land Acquisition Commission  
Nicholas D. Mirabile (R) 125 Sycamore Lane, term 11/21-11/25  
(Resigned May 25, 2023)

The BOS thanked those who had resigned for their service to the Town.

- 4) **APPOINTMENTS**  
Fairfield Arts Advisory Committee
  - i. Samuel W. Cargill (R) 144 Westway Road, Spt, term 06/23-06/26
  - ii. Connor F. Deane (D) 34 New England Avenue, term 06/23-06/26
  - iii. Sam R. Goldstein (D) 135 Bayberry Road, term 06/23-06/26
  - iv. Kevin D. Gosselin (U) 1046 Banks North Road, term 06/23-06/25
  - v. Clara A. (Lou) Heumann (R) 608 Harbor Road, term 06/23-06/25
  - vi. Kathleen C. Lang (D) 1677 Bronson Road, term 06/23-06/25

- vii. Charles P. MacDonald, Jr. (U) 320 Old Mill Road, term 06/23-06/24
- viii. Matthew J. Oestreicher (U) 70 Dunnlea Road, term 06/23-06/24
- ix. Christine L. Orlando (D) 210 Rockland Road, term 06/23-06/24

Selectman Flynn made a motion to approve the appointments in Item 4 i-ix. Selectwoman Lefkowitz seconded the motion which carried unanimously.

The BOS thanked all the appointees for serving on this new Town committee.

- b) Harbor Management Commission (*requires RTM approval; Terms Effective July 1, 2023*)
  - i. George O. Harris (R) 95 Orchard Hill Lane, term 11/21-11/23 (*alternate*)  
(to replace Jeffrey S. Warren (U) who's being moved to full member)
  - ii. Jeffrey S. Warren (U) 330 Parkwood Road, term 11/19-11/23  
(replacing full member Samuel W. Cargill (R) who's being appointed to Fairfield Arts Advisory Committee)

Selectman Flynn made a motion to approve the appointments in Item 4b i-ii. Selectwoman Lefkowitz seconded the motion which carried unanimously.

The BOS thanked all the appointees for serving the Town.

- c) Western Regional Tourism District Board of Directors  
Mark Barnhart\* term 07/23-07/26  
(Mr. Barnhart is the Town's Community and Economic Development Director)

Selectman Flynn made a motion to approve Item 4c. Selectwoman Lefkowitz seconded the motion which carried unanimously.

- 5) **COMMUNITY AND ECONOMIC DEVELOPMENT DIRECTOR** (*requires RTM approval*)  
To hear, consider and act upon the following resolution as recommended by the Director of Community and Economic Development:  
RESOLVED, that the applications received under the Neighborhood Assistance Act (NAA) Program are hereby approved, and that the Director of Community and Economic Development is hereby designated as the municipal liaison of the Town of Fairfield for this program.

Selectman Flynn made a motion to approve Item 5. Selectwoman Lefkowitz seconded the motion.

Community and Economic Development Director Mark Barnhart said the Town has participated in this program for years. He said this program provides contributions for businesses from businesses. He said those who donate are eligible to receive a tax credit against the Corporate Estate Tax. Mr. Barnhart said the deadline to apply is July 1, 2023 and the six applications are included in the backup packet.

The motion carried unanimously.

- 6) **COMMUNITY AND ECONOMIC DEVELOPMENT DIRECTOR** (*requires RTM approval*)

To hear, consider and act upon the following resolution as recommended by the Director of Community and Economic Development:

RESOLVED, that the Program Year 49 (October 1, 2023 – September 30, 2024) Community Development Block Grant (CDBG) Annual Action Plan be and hereby is approved in the amount of \$537,000, which includes entitlement grant funds of \$492,327 and program income of \$44,673; and

FURTHER RESOLVED, that Brenda L. Kupchick, First Selectwoman of the Town of Fairfield, be, and hereby is, authorized to execute any and all necessary documents to facilitate the Town's receipt of these funds and participation in said CDBG Program.

Selectman Flynn made a motion to approve Item 6. Selectwoman Lefkowitz seconded the motion.

Community and Economic Development Director Mark Barnhart said the Town has received CDBG grants since 1974. The proposed allocation plan is in the backup. Mr. Barnhart said the program provides flexible funding for a variety of programs. He said the Town serves as fiduciary for HUD and the applicant needs to meet primary objectives to receive funding.

The motion carried unanimously.

7) **ASSISTANT PUBLIC WORKS DIRECTOR (*requires RTM approval*)**

To consider and act upon the following resolution as recommended by the Assistant Public Works Director:

To consider and act upon the attached resolution recommended by the Assistant Public Works Director between the Town of Fairfield and the South Central Connecticut Regional Water Authority to confirm participation in the regional household waste collection center. (See attached Resolution)

Selectman Flynn made a motion to approve Item 7. Selectwoman Lefkowitz seconded the motion.

Assistant Director of DPW John Cottell said the Town has been part of this program since 1990. He said the resolution states a 3-year minimum that he changed to a 1-year minimum for the next year with two 1-year period options. He said the Town has its own House Waste Collection once a year and residents can take waste to a facility in New Haven. Mr. Cottell said MetroCog would like to get communities together to do something similar and this is why Mr. Cottell does not want to commit to three years with South Central Connecticut Water Authority program. There was a discussion about the cost.

Selectman Flynn made the following amendment that is to be placed after the last sentence in the first paragraph under "NOW, THEREFORE, BE IT RESOLVED BY THE Town of Fairfield THAT:"

The budgeted figure of \$63,107 is the cap on spending. Invoicing to be fully placed on a two-part formula. The expense cap for FY24 is \$63,107. Should the service cost more than this, DPW should come back to the BOS for approval.

Selectwoman Lefkowitz seconded the amendment which carried 2-1-0 (Kupchick opposed).

The main motion as amended carried unanimously.

8) **ENGINEERING DIRECTOR (*requires BOF and RTM approval*)**

WHEREAS, the Town of Fairfield, Connecticut ( the 'Town') will receive grant funds from the Federal Emergency Management Agency ( ' FEMA') in the amount of \$ 256,335.95 ( the 'Grant Funds') as reimbursement for money to be spent by the Town's Department of Public Works and their Contractor in fiscal years 2024 and 2025 related to infrastructure repair caused by storm IDA; and

WHEREAS, the Town desires to appropriate the Grant Funds to the Department of Public Works to be used for said infrastructure repairs;

NOW, THEREFORE, BE IT RESOLVED: the Town hereby appropriates the Grant funds to the Department of Public Works and authorizes the grant funds to be used for infrastructure repair purposes.

Selectman Flynn made a motion to approve Item 8. Selectwoman Lefkowitz seconded the motion.

Engineering Manager Bill Hurley gave the background of this approval request. He said the Town's infrastructure was damaged by Hurricane Ida which caused extreme stream and pipe overflows. He said after a year and a half, FEMA granted acceptance of these repairs to culverts and stabilizing eroded slopes. The locations are in the backup documents. Mr. Hurley said the amount is based on the approved FEMA amount for reimbursement. He said FEMA will give the Town the funds up front. There was a discussion about other FEMA fund requests. Mr. Hurley said if the project costs less than estimated, FEMA said the Town can keep that money, but if it goes over, DPW has 10% contingency that can be used for this project.

The motion carried unanimously.

9) **CHIEF FISCAL OFFICER (*requires BOF and RTM approval*)**

To hear, consider and approve a resolution appropriating \$148,000 for the costs related to uses of Coronavirus State Fiscal Recovery Fund and the Coronavirus Local Fiscal Recovery Fund

Selectman Flynn made a motion to approve Item 9. Selectwoman Lefkowitz seconded the motion.

CFO Jared Schmitt gave an overview. He said this is the Fairfield Museum and the Fairfield Police Safe Corridor Program and unallocated ARPA funds are being used. First Selectwoman Kupchick gave the background on this item. All the information on the programs requesting the funding is in the backup documents and the discussion is accessible through the link here: [BOS Regular Meeting 6/5/2023](#).

The motion carried unanimously.

10) **PUBLIC WORKS DIRECTOR (*requires BOF and RTM approval*)**

To hear, consider and adopt a bond resolution entitled "A resolution appropriating \$2,377,000 for the purchase of vehicles and equipment for the Department of Public Works and authorizing the issuance of bonds to Finance such Appropriation"

Selectman Flynn made a motion to approve Item 10. Selectwoman Lefkowitz seconded the motion.

CFO Jared Schmitt said this is the same model from almost three years ago. He said it is a 3-year fund plan of capital projects listed in the backup documents. He said the service life for the equipment is 15 years and the bond request is for 15 years to capture the average service life. Mr. Schmitt said the vehicle list is included in the backup and was reviewed in the discussion.

The motion carried unanimously.

- 11) **WATER POLLUTION CONTROL AUTHORITY (*requires BOF and RTM approval*)**  
To hear, consider and approve funding of up to \$70,000 from the WPCA fund balance for the purchase of an Influent Building Transformer.

Selectman Flynn made a motion to approve Item 11. Selectwoman Lefkowitz seconded the motion.

WPCF Superintendent John Bodie said the funding and PO was in place last year, but the WPCA couldn't find a new or used transformer. He said the transformer unit was switched out and the old one was kept just in case anything happened. He said the switch failed so the old transformer was put back. Mr. Bodie said the transformer needs to be replaced. He said it is cheaper and the warranty is better on the refurbished transformer than the new one. (3-years vs. 1-year).

The motion carried unanimously.

- 12) **WATER POLLUTION CONTROL AUTHORITY (*requires BOF and RTM approval*)**  
To hear, consider and approve funding of up to \$125,000 from the WPCA fund balance for the purchase of a Trailer Mounted Generator

Selectman Flynn made a motion to approve Item 12. Selectwoman Lefkowitz seconded the motion.

WPCF Superintendent John Bodie gave the background on this Item. He said there are three generators located at the pump stations in town. He said the pump stations are reliant on emergency power. Mr. Bodie said last May, the generator at the Easton Turnpike pump station failed and it took a year to get the parts that were needed. He said the warranty covers parts and labor only. He said this generator can also be used within the Town government if needed. There was a discussion about why ARPA funds weren't used toward WPCF projects. Mr. Bodie said the WPCA fund balance will be \$14.5 million after this project and the current approved projects have been deducted.

The motion carried unanimously.

- 13) **TAX COLLECTOR**  
To consider and act upon tax refunds as recommended by the Tax Collector in the amount of \$28,373.52

Selectwoman Lefkowitz made a motion to approve Item 13. First Selectwoman Kupchick seconded the motion which carried 2-0. (Selectmen Flynn was not present during this vote).

- 14) To hear, consider and act upon any other business which shall properly come before this meeting:

Selectwoman Lefkowitz asked First Selectwoman Kupchick for an update on the DEI consultant. First Selectwoman Kupchick said that Human Resources has secured Maurice Nelson who is the Chief Diversity, Equity, and Inclusion Officer at Sacred Heart University. She said Mr. Nelson has come in to Town Hall, met with some people in HR and he is reviewing the Racial Equity and Justice Task Force's Blueprint. Selectwoman Lefkowitz said she would like to hear from Mr. Nelson publicly.

First Selectwoman Kupchick announced the following:

- Memorial Day Weekend Events:

We had a very busy Memorial Day weekend and were fortunate to have amazing weather. We had one of the largest Parade attendance in recent history. It was an incredible honor for Selectman Flynn and I to march alongside our Veterans.

On Saturday, I attended the annual Sea Memorial Ceremony which is a very solemn and important day to gather with our Veterans and their families and members of our community. On Sunday, I spoke at the annual Memorial Day Service Mass and Military Remembrance Service at Assumption Church.

- Walk A Mile in Her Shoes:

This past Saturday, I participated in the Walk a Mile in Her Shoes which had been rescheduled from April because of rain. The walk had a large crowd and raises awareness about domestic and sexual abuse and is an important event.

- Half Marathon:

On Sunday, I kicked off the 43rd annual Half Marathon at Jennings Beach. A lot of Fairfield's Firefighters volunteered and the funding goes to their charitable foundation which does a lot of good for our community.

15) TOWN ATTORNEY

Executive Session – Pending Litigation – Roll vs. Town of Fairfield with Town Attorney James Baldwin

Selectwoman Lefkowitz made a motion to go into Executive Session at 5:19 pm. Selectman Flynn seconded the motion which carried unanimously.

Selectman Flynn made a motion to come out of Executive Session at 5:29 pm. Selectwoman Lefkowitz seconded the motion which carried unanimously.

Selectman Flynn made a motion to proceed with handling of the matter by the Town Attorney. Selectwoman Lefkowitz seconded the motion which carried unanimously.

16) Adjourn

Selectwoman Lefkowitz made a motion to adjourn. Selectman Flynn seconded the motion which carried unanimously.

The meeting adjourned at 5:31 pm.

Respectfully submitted,

Pru O'Brien

Recording Secretary



**From:** [null@town.fairfield.ct.us](mailto:null@town.fairfield.ct.us)  
**To:** [Board of Selectmen](#)  
**Subject:** New submission for form: Boards and Commissions Interest Form (ID #324)  
**Date:** Thursday, June 8, 2023 12:48:39 PM

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## Boards and Commissions Interest Form

Record #324 submitted from IP address 69.112.101.69 on 6/8/2023 12:49 PM

[View form](#)

<b>ID</b>	324
<b>First Name</b>	Gilbert
<b>Last Name</b>	Gilbert (Chip)Donovan
<b>Street Address</b>	162 Green Acre Ln
<b>Zip Code</b>	06824
<b>Email Address</b>	gdonovan3@mailbox.org
<b>Cell Phone</b>	203-231-2567
<b>Home Phone</b>	
<b>Work Phone</b>	
<b>Voter Registration Status</b>	Yes
<b>Political Party Affiliation</b>	Democratic Party
<b>Board or Commission</b>	Ethics Commission
<b>Read the Boards Role</b>	Yes
<b>How You Learned About the Position</b>	Town News
<b>Who You Have</b>	Other Board Members

<b>Spoken To</b>	
<b>Explanation of Interest and Contribution</b>	<p>I have lived in Fairfield since 1986. My wife and I raised our family here and we will retire here. I believe in public service and I want to give back to my community and contribute to the well-being of the Town and my fellow citizens in a capacity that I know I can perform well, as a member of the Board of Ethics Commission. I have served on other Town commissions and in elected office in Fairfield and I have contributed as a volunteer for a number of local public and private organizations. These experiences as well as a 40+ year career with major highly regulated public financial institutions where high ethical conduct and training was required have prepared me well for this role.</p>
<b>Resume or Bio</b>	<a href="#">Gilbert Donovan - Work Resume.pdf</a>
<b>Additional Comments</b>	<p>I moved to Fairfield in 1986 after taking a job with GE Capital in Stamford, CT. We were attracted by the community, the school system, the beaches, ready access to cultural events, and the proximity to New York. We raised our two daughters here and they graduated from Fairfield Public High Schools.</p> <p>To add to my business resume, following are some of the community organizations I have volunteered for/ served with:</p> <p>Fairfield Water Pollution Control Authority  Elected member of the Fairfield Board of Assessment Appeals  VITA/AARP Tax Aide Volunteer at the Fairfield Senior Center  Financial Planning Association- Pro Bono Committee  Elected Sports Committee Director- St Thomas Aquinas School, Fairfield  Fairfield Recreation Department Soccer Coach  Parent representative on the Fairfield High School Accreditation Committee  Assistant Treasurer and Treasurer - Fairfield Beach Club  Tennis Committee Chairman - Fairfield Beach Club  Fairfield DTC member - Legislative Issues Committee Chair</p>

[Manage](#)

## Contact

gdonovan3@mailbox.org

www.linkedin.com/in/  
gilbertdonovan (LinkedIn)

## Top Skills

Financial Advisory

Financial Analysis

Education Funding

## Languages

Spanish

## Certifications

Series 65

Registered Investment Adviser,  
Financial Advisor

## Honors-Awards

2018 U.S. Bank - Legends of  
Possible, Award Recipient (Summit  
Award)

# Gilbert "Chip" Donovan

Chairman , CEO at GCD Financial Planning and Advisory Services  
Fairfield, Connecticut, United States

## Summary

30 years Banking and Finance, Financial Planning and Advisory background - Registered Investment Adviser, CFP Certification Professional Education Program, CFP Certification Exam, SEC FINRA Series 65 Securities License Exam, Financial Planning, Investments, Taxes, Retirement Planning, Risk Management and Insurance, Debt Management, Higher Education Planning, Estate Planning, Social Security/ Medicare, Bank Management Training program, Capital Markets (registered representative series 7,63), Lending , Risk/Credit analysis. Bilingual.

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## Experience

GCD Financial Planning and Advisory Services LLC  
Chief Executive Officer, RIA, Financial Adviser  
December 2018 - Present (4 years 7 months)  
Fairfield, CT 06824

### AARP Foundation

Tax Aide Volunteer

January 2019 - March 2020 (1 year 3 months)

VITA/TCE Certification - Advanced Exam January, 2019

### US Bank Corporation

Area Manager -Northeast and Mid Atlantic Regions, CEG

May 2014 - December 2018 (4 years 8 months)

New York, NY

Originate and Execute corporate loans and large ticket asset financing for major corporate and middle market clients from NY to DC with focus on larger transaction sizes (\$1Million - \$50Million+) and most asset types.

### GE Capital

Senior Vice President

1993 - May 2014 (21 years)

GE Capital 1993 - 2014

- Sr.Vice President-Corporate Finance (2008-2014)- Direct origination of corporate loans and leases for investment and syndication, equipment and technology finance.
- Managing Director- Business Development- Intermediary Funding Group (2005- 2008) Lead cross sales origination of 12 person sales team- corporate loans and leases through financial intermediaries for GE Capital Product groups:Energy, Healthcare, Franchise, Commercial Lending , Sponsor Finance, Real Estate, Vendor, International, Corp. Aircraft, Transportation, Technology, Public Finance. \$750MM annual volume.
- Sr. Transactor - Intermediary Funding(1995-2005) Originated corporate loans and leases through financial intermediaries.\$100-300+MM annual volume.
- Sr. Transactor - Structured Finance (1993-1995)  
Originated large, below investment grade secured corporate loans and leases for investment and syndication.

#### Spectrum Capital, Ltd

Sr. Vice President, Merchant Banking

1991 - 1993 (2 years)

NY, NY

Spectrum Capital Ltd., NY 1991-1993

Large Ticket transaction origination, underwriting, execution and syndication, leveraged lease and cross border lease arrangement, and debt private placements.

#### Xerox Credit- Corporate Finance Division

Senior Vice President- Manager, Special Products Group

1988 - 1991 (3 years)

Stamford, CT

Led 4 person team - Corporate secured loan and lease originations and placement. Direct and Indirect originations .Primary liaison for Florida Progress lessor joint venture.

New product development, Leveraged ESOP's, UK Preferred Stock, Foreign Sales Corp. structures,Portfolio Management

#### GE Capital Corp

Sr.Vice President- Unit Manager, Structured Finance Division

1986 - 1988 (2 years)

Stamford, CT

Led 3 person syndications team - Corporate loan and lease syndications and intermediary origination

J.P. Morgan Chase( legacy Chemical Bank)  
District Manager, Vice President- Special Finance Group  
1974 - 1986 (12 years)  
New York, NY

- Managed Chemical Bank's tax lease and large ticket equipment lending activities and portfolio management staff- 8 person team, with bottom line responsibility- Annual Origination \$100MM, \$1MM advisory and syndication fee income, \$1B portfolio.(1982-1986)
- Vice President- Leveraged lease and large ticket equipment lending origination, syndication and portfolio management (1981-1982)
- Assistant Vice President- Special Finance Group (1979-1981)Originated and executed Lease and Secured Loan investments
- Assistant Secretary- Special Finance Group(1977-1979)
- Assistant Manager- Special Finance Group (1976-1977)
- Officer's Assistant (1975)
- Corporate Bank Management Trainee (1974-1975)

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## Education

Columbia Business School  
Masters Degree · (1980 - 1982)

Long Island University  
Bachelor of Science - BS, Business Administration and Management,  
General · (1970 - 1974)

The Peddie School  
Highschool · (1968 - 1970)

American Community School- Buenos Aires, Argentina  
high school · (1965 - 1968)

**From:** [null@town.fairfield.ct.us](mailto:null@town.fairfield.ct.us)  
**To:** [Board of Selectmen](#)  
**Subject:** New submission for form: Boards and Commissions Interest Form (ID #327)  
**Date:** Thursday, June 15, 2023 1:02:50 PM

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## Boards and Commissions Interest Form

Record #327 submitted from IP address 32.220.183.203 on 6/15/2023 1:03 PM

[View form](#)

<b>ID</b>	327
<b>First Name</b>	Paul
<b>Last Name</b>	Fattibene
<b>Street Address</b>	235 Village Lane
<b>Zip Code</b>	06890
<b>Email Address</b>	paul@fattibene.com
<b>Cell Phone</b>	203-451-7811
<b>Home Phone</b>	203-255-2167
<b>Work Phone</b>	203-255-4400
<b>Voter Registration Status</b>	Yes
<b>Political Party Affiliation</b>	Republican Party
<b>Board or Commission</b>	Ethics Commission
<b>Read the Boards Role</b>	Yes
<b>How You Learned About the Position</b>	colleague
<b>Who You Have Spoken To</b>	Other Person(s)
<b>Explanation of Interest and Contribution</b>	To aid the Town in governing a municipality without improprieties. I can contribute with the interpretation and application of standards and codes.
<b>Resume or Bio</b>	<a href="#">RESUME Paul Fattibene Personal 061523.pdf</a>

Additional Comments	
------------------------	--

[Manage](#)

# PAUL A. FATTIBENE

235 Village Lane  
Southport, Connecticut 06890  
Tel. 203-255-4400  
Fax 203-259-0033  
Email paul@fattibene.com

## ***Professional Experience***

### **1990 to Present**

Principal or Member of the intellectual property law firm of Fattibene and Fattibene, LLC.

### **1987 - 1990**

Employed by The Perkin-Elmer Corporation, Norwalk, Connecticut as a patent attorney in the Patent Law Department. Responsible for patent prosecution in technologies involving semiconductor manufacturing equipment, optical devices, solid state laser devices, analytical instruments, and other related technologies. Other duties included obtaining trademark registrations and providing general legal advice.

### **1984 - 1987**

Employed by the Department of the Army, Communications and Electronics Command, Ft. Monmouth, New Jersey as a patent attorney in the Intellectual Property Law Division of the Legal Office. Responsible for patent prosecution in technologies involving semiconductor waveguides, antennas, magnetic devices, communication systems, electronic and photo-optical devices, and other related technologies. Other duties included obtaining data rights, infringement extent of use investigations, Government contract law, and rendering opinions in other areas of Intellectual Property Law.

### **1983 - 1984**

Private practice, in combination with assisting a patent lawyer with prosecution of patent applications and patent and corporate litigation.

### **1979 - 1980**

Employed by EXXON Enterprises, Inc., Danbury, Connecticut as a process engineer working with the development of ink jet technology. Responsibilities included adaptation of techniques from research and development to preliminary manufacturing stages.

## ***Education***

### **The Perkin-Elmer Corporation**

Courses in optical engineering and electro-optical systems.

### **Department of the Army**

Courses in electronics, radar, and Government contracting.

### **University of Bridgeport School of Law**

Received Juris Doctor degree in May of 1983.

### **University of Vermont**

Received B. S. degree in Manufacturing and Management Engineering in May of 1979.

## ***Government***

Elected to the town of Fairfield Representative Town Meeting for the 1997-1999, 1999-2001, 2001-2003, 2003-2005, 2005-2007, 2007-2009 terms, Elected to the town of Fairfield Board of Education for the 2009-2011, 2011-2015 terms.



## Boards and Commissions Interest Form

Record #323 submitted from IP address 67.80.17.139 on 6/2/2023 9:02 AM

[View form](#)

<b>ID</b>	323
<b>First Name</b>	Donald
<b>Last Name</b>	Kleber
<b>Street Address</b>	50 Taquoshe Pl
<b>Zip Code</b>	06825
<b>Email Address</b>	<a href="mailto:dkleber@sbcglobal.net">dkleber@sbcglobal.net</a>
<b>Cell Phone</b>	203-395-0611
<b>Home Phone</b>	203-254-8462
<b>Work Phone</b>	
<b>Voter Registration Status</b>	Yes
<b>Political Party Affiliation</b>	Unaffiliated (No party affiliation)
<b>Board or Commission</b>	Ethics Commission
<b>Read the Boards Role</b>	Yes
<b>How You Learned About the Position</b>	Town resident for over 41 years. Formerly on the Police Commission
<b>Who You Have Spoken To</b>	Other Person(s)
<b>Explanation of Interest and Contribution</b>	On June 1, 2023, I received a call from the First Select woman's office, asking if I would consider an appointment to the Ethics Commission. While I had never considered this Commission, I believe my life's experience and prior work on the Police Commission

	gives me great insight into issues that would be overseen by this position.
<b>Resume or Bio</b>	<a href="#">Don Kleber Resume[1].docx</a>
<b>Additional Comments</b>	

[Manage](#)

**Donald R. Kleber**  
50 Taquoshe Place  
Fairfield, CT 06825  
(203) 254-8462 Home  
(203) 395-0611 Cell  
[DKleber@sbcglobal.net](mailto:DKleber@sbcglobal.net)

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## **Professional Experience**

### **Blue Hawk Investigations, LLC** (October 2013-December 2022)

#### **Founder and President**

Blue Hawk Investigations is a Private Investigative firm that offered comprehensive corporate and legal investigative services in New York and Connecticut.

### **State of Connecticut Department of Consumer Protection Gaming Division** (April 2006 – February 2013)

The Department of Consumer Protection Gaming Division is responsible for enforcing and regulating all statewide gaming. Governor appointed and reported directly to the Commissioner of Consumer Protection.

#### **Chief of Security and Licensing**

- Responsible for the due diligence and licensing of all casino employees at Mohegan Sun Casino and Foxwoods Resort representing annual state revenues in excess of \$500 Million Dollars.
- Responsible for compliance and the licensing of all State of Connecticut Lottery agents representing One Billion Dollars in annual revenues.
- Created and implemented statewide compliance 'handbook' ensuring uniformity across all agents, corporations and individuals working in Connecticut's gaming industry.
- State Certified Chief of Police for a department that ensures the integrity of all lottery drawings and conducts investigations of fraud and theft within Connecticut's lottery system, off-track betting and charitable gaming enterprises.

### **Federal Bureau of Investigation** (1977 – 2006)

The Federal Bureau of Investigation is widely recognized as the premier law enforcement agency in the world, with over 26,000 employees, of which just under half are Special Agents. Its investigative responsibilities include but are not limited to, violent crimes, white-collar crimes, traditional and non-traditional organized crimes, foreign counter intelligence, and international and domestic terrorism affairs. Office assignments consist of: Norfolk, Virginia (1977-1980), New York, New York (1980-2000) and New Haven, Connecticut (2000-2006).

#### **Special Agent**

- Federal Bureau of Investigation National Academy Coordinator for Connecticut.

- Responsible for Violent Crime Investigations: Fairfield County, Connecticut.
- Team Leader: Responsible for interviews of enemy combatants at Guantanamo Bay, Cuba.
- Command Post Leader, New York Anthrax Investigation. Responsible for creating the New York Anthrax Command Post, deploying human resources and writing Federal Bureau of Investigation Headquarters briefing papers for the Assistant Director, the Executive Director and the Director.
- Assisted in the creation of the New York Office Command Post following the events of 9/11.
- Responsible for Violent Crime Investigations in Westchester and Putnam Counties, New York, as a member of the Joint Bank Robbery Task Force. Responsibilities included management of all investigative and trial resources.
- Authored the Westchester County Airport Crises Management Plan.
- Team Leader: New York Office Special Weapons and Tactics Team. Assignments included protection details for the Attorney General of the United States, the Director of the Federal Bureau of Investigation and other foreign dignitaries.
- Developed hostage rescue plans during the Atlanta Prison Riot.
- Developed security plans for Operation Libsail (The one-hundredth anniversary celebration of the Statue of Liberty).
- Certified General Police Instructor: Lectured at the Federal Bureau of Investigation Academy, Quantico, Virginia; Westchester County, New York Police Academy; Dubai Police Academy, Dubai, Arab Emirates; Connecticut Police Academy; Monmouth University, Iona College and Fairfield University.

#### **Johnson and Johnson Baby Products Company (1974 – 1977)**

Johnson and Johnson Baby Products Company is an industry leader in baby health care products and a subsidiary of the Johnson and Johnson family of companies based in New Brunswick, New Jersey.

#### **Senior Systems Analyst**

- Managed a staff of eight support and professional personnel that entered and retrieved all financial and sales data for the company.
- Developed, implemented and managed financial and sales reporting systems for new plants and products.
- Created user manuals for new financial and sales systems developed by the systems staff.

#### **Education**

Graduate: Law Enforcement Executive Development Program, Princeton University (2004)

Post Graduate Credits: Personnel Management, Farleigh Dickinson University, Madison, New Jersey (1974 – 1977)

B.S. Business/Accounting: Monmouth College, West Long Branch, New Jersey (1974)

Four-year Athletic Scholarship. Varsity Basketball Team Member (1970 – 1974)

Varsity Basketball Team Captain, 1974 Outstanding College Athlete

**Organizations**

- Past Member and Chairman, Town of Fairfield, Connecticut Board of Police Commissioners (8 years)
- Member and past President, Phi Kappa Psi New Jersey Beta Alumni Corporation (12 years)
- Member, Federal Bureau of Investigation National Academy Associates (19 years)
- Member, Society of Former Special Agents of the FBI (17 years)
- Member, National Law Enforcement Association (19 years)

**References Available Upon Request**

# Town of Fairfield

Office of the First Selectwoman  
725 Old Post Road  
Fairfield, CT 06824

## BOARDS AND COMMISSIONS QUESTIONNAIRE

To be considered for appointment to a Board or Commission, please fill out this form, save a copy and email the saved copy, along with a copy of your resume, to the First Selectwoman's Office at [jcarpenter@fairfieldct.org](mailto:jcarpenter@fairfieldct.org). Please note that your resume and completed questionnaire are public documents. If you have any questions, please contact Jennifer Carpenter in the First Selectwoman's Office at 203-256-3095 or [jcarpenter@fairfieldct.org](mailto:jcarpenter@fairfieldct.org).

Board/Commission: FairTV Commission

Date: June 6, 2023

Name: PAUL FOLEY

email: paulfoley5122@gmail.com

Address: 175 Old Spring Road, Fairfield, CT

home phone: **203-260-6701**

work phone:

Party Affiliation: Republican

cell phone:

1. How did you learn about this position?
2. Why are you interested in serving and how can you contribute to this board/commission?  
  
Utilize my background to improve and deliver innovative and valuable cable TV performance and services
3. Have you attended any meetings or reviewed past minutes/agendas? If yes, please specify.  
  
No
4. Have you spoken with the chair, any members, or the appropriate Department Head?  
  
No
5. Have you read the written description of the board's role?  
Yes

6. Do you have any potential conflict of interest?

No

7. Do you know the time, date and location of meetings and will you be able to attend and fulfill the obligations of the position?

Yes

9. Participation requires that you are registered voter in the town of Fairfield. Additionally, the Town Charter requires that party balance be maintained on all boards/commissions. Are you registered to vote and what is your party affiliation?

Yes, Republican.

10. Please use this space to ask any questions you may have or to provide additional information you'd like to share.

**Paul Foley**  
175 Old Spring Road  
Fairfield, CT 06824  
203-292-3256(H)  
203-260-6701(M)  
[paulfoley5122@gmail.com](mailto:paulfoley5122@gmail.com)

**Objective:**

Senior Technology Sales/Business Development Position

**Experience:**

PSCK Consulting 3/19 to present

Principal and owner of Cyber security training firm.  
Create awareness training and courses are for businesses and non profits.

Advise, plan and develop Disaster Recovery and Business Continuity Services Procedures and Documents.

Sales development and account management duties.

8/16 - 3/19

**TBNG Consulting**  
**Senior IT Account Executive**

**Milford, CT**

Sales and business development for an IT Managed Service Provider (MSP) based in Fairfield County. Concentration on providing IT infrastructure services. Specialties and expertise in disaster recovery, business continuity and IT security services. Particular expertise in Fortinet Security Suite

Founded in 2005, TBNG Consulting is a Connecticut-based professional information technology consulting firm specializing in: Business Continuity, Network Infrastructure, Perimeter Security, and Support Services for a variety of product sets. We deliver value to organizations by engineering IT solutions to fit client needs with a philosophy driven by experience, product expertise and customer commitment. Working with all sizes of municipal, K-12, non-profit and commercial clients throughout New England, TBNG Consulting is a strategic technology integration partner with Dell, VMware, Citrix, Brocade, Barracuda Networks, Fortinet, ESET, HP, Cisco Systems and Microsoft. TBNG Consulting designs, implements and supports highly scalable and secure network related technologies for both government and private sector clients. Our solutions utilize best of breed technologies that bolster local and wide area network performance speed and security. With our Managed IT Support offering, we help organizations proactively manage and monitor their networks. TBNG Consulting seeks to provide our clients with best practice solutions for the purpose of enhancing their operational effectiveness. This management philosophy relies on clear customer communication coupled with solid goal expectations.



6/2014 - 8/2016

**CS TECHNOLOGY**

New York, NY

**Business Development Executive**

Responsible for direct sales and strategic partner relationships around the CS Technology service areas of data center, cloud and IT infrastructure strategy and advisory services. Main role was building a partner ecosystem with colocation/hosting providers.

Mentor and teach junior sales associates including inside lead generation team

CS Technology delivers real and measurable results that matter to our clients and their shareholders

From business and technology strategy development to precision execution of critical transformational initiatives to assuring sustainable operational excellence, CS Technology delivers real and measurable results that matter to our clients and their shareholders. Today, business is not just dependent upon technology; it has become intrinsically intermingled with technology. Technology infrastructure is the critical fiber, fuel, and foundation for the business engine of today and of the future. We are passionate in our beliefs that IT portfolios must be held to the standards of free and efficient markets, and that organizational inefficiency and obsolete processes drastically limit enterprise value contribution in most IT organizations.

We instill in our client IT organizations a new paradigm, Return on Spend, which unlocks value for our clients, and enables our client technology and business leaders to completely focus on serving strategic business needs. Our mission is to help our clients derive more value, leverage, predictability, and flexibility from their technology infrastructures.

2/2012 - 6/2014

**GARTNER**

Stamford, CT

**Account Manager**

Responsible for sales and consultative services surrounding the Outsourcing, Shared Services and Strategic Partnerships areas. Advise clients on best ways to market and sell their products and services through Gartner portfolio of events.

Specific expertise in cloud services infrastructure, hosting, cloud services brokerage.

Additional experience in shared services, IT Financial, Procurement and Asset Management areas.

Exceeded quota with sales of over \$2MM in 2012.

Gartner, Inc. is the world's leading information technology research and advisory company. We deliver the technology-related insight necessary for our clients to make the right decisions, every day. From CIOs and senior IT leaders in corporations and government agencies, to business leaders in high-tech and telecom enterprises and professional services firms, to technology investors, we are the indispensable partner to 60,000 clients in 10,000 distinct organizations. Through the resources of Gartner Research, Gartner Executive Programs, Gartner Consulting and Gartner Events, we work with every client to research,

analyze and interpret the business of IT within the context of their individual role. Founded in 1979, Gartner is headquartered in Stamford, Connecticut, U.S.A., and has 4,000 associates, including 1,200 research analysts and consultants in 80 countries. For additional information, visit [www.gartner.com](http://www.gartner.com).

1/2010 - 2/2012

FrontBlade Systems/NST

Stamford, CT

**Contract Sales Consultant**

- Senior sales and business development individual responsible for sales, marketing, lead generation and new services creation.
- Mentor and advisor to other sales and account management personnel.
- Focus on IT infrastructure and IT network and end point security offerings and services
- Senior Business Continuity and Disaster Recovery Practice Manager providing pure consultative services
- Responsible for web marketing, email and direct mail campaigns
- Sales and business development for company IT service offerings which include IT infrastructure projects, support and consulting and outsourcing. Key individual for designing, implementing and sales / marketing of company services offering.
- Promote IT security efforts targeted at healthcare and financial services firms including capital management and hedge fund firms. Focus on web based investor reporting and financial and compliance reporting.
- Sales certifications in Check Point EqualLogic and Compellent SAN systems, Citrix, VMware, CA, Fortinet and EMC/ RSA

11/2005 - 1/2010

The TNS GROUP, Inc.

Stamford, CT

**Senior Account Manager**

- Account development and management for an IT systems integration and services firm specializing in IT infrastructure, managed services, collocation, hosting, networking and security. Advanced sales certification in VMware, Citrix, RSA, Dell Equallogic and Compellent SAN.
- Consistently achieved and surpassed sales quota targets. Achieved sales revenue of 3 million dollars in 2008. These included specific projects, consulting arrangements, and professional services and complete IT outsourcing arrangements.
- Achieved 210% of quota in 2007, 370% of quota in 2008, and 120% of quota in 2009. Closed significant full IT outsourcing arrangements including IT infrastructure management, help desk services, business continuity and disaster recovery setup and ongoing testing and updating. Was first in company history and only individual to receive the 3 Million Dollar Club award.
- Prospect for new IT services opportunities with existing accounts, cold calling, strategic partnerships. Coordination of the planning and execution of solution team selling strategies. Specific focus on financial services companies including hedge funds and capital management firms.
- Particular expertise in areas of virtualization, secure remote access, unified security, business continuity and compliance services and solutions.
- Focused efforts on senior IT executive and director levels to sell strategy consulting, assessments, full project cycle and staff augmentation services
- Manage and monitor sales activities via CRM database and pipeline forecasting systems

- Consistently achieved and surpassed sales quota targets of 3 million dollars. These included specific projects, ongoing staff augmentation and complete IT outsourcing arrangements.
- Directed all business development and lead generation campaigns including television ad campaigns, Executive Technology Exchange seminars, telemarketing scripting and out calling programs, direct mail efforts.
- Developed key partner programs with leading services and technology partners including VMware, CA, CITRIX, Compellent, RSA and Fortinet. These include joint seminars, calling campaigns, list and lead sharing and cooperative sales calls.

1/2003 - 11/2005

**CERVALIS, INC.**

Stamford, CT

#### **Senior Account Executive**

- New business development and sales for outsourcing of IT infrastructure services and products
- Identify and cultivate business partnership opportunities with other IT providers
- Prospecting for client opportunities in the provision of managed IT disaster recovery, business continuity, collocation and hosted services within current client contacts, networking events
- Represent Cervalis at industry events and trade shows
- Manage current account relationships and identify new product/ services opportunities
- Exceeded quota in past year with sales of over \$2 Million Dollars

11/2000 - 1/2003

**INTEQ CORPORATON**

Bedford, MA

#### **Regional Sales Executive - NY, CT, NJ, PA**

- New business development in managed services technology infrastructure and consultative sales selling to CIO and senior IT operations management
- Prospecting, defining account strategies, develop target accounts
- Propose outsourcing solutions in areas of network service and IT infrastructure
- Areas of expertise in IT monitoring, management and performance
- Recruit and develop channel sales partners- VARS, System Integrators

1997 - 2000

**WESTCON, INC.**

Tarrytown, NY

#### **Director Pre-Sales / IT Professional Services**

- Managed professional consulting group of 13 engineers
- Recruited network consultants in areas of IT networking.
- Identified pro services and consulting opportunities
- Areas of expertise in IT LAN/WAN, Security Infrastructure.
- Developed new professional services offerings for direct and channel sales

1992 - 1997

**READERS DIGEST**

Pleasantville, NY

**Director of IT Client Services**

- Directed corporate IT services support group of 35.
- Managed IT vendor relations, client support and outsourcing projects
- Responsible for all IT infrastructure service initiatives

**Global Director of Telecommunications**

Responsible for telecom equipment services for 52 global locations.

Worked with local utilities including power and Cable TV companies to build local office infrastructures.

**Education:**

**Boston College, Chestnut Hill, MA, BA International Business**

**Organizations:**

Help Desk Institute, ITSMF, Managed Services Provider Alliance, Board of Directors Managed Services Providers Association MSP

## Boards and Commissions Interest Form

Record #316 submitted from IP address 38.81.106.83 on 5/31/2023 1:37 PM

[View form](#)

<b>ID</b>	316
<b>First Name</b>	Lee
<b>Last Name</b>	Kamlet
<b>Street Address</b>	726 Beach Rd
<b>Zip Code</b>	06824
<b>Email Address</b>	<a href="mailto:lee.g.kamlet@gmail.com">lee.g.kamlet@gmail.com</a>
<b>Cell Phone</b>	914-772-8637
<b>Home Phone</b>	203-292-9840
<b>Work Phone</b>	
<b>Voter Registration Status</b>	Yes
<b>Political Party Affiliation</b>	Democratic Party
<b>Board or Commission</b>	FairTV Commission
<b>Read the Boards Role</b>	Yes
<b>How You Learned About the Position</b>	Selectwoman's weekly newsletter
<b>Who You Have Spoken To</b>	Other Person(s)
<b>Explanation of Interest and Contribution</b>	I have 30+ years of professional experience as a network news producer at ABC News and NBC News, as well as administrative experience as Dean of the School of Communications at Quinnipiac University. I believe I can make a contribution to the work of the commission

<b>Resume or Bio</b>	<a href="#">Lee Kamlet Resume - SVPCT.docx</a>
<b>Additional Comments</b>	

[Manage](#)

# Lee Kamlet

726 Beach Road  
Fairfield, CT 06824  
(914) 772-8637 (cell)  
203-292-9840

[Lee.g.kamlet@gmail.com](mailto:Lee.g.kamlet@gmail.com)

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## **Qualification Highlights**

- Award-winning broadcast journalist with over 30 years of experience in producing nationally acclaimed national network news reports.
- Agile and responsive to changing demands with the ability to produce quality reports recognized for their substance and relevance, while meeting time and fiscal constraints.
- Skilled at quickly absorbing complex subjects and relating them in clear and concise language to large and diverse audiences.
- Chief academic officer dedicated to the pursuit of truth, knowledge and ethics by students at a school of communications at a midsize university.
- Excellent personnel manager who easily develops rapport with a wide variety of stakeholders.

## **Summary of Experience and Skills**

- As head writer for *World News Tonight with Diane Sawyer* and *World News Tonight with Charles Gibson*, coordinated the scripting of daily national network news broadcasts, earning a Writers Guild of America Award for best regularly scheduled newscast.
- As national field producer for ABC News, was co-producer of series on children in poverty, earning the Alfred I. duPont/Columbia Graduate School of Journalism Silver Baton Award.
- As a producer for *Dateline NBC*, co-winner of three National News Emmys.
- Directed, managed and wrote hundreds of national news stories as a field producer for ABC News and NBC News overseeing projects from inception and research, to final edit and broadcast.
- Adapted scripting to the reading style, word choices and other speaking preferences of the anchor or correspondent.
- Conducted in-depth editorial research and countless personal interviews to produce the most compelling and accurate reflection of events.
- Broad knowledge of national and world affairs.
- As Dean of the Quinnipiac University School of Communications, was the chief administrator and academic officer for a school with 950 graduate and undergraduate students, 50+ full-time and adjunct faculty, 14 administrative staff and a \$2.1 million annual operating budget.
- Made speeches and presentations promoting the school to prospective students, parents, administrators and general audiences.
- As a freelance writer for the European Society of Cardiology, write articles, editorials and background materials on issues of concern to the 90,000 members of the ESC community.

### **Work History**

- **European Society of Cardiology**
  - Freelance writer, 2018 to July 2020
- **Quinnipiac University**
  - Dean of the School of Communications, 2011-2017
- **ABC News**
  - Editor / Producer / Writer ABCNews.com, 2010
  - Head Writer, *ABC World News Tonight*, 2008-2010
  - Senior Producer / National Field Producer, 1981-1998
- **NBC News**
  - Producer, *Dateline NBC*, 1998-2008
- **CNN**
  - Producer, 1980-1981

### **Community Involvement**

- Board member / volunteer Adam's House, Shelton, CT., which provides programing and support for children ages 5-18 who are grieving the loss of a family member or friend, February 2018 to present
  - Member of the communications, marketing and development committee.
- Docent, Fairfield Museum and History Center, providing tours and lectures to schoolchildren about the history of the town of Fairfield, CT. May 2017 to April 2020.
- Graduate of University of Connecticut ENCORE!FAIRFIELD program, a unique five-month emersion experience in the Connecticut non-profit sector, 2017-18

### **Education**

- Colorado State University, B.A. Political Science

### **Awards**

- Three National News Emmy Awards
- Writers Guild of America Award for Outstanding Television News Script
- Alfred I. duPont/Columbia University Silver Baton Award
- CINE Award
- Colorado State University Honored Alumnus



## IMPORTANT INFORMATION • RESPONSE REQUESTED



**NOTICE FOR RESIDENTS OF:**  
**FAIRFIELD, CT**

Sample A. Sampleman  
<123 Street Address>  
<City>, MA <Zip>



### **ATTENTION UNITED ILLUMINATING CUSTOMER:**

Great news – you have been prequalified for energy-saving opportunities available to you through Energize Connecticut™. Through a Home Energy Solutions – Income-Eligible no-cost energy assessment, you may qualify for home upgrades such as better insulation, new HVAC equipment, and windows, all at no cost to you. Here's how to take advantage:

# IMPORTANT INFORMATION • RESPONSE REQUESTED



NOTICE FOR RESIDENTS OF:  
<TOWN>, CT



Sample A. Sampleman  
<123 Street Address>  
<City>, MA <Zip>



## ATTENTION UNITED ILLUMINATING CUSTOMER:

Great news – you have been prequalified for energy-saving opportunities available to you through Energize Connecticut<sup>SM</sup>. Through a Home Energy Solutions – Income-Eligible no-cost energy assessment, you may qualify for home upgrades such as better insulation, new HVAC equipment, and windows, all at no cost to you. Here's how to take advantage:

1.



Call **1-203-292-8088** to schedule your Home Energy Assessment

or visit **NE-SmartEnergy.com** to sign up online

2.

A specialist will check your home's energy performance, make sure your heating system is safe, find and seal drafty doors and windows, duct-test and seal your central air system if you have one, and install items like energy-efficient light bulbs. **This is all at no cost to you.**

3.

You will receive a home energy report to better understand the efficiency of your home and highlight deeper energy saving measures, **including 100% off recommended insulation projects.**

## PARTICIPATION IN THIS PROGRAM IS AT NO COST

The mission of the program, sponsored by Eversource, UI, SCG, and CNG is to encourage home energy efficiency and help income-eligible residents reduce energy and save money. **Find out if you qualify for no-cost:**

- Triple-glazed windows
- New boiler or furnace
- Insulation for your walls, attic, and basement
- Hot water heater

### Schedule your no-cost assessment today:

Visit **NE-SmartEnergy.com**, or call **1-203-292-8088** to schedule your Home Energy Assessment.

**EVERSOURCE**



PROUD SPONSORS OF





## Town of Fairfield

Sullivan Independence Hall  
725 Old Post Road

Fairfield, Connecticut 06824  
Purchasing Department

(203) 256-3060  
FAX (203) 256-3080

### Award Recommendation Resolution:

On Wednesday, 14<sup>th</sup> June 2023, the Purchasing Authority awarded RFP number 2023-148 Program Management Oversight (PMO) Services – HVAC Upgrades to Colliers Project Leaders USA NE, LLC, Madison, CT for professional services to serve in a Program Management Oversight (PMO) capacity for Phase I of upgrades to air conditioning systems at Osborn Hill Elementary School, North Stratfield Elementary School, and Fairfield Woods Middle School as detailed in the RFP specifications.

Colliers Project Leaders USA NE, LLC was selected based on a combination of qualifications, experience, understanding of the work and project timeline, and proposed cost.

The award of this contract to may be subject to the review and approval of the Board of Selectmen.

  
Brenda L. Kupchick, First Selectwoman

  
Adam B. Tulin, Director of Purchasing



## Town of Fairfield

Sullivan Independence Hall  
725 Old Post Road

Fairfield, Connecticut 06824  
Purchasing Department

(203) 256-3060  
FAX (203) 256-3080



### Request for Proposal #2023- 148 Program Management Oversight (PMO) Services HVAC Upgrades at Various FPS Facility Locations

TOWN OF FAIRFIELD  
PURCHASING AUTHORITY  
725 OLD POST ROAD  
INDEPENDENCE HALL  
FAIRFIELD, CT 06824

Date Submitted \_\_\_\_\_, 2023.

SEALED SUBMISSIONS are subject to the standard instructions set forth on the attached sheets.

Any modifications must be specifically accepted by the Town of Fairfield, Purchasing Authority.

  
First Selectwoman  
  
Director of Purchasing

  
Date

Bidder:

Doing Business As (Trade Name)

Address

Town / State / Zip

Printed Name (Mr. / Ms.) and Title

Signature

Telephone

Fax

E-mail Address

Sealed qualifications will be received by the Purchasing Authority at the office of the Director of Purchasing, Independence Hall, First Floor, 725 Old Post Road, Fairfield, Connecticut 06824, up to:

**02:00PM on Friday, 2<sup>nd</sup> June, 2023**

The Town of Fairfield requests proposal submissions for program management oversight services from qualified firms specializing in facility construction oversight. Work will be performed at Osborn Elementary School, North Stratfield Elementary School and Fairfield Woods Middle School.

#### NOTES:

1. Respondents are to complete all requested data in the upper right corner of this page and must return this page and the Proposal page with their bid.
2. No submission shall be accepted from, or contracts awarded to, any person/company/affiliate or entity under common control who is in arrears to the Town of Fairfield upon debt, or contract or who has been within the prior five (5) years, a defaulter as surety or otherwise upon obligations to the Town of Fairfield, and shall be determined by the Town.
3. Proposals are to be submitted in a sealed envelope and clearly marked "RFP #2023-148" on the outside of the envelope, including all outer packaging, such as, DHL, FedEx, UPS, etc.
4. It is the sole responsibility of the Respondent to see that the Proposal is received by the Fairfield Purchasing Department prior to the time and date noted above. Proposals are not to be submitted via email or fax.
5. Proposals are not to be submitted with plastic binders or covers, nor may the Proposal contain any plastic inserts or pages.

## Introduction and Background:

The Town of Fairfield (Town) on behalf of Fairfield Public Schools (FPS) is seeking proposals from qualified firms for professional services to serve in a Program Management Oversight (PMO) capacity for Phase I of upgrades to air conditioning systems at Osborn Hill Elementary School, North Stratfield Elementary School, and Fairfield Woods Middle School. The work shall be performed in cooperation with FPS and Town staff, the Town's selected design consultant (BL Companies), and Construction Manager (not yet selected).

The program has been separated into five (5) phases of which only Phase I has been funded. Future phases include projects at: Tomlinson Middle School, Fairfield Ludlowe High School, Walter Fitzgerald Campus, Fairfield Warde High School, Timothy Dwight Elementary School, and Jennings Elementary School. These projects may also include additions and/or alterations for new/altered mechanical spaces (Electrical Rooms, Water Service Rooms, etc.) and for security vestibule entrances.

The Town desires to engage a single entity to provide a complete range of professional consulting services to support its program as described below. It is anticipated that the selected firm will provide PMO services input and guidance concerning the organization and management of the program. The PMO shall not serve as the owner, architect, engineer or constructor for this program. The full contracted scope of services shall be negotiated with the selected firm based on the services proposed by firm and/or required by the Town. It is essential that the selected firm recognizes the need to preserve participative culture of the community while effectively and efficiently completing the program. It is critical that the PMO is successfully able to blend the authority delegated to the PMO by the Town, through the Building Committee, with the Town's non-delegable responsibilities to form a constructive and effective working relationship.

This Request for Proposals (RFP) describes the program, required scope of services, consultant selection process, and minimum information that must be included in the proposal. This RFP requires each Proposer to concisely state its qualifications and its concept for how the PMO and the Town will develop a constructive and effective partnership to ensure the success of this program.

The Town intends to contract with a single firm and not with multiple firms doing business as a joint venture. Accordingly, where two or more firms desire to join in preparing and submitting Proposals, such firms should do so on a prime-sub consultant basis, rather than as a joint venture or informal team. The firm acting as the "prime", if it receives the Award, will execute the Program Management Oversight Agreement with the Town. Proposers are required to reveal all parties and relationships with their Proposal for any joint offer submitted under this RFP.

The Senior Program Management Oversight professional will report directly to the Program Building Committee, but shall also interact with the Board of Selectman, Board of Finance, Building Committee members, Director of Purchasing, as well as various other departments throughout the Town.

## Program Schedule and Budget:

- Funding for the initial 2023 air conditioning upgrade projects at Osborn Hill Elementary School, North Stratfield Elementary School and Fairfield Woods Middle School has been secured in the amount of \$22,701,443.00. This funding dollar amount is based on a conceptual estimate provided by DTC Engineers.
- The timeline for this phase of the program estimates:
  - a four (4) month design period (May 2023 – August 2023)
  - two to three (2 to 3) months for approval and bid process (September 2023 – October 2023)
  - fourteen (14) months for construction oversight (October 2023 – November 2024)
  - ***The Town must be able to accept the Phase I program as complete by December 1<sup>st</sup> 2024.***

The Town & FPS have established a building committee consisting of citizens of the Town of Fairfield and may or may not have design and or construction experience.

## **Pre-Bid Meeting:**

A non-mandatory pre-bid meeting will commence at **11:30am, 1<sup>st</sup> Floor Conference Room, at 725 Old Post Road, Fairfield, Connecticut**, on **Thursday, May 18<sup>th</sup>, 2023**, for prospective bidders to scope the conditions.

- While the meeting is non-mandatory, prospective Proposers will be required to sign-in at commencement of the meeting. The sign-in sheet will be posted on the Purchasing Department website as below. Copies will not be made available at the meeting, nor will they be faxed out.
- All requests for information will be answered in writing as specified below under Addenda.

## **Addenda / Requests for Information (RFI):**

Addenda concerning important information and/or modifications to specifications will be posted on the Fairfield Purchasing Department website at [www.fairfieldct.org/purchasing](http://www.fairfieldct.org/purchasing)

- It is each Proposer's sole responsibility to monitor the above website for all updated information.
- Addenda will not be mailed, e-mailed or faxed out.
- Written requests for information will not be accepted after **11:00am on Tuesday the 23<sup>rd</sup> of May, 2023**.
- Verbal requests for information via phone or other means will not be accepted.
- Failure to comply with these conditions will result in the bidder waiving the right to dispute bid specifications and conditions, no exceptions.

Questions concerning this RFP must be submitted in writing and directed only to:

**Ms. Lee A. Flaherty, Assistant Director:** [LFlaherty@fairfieldct.org](mailto:LFlaherty@fairfieldct.org)

Response will be in the form of an addendum that will be posted approximately **Friday, 26<sup>th</sup> May, 2023** to the Town of Fairfield website, which is [www.fairfieldct.org/purchasing](http://www.fairfieldct.org/purchasing). It is the responsibility of each Proposer to retrieve addenda from the website. Any contact about this RFP between a Proposer and any other Town official and/or department manager and/or Town of Fairfield employee, other than as set forth above, may be grounds for disqualification of that Proposer. No questions or clarifications shall be answered by phone, in person or in any other manner than specified above.

## **Program Management Oversight (PMO) Selection Process:**

The Program Management Oversight Selection Committee (Selection Committee) intends to review each RFP response received and create a short list of PMO proposers. Each short-listed proposer selected will be interviewed by the Selection Committee. The final selected PMO proposer will be forwarded and presented to the Board of Selectmen for final approval.

## **RFP Content:**

To be considered complete, the response to this RFP must include certain minimum information:

- A complete explanation of the experience and capabilities of the proposers;
- A narrative describing the proposer's understanding and approach to the proposed program;
- A description of the proposer's legal standing, i.e. corporation, LLC, etc...
- A listing of all Company Officers;
- A description of the proposer's years of experience providing PMO services, current and average annual workload i.e. typical program size and total value of projects on an annual basis; and
- Names, titles and resumes of those individuals proposed for the program assignment.

## **Scope of Services:**

### ***PROGRAM MANAGEMENT OVERSIGHT (PMO) RESPONSIBILITIES:***

#### **1. Pre-Construction Phase Services:**

The pre-construction phase commences at the inception of the program and continues through the award of the construction contract to the CM/GC. The PMO shall be responsible for managing the pre-construction phase by assisting the responsible Building Committee, but shall also interact with the Board of Selectmen, Board of Finance, Building Committee members, Director of Purchasing, as well as various other departments throughout the Town, concerning the following activities:

- A. Advise the Town on program planning, implementation strategies, procedures, sequences and actions.
- B. Assist the Town with project scope development, preliminary budget development, early phase studies and evaluations and preliminary schedule development.
- C. Develop detailed milestone schedules for the pre-construction phase outlining all working group meetings, town meetings, required approvals, review times, and major milestones.
- D. Assist the Town with procuring funding approval from Board of Selectmen, Board of Finance and Representative Town Meeting.
- E. Provide appropriate reports, support town staff and attend meetings as required to provide information required by town boards, departments and committees.
- F. Coordinate all activities between town departments, boards and commission and retained consultants and/or CM/GC.
- G. Determine required state and federal agency approvals and coordinate all meetings and submissions to gain said approvals.
- H. Determine Town agency and other Town boards and/or commissions requiring approvals and coordinate all meetings and submissions to gain said approvals.
- I. Assist the Town in determining the most appropriate procurement strategy and delivery methodology for the program.
- J. Determine list of vendors and consultants that shall be required to be retained by the Town to fully execute the entire program. (i.e. Architect, CM/GC, specialty design consultants, commissioning agents, FF&E vendors, environmental consultants, material testing, move services, special inspections, etc.)
- K. Provide support to the Town concerning retaining architects, engineers, consulting firms, construction managers and other services required to successfully complete the program. The PMO shall develop all Request for Qualifications (RFQs) and Request for Proposals (RFPs) document specifications for review and approval by the Town. This shall be performed in cooperation with the Town's Purchasing Department.
- L. Assist the Town in the review of all responses to RFQ's, RFPs and/or other proposals for goods and services. Provide analysis of each proposer and present a recommendation to the Town. Assist the Town with final negotiations and execution of contracts.
- M. Assist the Town with the identification of any applicable rebate or incentive programs.

- N. Perform design reviews at each major phase of design (e.g. schematic design, design development and construction documents) to confirm scope and level of completeness. PMO shall provide written comments as well as gather comments from Town Departments and/or Town Officials and incorporate into the one comprehensive review document.
- O. Provide estimate reconciliation services at each major phase of design to ensure the program is tracking within established construction budget. Review estimates prepared by the architect and CM/GC, prepare reconciliation documentation, facilitate reconciliation meetings and report to the Town.
- P. Prepare value engineering recommendations in collaboration with the architect, CM/GC and Town.
- Q. Provide budget management and tracking of the total program budget utilizing an established and proven electronic budget management system. Reconcile with Town's general ledger on at minimum a monthly basis to ensure that all program costs are being accounted for, tracked and reported accurately.
- R. Review of all program invoices from the architect, CM/GC and other vendors providing pre-construction services. Provide to Town a recommendation for payment or withholding. Ensure that all invoices are (1) accurate, (2) complete, and (3) within contracted values issued by the Town Purchasing Department. Track all invoices utilizing an electronic budget management system. PMO shall also respond to any questions presented by the Town's Purchasing Department.
- S. Establish uniform procedures for reviewing, analyzing and assessing each cost estimate submitted to the Town. Prepare and/or review budgets prepared by the architectural design team, the Owner, and/or the CM/GC to ensure that all categories of work are properly accounted for, that unit costs are accurate, quantity take-offs are accurate, level of detail is appropriate to the design stage and that the pricing for such work accurately reflects the current market conditions. Prepare and/or review cash flow analysis. Note: This includes developing the budget for soft costs and a review of the comprehensive construction cost budget subsequently prepared by the CM/GC.
- T. Manage the program budget by properly forecasting cost exposures and provide monthly financial reports to the Town.
- U. Ensure that all local, state and federal reviews and approvals for the program are attained prior to proceeding with bidding.
- V. As applicable, review and provide comments to the Town on the CM/GCs proposed bid packages, general conditions, proposed allowances and bid alternates proposed prior to bidding.
- W. Review CM/GC proposed phasing plan and review with the Town prior to bidding to ensure that the proposed phasing plan does not impede the operations of the building facility.
- X. Assist Town, in collaboration with the CM/GC, with any required public notice advertising of the program and the proper posting to town and state websites (CTDAS Contracting portal).
- Y. Attend all subcontractor pre-bid meetings with the CM/GC. Monitor the bidding process including the posting of any required addenda materials.
- Z. Attend all subcontractor bid openings with the CM/GC and Town Purchasing Department.



AA. Attend all bid submission scoping meetings between the CM/GC and the trade subcontractors.

BB. Upon the development of the Guaranteed Maximum Price proposal, or lump sum bid by general contractor, review the proposal/bid submission for conformance with the contract documentation. Review all proposed clarifications, exclusions, allowance amounts, general conditions, general requirements, fees, site services, and other CM/GC markups and ensure subcontractor bid submission amounts are accurately reflected. Provide written review and recommendation of approval to the Town.

CC. Assist Town with the review and negotiation of the final terms and conditions of the construction contract.

## **2. Construction Phase Services:**

- A. Attend all pre-construction meetings hosted by the CM/GC and/or Town staff. Provide a system for tracking the resolution of any issues at that are identified at any such meetings.
- B. Provide recurring construction observation and oversight (ie. 2-3 visits weekly/one (1) weekend per month if necessary) as requested by the Building Committee and provide written reports including photos for each site visit. Advise the Building Committee of any construction related/quality assurance issues or risks found in the field or determined by the site visit.
- C. Attend all Town/Architect/Contractor (TAC) meetings. Review and comment on published meeting minutes.
- D. Submit monthly PMO reports to the Building Committee of the progress of the program including but not limited to; progress of the work against approved schedules, change orders, proposed change orders, potential schedule and/or budget impacts, approvals and inspections, the Architect's performance, performance of any Town retained vendors and/or other open items or issues.
- E. Assist the Town and the CM/GC with coordination of Town required work or reviews and approvals necessary to meet the program schedule.
- F. Assist the Town and the CM/GC with coordination of 3<sup>rd</sup> party required work or reviews and approvals necessary to meet the program schedule.
- G. Review and provide comments on the CM/GC baseline/as-planned schedule including but not limited to; completeness, accuracy, conformance with the overall program milestones and the terms of the contract.
- H. At minimum on a monthly basis, review and provide comments on the CM/GC schedule updates including but not limited to; completeness, accuracy, conformance with the overall program milestones and the terms of the contract.
- I. Review and provide recommendations regarding the CM/GC initial submittal for the construction schedule of values.
- J. Assist the Town in ensuring all required insurance certifications and other contractually required paperwork has been submitted.

- K. Review of all invoices from the architect, CM/GC and other vendors providing goods or services for the program. Provide the Building Committee with a written recommendation for payment or withholding. Ensure that all invoices are (1) accurate, (2) complete, and (3) within the contracted values issued by the Town Purchasing Department. Track all invoices utilizing an electronic budget management system. PMO will also respond to any questions posed by the Town's Purchasing Department.
- L. Review all proposed change orders by CM/GC and procure architect's review and written approval. Confirm if proposed work constitutes extra work per the contract. Ensure that all applicable supporting documentation is provided, and all costs are supported, per the terms of the contract and are reasonable for the scope of the work.
- M. Manage and track all proposed change orders and potential exposures to the against the owner's contingency. PMO shall provide status in monthly written report to the Town.
- N. Review and track CM/GC's expenditures against the approved GMP. Track all requests for use of allowances and construction contingency. Verify that all owner approved Change Orders and/or Budget Transfers are appropriately and accurately documented in Change Orders to the CM/GC subcontractors.
- O. Continue total program budget management and tracking. Report to the Town, on a monthly basis, any budgetary line items that are tracking over budget and make recommendations to the Town to resolve those items.
- P. Monitor and report on any incomplete or non-conforming work.
- Q. Ensure that the CM/GC is receiving certified payroll documentation from the subcontractors as well as monthly lien waivers.
- R. Coordinate those goods and services procured directly by the Town that are not the CM/GC's responsibility.
- S. Coordinate the Furniture, Fixture & Equipment (FF&E) review process, product selection, product review, bidding approvals, advertising and bidding of all FF&E procurements
- T. Assist the Building Committee with the bid evaluation and review process concerning all FF&E submission.
- U. Coordinate FF&E deliveries and installation with construction schedule. Coordinate with Town building officials and the fire marshal with respect to the delivery or installation of any FF&E prior to the receipt of the temporary certificate of occupancy (TCO) and/or the Certificate of Occupancy (CO).
- V. Ensure that the TCOs and CO are obtained by the CM/GC from all Town building officials, fire marshals, and other town departments as necessary.

**Construction Close-Out:**

- A. Assist the Town in the preparation of a project punch lists.
- B. During construction closeout ensure that the CM/GC has provided all the required contractual closeout documentation such as operation and maintenance manuals, warranties, punch list closeout, attic stock, training, etc.

- C. Review final requisition from CM/GC. Ensure that all lien waivers have been properly submitted and that all allowances and contingencies have been reconciled with proper returns to the Town.
- D. Manage all construction closeout requirements with the Town, state (OSCGR) and federal agencies as required. Compile project related documentation representing a complete program record to be turned over to Building Committee and the Town.
- E. Ensure that all final funding, incentive and/or reimbursement paperwork has been properly submitted, processed by the applicable grantor, and that the Town awards have been received.
- F. Prepare and issue a final close-out report including a financial reconciliation.

#### **Building Occupancy and Commissioning Phase Services:**

- A. Coordinate and manage commissioning process.
- B. Ensure Commissioning process is coordinated between all parties to include but not limited to; the contractor and its associated subcontractors, the Town Facilities Department and the Architect.
- C. Report inadequacies of systems to appropriate parties.
- D. Ensure all pre-functional checklists are being completed and functional testing is being performed.
- E. Ensure all proper commissioning reports and closeout documentation is submitted by Commissioning agent.
- F. Ensure Town staff is receiving proper training by subcontractors and that Commissioning agent is in attendance
- G. Ensure all deficiencies are corrected.

#### **Program Management Oversight Records:**

All operational working records and reports must be retained, at the Proposer's expense, for a minimum of five (5) years beyond the expiration of the contract, unless the Proposer is notified in writing by the Town of Fairfield of the need to extend the retention period. The Proposer shall be required to make such operational working records and reports available, upon request to the following parties or their designee:

- The Town of Fairfield
- The State of Connecticut

#### **Evaluations of Performance:**

Assist the Building Committee and the Town in compiling evaluations of the performance of all parties of the CM/GC, Architect, sub-contractors and any other vendor contracted by the Town for this program.

## **Review and Selection Process:**

The Program Management Oversight Selection Committee (Selection Committee) intends to review each RFP response received and create a short list of PMO proposers. Each short-listed proposer selected will be interviewed by the Selection Committee. The final selected PMO proposer will be forwarded and presented to the Board of Selectmen for final approval.

## **Selection Criteria:**

The Town will evaluate the proposal submissions based on the following criteria:

1. Proposer's background and professional expertise, including size and scope of previous projects, and specific expertise coordinating HVAC upgrade projects, and the expertise and experience of assigned personnel.
2. The Proposer's ability to complete this phase of the program within the required timeline, and to commit staff in a timely way when requested.
3. The Proposer's demonstrated understanding of the work.
4. Evidence of any special or innovative approach that the firm will use.
5. The proven ability to submit cost-effective solutions.
6. Fee proposal.

After review of all factors, terms and conditions, including price, the Town Purchasing Department reserves the right to reject any and all proposals, or any part thereof, or waive defects in same, or accept any proposal deemed to be in the best interest of the Town of Fairfield.

## **Format of Proposal:**

All responses to this RFP must conform to these instructions.

1. Delivery of responses:
  - All responses to this RFP should be complete, accurate and concise and must be in sealed envelopes and marked with the RFP reference title, the RFP number, and due date and time. The Proposer's name and address must appear on the outer envelope.
  - The Town of Fairfield is dedicated to waste reduction and the practice of using and promoting the use of recycled and environmentally preferable products. Proposers are encouraged to submit proposals that are printed double-sided (except for the signed proposal page) on recycled paper, and to use paper dividers to organize the bid for review. All proposal pages should be secured with a binder clip, staple or elastic band, and may not be submitted in plastic binders or covers, nor may the proposal contain any plastic inserts or pages.
2. Proposal Submission Content: Proposals should put forth full, accurate, and complete and concise information as required by this request. In addition to the Pricing Response Form, Schedule of PMO staff and values, the proposal should include:
  - A. Title Page: This should include your company name, address, telephone and fax numbers, email addresses, and proposed program representatives.
  - B. Executive Summary: Provide a brief history of your firm and outline similar current or completed projects. Identify key qualities or services to distinguish your firm from other Program Management Oversight organizations.

C. Organization and Staffing: Discuss your company organization, along with your proposed program team organization. Include resumes of all key program team members.

- Provide an organizational chart for the firm and the proposed staffing for this project, including any proposed consultants or those otherwise not full time employees of Proposer's firm.
- Include information concerning previous assignments such as title, length of time on job, references and contract information. Provide a brief description of previous projects, similar to this program, where the key personnel have worked together as a team. List any municipal /public school HVAC upgrade projects in Connecticut that have been completed and/or are in-process during the past seven (7) years; provide the owner's name and contact information, program description and value, start and completion dates, and other pertinent information related to the program. The Town reserves the right to interview and select key staff members for this program. Provide an estimate as the percentage of time and the approximate number of hours that you are proposing to have each staff member working on each of the phases of the assigned program.
- Provide the name of the professional who will be responsible for the program.

D. List the name and address of any consulting firm(s) or sub-consultants to the PMO that may be used on this program, with a brief description of qualifications and your association with them.

E. Pre-Construction Phase Services: Provide a narrative describing your Firm's understanding and proposed approach to providing PMO pre-construction services for this program. Include a brief overview describing how your firm would interact with the Building Committee and the other Town Departments and Officials under this phase of the program.

- List any additional services not noted in the preceding Scope of Services.

F. Construction Phase Services: Provide a narrative describing your Firm's understanding and proposed approach to providing PMO construction services for this program. Include a brief overview describing how your firm would interact with the Building Committee and the other Town Departments and Officials under this phase of the program.

- List any additional services not noted in the preceding Scope of Services.

G. Construction Close-Out Phase Services: Provide a narrative describing your Firm's understanding and proposed approach to providing PMO construction close-out services for this program. Include a brief overview describing how your firm would interact with the Building Committee and the other Town Departments and Officials under this phase of the program.

- List any additional services not noted in the preceding Scope of Services.

H. Building Occupancy and Commissioning Phase Services: Provide a narrative describing your Firm's understanding and proposed approach to providing PMO construction close-out services for this program. Include a brief overview describing how your firm would interact with the Building Committee and the other Town Departments and Officials under this phase of the program.

I. Provide a sample of all proposed reports (financial, progress / status, schedule, etc.).

#### J. Fee Proposal and Agreement

- Provide proposed monthly fee for each phase of the program (to remain firm) and its basis (ex. Proposed staffing levels and the proposed number of hours per employee) for that monthly rate. Submit hourly rates per discipline / employee for the proposed work and for any additional work that may be required, or should the contract term be extended.
- Provide an estimate for direct expenses by category and if applicable unit rates. Include multiplier on direct expenses.

K. Provide the Town with proposed sample contract between your firm and the Town of Fairfield.

**Pricing Response Form:****1. Proposed Monthly Fees:**

Pre-construction Phase Services:	Proposed Monthly Fee	\$
Construction Phase Services	Proposed Monthly Fee	\$
Construction Close-Out Phase Services	Proposed Monthly Fee	\$
Building Occupancy & Commissioning Phase Services	Proposed Monthly Fee	\$

2. For informational purposes please identify the estimated time in working hours for each phase:

Pre-construction Phase Services:	Total Monthly Hours	
Construction Phase Services	Total Monthly Hours	
Construction Close-Out Phase Services	Total Monthly Hours	
Building Occupancy & Commissioning Phase Services	Total Monthly Hours	

3. Identify the key team members who will provide these services. Quantify their involvements (X%) for each phase of the program. Provide an estimate of proposed monthly hours along with the proposed hourly rate for each team member.

**A. Pre-Construction Phase:**

Name	Title	% Involved	Monthly Hours	Hourly Rate
<b>A.</b>				
<b>B.</b>				
<b>C</b>				

**B. Construction Phase:**

Name	Title	% Involved	Monthly Hours	Hourly Rate
<b>A.</b>				
<b>B.</b>				
<b>C</b>				

**C. Construction Close-Out Phase:**

Name	Title	% Involved	Monthly Hours	Hourly Rate
<b>A.</b>				
<b>B.</b>				
<b>C</b>				

**Continued on Next Page**

D. Building Occupancy & Commissioning Phase:

Name	Title	% Involved	Monthly Hours	Hourly Rate
A.				
B.				
C				

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Company*

\_\_\_\_\_  
*Printed name*

\_\_\_\_\_  
*Title*

\_\_\_\_\_  
*Address*

\_\_\_\_\_  
*City / State / Zip*

\_\_\_\_\_  
*Phone*

\_\_\_\_\_  
*E-mail*



## REFERENCES

Provide reference details of most recent similar scope projects performed.

### REFERENCE #1:

Name of Company \_\_\_\_\_ Phone \_\_\_\_\_  
Contact Person \_\_\_\_\_ Cell \_\_\_\_\_  
Company Address \_\_\_\_\_ Email \_\_\_\_\_  
Project, Location, & Date Completed \_\_\_\_\_  
\_\_\_\_\_

### REFERENCE #2:

Name of Company \_\_\_\_\_ Phone \_\_\_\_\_  
Contact Person \_\_\_\_\_ Cell \_\_\_\_\_  
Company Address \_\_\_\_\_ Email \_\_\_\_\_  
Project, Location, & Date Completed \_\_\_\_\_  
\_\_\_\_\_

### REFERENCE #3:

Name of Company \_\_\_\_\_ Phone \_\_\_\_\_  
Contact Person \_\_\_\_\_ Cell \_\_\_\_\_  
Company Address \_\_\_\_\_ Email \_\_\_\_\_  
Project, Location, & Date Completed \_\_\_\_\_  
\_\_\_\_\_

### REFERENCE #4

Name of Company \_\_\_\_\_ Phone \_\_\_\_\_  
Contact Person \_\_\_\_\_ Cell \_\_\_\_\_  
Company Address \_\_\_\_\_ Email \_\_\_\_\_  
Project, Location, & Date Completed \_\_\_\_\_  
\_\_\_\_\_

### REFERENCE #5:

Name of Company \_\_\_\_\_ Phone \_\_\_\_\_  
Contact Person \_\_\_\_\_ Cell \_\_\_\_\_  
Company Address \_\_\_\_\_ Email \_\_\_\_\_  
Project, Location, & Date Completed \_\_\_\_\_  
\_\_\_\_\_

**SUBCONTRACTORS**

Provide subcontractor details if any are to be employed as part of this contract:

**SUBCONTRACTOR #1:**

Name of Company _____	Fed ID # _____
Contact Person _____	Title _____
Company Address _____	Phone _____
Trade _____	Email _____

**SUBCONTRACTOR #2:**

Name of Company _____	Fed ID # _____
Contact Person _____	Title _____
Company Address _____	Phone _____
Trade _____	Email _____

**SUBCONTRACTOR #3:**

Name of Company _____	Fed ID # _____
Contact Person _____	Title _____
Company Address _____	Phone _____
Trade _____	Email _____

**NOTE: All sub-Contractors are subject to approval by the Town of Fairfield and are required to provide Fed ID #.**



## Town of Fairfield

Sullivan Independence Hall  
725 Old Post Road

Fairfield, Connecticut 06824  
Purchasing Department

(203) 256-3060  
FAX (203) 256-3080

**ADDENDUM #1  
BID #2023-148  
Program Management Oversight Services  
HVAC Upgrades**

**24<sup>th</sup> May 2023** – It is intended that this Addendum incorporating the following corrections, revisions, additions, deletions and clarifications become part of the Contract Documents, including pricing as submitted.

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**New Information:**

*1. A pre-bid meeting for this bid solicitation was held at 11:30am on Thursday, May 18<sup>th</sup>, 2023 at 725 Old Post Road, 1<sup>st</sup> Floor Conference Room, Fairfield, CT 06824. A copy of the sign-in sheet from the pre-bid meeting is posted on the Purchasing Department's page of the Town's website. For your convenience, a direct link to the sign-in sheet is provided below.*

[2023-148 Pre-Bid Sign-In Sheet](#)

**Questions:**

1. Under pre-construction services, section Q, asks for an electronic budget management system. We have used Procore in the past and would recommend it for a project of this size, however this platform is costly. Does the Town have a particular platform in mind?

*Response: The Town has used Procore and BlueBeam in previous projects. The Town does not have a particular platform in mind.*

2. Does the Town want the cost for this platform separated from the bid for management and engineering labor?

*Response: Please provide cost for this platform separated from the bid for management and engineering labor.*

3. Under pre-construction services, section G, asks for state and federal approvals for this HVAC project. Other than permitting, what does Fairfield foresee for other necessary approvals?

*Response: Fairfield has already secured 'HVAC Grants' for these projects from the state. There may be applications for OSCGR school construction grants along with the typical construction permitting on the local level.*

4. Under introduction and background, the RFP mentions a Design Consultant and Construction Manager. Is the selected design consultant eligible to provide CM or PMO services?

*Response: No.*

**End of Addendum #1**

Company: \_\_\_\_\_ Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## **PROJECT MANAGEMENT AGREEMENT**

This Agreement made as of the [redacted] day of [redacted] by and between [redacted] Town of Fairfield having an office located at [redacted] 725 Old Post Road, Fairfield, CT 06824 (hereinafter "Client") and Colliers Project Leaders USA NE, LLC having an office located at 135 New Road, Madison, Connecticut (hereinafter "Project Manager").

### **WITNESSETH**

**WHEREAS**, Client desires to retain the advisory services of Project Manager ("Services") in connection with its HVAC Upgrades at Various FPS Locations (hereinafter the "Project"), Pursuant to all of the terms, specifications and conditions contained in Town of Fairfield RFP 2023-148 and its addenda as attached in Exhibit A annexed hereto, and Project Manager desires to be so retained; ~~CWI renovation/construction at [redacted] (hereinafter the "Project"), as more fully described in Exhibit A annexed hereto, and Project Manager desires to be so retained.~~

**WHEREAS**, Project Manager desires to furnish such advisory services during planning and implementing of the Project;

**NOW THEREFORE**, for the consideration hereinafter stated, the parties hereto, intending to be legally bound, covenant and agree as follows:

### **ARTICLE 1 – SERVICES**

1.1 Project Manager shall make available to Client its knowledge, skills, ideas, experience and abilities with respect to all matters within the scope of its Services described herein.

1.2 In addition to ~~Project Manager's Scope~~ the Town of Fairfield's Scope of Work annexed hereto as Exhibit A, Project Manager shall advise Client on the status of all aspects of the Project during the preconstruction and construction phase of the Project, assisting Client in: i) developing the budget and tracking costs, ii) establishing the schedule; iii) tracking work progress; iv) monitoring the standards of quality; v) assisting Client in the selection of commercially reasonable services necessary to complete the Project. Notwithstanding anything to the contrary in this Agreement, Project Manager's obligations under this Agreement are not in any way intended to require or imply that Project Manager is to assume any of the responsibilities of other consultants or any contractor or architect and the consultants, architect and contractor shall be solely responsible for their services related to the Project and the performance of their obligations under their relevant agreement with Client. It is expressly acknowledged and agreed that the Scope of Work at Exhibit A is not intended to require or imply that Project Manager shall be responsible or liable for the failures, breach and/or negligence of any consultants, contractors, architects or engineers with regard to their performance and/or respective obligations in connection with the Project.

1.3 Project Manager shall not be required to provide any services in connection with the remediation, abatement or rendering harmless any hazardous material or substances, asbestos or asbestos related products.

1.4 Project Manager has the responsibility to assign personnel who, in the judgement of Project Manager, can and will provide Services. Insert Executive Managing Director or Managing Director Name will act on behalf of Project Manager as the Executive Managing Director or Managing Director for the oversight and administration of services provided to Client, unless such person is replaced by Project Manager with notice to Client. . Project Manager will also assign additional personnel to the team providing the Services as needed. If it is determined by Client, in its reasonable discretion, that a specific individual assigned by Project Manager is not adequately providing the Services, Client will promptly contact Project Manager to request adjustment to the individual's work or replacement of that individual as mutually agreed by Client and Project Manager. Client's approval of personnel assigned by Project Manager shall not be unreasonably withheld.

## **ARTICLE 2 – FEES**

2.1. Client shall pay Project Manager a fee (“Fee”) as specified in the Project Manager’s Proposal dated [CW2] June 2, 2023, equal to \$ \_\_\_\_\_. The Fee for the Project shall be payable within thirty (30) days of after its receipt of invoice [CW3]. \_\_\_\_\_.

2.2 The Fee shall be the sole compensation to Project Manager, and is inclusive of its general and office overhead, insurance, profit, and all other costs, except for Reimbursable Expenses as provided for in Article 4.

2.3 Client shall pay Project Manager's Fee and approved Reimbursable Expenses for the Services within thirty (30) days after submission by Project Manager of an invoice covering such Fee and Reimbursable Expenses due each month for the Project.

2.4 Project Manager’s services within this Agreement are based on the Project’s duration shown in the Project timeline provided by Project Manager to Client. Any Services to be provided beyond such timeline shall be subject to mutual agreement between the parties regarding additional fees.

## **ARTICLE 3 – INSURANCE**

3.1 Project Manager shall maintain with respect to the Project, Professional Liability insurance coverage of \$1,000,000.00 per occurrence. Such coverage shall protect Client with respect to any acts or omissions of Project Manager in connection with this Agreement.

3.2 Project Manager shall maintain with respect to the Project, General Liability insurance coverage of \$2,000,000.00 each occurrence and in the aggregate (which may be comprised of a combination of primary and umbrella/excess policies). Such coverage shall include Client as additional insured with respect to any grossly negligent acts or omissions or willful misconduct of Project Manager resulting in third party bodily injury, property damage or wrongful death arising in connection with this Agreement.

3.3 Project Manager shall also maintain worker’s compensation insurance coverage in statutorily required amounts and Employer’s Liability insurance with limits of liability of no less than \$1,000,000 each accident, \$1,000,000 disease each employee and \$1,000,000 disease policy limit covering all employees of Project Manager employed in, on or about the Project in the state where the project is to take place.

3.4 Client shall maintain primary and non-contributory Commercial General Liability Insurance with minimum per occurrence limits of \$5,000,000 inclusive for bodily injury, including death, personal injury and damage to property with blanket contractual liability, product and completed operations, non-owned auto, broad form property damage and sudden & accidental pollution liability. Such policy shall contain a cross-liability and severability of interests provisions naming Project Manager and the PM Indemnified Parties (as defined below) as additional insureds and include a waiver of subrogation in favor of Project Manager and the PM Indemnified Parties.

3.5 Consultant shall provide commercial automobile insurance for any owned autos (symbol 1 or equivalent) in the amount of \$1,000,000 each accident covering bodily injury and property damage on a combined single basis. Such coverage shall include hired and non-owned automobile coverage.

3.6 Client will (a) cause its general contractors and their subcontractors involved in the construction of the Project to carry Commercial General Liability Insurance with minimum per occurrence limits of \$5,000,000 covering bodily injury, including death, personal injury and damage to property with blanket contractual liability, product and completed operations, non-owned auto, broad form property damage and sudden & accidental pollution liability on a primary basis to name Client and Project Manager including the PM Indemnified Parties as additional insured with a cross-liability and severability of interests provisions and provide a waiver of subrogation in favor of Client and Project

Manager, (b) cause its consultants involved in the design of the Project to carry usual and customary professional liability insurance, (c) cause the construction work to be covered under all risk construction insurance on a replacement cost value against physical loss or damage to the Project during the performance of the work to completion providing a waiver of subrogation in favor of Project Manager and the PM Indemnified Parties and/or Client and the Client Indemnified Parties, and (d) if applicable, cause the Project to be covered under a wrap-up liability policy in amounts customary for projects similar to the Project insuring Client, Project Manager, PM Indemnified parties, general contractors and their subcontractors, and consultants' liability arising out of their performance for the Project as named or additional insured listed on the policy declaration. In any and all trade contracts and agreements between Client and its consultants, construction manager, contractors, architect and other service providers, Client shall have both itself and Project Manager (including the PM Indemnified Parties) named as additional insureds with respect to all such liability insurance policies.

3.7 Each party shall provide the other with certificates of insurance evidencing the aforementioned coverages prior to commencement of this agreement and upon renewal of such policies for the duration of this agreement and any extensions thereof.

#### **ARTICLE 4 – REIMBURSABLE EXPENSES**

4.1 In addition to the Fee set forth in Article 2.1 herein, Client shall reimburse Project Manager for the actual cost, without markup, of reimbursable expenses such as mail, express postage, mileage to and from the Project, third party printing and copying and blueprinting costs and Client approved out of town travel and related expenses.

#### **ARTICLE 5 – CLIENT'S REPRESENTATIVE**

5.1 Client shall designate \_\_\_\_\_ to act for Client and Client shall be bound by any consents or approvals given by said representatives. The designation of Client to be made hereunder shall be in writing and may be changed by Client from time to time by written notice to Project Manager.

#### **ARTICLE 6 – TERMINATION**

6.1 ~~Either party may cancel this Agreement for any reason or no reason by giving the other party thirty (30) day prior written notice of cancellation. In such event Client shall pay to Project Manager a minimum fee of twenty percent (20%) of the remaining Fee or an amount equal to the Fee to be accrued to the last day of the cancellation notice period, whichever is greater, plus all approved Reimbursable Expenses incurred through such date. Termination for Cause. If at any time during the term of this Agreement the TOWN determines that the PROJECT MANAGER has breached the terms of this Agreement by negligently or incompetently performing the work, or any part thereof, or by failing to perform the work in a timely fashion, or by failing to perform the work to the satisfaction of the TOWN, or by not complying with the direction of the TOWN or its agents, or by otherwise failing to perform this Agreement in accordance with all of its terms and provisions, the TOWN shall notify the PROJECT MANAGER in writing stating therein the nature of the alleged breach and directing the PROJECT MANAGER to cure such breach within five (5) days. The PROJECT MANAGER specifically agrees that it shall indemnify and hold the TOWN harmless from any loss, damage, cost, charge, expense or claim arising out of or resulting from such breach regardless of its knowledge or authorization of the actions resulting in the breach. If the PROJECT MANAGER fails to cure said breach within five (5) days, the TOWN may, at its election at any time after the expiration of said five (5) days, terminate this Agreement by giving written notice thereof to the PROJECT MANAGER specifying the effective date of the termination. Upon receipt of said notice, the PROJECT MANAGER shall cease to incur additional expenses in connection with this Agreement. Upon the date specified in said notice, this Agreement shall terminate. Such termination shall not prejudice or waive any rights or action which the TOWN may have against the PROJECT MANAGER up to the date of such termination, and the PROJECT MANAGER shall be liable to the TOWN for any amount which it may be required to pay in excess of the compensation provided herein in order to complete the work specified herein in a timely manner. Upon such termination, the PROJECT MANAGER shall be entitled to compensation for all satisfactory work completed prior to the termination date, as determined by the TOWN.~~ [CW4]

#### **ARTICLE 7 – MISCELLANEOUS**

7.1. All notice required by or permitted to be given pursuant to this agreement shall be deemed validly given three (3) days after the same shall be deposited in the United States Mail, certified or registered, return receipt requested, postage prepaid, or by overnight courier addressed as noted herein to the parties as follows:

**TO CLIENT:**

with a copy to:

[Town of Fairfield](#)  
[725 Old Post Road,](#)  
[Fairfield, CT 06824](#)  
[Attention: Adam Tulin, Director of Purchasing](#)

**TO PROJECT MANAGER:**

Colliers Project Leaders USA NE, LLC  
135 New Road  
Madison, Connecticut  
Attention: Jonathan Winikur

with a copy to:

Colliers Engineering and Design  
101 Crawfords Corner Road, Suite 3400  
Holmdel, NJ 07733  
Attention: Legal Department

7.2 The captions and subheadings contained herein are for information only and shall in no way modify or limit terms, provisions or conditions hereof.

7.3 This Agreement constitutes the entire agreement between the parties with respect to the Services. No provisions of this Agreement shall be changed or modified, nor shall this Agreement be discharged, in whole or in part, except by an agreement in writing signed by the party against whom the change, modification or discharge is claimed or sought to be enforced.

7.4 No waiver of any of the conditions or provisions of this Agreement or of any of the rights of either party hereunder shall be effective or binding unless such waiver shall be given in writing and signed by the party claimed to have given, consented or suffered the waiver.

7.5 To the extent not covered by Client's insurance, Project Manager shall indemnify and hold harmless Client and its respective agents, officers, directors, officials, members, invitees and employees (collectively, the "Client Indemnified Parties") from any third party claims, judgments, costs, injuries, damages, liabilities and expenses, including reasonable attorneys' fees, to which the Client Indemnified Parties may be subject because of any gross negligence of Project Manager, or its respective agents, officers, directors, employees, arising out of or in connection with this Agreement which causes or results in third party personal injury, property damage or wrongful death. Client will indemnify, defend and save harmless Project Manager and its affiliated companies, their agents, consultants, principals, officers, representatives and employees ("PM Indemnified Parties") from all liability, costs, claims, expenses, damages and loss (including reasonable attorneys' fees incurred in defending claims and responding to subpoenas) (but excluding liability that is due to the gross negligence or willful misconduct of Project Manager or its affiliates and agents) that may occur or may alleged to have occurred arising out of or related to the Project, the Services and/or any written contracts or other agreement that Client or Project Manager may enter into in connection therewith. In the event of a claim, the indemnified party agrees to: (i) give the indemnifying party prompt notice of the claim; (ii) cooperate with the reasonable request of the indemnifying party in the defense of the claim, at no cost to the indemnified party; (iii) permit the indemnifying party to choose counsel to defend, subject to the reasonable approval of the indemnified party and (iv) not settle any claim without the written consent of the indemnifying party.



7.6 ~~Nothing contained in this Agreement shall be construed to mean that Project Manager and Client are joint venturers or partners.~~ Independent Contractor. The PROJECT MANAGER acknowledges and agrees that it is acting as an independent contractor for all work and services rendered pursuant to this Agreement, and shall not be considered an employee or agent of the TOWN for any purpose. In the event that any subcontractors, PROJECT MANAGER'S services providers or any other third parties are used in connection with the Project ("Subcontractor's"), PROJECT MANAGER shall be fully responsible for all acts, omissions and the performance of each Subcontractor and any of their employees, agents, contractors and other entities or persons rendering services hereunder, it being understood that (a) any violation of the terms of this Agreement by a Subcontractor will be deemed a breach by PROJECT MANAGER, and (b) no Subcontractor may relieve PROJECT MANAGER of any of its obligations hereunder in any manner whatsoever. PROJECT MANAGER shall indemnify, defend, and hold harmless The TOWN and its affiliates, subsidiaries and clients from and against any and all claims, demands, liabilities, damages, costs, and expenses, including, but not limited to, reasonable attorneys' fees in any way arising from or related to PROJECT MANAGER'S use of any Subcontractor to perform any portion of the Services. Subject to applicable laws.

7.7 It is expressly agreed that Project Manager is not responsible for Project design which services shall remain the responsibility of the architect, nor shall Project Manager be responsible for the actions of the contractor, subcontractors, and for any means and methods used for the construction of the Projects. Client shall secure and pay for all necessary permits, approvals, easements, assessments and charges required in connection with the Project. All contracts relating to the Project shall be in the name of Client and executed by Client.

7.8 This Agreement shall be governed by the laws of the State of ~~New Jersey~~ Connecticut both as to interpretation and performance. In the event of a dispute, the parties shall negotiate in good faith. Should the dispute remain unresolved after such good faith effort, either party may pursue their legal remedies in the Supreme Court of the State of ~~New Jersey~~ Connecticut, ~~Monmouth-Fairfield~~ County, for all purposes in connection with any action or proceeding which arises from or relates to this Agreement. Neither party shall be liable to the other for, and each party hereby waives any and all rights to claim against the other, any special, indirect, incidental, consequential, punitive or exemplary damages in connection with this Agreement, including, but not limited to, lost profits, even if the party has knowledge of the possibility of such damages. If a legal or equitable action is brought to enforce the terms of this Agreement, the prevailing party shall be entitled to collect its costs, including reasonable attorneys' fees and expenses of appeal, if any.

7.9 Client agrees that it shall not, directly or indirectly, hire or engage, or arrange for or attempt to arrange for, or persuade any other person to hire or engage, any employee of Project Manager while such employee is employed by Project Manager and for a period of ninety (90) days after the termination of such person's employment by Project Manager; including, without limitation, engaging such Project Manager employee or former employee as an independent contractor or as an employee of any person other than Project Manager or any affiliate of Project Manager. In addition to all other remedies available to Project Manager for breach of this provision, Client agrees to pay Project Manager, as liquidated damages and not as a penalty, the agreed upon sum equal to six (6) months' base salary or wages (measured using the employee's rate of salary or wages as of his or her last day of employment with Project Manager) of each employee hired directly or indirectly by Client or any other person in violation of this Section 7.9.

7.10 This Agreement is intended to employ Project Manager in a consulting role so that Client can seek the opinions of Project Manager as Client makes various Project decisions, and for Project Manager to be able to provide its opinions without reservation. More specifically, Client will be employing designers, construction managers, attorneys, architects, testing and inspection services, and other specialized consultants and vendors who will be responsible for all matters related to their respective specialty. Client and Project Manager will both rely on the proper performance of and information provided by such specialists, and Client hereby waives and releases all claims against Project Manager that arise out of or relate to (1) the failure of others engaged by or through Client (for example, designers, construction managers, architects, attorneys, testing and inspection services, and other specialized consultants and vendors) to properly perform their responsibilities, (2) matters that are not the sole responsibility of Project Manager as specifically required by this Agreement, or (3) any action or inaction taken or withheld by Project Manager because it reasonably believed that such action or inaction was in the best interests of Client. Project Manager's aggregate liability under this Agreement shall be deemed limited to Fees and Reimbursable Expenses received by Project Manager.

7.11 Client will provide a temporary office for Project Manager's use to conduct the Services on or near the Project site. The office space will be mutually agreed by Client and Project Manager within an existing building on the campus or through provision of a temporary structure such as an office trailer. This temporary office will be secured and provided with lighting, heating and cooling and furnishings for Project Manager's use for the duration of the Project(s). In addition, the office will be equipped with the following: cable internet 16mb download/2mb upload speeds, wireless N-router, 10/100 Network Switch and 5+ ports, telephone service to land lines for the duration of the Project, surge protectors (3) and an all-in-one printer (Printer/Copier/Fax/Scanner). This office is where record file materials will be collected and maintained by Project Manager for transmittal to Client at the conclusion of the Project. Project Manager will have the authority to retain copies of these files as it deems appropriate for project services record purposes.

7.12 If mutually agreed, Client and Project Manager may expand or extend the scope of services and adjust fees for such services to incorporate other facility repair, modernization, expansion or new construction projects.

7.13 Client hereby grants Project Manager the nonexclusive right and license to use and display Client's name, logo and similar indicia ("Client Marks") (a) to the extent any customization or implementation of the Services involve the incorporation of Client Marks in furtherance of this Agreement and (b) on its website, advertising and marketing collateral identifying Client as a customer of Project Manager. Project Manager obtains no rights in the Client Marks except for the limited right described in the preceding sentence, and Client retains all right, title and interest in the Client Marks. All use of the Client Marks by Project Manager will inure to Client.

7.14 Assignment. The PROJECT MANAGER shall not assign, sublet or otherwise transfer this Agreement, in whole or in part, without the prior written consent of the TOWN, and shall not assign any of the moneys payable under this Agreement, except by and with the written consent of the TOWN.

7.15 This Agreement is binding upon the parties hereto, their successors, assigns, and legal representatives. Neither the TOWN nor the PROJECT MANAGER shall assign or transfer any interest in the Agreement without the written consent of the other.

7.16 Severability. If any term or condition of this Agreement or any application thereof shall to any extent by held invalid, illegal or unenforceable by the court of competent jurisdiction, the validity, legality, and enforceability of the remaining terms and condition of this Agreement shall not be deemed affected thereby unless one or both parties would be substantially or materially prejudiced.

7.17 Entire Agreement. This Agreement, including all documents incorporated herein by reference, constitutes the entire integrated agreement between the parties with respect to the matters described. This Agreement supersedes all prior agreements, negotiations and representations, either written or oral, and it shall not be modified or amended except by a written document executed by the parties hereto.[CW5]

**IN WITNESS WHEREOF**, the parties hereto have executed this Agreement effective the day and year first above written:

**Client:**

By: \_\_\_\_\_  
Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_

**Project Manager: Colliers Project Leaders USA NE, LLC**

By:\_\_\_\_\_

Name: Jonathan F. Winikur

Title: Division Director

Date:\_\_\_\_\_

**EXHIBIT A**

**SCOPE OF SERVICES**





Colliers

Project Leaders

# Town of Fairfield

HVAC Upgrades at Various FPS  
Facility Locations, RFP #2023-148

**Program Management Oversight Services**

June 2, 2023

**Prepared for**

Adam B. Tulin  
Director of Purchasing  
Town of Fairfield

**Prepared by**

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

Accelerating success.

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## Town of Fairfield

Sullivan Independence Hall  
725 Old Post Road

Fairfield, Connecticut 06824  
Purchasing Department

(203) 256-3060  
FAX (203) 256-3080



### Request for Proposal #2023- 148 Program Management Oversight (PMO) Services HVAC Upgrades at Various FPS Facility Locations

TOWN OF FAIRFIELD  
PURCHASING AUTHORITY  
725 OLD POST ROAD  
INDEPENDENCE HALL  
FAIRFIELD, CT 06824

Date Submitted June 2, 2023.

SEALED SUBMISSIONS are subject to the standard instructions set forth on the attached sheets.

Any modifications must be specifically accepted by the Town of Fairfield, Purchasing Authority.

  
First Selectwoman  
  
Director of Purchasing

Date

5/12/2023

Bidder:

Colliers Project Leaders USA NE, LLC

Doing Business As (Trade Name)

135 New Road

Address

Madison, CT 06443

Town / State / Zip

Jonathan F. Winikur, Division Director

Printed Name (Mr. Ms.) and Title

  
Signature

(860) 395-0055

Telephone

(203) 779-5661

Fax

charles.warrington@collierseng.com (contact person)

E-mail Address

Sealed qualifications will be received by the Purchasing Authority at the office of the Director of Purchasing, Independence Hall, First Floor, 725 Old Post Road, Fairfield, Connecticut 06824, up to:

**02:00PM on Friday, 2<sup>nd</sup> June, 2023**

The Town of Fairfield requests proposal submissions for program management oversight services from qualified firms specializing in facility construction oversight. Work will be performed at Osborn Elementary School, North Stratfield Elementary School and Fairfield Woods Middle School.

#### NOTES:

1. Respondents are to complete all requested data in the upper right corner of this page and must return this page and the Proposal page with their bid.
2. No submission shall be accepted from, or contracts awarded to, any person/company/affiliate or entity under common control who is in arrears to the Town of Fairfield upon debt, or contract or who has been within the prior five (5) years, a defaulter as surety or otherwise upon obligations to the Town of Fairfield, and shall be determined by the Town.
3. Proposals are to be submitted in a sealed envelope and clearly marked "RFP #2023-148" on the outside of the envelope, including all outer packaging, such as, DHL, FedEx, UPS, etc.
4. It is the sole responsibility of the Respondent to see that the Proposal is received by the Fairfield Purchasing Department prior to the time and date noted above. Proposals are not to be submitted via email or fax.
5. Proposals are not to be submitted with plastic binders or covers, nor may the Proposal contain any plastic inserts or pages.

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May 31, 2023

Mr. Adam B. Tulin  
Director of Purchasing  
Town of Fairfield  
Independence Hall, First Floor  
725 Old Post Road  
Fairfield, CT 06824

**Subject:     *Proposal to Provide Program Management Oversight (PMO) Services  
for the HVAC Upgrades at Various FPS Facility Locations, RFP #2023-148***

Dear Mr. Tulin:

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 program management oversight 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 Town of Fairfield.

Having served as the Project Management Oversight consultant on multiple projects in Fairfield since 2013, we are excited at the opportunity to continue our relationship with Town. We highly value our working relationship with the town and strongly believe that all our projects to date have been successful.

For this specific project, Colliers is taking a slightly different approach to the project based on the unique scope of work. To date, Colliers has primarily provided our project management services with limited exposure, if any, by our commissioning and energy services team. In the past, the Town requested that we only provide our project management services and not submit for commissioning services when we served as the PMO. Given that the scope is primarily mechanical and electrical in nature, we have assembled a team of both project management and commissioning team members that we feel will provide the highest quality assurance possible to the Town.

Leading the overall project with me will be Mark Schweitzer who has served as the project manager on the Holland Hill Elementary School addition and alterations as well as the Mill Hill Elementary School project. Mark also worked on the H. Smith Richardson Golf Course Clubhouse project and has assisted the Fairfield Public Schools with restructuring of their 10-year waterfall plan. Mark will serve as the liaison with building committee and Fairfield Public Schools, similar to his role on Holland Hill and Mill Hill.

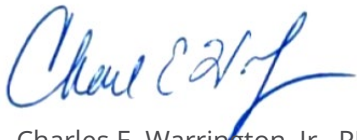
Teaming with me as the technical director, Blair Richardson, Director of Commissioning and Energy Services, and his team will provide technical support for the review of the design and oversight during construction. As a licensed mechanical engineer, Blair has designed many of these systems as well as commissioned them. Given his expertise, as well as his team's expertise, we believe you'll be hard pressed to find a higher qualified team than Colliers.

Given the importance of these systems for providing high indoor air quality and control of the interior environment, we believe it's vital to ensure these systems are designed, installed, and commissioned correctly. We understand that a third-party commissioning agent has been retained already but given we have highly qualified team members already in house, we hope that you find this to be an added value to your project(s).

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. If you have questions or require additional information, you can contact me at [charles.warrington@collierseng.com](mailto:charles.warrington@collierseng.com) or (860) 235-5313.

Sincerely,

A handwritten signature in blue ink, reading "Charles E. Warrington, Jr." in a cursive style.

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

# Contents

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## I. Executive Summary

## II. Relevant Experience



## III. Organization and Staffing

## IV. Project Understanding

## V. Project Approach



## VI. Fee Proposal and Agreement

## VII. Required Forms

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## Colliers Project Leaders

Colliers Project Leaders was founded as Strategic Building Solutions, LLC and has operated for the past two decades with a fairly simple mission in mind – to be ***the premier provider of project management oversight services in the marketplace.*** Our focus upon project management 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 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.



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.

Provided on the following pages are some of the key differentiators on why Colliers is the ideal project management firm for this project.

## Key Differentiators

At Colliers, the quality and depth of experience of our team and their proven approach to project management combine to set us apart from our competition. Provided below are some of the key differentiators on why Colliers is the ideal project manager for the Town of Fairfield.



### Strong Understanding of Construction Projects on Public K-12 Campuses

Colliers has been providing program management oversight services for charter school clients throughout the Northeast for more than two decades. During this time, our clients have been well-served by our staff's ability to stay ahead of the planning, design, and construction of buildings within active campus settings. A thorough understanding of the school campus environment is critical both in terms of the planning and execution of complex building construction projects.



### Educational Project Experience in Excess of 450 Projects

With more than **450 education projects and a total value in excess of \$3.5 Billion**, Colliers has a well-established reputation for providing program management oversight services within the education marketplace and is well-versed in guiding school leaders and building committees through the complex process of school construction projects. As a result of our project experience, Colliers has developed a unique perspective and understanding of the very specialized needs of public school construction – allowing us to view the larger issues at hand and to develop strategies and tactics to successfully lead the Town of Fairfield through the process.



### Management Systems with Dramatic Project & Life Cycle Cost Savings

Complete financial control of any project is perhaps the most fundamental determinant of its eventual success or failure. Establishing financial control becomes particularly complicated when balancing the issues of upfront project cost with design and construction decisions that will have a long-term impact on life cycle costs. Throughout the life of a project, we utilize a sophisticated set of complex management, technical, and analytical systems.

Colliers has developed a robust financial management system for budgeting, tracking, and anticipating all project related expenditures in the most thorough and accurate manner possible, greatly reducing the possibility of unwanted financial surprises. Throughout the programming and the design phases, our estimate reconciliation process and value engineering techniques help ensure that the project is designed to a realistic budget. Our bid phase management techniques help to keep the initial construction contract within budget. Our technical design reviews and our change order review process reduce unwanted change order costs during the construction phase and help the Town receive fair pricing for those change orders that are legitimate. Our commissioning process creates ongoing energy and operational savings that last long after project completion.

***Colliers has built our reputation on providing dramatic and pervasive savings throughout a project, always exceeding the cost of service.***



### **In-House Financial, Schedule, and Quality Assurance Services**

Colliers is committed to ensuring that our program management oversight services include the capability to support the Town of Fairfield with financial, scheduling, and quality assurance expertise. We will make available, in-house staff well-seasoned within these areas, to assist Colliers' proposed project team throughout the duration of the project, as required.



### **Mechanical, Electrical, and Plumbing Systems Expertise**

As a firm committed to providing comprehensive program management oversight services for more than two decades, we have always recognized the clear link between a building's mechanical and electrical systems and the success of a project. We have assembled a team of experienced engineers, controls technicians, and facilities operators to ensure that our services are provided by a group of multi-disciplined professionals with the necessary backgrounds required to optimize building performance and to maximize energy savings.



# Company Information

Provided below is information specifically requested in the Town of Fairfield’s Request for Proposal.

Company Information	
Legal Standing	Limited Liability Company
Corporate Officers	<p>The following individuals are Officers at Colliers Project Leaders:</p> <ul style="list-style-type: none"><li>• Executive Chairman – Richard M. Maser</li><li>• President &amp; Chief Executive Officer – Kevin L. Haney</li><li>• Executive Vice President, Chief Administrative Officer, Treasurer – Leonardo E. Ponzio</li><li>• Vice President &amp; Chief Operating Officer – Joseph A. Dopico</li><li>• Vice President &amp; Chief Financial Officer – Thomas J. Hinczynski</li><li>• Vice President &amp; Division Director, Recording Secretary – S. Maurice Rached</li><li>• Vice President &amp; Chief People Officer – Allison Colantuoni</li><li>• Vice President &amp; General Counsel, Secretary – Brian E. Curtis, Esq.</li><li>• Vice President &amp; Division Director – Craig Zeidman</li><li>• Vice President &amp; Chief Risk Officer – Jennie M. Muscarella, Esq.</li></ul>



# Relevant Experience

## Public K-12 Experience

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

As a result of our project experience throughout the Northeast, Colliers has developed a unique perspective and understanding of the very specialized needs of construction projects – allowing us to view the larger issues at hand and to develop strategies and tactics to successfully lead the Town of Fairfield through the process.

For more than 25 years, we have provided program management oversight services for numerous clients because of our reputation for quality service, client satisfaction, and unique expertise. In fact, we are proud to state that nearly all of our clients have gone on to request additional services.

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

### By the Numbers

- **450+** Education Projects
- **125+** Public K-12 School Projects
- **\$3.5 Billion** Construction Value of School Projects
- **100%** Projects Completed On-Time



Public K-12 School Experience		
Clients		
Assabet Valley School District	Gardner Public Schools	Old Saybrook Public Schools
Bloomfield Public Schools	Granby Public Schools	Oxford Public Schools
Branford Public Schools	Madison Public Schools	Regional School District 14
Bristol County Agricultural SD	Mansfield Public Schools	Rocky Hill Public Schools
Cape Cod Regional Technical HS	Narragansett Regional SD	Simsbury Public Schools
Chatham Central School District	New Fairfield Public Schools	South Windsor Public Schools
Cheshire Public Schools	New Haven Public Schools	Southwick-Tolland-Granville RSD
East Hampton Public Schools	New London Public Schools	Stonington Public Schools
Easthampton Public Schools	Newington Public Schools	Toms River Regional Schools
<b>Fairfield Public Schools</b>	North Adams Public Schools	West Bridgewater Public Schools
Fitchburg Public Schools	North Haven Public Schools	West Springfield Public Schools
Foxborough Public Schools	Northborough Public Schools	Windham Public Schools

# Current Workload

The following matrix reflects our current workload exclusively for program management oversight engagements. Although this impressive list includes the work of our proposed project team as well as other project management staff, we have the capacity to undertake several additional program management oversight engagements.

In addition to these projects, Colliers is actively working with a lengthy list of public and private institutions through our planning & advisory and commissioning & energy services.

Current Workload			
Client & Project Name	Phase	Budget	Projected Services Completion
Bethel’s On-Call Capital Projects	TBD	TBD	TBD
Hartford’s Betances Learning Lab Magnet School	Design	\$44M	June 2026
Hartford’s E.B. Kennelly School	Design	\$51M	June 2026
Hartford’s Fred D. Wish Museum School	Design	\$49M	June 2025
King School – Master Plan Projects	Design	TBD	TBD
Madison’s School Renewal Plan	Design	\$61M	September 2024
Madison Academy School – Community Center Project	Design	\$15.9M	Summer 2025
New Fairfield’s New High School and Meeting House Hill School	Construction	\$113.4M	September 2023
New London’s Bennie Dover Jackson Middle School	Construction	\$49.5M	August 2024
South Windsor’s Pleasant Valley Elementary School	Construction	\$58.5M	September 2023
Southington Public Schools – Elementary Schools Assessment	Planning	TBD	TBD
Stamford’s Westhill High School	Pre-Design	\$308M	September 2027
Westport Public Schools – Capital Improvements	Planning	TBD	TBD
Westport Public Schools – Roof Replacement Projects	Design	\$1M	August 2023
Windham High School	Construction	\$112M	January 2024



Project Leaders



## Town of Fairfield

# Multiple Projects

Fairfield, CT

## Project Overview

Colliers provided project management services for the renovation, expansion, and construction of several schools in Fairfield, CT. Projects include:

- **Holland Hill Elementary School:** Temporary expansion and proposed renovation / addition. The scope of work includes installing temporary portable classrooms, construction of a 17,000 square foot addition, and renovations to the existing 42,732 square feet.
- **Mill Hill Elementary School:** Renovation and addition project, which will eliminate five portables currently in use, add 21 classrooms as well as dedicated space for special education, and expand the size of core areas (library media center and the cafeteria).
- **Riverfield Elementary School:** Design and construction of additions and renovations, which included demolition of the modular classrooms, renovation of the existing structure, and increasing the size of the current building by approximately 15,400 gsf.
- **Roger Sherman Elementary School:** Third phase of renovations and additions, which will include installation of air conditioning, fire sprinklers, lockers, and improvements to the student drop-off area.

## Services Overview

As project manager, Colliers provided comprehensive project management services and work under the auspices of the building committee and coordinate a project team consisting of the architect, construction manager-at-risk or general contractor, various independent consultants, representatives from the Fairfield Public School District, and various Town departments.

## Completion

Riverfield ES – November 2015

Holland Hill ES – November 2020

Roger Sherman ES – Spring 2021

Mill Hill ES – September 2022

## Project Size

Riverfield ES – 61,500 gsf

Holland Hill ES – 59,732 gsf

Roger Sherman ES – 30,000 gsf

Mill Hill ES – 58,495 gsf

## Project Budget

Riverfield ES – \$16.5 Million

Holland Hill ES – \$18.5 Million

Roger Sherman ES – \$3.2 Million

Mill Hill ES – \$22 Million

## Services Provided

Project Management

[www.cplusa.com](http://www.cplusa.com)

## Client Contact

Tom Quinn

Chair, Riverfield Building Committee

609 805 0180

## GRISWOLD MIDDLE SCHOOL

**Rocky Hill School District****Griswold Middle School**

Rocky Hill, CT

**Project Overview**

Colliers provided project management services for the Rocky Hill School District's Griswold Middle School HVAC Project.

**Services Overview**

Colliers provided project management services during the pre-construction, bidding, construction, and close-out phases. Responsibilities included:

- Performing value engineering at the completion of the design phase
- Performing cost estimating for all building construction and site development work
- Reviewing and maintaining a detailed construction schedule
- Monitoring construction progress and control construction quality
- Developing and implementing a procedure for the review and processing of contractor payment
- Coordinating, monitoring and documenting testing, calibration, and start-up of all equipment and building systems
- Coordinating and assisting in training of Owner's personnel on the operation and maintenance of building systems and equipment

**Completion**

October 2017

**Project Budget**

\$1.4 Million

**Services Provided**

Project Management

**Architect**

Bemis Associates, LLC

**Contractor**

West State Mechanical, Inc.

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[www.cplusa.com](http://www.cplusa.com)

**Client Contact**

Ron Lamontagne  
Director of Facilities  
860 258 7700





Project Leaders

## Westport Public Schools

# Capital Projects

Westport, CT

### Project Overview

Colliers has been engaged to provide project management services for the Westport Public School District's Master Facility Plan for a portfolio of District buildings.

### Services Overview

Colliers' services include analyzing constructability, evaluating the recommended improvements and recommended timeframe for select improvements in the Master Facility Study report, assisting the Director of Facilities and the Chief Financial Officer with prioritizing capital projects, assessing opportunities for collaborative work with Town departments and personnel, advising the District on project delivery systems and forms of contracts, serving as a single point of contact between contractors and designers, representing the District at key meetings, monitoring the project schedule and budget, auditing quality assurance/quality control procedures, assisting in evaluation contractor payment requests, providing monthly reporting, and facilitating issue resolution.

Colliers is also providing all project management services throughout the project, including turnover, closeout, commissioning, and State audit compliance, where applicable.

### Completion

TBD

### Project Size

Various

### Project Budget

\$95.3 Million

### Services Provided

Project Management

### Architect

TBD

### Contractor

TBD

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[www.cplusa.com](http://www.cplusa.com)

### Client Contact

Thomas Scarice  
Superintendent  
203 341 1026



Project Leaders

## 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

### Contractor

O&G Industries, Inc.

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[www.cplusa.com](http://www.cplusa.com)

### Client Contact

Anna Cutaia-Leonard  
Superintendent of Schools  
203 263 4339

John Chapman  
Building Committee Member  
203 395 6347



WALTER C. POLSON  
MIDDLE SCHOOL

## Town of Madison

## School Renewal Plan

Madison, CT

## Project Overview

Colliers has been engaged to provide comprehensive project management services for their School Renewal Plan. The project includes the construction of a new PreK-5, 88,000 gsf school and renovations at Brown Intermediate School and Polson Middle School.

The project will include the demolition of three existing schools and site restoration. The new PreK-5 school will incorporate sustainability, energy and water conservation, and greenhouse gas emission reduction. Brown will transform into a K-5 school including new kindergarten classrooms, bathrooms, doors, and hardware to improve school security. Renovations at Polson will include improvements of the HVAC system, electrical system, and auditorium, as well as the addition of a generator and renewable energy systems.

## Services Overview

Colliers' responsibilities through the pre-design, design, construction, and closeout, training, and FF&E phases include but are not limited to:

- Develop budget and project schedules
- Design document review
- Manage the Office of School Construction Grants and Review process
- Coordinate State reimbursement
- Oversee construction activities and on-site consultants
- Review contractor change orders
- Coordinate training for operating staff and project closeout

## Completion

PreK-5 – Fall 2025  
Brown Intermediate School – TBD  
Polson Middle School – TBD

## Project Size

PreK-5 – 90,000 gsf  
Brown Intermediate School – 107,077 gsf  
Polson Middle School – 150,000 gsf

## Project Budget

PreK-5 – \$66.15 Million  
Brown Intermediate School – TBD  
Polson Middle School – TBD

## Services Provided

Project Management

## Architect

PreK-5 – Tecton Architects  
Brown Intermediate School – TBD  
Polson Middle School – TBD

## Contractor

PreK-5 – Gilbane Building Company

[www.cplusa.com](http://www.cplusa.com)

## Client Contact

William H. McMinn  
Director of Facilities  
203 245 6470

## Town of Newington

# Anna Reynolds Elementary School

Newington, CT

### Project Overview

Colliers provided pre-referendum services for the renovation project at Anna Reynolds Elementary School.

The project will consist of upgrades of the school to comply with School Safety Infrastructure Council guidelines, improvements to the building envelope systems (roof, windows, doors, canopies), and replacement of the existing MEP systems (Heating, Ventilation, and Air Conditioning, Electrical, Plumbing, and Fire Alarm). In addition, the project will include installation of new elevator for ADA accessibility, technology improvement, site improvement, and programmatic improvements to the school.

### Services Overview

As project manager, Colliers assisted with the development of a comprehensive assessment of the current condition of the school and the various systems within the school (HVAC, roofs, electrical, fire protection, ADA compliance, site conditions, safety needs, etc.).

Colliers was also responsible for the development of the educational specification, total project budget, project schedule and compilation and filing of the grant application to the state. Colliers was also responsible for procuring professional architectural services required to assist with the request renovation status.

In addition, Colliers acted as liaison with the Office of School Construction Grants & Review (OSCG&R) and was responsible for all aspects of preliminary plan development and filings required by OSCG&R as well as Town requirements to support the referendum, which was approved on November 3, 2020.

### Completion

September 2023

### Project Size

65,269 gsf

### Project Budget

\$35.5 Million

### Services Provided

Project Management

### Architect

Kaestle Boos Associates, Inc.

### Contractor

TBD

[www.cplusa.com](http://www.cplusa.com)

### Client Contact

Maureen Brummett

Superintendent

860 665 8611





Colliers

Project Leaders

## 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](http://www.cplusa.com)

### Client Contact

Dr. Kate Carter

Superintendent of Schools

860 291 1205

## Town of Mansfield

# Mansfield Middle School Modernization Plan

Mansfield, CT

## Project Overview

Colliers provided project management services to conduct a Facilities Conditions Assessment and Modernization Study for long term planning of the Middle School. A comprehensive assessment was undertaken to examine the current condition of the school and the various building systems. Detailed programming meetings included reviews of the academic needs, student population, existing building structure, and floor plans with proposed options to resolve inherent educational challenges.

The Colliers' report identified and prioritized facility upgrades, programming deficiencies, and organizational challenges with estimated budgets and timelines for implementation. The potential for state reimbursement was also an important driver for the recommendations and planning. The information contained in the final report will be utilized by the Town and the Board of Education to develop their ongoing approach to maintain the Middle School's high educational standards for the District.

## Services Overview

As Project Manager, Colliers provided the following services:

- Complete inspections and evaluations of the middle school, building systems, plans, building shell, and site
- Provide recommendations to resolve educational programming shortfalls including concepts for future renovations
- Focus on code issues, infrastructure needs, and educational needs to incorporate into a plan/proposal that would benefit students and educators
- Develop concept plans, budgets, and timelines
- Provide liaison services with OSCG&R

## Completion

September 2022

## Project Size

118,338 gsf

## Project Budget

N/A

## Services Provided

Project Management

## Architect

N/A

## Contractor

N/A

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[www.cplusa.com](http://www.cplusa.com)

## Client Contact

Allen Corson

Director, Facilities Management

860 429 3326





## Town of Stonington

# School Modernization Project

Stonington, CT

### Project Overview

Colliers provided project management services for the Town of Stonington's School Modernization Project.

The School Modernization Project included renovations to three of the district's schools: West Vine Street School and Deans Mill School, which were both new addition and renovate-as-new projects, and Pawcatuck Middle School, which involved the replacement of the roof.

The project at West Vine Street School included a complete renovation of the original 1967 structure and construction of a new addition for classrooms and common spaces including a library, a gymnasium, and playground.

The project at Deans Mill School included complete renovation of the original 1967 structure, demolition of the 1973 addition and construction of a new addition for classrooms and common spaces including a library, a gymnasium, and playground.

### Services Overview

Colliers provided project management and coordination of the design and bidding phases as well as provided regular inspections and coordination of activities throughout construction, the management of all finances related to the project, and the closeout of the project. All work was completed during non-school hours including summer vacations and regularly scheduled holiday periods.

### Completion

Fall 2019

### Project Size

West Vine Street School – 54,625 gsf

Deans Mills School – 65,375 gsf

### Project Budget

West Vine Street School – \$31.6 Million

Deans Mills School – \$35.9 Million

Pawcatuck Middle School – \$1.4 Million

### Services Provided

Project Management

### Architect

DRA Architects

### Contractor

Gilbane Building Company

[www.cplusa.com](http://www.cplusa.com)

### Client Contact

June Strunk

Board of Selectmen Representative

860 235 0677



Project Leaders



## ACES: Area Cooperative Education Services

# Little Theatre

New Haven, CT

### Project Overview

The Little Theatre has been home to the Educational Center for the Arts Theatre Department since 1986. The last round of significant renovations to the Little Theatre took place more than 20 years ago. To continue the safe and effective operation of the building, and to accommodate the current and future needs of the department, the Little Theatre needed significant repairs and renovations. Repairs included the installation of a new HVAC system, repairs to the stage area, lighting and sound, and the replacement of the seating (both fixed and portable). Renovations also included extending the classroom wing to the front of the property to include a theatrical construction shop, expanded dressing rooms and audience restrooms, as well as adding two additional classrooms and updating handicap access throughout the facility.

### Services Overview

In providing comprehensive Owner's Representation Services, Colliers established and monitored total project budgets; developed a project implementation schedule; facilitated and coordinated design activities; developed and administered a process for bidding and contracting; provided on-site construction inspections as part of an overall construction quality control plan; coordinated construction activities with school activities; completed paperwork as required by the State of Connecticut to ensure State reimbursement; provided commissioning services with regard to all mechanical and other systems to verify they work as intended; coordinated project closeout, contract completion, and move-in; provided training of building users, operators and O&M staff; and provided a detailed project file suitable for review by State Department auditors.

### Completion

December 2013

### Project Size

13,000 gsf

### Project Budget

\$6.9 Million

### Services Provided

Project Management

### Architect

Svigals & Partners

### Contractor

Newfield Construction

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# Organization and Staffing

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Colliers is confident that we are uniquely qualified to deliver the necessary program management oversight services for the Town of Fairfield HVAC Upgrades at Various FPS Facility Locations Project as outlined within the RFP and as may be required. We have assembled a very unique team comprised of both our project management division as well as our commissioning and energy services division. Given the specific scope of this project, we believe our uniquely staffed team will provide the highest qualified team possible.

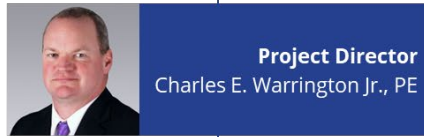
Colliers is committed to serving the Town of Fairfield with a team approach that allows the strengths of our individuals to complement each other and provide a superior level of service. To accomplish this goal, your project will be led by Charles “Chuck” Warrington, Director of Project Management, who will be responsible for providing general oversight for the delivery of our services and who will ensure that the Town is well served. Chuck has served the town of Fairfield for the past nine years and is intimately knowledgeable of the town's processes.

Serving as our technical director, Blair Richardson, Director of Commissioning Services, will assist primarily in the design phase of the project. As a licensed professional mechanical engineer, Blair will review the design of BL Companies and provide invaluable insight and recommendations to improve the design.

In addition, Mark Schweitzer will serve as the Project Manager and will be responsible for the day-to-day operations and the final success of the project. Mark will be the liaison with the building committee and Fairfield Public Schools and will be responsible for project scheduling, phasing, financial management and assistance with OSCGR reimbursement requests and ultimately project closeout.

We are providing support to Mark from our commissioning and retro-commissioning team members who work under Blair on a day-to-day basis. Ravi Chavan will assist during the procurement phase by reviewing submittals and shop drawings and offering energy saving insight to the design. We understand that BL Companies are the design but believe having a second set of eyes to assist will be helpful to your project. During the installation phase of construction, Sierra Keon will be assigned to assist Mark Schweitzer in the field. As a team member of our commissioning services as well as being a mechanical engineer, Sierra's technical background will greatly assist with quality assurance in the field. She'll be able to identify any installation concerns and bring them to the attention of the design team and commissioning agent. Please note, Mark will still serve as the primary representative overseeing phasing, scheduling, and leading the OAC meetings.





## Sub-Consultants

Colliers will not require the use of sub-consultants. As an owner's representative firm that possesses in-house commissioning and retro-commissioning services as well, we will be utilizing our technical staff to augment our project management staff on this unique project. You will be hard pressed to find another PMO firm that possesses this in-house capability. We believe having this capability will provide Fairfield the highest level of service for a project of this scope.

# Capacity & Skills

Colliers' team of more than 120 technical professionals includes the following specialties:

11	MA Certified Public Purchasing Officer	12	Registered Architects
22	LEED Accredited Professionals	12	Professional Engineers
13	Field Supervision Experience	5	Cost Estimating Experience
15	Schedule Analysis Experience	27	Value Engineering Experience
60	Constructability Review Experience*	27	Quality Control and Safety Experience

\* Our diverse team of architects, engineers, and constructors review construction documents independently and provide their unique perspective.

In addition, all of our Project Managers, Assistant Project Managers, and Construction Representatives have received a minimum of OSHA 10-hour certification for safety and field supervision training.

Colliers has an established reputation for providing program management oversight services within the education marketplace and is ***well-versed in guiding school leaders and building committees through the complex process of school construction projects.*** As a result of our project experience and team diversity, Colliers has developed a unique perspective and understanding of the very specialized project management needs of Connecticut public schools – allowing us to view the larger issues at hand and to develop strategies and tactics to successfully lead the Town of Fairfield through the process.

Our project management team is highly credentialed, and these credentials speak to their ability to deliver critical management services such as value engineering, constructability reviews, life cycle cost analysis, construction quality control, and building commissioning.

## Ability to Complete the Project

Colliers has assembled a multi-disciplined team with the necessary skill sets to support our clients through all aspects of capital projects. ***Our proposed team is well prepared and available to begin work immediately as may be required.*** In addition, any member of Colliers' 120+ technical professionals can be made available to assist the proposed project team, as required.

One of the unique attributes of the Colliers team is our range of in-house capabilities. We are able to bring expertise in all aspects of the project with our team of licensed architects, engineers (mechanical, electrical, plumbing, structural, civil) and construction professionals (former superintendents, project managers, and scheduling experts). In addition, we have a number of LEED accredited professionals and building code officials. Our financial analysts focus on ensuring every dollar expended is accounted for. There is virtually no aspect of a project where we can't turn to an in-house colleague for an answer or a solution to a problem.

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

[Colliers Project Leaders](#)



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Project Leaders

## Charles E. Warrington, Jr. PE

Director

charles.warrington@collierseng.com

### 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

29 years

### Years with Firm

10 years

[www.cplusa.com](http://www.cplusa.com)

### Area of Expertise

Mr. Warrington is a professional civil engineer with nearly 30 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

#### 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 elementary school.
- **Mill Hill Elementary School:** \$22 Million renovation and addition to the 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 elementary school.

#### Westport Public Schools – Capital Projects – Westport, CT

Project management services for the Westport Public School District's Master Facility Plan for a portfolio of District buildings.

#### Town of Darien – Ox Ridge Elementary School – Darien, CT

Project management services for the new elementary school, \$63 Million, 110,000 gsf facility. As a consultant, assisted the Ox Ridge Elementary School Building Committee with contract negotiations, project schedules and budgets and the Office of School Construction & Review grant application process.

#### 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 providing project management services for the life of the project.

#### Town of Madison – Polson Middle School – Madison, CT

Renovations to the 150,000 gsf school include improvements of the HVAC system, electrical system, auditorium, addition of a generator & renewable energy systems.



Project Leaders

# Mark A. Schweitzer PE

Project Manager

mark.schweitzer@collierseng.com

## 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

33 years

## Years with Firm

5 years

[www.cplusa.com](http://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/addition to the school.
- **Riverfield Elementary School:** multi-phased, \$17 Million renovation and new addition project that encompassed a total of 45,140 gsf on 20-acres, and five on-site modular classrooms 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 school.

### Town of Fairfield – H. Smith Richardson Golf Course, Clubhouse Facility – Fairfield, CT

Project management services for the demolition and replacement of the existing clubhouse facility, golf cart barn and other site and grounds, parking lot, and landscape improvements.

### 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 providing project management services for the life of 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.



Project Leaders

# Blair Richardson PE, CEM, LEED AP

Director

blair.richardson@collierseng.com

## 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)

Certified Geo-Exchange Designer (CGD)

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

1 year

[www.cplusa.com](http://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

### 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.

### 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.

### Stonington High School – Energy Study & HVAC Improvements –Stonington, CT

Senior Mechanical Engineer for a building energy study. The project included building envelope inspections, thermal imaging, HVAC system inspections/assessments, and a graphic report/recommendation. At the request of the owner, performed a technical inspection of the roof-mounted air conditioning equipment to generate detailed refurbishment specifications.

### Waterbury Public Schools – Boiler & Chiller Upgrades – Waterbury, CT

Senior Mechanical Engineer for new boilers and chillers at eight Waterbury schools. The project started with an overall energy analysis of the existing building to determine the heating/cooling requirements and to identify any additional energy savings opportunities. The design and construction documents were generated through a design-build collaboration with mechanical contractors. All construction documents were validated by the mechanical contractors in the field and underwent a rigorous peer review process.



# Ravi Chavan

CEM, CDSM

Project Manager

ravi.chavan@collierseng.com



Project Leaders

## Education and Qualifications

Master of Science  
Industrial Engineering –  
West Virginia University

Bachelor of Engineering  
Production Engineering –  
University of Pune, India

## Accreditations and Memberships

Certified Energy  
Manager (CEM)

Certified Demand-Side  
Management  
Professional (CDSM)

Member of Association of  
Energy Engineers

## Years of Experience

20 years

## Years with Firm

10 years

[www.cplusa.com](http://www.cplusa.com)

## Area of Expertise

Mr. Chavan has deep, cross-functional experience in the field of energy, water and resource conservation, energy auditing, renewable energy studies, metering and data logging, measurement and verification, development and review of energy savings analyses, economic analysis, commissioning and functional testing, LEED-EB documentation, utility rebate programs, developing demand curtailment plans and related engineering services relevant to the energy efficiency and the performance contracting industry.

## Relevant Experience

### **Norwalk Public Schools – Norwalk & Brien McMahon High Schools – Norwalk, CT**

Retro-commissioning survey to identify energy conservation measures, preliminary implementation costs, and energy savings for the Norwalk High School and Brien McMahon High School totally approximately 900,170 gsf.

### **Trumbull Public Schools – Multiple Projects – Trumbull, CT**

Retro-commissioning services on behalf of the Trumbull Public Schools as part of its participation in the Connecticut Energy Efficiency Fund Retro-Commissioning program. Projects included the 35,500 gsf Trumbull Agriscience & Biotechnology Center, the 24,044 gsf Trumbull Early Childhood Education Center, and the 323,000 gsf Trumbull High School.

### **Darien Public Schools – High School & Tokeneke Elementary School – Darien, CT**

Retro-commissioning investigation report for the Darien Public School's High School and Tokeneke Elementary School. The purpose of the report was to identify final implementation costs, energy savings and persistence strategies for the investigated energy conservation measures (ECMs) for cost effective retro-commissioning.

### **Danbury Public Schools – Multiple Projects – Danbury, CT**

Retro-commissioning survey to identify energy conservation measures, preliminary implementation costs, and energy savings for five schools encompassing 874,268 gsf.

### **Glastonbury Public Schools – Energy Audit & Energy Consulting – Glastonbury, CT**

ASHRAE Level I Energy Audit of the building systems and operations for the Glastonbury Public Schools encompassing approximately 1,063,646 gsf.

### **Avon Public Schools – Avon Middle School & Roaring Brook Elementary School – Avon, CT**

Retro-commissioning building survey of the 109,529 gsf Middle School built in 1960 and the 70,000 gsf Roaring Brook Elementary School built in 1962.



# Sierra Keon

Assistant Project Manager

sierra.keon@collierseng.com



Project Leaders

## Education and Qualifications

Bachelor of Science  
Mechanical Engineering,  
Minor in Mathematics –  
University of Vermont

## Years of Experience

2 years

## Years with Firm

Less than 1 year

[www.cplusa.com](http://www.cplusa.com)

## Area of Expertise

Ms. Keon is an experienced professional with a diverse background in mechanical engineering. On behalf of Colliers, Sierra works as an Assistant Project Manager providing commissioning & energy services to both public and private institutions throughout the Northeast. Prior to joining Colliers, Sierra served as a Mechanical Engineer (Architecture/MEP & Energy) where she was responsible for the investigation, design and drafting of HVAC systems for a variety of building types including residential, educational, commercial, and municipal. Sierra also modeled building energy usage loads with TRACE700 & TRACE 3D Plus software and designed procedure & abandonment drawings for state gas system enhancement programs.

## Relevant Experience

### **Stamford Board of Education – District Wide Alarming Project – Stamford, Connecticut**

Mechanical Engineer for the design of building management system (BMS) and security system upgrades at 18 schools and Board of Education facilities. Project responsibilities included site survey of existing conditions MEP equipment and quantities to be picked up in the alarming systems. Design responsibilities included the language to capture all alarming points defined by the clients and product selection for sensors needed to pick these up and integrate with the BMS and security systems. Drafting responsibilities include MEP bid documents created in AutoCAD for each school in the project scope.

### **Sarah Noble Intermediate School – Underground Storage Tank Replacement – New Milford, Connecticut**

Mechanical Engineer for the replacement of an underground storage tank and all equipment associated with the tank. Project responsibilities included site evaluation of existing equipment, assisting in the design of a new system, and demolition design and documentation of the current system.

### **Sarah Noble Intermediate School – Underground Storage Tank Replacement – New Milford, Connecticut**

Mechanical Engineer for the replacement of an underground storage tank and all equipment associated with the tank. Project responsibilities included site evaluation of existing equipment, assisting in the design of a new system, and demolition design and documentation of the current system. Design services were completed in 2020.

### **Rhode Island Department of Transportation (RIDOT) – Vehicle Maintenance Building – Warwick, Rhode Island**

Mechanical Engineer for the design of a vehicle maintenance building for RIDOT. Project responsibilities included mechanical load calculations of airflow, cooling and heating requirements for the vehicle maintenance area and office spaces and building code compliance checks for the state of Rhode Island. Design responsibilities included ductwork design, and new construction documents. Design services were completed in 2022.

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Colliers has carefully reviewed the Town of Fairfield's Request for Proposal. We understand that the Town seeks firms to provide Program Management Oversight services for Phase I upgrades to air conditioning systems at Osborn Hill Elementary School, North Stratfield Elementary School, and Fairfield Woods Middle School.

In upcoming phases, the project will extend to Tomlinson Middle School, Fairfield Ludlowe High School, Walter Fitzgerald Campus, Fairfield Warde High School, Timothy Dwight Elementary School, and Jennings Elementary School. These future projects may involve various enhancements, such as additions or alterations, to accommodate new or modified mechanical spaces like Electrical Rooms and Water Service Rooms. Additionally, there may be a need to incorporate security vestibule entrances as part of the project objectives.

Colliers recognizes that upgrading school HVAC systems is crucial for creating a healthy and conducive learning environment. Improved indoor air quality, temperature regulation, and energy efficiency contribute to student well-being, academic success, and cost savings. Investing in these upgrades aligns with sustainability goals, ensures system reliability, and demonstrates a commitment to student welfare and community development.

We also realize that the Town's main goals are to ensure that the HVAC upgrades are constructed on schedule, well within the project budget, with respect to the school students and staff.

In addition to the technical aspects of the project, there will also be reimbursement requirements with the state of Connecticut. Our Project Director, Chuck Warrington, leads Collier's Connecticut project management team and is an expert in the OSCGR process. Having led the Riverfield, Holland Hill, and Mill Hill Elementary School projects for Fairfield, Chuck is very familiar with Fairfield's expectations. In addition, Mark Schweitzer was involved on Holland Hill and Mill Hill as well.

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# 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 educational 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 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 Town of Fairfield 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

### Establish Building Program

Upon identification of a specific project, Colliers will work with the Town of Fairfield to establish a building program which:

- outlines the space needs and specifications to be addressed in the project
- defines the criteria that the design team must satisfy in its physical building solution

Without a clear understanding of the building program up-front, designers spend valuable time having to repeatedly revise design plans to meet the needs of the Owner.

***Having clear criteria up front eliminates a trial-and-error design process that is labor intensive, time consuming, and costly.***

### Identify Project Goals (Cost, Quality, Schedule)

Colliers will approach the HVAC Upgrades Project with a simple mission – ***to deliver superior project results, on time, within the available budget.*** Once engaged as the project manager, Colliers will:

- schedule an immediate kick-off meeting with the Town of Fairfield
- establish the cost, quality, and schedule goals for the project

It is critical at the start to identify clear expectations for all parties as these goals significantly determine the success and cost of the project. Throughout the proposal, you will read how we continually manage the ***Cost, Quality, and Schedule*** of the HVAC Upgrades Project.

### Develop Project Budget

A critical responsibility of the Town of Fairfield is to ***clearly delineate a total project budget anticipating all related costs.*** We often see a disconnect between what a client thinks they are getting versus what they can afford. Likewise, budget parameters are often established which do not realistically reflect the program ambitions or consider the inflationary impact of time. To avoid this, Colliers will develop a total project budget broken down into the following categories:

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

With the project budget established, our job is two-fold:

1. Ensure the design team designs to the budget
2. Manage all project costs 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.

### 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
- 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

***Please find attached an example of a Financial Summary Report from Mill Hill Elementary School addition and alterations***

### Develop Project Schedule

Concurrent to developing a total project budget, Colliers will also establish a **project schedule with both macro (big picture overview) and 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

Once hired, Colliers will facilitate the process of engaging high-quality consultants as needed on the project including:

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

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 Town of Fairfield 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 Town of Fairfield 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 Town of Fairfield to review and discuss the proposal submissions
- Coordinate/facilitate interviews
- Develop, working with the Town of Fairfield attorney, the Owner/Consultant Agreement
- Negotiate the terms and conditions of the contract with the selected consultant

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



## 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 Town of Fairfield 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 Town of Fairfield 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 proactively figure out the best way for the Town of Fairfield to stage the work.*** We will identify what will impact the day-to-day life at Town of Fairfield and when and work with you to share this information with the community.

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 Town of Fairfield 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 Town of Fairfield, **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
- Town of Fairfield 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 Town of Fairfield, 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 Town of Fairfield to allow the HVAC Upgrade 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.



## Construction Phase

### Coordinate Construction Activities

If not properly managed, construction activities can significantly disrupt school operations. 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.

### 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 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, and school visitors 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.***





## Organize Trade Contractor Meetings

Separate from OAC meetings, we require alternate meetings be held prior to the start of specific major construction activities. Typical scopes requiring pre-construction/pre-installation meetings are:

- Soil conditions
- Concrete
- Steel
- Specialty equipment layout/coordination
- MEP systems including coordination
- Commissioning
- Testing/Balancing
- Envelope systems and mock-ups (Roofing, Windows, Cladding, ABB systems)

At these meetings, the team will review:

- specific trade qualifications/certifications
- status of the required shop drawing submissions
- specific open issues requiring attention prior to commencement of the work
- coordination of testing required by the Contractor and Owner

Colliers will set the agenda, document minutes, and issue action item reports to issues requiring timely follow up. ***This process guarantees there is no confusion on what is required of the construction documents.***

## 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 Town of Fairfield 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 Town of Fairfield 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.



## Phase 3

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.



## 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 Town of Fairfield:

- 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 Town of Fairfield 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.



## 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 Town of Fairfield 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.

## 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.





## Work Samples

The information on the following pages are examples as requested of the budget tracking spreadsheet/cost control system paperwork that Colliers Project Leaders uses to track project budget to actuals.

# OWNERS DESIGN REVIEW

## South Windsor Public Schools Pleasant Valley E.S.

## Construction Documents

### CPL Review Comments

Review Date: 8/23/2021  
Reviewer Name: Kate Turner

DISCIPLINE CODES	DWGS / SPECS	REVIEW COMMENTS	PHASE / DATE	SOURCE
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
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
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
L 1.0	MA	Provide callouts for benches.	6-May-21	CPL-CEW
L 2.0	MA	Provide detail number for timber guiderail	6-May-21	CPL-CEW
L 3.0	MA	Remove sidewalk at north of staff parking lot ILO sidewalk along E/W connector	30-Aug-21	CPL-KT
L 4.0	MA	Confirm if storage shed is to be bid as part of base contract or alternate	30-Aug-21	CPL-KT
L 5.0	MA	Fenced in generator	19-Apr	SWPS-DC
L 6.0	MA	Indicate materials at entrances	30-Aug-21	CPL-KT
L 7.0	MA	remove timber guardrail island between parking and parent drop off	3-Sep-21	SWPS-DC
L 8.0	MA	add fence to right of paved playground so balls do not go into loading dock	3-Sep-21	SWPS-DC
L 9.0	MA	swap location of Basketball court outside	3-Sep-21	SWPS-DC
L 10.0	MA	fence enclosure for generator	3-Sep-21	SWPS-DC
L 11.0	MA	# of planting increased since DD there are too many safety and maintenance concerns reduce drastically	3-Sep-21	SWPS-DC
L 12.0	LA	Correct dimensions on the reinforced paved parking in the rear. Should be 120-ft wide.	30-Aug-21	CPL-CEW
L 13.0	LA	Indicate detail for timber guardrail	30-Aug-21	CPL-KT
L 14.0	SPM	Clarify crosswalks along Ellington Rd	30-Aug-21	CPL-KT
L 15.0	SD-2	Detail 01 Refuse Enclosure - identify location on plan. No fencing indicated on LA	30-Aug-21	CPL-KT
L 16.0	ENL-2	Courtyard needs re-design to simplify materials. Not maintenance friendly.	30-Aug-21	CPL-CEW
L 17.0	ENL-2	reduce brick pavers in courtyard	3-Sep-21	SWPS-DC

### Designer Response Comments

Date of Designer Response: 9/30/2021  
Date of Documents: 7/30/2021

DESIGN TEAM RESPONSE	DATE	STATUS
Note is already on the plans to deflect the fire line below the sanitary and storm line crossings		
Natural gas line is shown on C-UT1. SLR to add fence for equipment.		
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.		
Callouts will be added to the drawings		
Detail number is on the detail sheet		
Sidewalk has been removed		
Storage shed is currently listed as add Alternate #1		
Coordinating with CES		
Only material at all entrances is scored concrete sidewalk		
This has been completed		
This has been completed		
This has been completed		
This has been completed		
This has been completed - total number of trees is now 181		
This has been completed		
Steel-backed Timber Guiderail Detail is on Detail Sheet		
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		
Vinyl Clad fence detail has been added. As requested, there will be no swing gates at the paved side of the pad		
Courtyard has been redesigned as directed		
Done		



# OWNERS DESIGN REVIEW

## South Windsor Public Schools Pleasant Valley E.S.

## Construction Documents

CPL Review Comments					Designer Response Comments		
Review Date:		8/23/2021			Date of Designer Response:		9/30/2021
Reviewer Name:		Kate Turner			Date of Documents:		7/30/2021
DISCIPLINE CODES	DWGS / SPECS	REVIEW COMMENTS	PHASE / DATE	SOURCE	DESIGN TEAM RESPONSE	DATE	STATUS
L 18.0	ENL-2	reduce or 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 landscape beds will only include evergreen ground cover in the beds. After a year or two there should be no additional maintenance required for these beds		
L 19.0	ENL-2	confirm separate shut off/ isolation 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 activities 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 downspout from the vestibule roof ties into 6" leader.	30-Aug-21	CPL-CEW	Not sure which downspout you are referring 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

## South Windsor Public Schools Pleasant Valley E.S.

## Construction Documents

### CPL Review Comments

Review Date: 8/23/2021  
Reviewer Name: Kate Turner

DISCIPLINE CODES	DWGS / SPECS	REVIEW COMMENTS	PHASE / DATE	SOURCE
A 11.0	A1-1-1B	Confirm if there's supposed to be a secure records room for files.	30-Aug-21	CPL-CEW
A 12.0	A1-1-1B	Provide elevation 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 wall according to the technology drawings.	30-Aug-21	CPL-CEW
A 13.0	A1-1-1B	Room 101F: Confirm if whiteboard/tackboard should be noted on east wall.	30-Aug-21	CPL-CEW
A 14.0	A1-1-1B	Provide exterior elevation of wall on CL Y10 (along media center).	30-Aug-21	CPL-CEW
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
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
A 17.0	A1-1-1B	Room 158: Confirm if enough room between door frame and FSTV for light switch.	30-Aug-21	CPL-CEW
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
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
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
A 21.0	A1-1-1C	AV Closet 136B is not proximal to location of AV in Cafeteria.	30-Aug-21	CPL-KT
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
A 23.0	A1-1-1D	Relocate teacher desk and associated power to west wall of Music Room 141	30-Apr-21	PV-Faculty
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
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
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

### Designer Response Comments

Date of Designer Response: 9/30/2021  
Date of Documents: 7/30/2021

DESIGN TEAM RESPONSE	DATE	STATUS
Refer to Educational Specifications		
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.		
See note above		
Exterior elevation along CL Y10 (along media center) is 3/A2-1-1		
Refer to item 8.0 above		
It's not a column but a brace frame. Refer to drawing S2-1-2, brace frame VB-B4.		
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		
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.		
These door are on hold openers which the chase is there for them to mount to.		
There is currently a flat screen TV along the west wall		
There weren't a lot of options as to where to place this space. It is located out of the Cafeteria.		
Note has been modified to refer to site utilities plan		
There is no space on the west wall to relocate the teacher's desk and associated power.		
Dimensioning has been updated		
There is a steel column in the northern most enclosure. All 3, including the two false columns sit on footings per the structural drawings.		
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

## 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
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		

# OWNERS DESIGN REVIEW

## South Windsor Public Schools Pleasant Valley E.S.

## Construction Documents

CPL Review Comments					Designer Response Comments		
Review Date:		8/23/2021			Date of Designer Response:		9/30/2021
Reviewer Name:		Kate Turner			Date of Documents:		7/30/2021
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 height 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 enlarged 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

## South Windsor Public Schools Pleasant Valley E.S.

## Construction Documents

### CPL Review Comments

Review Date: 8/23/2021  
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DISCIPLINE CODES	DWGS / SPECS	REVIEW COMMENTS	PHASE / DATE	SOURCE
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
A 54.0	A6-1-1	Clean up on door schedule required	30-Aug-21	CPL-CEW
A 55.0	A6-1-1	Advise if card readers should be noted in hardware schedule	30-Aug-21	CPL-KT
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
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
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
A 59.0	A8-1-1C	Reference detail for ceiling type in Cafeteria Lobby L1-3	30-Aug-21	CPL-KT
A 60.0	A9-0-1	Note grommets to be located in field	30-Aug-21	CPL-KT
A 61.0	A9-2-2	Indicate mounting detail for typical classroom to be applied on tackable surface	30-Aug-21	CPL-KT
A 62.0	AF1-1-1C	Consider Carpet in office 150A	30-Aug-21	CPL-KT
A 63.0	EQ-3.6	Consider prefabricated music storage units	30-Aug-21	CPL-KT
A 64.0	FS-01	Swap hinge side and open into hall for dry storage. Will increase storage ability	3-Sep-21	SWPS-DC
A 65.0	FS-02	Confirm ventilation requirements for warming kitchen with no open heat source	30-Aug-21	CPL-KT
A 66.0	FS-02	Verify convenience outlets are sufficient at prep surfaces	30-Aug-21	CPL-KT
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
S 1.0	S1-1-1C	Confirm recessed area for coolers in slab as noted in FS-04	30-Aug-21	CPL-KT

### Designer Response Comments

Date of Designer Response: 9/30/2021  
Date of Documents: 7/30/2021

DESIGN TEAM RESPONSE	DATE	STATUS
Comments noted, will add roof membrane notation, pitching insulation and drainage.		
Door schedule has been updated		
The card readers are indicated in the hardware sets which are specified under 08 70 00 Door Hardware.		
Comments noted, will comply.		
Manufacturers detailing requires base extrusion to be set in sealant only, our detailing pins the transition membrane below that continuous base extrusion thus providing a continuous closure of the AVB system.		
See response to electrical item 1.0		
Ceiling tag as been added		
General note is being added to A9-0-1		
There is no tackable surface outside of the typical classroom		
Carpet will be added to this space		
This is identified on the VE Log - need direction from Owner		
Door placement has been modified		
Design of the kitchen was completed in an earlier phase		
Design of the kitchen was completed in an earlier phase		
Design of the kitchen was completed in an earlier phase		
Slab depression is being added at the area of the freezer and cooler.		

# OWNERS DESIGN REVIEW

## South Windsor Public Schools Pleasant Valley E.S.

## Construction Documents

CPL Review Comments					Designer Response Comments		
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Reviewer Name:		Kate Turner			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 overflow drain outlets in the courtyard area to ensure they do not interfere 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 first 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 not 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 than 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.	

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Town of Madison  
New PreK-5 Elementary School

Schematic Design (\$000's)									
12/01/2022		A1	B1	C1	A	B	C	D	
	A/E Control Budget	Estimate for Review			Revised Post Recon Meeting			Reconciled Estimate	
		PACS	Gilbane	Difference (A1 - B1)	PACS	Gilbane	Difference (A - B)		
		5/24/2022	11/15/2022	11/15/2022		11/28/2022	11/22/2022		Date
Renovated Area (GSF)	0	0	0	0	0	0	0	0.0	
New Construction Area (GSF)	87,507	93,801	93,414	387	93,801	93,414	387	93607.5	
Construction Total Area (GSF)	87,507	93,801	93,414	387	93,801	93,414	387	93,608	
I. Building Construction (to 5' beyond perimeter)									
2 Existing Conditions (Ryerson Demo)	\$ 1,225.0	\$ 1,004.9	\$ 1,125.3	(120.3)	\$ -	\$ -	0.0	\$ -	
3 Concrete	30,095.3	\$ 1,669.0	\$ 2,062.9	(394.0)	\$ 1,706.0	\$ 1,996.8	(290.9)	\$ 1,851.40	
a. Footings / Foundations / Walls		806.3	947.6	-141.3	806.3	988.2	-181.9	897.3	
b. Precast Concrete		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
c. Slab on Grade		567.2	765.6	-198.4	592.4	692.0	-99.6	642.2	
d. Elevated Floor / Roof Slabs		295.5	349.8	-54.3	307.2	316.6	-9.4	311.9	
e. Other		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
4 Masonry		\$ 1,349.1	\$ 1,448.7	(99.6)	\$ 1,325.8	\$ 1,272.0	53.8	\$ 1,298.90	
5 Metals		\$ 4,879.9	\$ 3,096.1	1,783.8	\$ 3,694.3	\$ 3,430.5	263.7	\$ 3,562.40	
a. Structural		3922.8	2832.1	1090.7	3033.9	3110.8	-76.9	3072.3	
b. Misc Metals (incl stairs)		623.1	264.0	359.2	326.5	319.8	6.7	323.1	
c. Cold Formed		333.9	0.0	333.9	333.9	0.0	333.9	167.0	
6 Woods & Plastics		\$ 751.0	\$ 836.5	(85.5)	\$ 801.6	\$ 757.0	44.6	\$ 779.30	
a. Rough Carpentry		142.0	136.0	6.0	205.1	136.0	69.1	170.6	
b. Finish Carpentry - Millwork		608.9	79.5	529.4	596.4	0.0	596.4	298.2	
c. Finish Carpentry - Paneling / Trim		0.0	30.4	-30.4	0.0	30.4	-30.4	15.2	
d. Casework (Cabinets & Hardware)		0.0	590.6	-590.6	0.0	590.6	-590.6	295.3	
e. Other		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
7 Thermal & Moisture Protection		\$ 3,700.6	\$ 3,466.0	234.6	\$ 3,048.9	\$ 2,822.6	226.3	\$ 2,935.80	
a. Waterproofing & Damp proofing		4.3	39.7	-35.5	19.5	39.7	-20.2	29.6	
b. Insulation & AVB		456.9	69.7	387.2	446.1	342.5	103.6	394.3	
c. Roofing		1589.9	2918.3	-1328.4	2145.7	2269.8	-124.0	2207.8	
d. Flashing and Roof Accessories		0.0	35.3	-35.3	0.0	35.3	-35.3	17.6	
e. Wall Panels		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
f. Exterior Siding & Trim		871.1	0.0	871.1	247.1	0.0	247.1	123.5	
g. Canopy Soffits - Metal Wood Look		305.4	0.0	305.4	60.5	0.0	60.5	30.2	
h. Fireproofing		408.0	267.6	140.5	0.0	0.0	0.0	0.0	
i. Firestopping		0.0	75.0	-75.0	65.0	75.0	-10.0	70.0	
j. Joint Protection		65.0	60.4	4.6	65.0	60.4	4.6	62.7	
8 Doors & Windows		\$ 3,035.7	\$ 3,100.8	(65.0)	\$ 3,074.3	\$ 3,197.8	(123.5)	\$ 3,136.10	
a. Door and Frames (Wood and Metal)		228.3	623.7	-395.4	228.3	623.7	-395.4	426.0	
b. Specialty Doors and Frames		46.0	61.2	-15.2	71.1	61.2	9.9	66.1	
c. Entrances (Alum. / Glass / Revolving)		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
d. Storefront Systems		1018.8	429.6	589.2	1032.3	429.6	602.7	730.9	
e. Curtainwall Systems		1218.0	1654.0	-436.0	1218.0	1751.1	-533.1	1484.5	
f. Translucent Wall Panels		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
g. Windows		0.0	159.7	-159.7	0.0	159.7	-159.7	79.9	
h. Skylights		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
i. Hardware		287.6	0.0	287.6	287.6	0.0	287.6	143.8	
- Door and Window Hardware				0.0	0.0	0.0	0.0	0.0	
- Access Control Hardware		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
j. Glazing		237.1	172.6	64.5	237.1	172.6	64.5	204.8	
k. Louvers and Vents		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
l. Other		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
9 Finishes		\$ 4,180.5	\$ 3,381.1	799.4	\$ 3,370.2	\$ 3,559.1	(188.8)	\$ 3,464.70	
a. Gypsum Wall Board		1508.5	1635.5	-127.0	1508.5	1838.0	-329.5	1673.2	
b. Wall / Floor Tile		232.1	224.0	8.1	232.1	224.0	8.1	228.0	
c. Ceilings		0.0	0.0	0.0	0.0		0.0	0.0	
- Gypsum Board / Plaster / Soffit allowance		323.8	61.3	262.6	115.8	71.4	44.4	93.6	
- Acoustic Tile (ACT) + Wood		587.6	679.9	-92.3	600.3	619.9	-19.6	610.1	
d. Flooring and Base		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
- Wood Flooring		13.1	12.9	0.2	13.1	12.9	0.2	13.0	
- Resilient Flooring		810.3	481.2	329.1	579.7	481.2	98.5	530.4	
- Terrazzo		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
- Fluid-Applied Flooring		20.1	0.0	20.1	10.7	0.0	10.7	5.4	
- Carpet		59.3	85.9	-26.6	71.8	85.9	-14.1	78.8	
- Other Flooring Material		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
e. Acoustic Treatment		194.2	67.9	126.3	67.8	67.9	-0.1	67.9	
f. Painting		431.5	132.5	299.0	170.5	157.9	12.6	164.2	
- Interior		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
- Exterior		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
h. Other		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
10 Specialties		\$ 864.9	\$ 360.8	504.2	\$ 580.4	\$ 505.5	74.9	\$ 543.00	
a. Marker & Tack boards		170.6	98.3	72.3	170.6	131.3	39.3	151.0	
b. Toilet Partitions		29.4	21.0	8.4	29.4	21.0	8.4	25.2	
c. Toilet Accessories		138.2	76.3	61.9	96.2	76.3	19.9	86.3	
d. Fixed or Manual Partitions		236.7	40.6	196.1	83.5	76.4	7.1	79.9	
e. Lockers		55.9	67.1	-11.3	55.9	67.1	-11.3	61.5	
f. Fire / Emergency Cabinets & Equipment		9.0	10.7	-1.6	9.0	10.7	-1.6	9.9	
g. Wall & Door Protection		130.0	0.0	130.0	60.7	48.5	12.2	54.6	
h. Signage		95.0	46.8	48.2	75.0	74.2	0.8	74.6	
11 Equipment (Fixed to Building Only)		\$ 819.4	\$ 513.6	305.9	\$ 819.4	\$ 758.4	61.0	\$ 788.90	
a. Vehicle / Pedestrian Control Equipment		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
b. Food Service Equipment		521.0	339.8	181.2	521.0	515.7	5.3	518.4	
c. Appliances (Kitchen / Laundry, etc.).		6.0	3.1	2.9	6.0	3.1	2.9	4.5	
d. A/V Equipment		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
e. Loading Dock		22.5	14.6	7.9	22.5	14.6	7.9	18.5	
f. Medical & Exam		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
g. Theater / Stage		50.0	47.3	2.7	50.0	95.9	-45.9	72.9	
h. Athletic		216.2	105.3	110.9	216.2	125.7	90.5	171.0	
f. Kiln		3.8	3.4	0.4	3.8	3.4	0.4	3.6	
12 Furnishings (Fixed to Building Only)		\$ 53.8	\$ 144.3	(90.5)	\$ 121.0	\$ 123.9	(3.0)	\$ 122.40	
a. Window Treatments		50.0	99.7	-49.7	99.7	99.7	0.0	99.7	
b. Manufactured Casework (Music)		0.0	24.3	-24.3	17.5	24.3	-6.8	20.9	

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	A/E Control Budget	Estimate for Review			Revised Post Recon Meeting			Reconciled Estimate
	5/24/2022	PACS	Gilbane	Difference (A1 - B1)	PACS	Gilbane	Difference (A - B)	Date
		11/15/2022	11/15/2022		11/28/2022	11/22/2022		
- Metal Casework		0.0	0.0	0.0	0.0	0.0	0.0	0.0
- Wood Veneer Casework		0.0	0.0	0.0	0.0	0.0	0.0	0.0
- Plastic Laminate Casework		0.0	0.0	0.0	0.0	0.0	0.0	0.0
- Specialty Casework		0.0	0.0	0.0	0.0	0.0	0.0	0.0
c. Countertops		0.0	0.0	0.0	0.0	0.0	0.0	0.0
- Plastic Laminate		0.0	0.0	0.0	0.0	0.0	0.0	0.0
- Solid Surface		0.0	0.0	0.0	0.0	0.0	0.0	0.0
d. Fixed Audience Seating		0.0	0.0	0.0	0.0	0.0	0.0	0.0
e. Bleachers		0.0	20.4	-20.4	0.0	0.0	0.0	0.0
f. Entry Mats		3.8	0.0	3.8	3.8	0.0	3.8	1.9
13 Special Construction		\$ -	\$ -	0.0	\$ -	\$ -	0.0	\$ -
a. Pools		0.0	0.0	0.0	0.0	0.0	0.0	0.0
b. Special Athletic Courts		0.0	0.0	0.0	0.0	0.0	0.0	0.0
c. Pre-engineered Structures		0.0	0.0	0.0	0.0	0.0	0.0	0.0
d. Other		0.0	0.0	0.0	0.0	0.0	0.0	0.0
14 Conveying System		\$ 110.0	\$ 93.4	16.6	\$ 110.0	\$ 93.4	16.6	\$ 101.70
- Elevator		110.0	93.4	16.6	110.0	0.0	110.0	55.0
- Lift		0.0	0.0	0.0	0.0	0.0	0.0	0.0
21 Fire Protection		\$ 621.80	\$ 528.24	93.6	\$ 563.89	\$ 552.51	11.4	\$ 558.20
22 Plumbing		\$ 2,309.4	\$ 2,003.2	306.2	\$ 2,003.2	\$ 2,003.2	(0.0)	\$ 2,003.20
a. Domestic Water Distribution & Equip		882.7	863.6	19.0	765.6	863.6	-98.0	814.6
b. Sanitary Piping & Equip.		555.3	317.4	237.9	481.7	317.4	164.2	399.6
c. Storm Drainage & Equip.		371.5	181.4	190.1	322.2	181.4	140.8	251.8
d. Fixtures		439.0	414.0	25.0	380.8	414.0	-33.2	397.4
e. Compressed Air Distribution & Equipment		0.0	0.0	0.0	0.0	0.0	0.0	0.0
f. Gas Distribution & Equipment		0.0	0.0	0.0	0.0	0.0	0.0	0.0
g. Other		61.0	226.7	-165.8	52.9	226.7	-173.9	139.8
23 HVAC		\$ 6,022.6	\$ 6,088.0	(65.4)	\$ 6,022.6	\$ 6,088.0	(65.4)	\$ 6,055.30
a. Ductwork / Air Distribution & Insulation		3189.2	1995.3	1193.9	3189.2	1995.3	1193.9	2592.3
b. Piping Distribution and Pumps		0.0	1532.0	-1532.0	0.0	1532.0	-1532.0	766.0
c. Heat Generating Equipment		0.0	0.0	0.0	0.0	0.0	0.0	0.0
d. Cooling Equipment		0.0	0.0	0.0	0.0	0.0	0.0	0.0
e. HVAC Equipment		1629.3	1274.3	355.0	1629.3	1274.3	355.0	1451.8
f. Gas Distribution & Equipment		0.0	0.0	0.0	0.0	0.0	0.0	0.0
g. Controls and Instrumentation		745.7	589.5	156.2	745.7	589.5	156.2	667.6
h. Radiant Flooring		68.5	152.7	-84.3	68.5	152.7	-84.3	110.6
i. Other (Common work, other, TAB, Cx)		389.9	544.2	-154.3	389.9	544.2	-154.3	467.0
25 Automated Control Systems		see div 23	see div 23	0.0	see div 23	see div 23	0.0	\$ -
26 Electrical		\$ 5,192.9	\$ 3,423.1	1,769.8	\$ 3,425.1	\$ 3,423.1	2.0	\$ 3,424.10
a. Power Distribution and Devices		1291.1	1346.9	-55.9	1343.1	1346.9	-3.9	1345.0
b. Power Generating Equipment		350.0	234.4	115.6	370.0	234.4	135.6	302.2
c. Lighting		1092.8	1545.4	-452.6	1497.0	1545.4	-48.4	1521.2
d. Solar Panels (baseline was PPA)		2244.0	0.0	2244.0	0.0	0.0	0.0	0.0
		0.0	0.0	0.0	0.0	0.0	0.0	0.0
f. Power Transmission Equipment		0.0	0.0	0.0	0.0	0.0	0.0	0.0
g. Lightning Protection		0.0	24.3	-24.3	0.0	24.3	-24.3	12.1
h. Fire Alarm		0.0	0.0	0.0	0.0	0.0	0.0	0.0
i. Other (Common, early procurement, GRs)		215.0	272.1	-57.1	215.0	272.1	-57.1	243.5
27 Communications & Low Voltage		\$ 960.3	\$ 1,306.4	(346.1)	\$ 1,492.9	\$ 1,306.4	186.4	\$ 1,399.70
a. Cable Distribution and Devices (Data/Comm)		366.8	634.9	-268.1	646.8	634.9	11.9	640.8
b. A/V Cable Distribution		330.0	627.9	-297.9	582.5	627.9	-45.3	605.2
c. Clock / PA / Intercom Systems		263.6	43.7	219.9	263.6	43.7	219.9	153.6
d. Other		0.0	0.0	0.0	0.0	0.0	0.0	0.0
28 Security & CCTV		\$ 904.2	\$ 816.3	88.0	\$ 829.2	\$ 889.1	(59.8)	\$ 859.20
a. Cable Distribution		0.0	0.0	0.0	0.0	0.0	0.0	0.0
b. Video Surveillance (Cameras)		558.1	408.1	150.0	483.1	480.9	2.2	482.0
c. Access Control		0.0	0.0	0.0	0.0	0.0	0.0	0.0
d. Intrusion Detection		0.0	0.0	0.0	0.0	0.0	0.0	0.0
e. Fire Detection/Alarm		346.1	408.1	-62.0	346.1	408.1	-62.0	377.1
Total Building Construction	\$ 31,320.3	\$ 38,430.1	\$ 33,794.6	4,635.5	\$ 32,988.8	\$ 32,779.4	209.3	\$ 32,884.3

II. Related Construction								
A. Sitework (beyond 5' of building )								
31 Site Prep and Demo	7,523.8	\$ 825.10	\$ 754.17	70.9	\$ 960.30	\$ 814.11	146.2	\$ 887.20
32 Exterior Improvements		\$ 4,435.8	\$ 3,774.2	661.6	\$ 3,651.8	\$ 3,519.3	132.4	\$ 3,585.50
a. Bituminous Paving		788.0	453.8	334.2	788.0	520.5	267.5	654.2
b. Concrete Paving / Sidewalks, etc./ Pavers		1483.5	1755.9	-272.4	1177.6	1419.3	-241.7	1298.5
c. Athletic / Recreational Surfaces		0.0	0.0	0.0	0.0	0.0	0.0	0.0
d. Site Improvements		995.8	776.6	219.1	929.3	819.7	109.6	874.5
-e.g. Fences / Gates / Site Furnishings / Ret Walls/Monument Sign		0.0	0.0	0.0	0.0	0.0	0.0	0.0
f. Wetlands Restoration		0.0	0.0	0.0	0.0	0.0	0.0	0.0
g. Irrigation		0.0	0.0	0.0	0.0	0.0	0.0	0.0
h. Landscaping and Planting		1168.6	787.8	380.7	756.9	759.8	-2.9	758.4
i. Other		0.0	0.0	0.0	0.0	0.0	0.0	0.0
B. Sitework (beyond 5' of building)								
33 Utilities		\$ 3,607.0	\$ 2,165.4	1,441.6	\$ 3,005.2	\$ 2,632.3	372.9	\$ 2,818.70
a. Water - Fire Protection		0.0	62.1	-62.1	0.0	190.2	-190.2	95.1
b. Water - Domestic Water		264.2	70.2	194.0	264.2	158.6	105.6	211.4
c. Sanitary Sewer	750.0	415.7	249.1	166.5	393.1	390.9	2.2	392.0
d. Storm Sewer / Subdrainage		1367.0	1270.6	96.3	1367.0	1291.3	75.6	1329.2
e. Electric Distribution & Equipment		592.5	89.4	503.1	195.1	104.0	91.1	149.6
f. Generator		0.0	0.0	0.0	0.0	0.0	0.0	0.0
g. Site Lighting		0.0	60.8	-60.8	0.0	60.8	-60.8	30.4
h. Data & Communications		0.0	0.0	0.0	0.0	0.0	0.0	0.0
i. Security		0.0	0.0	0.0	0.0	0.0	0.0	0.0
j. Fuel Distribution (Gas, Steam, Oil)		9.0	0.0	9.0	0.0	0.0	0.0	0.0
k. Offsite Roadwork		346.3	139.8	206.5	346.3	213.1	133.2	279.7
k. Offsite Water	750.0	314.4	223.3	91.1	314.4	223.3	91.1	268.9

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	5/24/2022								
k. Offsite Gas		172.9	0.0	172.9	0.0	0.0	0.0	0.0	
I. Other (Phasing and Utilities Premiums)		125.0	0.0	125.0	125.0	0.0	125.0	62.5	
C. Building Demolition									
a. Selective Building Demolition		\$ -	\$ -	0.0	\$ -	\$ -	0.0	\$ -	
b. Entire Building Demolition / Raising		\$ -	\$ -	0.0	\$ -	\$ -	0.0	\$ -	
D. Hazardous Materials									
a. Selective Site Remediation - Soils		\$ -	\$ -	0.0	\$ -	\$ -	0.0	\$ -	
b. Facility Remediation		\$ -	\$ -	0.0	\$ -	\$ -	0.0	\$ -	
- Asbestos Abatement		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
- Lead Abatement		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
- PCB Abatement		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
- Mold Abatement		0.0	0.0	0.0	0.0	0.0	0.0	0.0	
E. Sustainable Elements									
a. Solar Panels (NOT USED, SEE ABOVE DIV 26)		\$ -	\$ -	0.0	\$ -	\$ -	0.0	\$ -	
b. Geothermal Wells	500.0	\$ 1,437.59	\$ 1,785.68	-348.1	\$ 1,563.59	\$ 1,785.68	-222.1	\$ 1,674.60	
Total Related Construction	\$ 9,523.8	\$ 10,305.4	\$ 8,479.4	1,826.0	\$ 9,180.8	\$ 8,751.4	429.4	\$ 8,966.0	
Total Construction before Markups	\$ 40,844.1	\$ 48,735.5	\$ 42,274.0	6,461.6	\$ 42,169.6	\$ 41,530.8	638.8	\$ 41,850.3	
F. Design and Pricing Contingency	included	3,741.9	3,150.7	591.3	7.25%	3,269.7	3,081.8	187.9	3,175.7
G. Performance Bond	included	381.9	342.7	39.2	0.60%	334.1	335.4	(1.3)	334.8
H. Insurance	included	1,740.5	1,662.0	78.6	2.91%	1,520.8	1,626.9	(106.1)	1,573.9
I. Permits (If by GC or CM)	included	0.0	0.0	0.0	0.00%	0.0	0.0	0.0	0.0
J. CM Contingency (CM Only)	included	1,247.3	1,125.2	122.1	2.50%	1,089.9	1,100.6	(10.8)	1,095.3
K. General Conditions	included	1,891.2	1,891.2	0.0		1,891.2	1,891.2	0.0	1,891.2
L. General Requirements	included	1,156.8	1,425.9	(269.1)		1,425.8	1,213.8	212.0	1,425.8
M. Overhead and Profit / Fee (CM Fee)	included	1,088.5	970.9	117.6	1.70%	952.4	970.9	(18.5)	961.7
N. State Education Fund	included	16.5	11.4	5.1	0.03%	14.5	11.2	3.3	12.8
Total Markups	Included	\$ 11,264.7	\$ 10,580.0	684.7		\$ 10,498.4	\$ 10,231.9	266.5	\$ 10,471.2
Construction w/Mark-ups before Escalation	\$ 40,844.1	\$ 60,000.2	\$ 52,854.0	7,146.2		\$ 52,668.0	\$ 51,762.8	905.3	\$ 52,321.5
III. Escalation	\$ 5,765.8	\$ 4,929.6	\$ 4,257.9	671.7	5.5%	\$ 4,307.8	\$ 4,164.8	142.9	4,236.3
Total Estimated Construction	\$ 46,609.9	\$ 64,929.8	\$ 57,111.9	7,817.9	18.8%	\$ 56,975.8	\$ 55,927.6	1,048.2	\$ 56,557.8
Variance to Budget (Over)/Under		(18,319.9)	(10,502.0)			(10,365.9)	(9,317.7)		(9,947.9)
Markups % (excl GCs, GRs)		23.1%	25.0%			17.0%	17.2%		17.1%

Building Construction - Current (\$/GSF)	357.9	409.7	361.8	47.9		351.7	350.9	0.8	351.3
Building Construction - Current (\$/GSF) - incl Markups, excl Escalation	357.9	504.4	452.3	52.1		439.2	437.4	1.9	438.3
Total Construction - Current (\$/GSF)	532.6	692.2	611.4	80.8		607.4	598.7	8.7	603.1

Proposed Alternates		New Construction			Alternates Total			
Alternate No 1 - Ryerson Demolition		\$ -	\$ -	0.0	\$ 1,537.60	\$ -	1,537.6	1,537.6
Alternate No 2 - Fire Pump (incl Feeder and ATS)		\$ -	\$ -	0.0	\$ 148.80	\$ -	148.8	148.8
Alternate No 3 - Natural Gas		\$ -	\$ -	0.0	\$ 225.50	\$ -	225.5	225.5
Alternate No 4 - PV system on Roof		\$ -	\$ -	0.0	\$ 2,760.12	\$ -	2,760.1	2,760.1
Alternate No 5 -		\$ -	\$ -	0.0	\$ -	\$ -	0.0	0.0
Alternate No 6 -		\$ -	\$ -	0.0	\$ -	\$ -	0.0	0.0
Alternates Total		\$ -	\$ -	0.0	\$ 4,672.0	\$ -	0.0	\$ 4,672.0

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# Town of Madison

AS REVIEWED AND APPROVED BY SBC AT 12/28/2022 MEETING

## New PreK-5 Elementary School

### Schematic Design - Value Engineering & Value Management Log

Date: 12/28/2022

Source	Code	Item #	Description	Trade \$ (\$000s)	Total w/Markup	Status	Accepted	Possible	Rejected	Alternate	Notes:
Estimate Process	Demo / Abatement	A1	Demolishing Ryerson - (value not in reconciled estimate value) - Alternate Target	0.0	0.0	Alternate				0.0	Demolition of Ryerson was initially targeted for inclusion in project budget. However, Final SD estimates have eliminated cost of Ryerson demo from base scope and already track as an alternate.  Shown in this manner for SBC to confirm authorization that demolition of Ryerson should be an alternate. Value to add back into the project would be approx. \$1.5M
Estimate Process	Fire Protection	A2	Fire Pump - (value not in reconciled estimate value) - Alternate Target	0.0	0.0	Alternate				0.0	Likely unneeded but tracked here because referenced in SD documents and separated as an alternate in estimate for reference in case pressure / flow of final water design is low. Includes Feeder and ATS.  Shown in this manner for SBC to confirm authorization that this should be an alternate (tracked as such on the estimate for now, so shown as alternate here for clarity). Value to add if needed would be approx. \$120k.
Estimate Process	Site	A3	Provide Gas line - (value not in reconciled estimate value) - Alternate Target	0.0	0.0	Alternate				0.0	Provision of a gas line was initially targetd for inclusion in project budget. However, some initial preferences from a portion of the SBC was to avoid fossil fuels. Final SD estimates have eliminated cost of the gas line from the base scope and already track as an alternate.  Shown in this manner for SBC to confirm authorization that the gas line should be an alternate. Also need to coordinate with the GeoExchange VM item. Value to add back into the project would be approx. \$225k
Estimate Process	Electrical	A4	Provide Solar PV panels within project - (value not in reconciled estimate value)	0.0	0.0	Accepted	0.0				This item was estimated to help confirm direction moving forward regarding final design of the actual panels and potential inclusion within the project (budget constraints). Budget originally contemplated a PPA for the solar panels.  Shown in this manner for SBC to confirm that the project is still targeting a PPA. Value to add into the project would be approx. \$2.7M
Estimate Process	Interior	A5	"Folding" operable storefront doors at STEAM, VA, Media Center - (value not in reconciled estimate value)	0.0	0.0	Accepted	0.0				Was not on SD Plans, so never made it to estimate. Shown in this manner for SBC because these style of partitions/doors were shown in renderings. Including these would be a cost premium that would need to be priced above and beyond the estimate.
GBC	Concrete	1.0	Structural - Provide more typical reinforcing at interior slab-on-grade	(16.0)	(19.8)	Accepted	(19.8)				Gilbane Constructability Review - Confirmed acceptable by Design Team  Provide more typical 6x6-W1.4xW1.4. WWF reinforcing at interior slab-on-grade in lieu of 6x6-W2.9xW2.9 as noted.
GBC	Concrete	2.0	Structural - Provide more typical reinforcing for foundation walls	(17.5)	(21.7)	Accepted	(21.7)				Gilbane Constructability Review - Confirmed acceptable by Design Team. Provide more typical (2) #5 cont. top & bottom reinforcing for foundation walls in lieu of #5 @ 16" OC vertical and #4 12" OC horizontal.
CPL (ADL)	Electrical	1.0	Theatrical Lighting - Reduce to 50% of Estimated Value	(63.1)	(78.3)	Accepted	(78.3)				Furnish and Install

# Town of Madison

AS REVIEWED AND APPROVED BY SBC AT 12/28/2022 MEETING

## New PreK-5 Elementary School

### Schematic Design - Value Engineering & Value Management Log

Date: 12/28/2022

Source	Code	Item #	Description	Trade \$ (\$000s)	Total w/Markup	Status	Accepted	Possible	Rejected	Alternate	Notes:
GBC	Electrical	2.0	Electrical - Provide more typical EMT conduit in mechanical and similar spaces in lieu of Ridgid conduit	(10.5)	(13.0)	Accepted	(13.0)				Gilbane Constructability Review - Confirmed acceptable by Design Team
CPL (ADL)	Equipment	1.0	Backup only for Gym Scoreboards - Alternate Target	(14.0)	(17.4)	Alternate				(17.4)	Provide backup framing/power, but defer actual boards for FFE/Alternate/post project. Gilbane Estimate only has 1 scoreboard
TA	Equipment	2.0	Toilet Accessories furnished and installed by owner/Owner's vendor and coordinated by Architect	(24.1)	(29.9)	Accepted	(29.9)				Per 12/2/22 email with McMinn - TP, Soap, San nap & PT dispensers, waste receptacles
TA	Equipment	3.0	Reduction in Kitchen Equipment - Hold to \$350k allowance	(168.4)	(208.8)	Rejected			(208.8)		<b>WOULD NEED ED SPEC REVISION AND BOE APPROVAL.</b> Project team has initially indicated that the equipment listed here won't physically fit well within the listed square footage. The estimated cost for this equipment is also substantially higher than on other similar projects  Update for 12/28/22: Returned to 'Possible' from 'Accepted' to re-highlight conversation in light of potential budget revisions and BOE impact.
CPL (ADL)	Exterior Bldg / Envelope	1.0	Reduce Canopies (areas with roof) by approx. 1300sf	(47.5)	(58.8)	Accepted	(58.8)				
CPL (ADL)	Exterior Bldg / Envelope	2.0	Reduce Canopies (steel 'pergola' areas) by approx 400sf	(15.0)	(18.6)	Accepted	(18.6)				
CPL (ADL)	Exterior Bldg / Envelope	3.0	Eliminate Glass overhead doors at STEM / VA to courtyard. Provide double person door at each space.	(24.7)	(30.7)	Alternate				(30.7)	
CPL (ADL)	Exterior Bldg / Envelope	4.0	Reduce amount of glass at exterior - remove the glass transoms at (3) locations and replace with metal panels	(5.4)	(6.7)	Accepted	(6.7)				Update for 12/28/22: Was "Reduce amount of glass at exterior doors - 25% reduction in glazing qty at exterior doors". Gilbane clarified value for scope after 12/19/2022 SBC meeting to be for transom glass replacement with metal panels: south elevation between lines 2 & 3, south elevation between lines 6 & 7, and north elevation between lines 3 & 2.
CPL (ADL)	General	1.0	Post-Reconciliation Reduction in General Requirements	(170.0)	(210.8)	Accepted	(210.8)				Coordinated post-reconciliation for items either A) not needed for this project or B) carried by owner elsewhere in project budget



# Town of Madison

AS REVIEWED AND APPROVED BY SBC AT 12/28/2022 MEETING

## New PreK-5 Elementary School

### Schematic Design - Value Engineering & Value Management Log

Date: 12/28/2022

Source	Code	Item #	Description	Trade \$ (\$000s)	Total w/Markup	Status	Accepted	Possible	Rejected	Alternate	Notes:
CPL (ADL)	HVAC	1.0	Eliminate GeoExchange system (72 wells + sitework), provide more traditional HVAC system, and provide natural gas line.	(2,087.0)	(2,587.9)	Rejected			(2,587.9)		VE value is from eliminating wells and attendant sitework, eliminating premium for geo internal HVAC equipment, and adding nat gas line back into project to support non-geo equipment. Presume condensing with VRF). Also includes Nat Gas install for non-geo system.  <u>If no Geo, then potentially do not get the following rebates/tax credits/etc.</u> -Federal IRA 30-40% of entire HVAC system (\$6M + \$1.7 wells @ 30-40% = <b>\$2.3 - \$3M</b> ) -Eversource Path 2 incentive vs more lucrative Path 1 (\$3.5-\$4.5/sf Path 1, Path 2 \$1-2.5/sf, 90000sf = <b>\$90-\$315k difference</b> ) -Energize CT heat pump incentive likely not applicable per Kohler Ronan if seeking rebate/credit money above
CPL (ADL)	HVAC	2.0	Eliminate Radiant flooring at K/Pre-K (in-slab hydronic heat)	(176.9)	(219.3)	Rejected			(219.3)		<b>WOULD NEED ED SPEC REVISION AND BOE APPROVAL.</b>
GBC	HVAC	3.0	Mech - Provide more typical G60 coating at ductwork in lieu of G90	(4.7)	(5.8)	Accepted	(5.8)				Gilbane Constructability Review - Confirmed acceptable by Design Team
CPL (ADL)	Interior	1.0	Eliminate stepped meeting area adjacent to communicating stair.	(6.0)	(7.4)	Rejected			(7.4)		Potentially have tables and chairs in FFE package, but no 'stepped' seating
CPL (ADL)	Interior	2.0	50% Reduction in Storefront at STEM/VA/Media Center to corridor	(64.9)	(80.4)	Accepted	(80.4)				Replace with standard partition wall
CPL (ADL)	Interior	3.0	Eliminate Wood Grille Ceilings 100%	(150.0)	(186.0)	Accepted	(186.0)				Putback ACT
CPL (ADL)	Interior	4.0	Infill one side of stage by Cafe	(28.5)	(35.3)	Alternate				(35.3)	I.e., would not have ability to 'open' to both café and gym -keep structure, ramp, café platform for ADA access infrastructure, -just eliminate partition/drapery and putback stud/gyp infill partition
TA	Interior	5.0	Qty of Millwork vs FFE in classroom storage	(128.0)	(158.7)	Accepted	(158.7)				Per Tecton FFE Planning - Typical Classroom millwork limited to the "back" wall of classrooms to include only sink, base/wall/warbrobe unit, and cubby storage. All remaining storage/bookcases targeted to be FF&E.
CPL (ADL)	Interior	6.0	Eliminate 'Premium' storefront at media center (e.g., finned)	(75.2)	(93.2)	Accepted	(93.2)				Provide standard Storefront only
CPL (ADL)	Interior	7.0	Eliminate Tack strips at classrooms	(33.0)	(40.9)	Accepted	(40.9)				Keep tack boards and white boards



# Town of Madison

## New PreK-5 Elementary School

AS REVIEWED AND APPROVED BY SBC AT 12/28/2022 MEETING

### Schematic Design - Value Engineering & Value Management Log

Date: 12/28/2022

Source	Code	Item #	Description	Trade \$ (\$000s)	Total w/Markup	Status	Accepted	Possible	Rejected	Alternate	Notes:
TA	Interior	8.0	Eliminate in-room restrooms for Grades 1 and 2 and provide consolidated restrooms to reduce fixture quantities	(20.6)	(25.6)	Rejected			(25.6)		<p><b>WOULD NEED ED SPEC REVISION AND BOE APPROVAL.</b> Savings contemplates the "easy" 4 locations with 'back to back' single restrooms (keep doors, but simply reduce fixtures).</p> <p>Potential for additional savings with further consolidation as gang restrooms, reduced doors, etc., but those savings would need to be vetted in DD. This item identifies if consolidation is acceptable in the first place.</p> <p>12/28/2022 Update: Per 12/19/2022 meeting Shoemaker indicated a strong preference to not contemplate gang bathrooms for grades 1 and 2, but could entertained shared 'in-room' restrooms as proposed with this VE value.</p>
TA	Site	1.0	Tecton Site Plan - Eliminate pollinator path sidewalk and formal seating areas Alternate Target	(209.7)	(260.0)	Alternate				(260.0)	Allow area to be natural nature walk and informal gathering.
TA	Site	2.0	Tecton Site Plan - Eliminate sidewalk at remote areas of pickup & dropoff.	(32.0)	(39.7)	Accepted	(39.7)				Operationally, PU/DO only occurs closer to building. Utilize space for potential overflow parking area.
TA	Site	3.0	Tecton Site Plan - Change Bluestone Pavers to stamped concrete	(75.7)	(93.9)	Accepted	(93.9)				
CPL (ADL)	Site	4.0	Tecton Site Plan - Consolidate to two playgrounds - west playground by PreK/K wing, east playground adjacent to play fields/asphalt basketball court - Alternate Target	(161.3)	(200.0)	Alternate				(200.0)	<p>Would effectively be a transfer from FFE/Owner budget to building budget. FFE budget is \$700k for 3 playgrounds, so conservatively presume \$200k value.</p> <p>Number of playgrounds was not dictated by the Ed Spec</p>
TA	Site	5.0	Tecton Site Plan - Eliminate second tier seat wall	(47.1)	(58.4)	Accepted	(58.4)				Allow hillside to be natural amphitheater (lawn and boulder) seating.
TA	Site	6.0	Tecton Site Plan - Eliminate 4' fence at pick-up/drop-off parking area.	(6.5)	(8.1)	Accepted	(8.1)				
TA	Site	7.0	Tecton Site Plan - Eliminate 10' fence at basketball court.	(9.0)	(11.2)	Accepted	(11.2)				
TA	Site	8.0	Tecton Site Plan - Playground Poured surface to woodchips (2 playgrounds)	(103.0)	(127.7)	Rejected			(127.7)		<p>Would effectively be a transfer from FFE/Owner budget to building budget.</p> <p>Update for 12/28: Returned to 'possible' from 'alternate' to reflect additional comments from school administrators after 12/19/22 SBC meeting and to spur re-review in light of budget update.</p>

# Town of Madison

AS REVIEWED AND APPROVED BY SBC AT 12/28/2022 MEETING

## New PreK-5 Elementary School

### Schematic Design - Value Engineering & Value Management Log

Date: 12/28/2022

Source	Code	Item #	Description	Trade \$ (\$000s)	Total w/Markup	Status	Accepted	Possible	Rejected	Alternate	Notes:
TA	Site	9.0	Tecton Site Plan - Reduce underground stormwater retention - provide additional above ground basins	(259.1)	(321.3)	Accepted	(321.3)				Reduce rows of underground stormwater retention from 6 to 2 (one each at North and South) - provide additional above ground basins. Includes 20ksf retention pond putback to accommodate remaining stormwater.
CPL (CW)	Site	10.0	Eliminate Loading Dock Scissor Lift	(14.6)	(18.1)	Alternate				(18.1)	Trucks often have lift gates Update for 12/28: McMinn Requested this might be considered as an alternate.
CPL (CW)	Site	11.0	Eliminate Sod at turf field (establish seed with early phase)	(41.0)	(50.8)	Accepted	(50.8)				
GBC	Site	12.0	Balance site soil import/export via berms	(119.1)	(147.7)	Accepted	(147.7)				Minimize costs and improve privacy
TA	Site	13.0	Reduction of Landscaping Allowance - hold at 350k	(67.7)	(84.0)	Accepted	(84.0)				Initial design team projection is that project could economize down to \$350k.
GBC	Site	14.0	Provide concrete in lieu of Granite Curbing	(129.4)	(160.5)	Accepted	(160.5)				
CPL (ADL)	Size of Building	1.0	GSF Reduction - Tighten building footprint via hallways and circulation (no programming reductions) -Approx. 2000sf	(161.7)	(200.5)	Accepted	(200.5)				See plan / space programming markup for rooms that would be impacted.
TA	Size of Building	2.0	GSF Reduction - Reduce select program spaces to reduce building footprint -e.g., perimeter classrooms sf reduction -Approx. 1700sf	(205.3)	(254.6)	Accepted	(254.6)				<b>WOULD NEED ED SPEC REVISION AND BOE APPROVAL.</b> See plan / space programming markup for rooms that would be impacted.  Update for 12/28: Per additional discussions with school administrators, there is a desire to not reduce the teacher workroom and limit the reduction to the secretarial office. Square foot reduction and potential savings updated here accordingly.
				\$ (4,993)	\$ (6,192)		\$ (2,453)	\$ -	\$ (3,177)	\$ (562)	

Mark-Up % 24.00% (27% when including escalation and excluding Div 1 GRs and GCs, which substantially won't change based on VE. Tracked at 24% for cc

Reconciled Cost Estimate	\$ 56,557.8	Based on PACS and Gilbane Updated Estimates
Construction Budget	\$ 46,609.9	
Additional Budget Increase	\$ 5,000.0	as indicated in discussions with SBC chair, to be finalized/formalized via BOS
VE/VM Required	(4,947.9)	
Estimate w/Accepted & Alternate	\$ 53,543.0	
Variance to Budget - (Over) / Under	(1,933.1)	

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
													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



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



South Windsor Public Schools  
Pleasant Valley Elementary School

Contingency Status Report

Date: 9/9/2022

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	SOURCES				APPROVALS			A - Construction		B - Owner's Project	
														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 discrepancy	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



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										



**South Windsor Public Schools**  
Pleasant Valley Elementary School



# Contingency Status Report

Date: 9/9/2022

[illegible]

	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
<b>TOTAL</b>	<b>55,959.00</b>	<b>1,307,820.00</b>	<b>212,283.00</b>

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	-	-	-
<b>Total</b>	<b>2,419,400.00</b>	<b>(100,738.00)</b>	<b>(1,657,782.00)</b>
<i>Additional Deferrable Items</i>			<i>(215,000.00)</i>



**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 getting 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

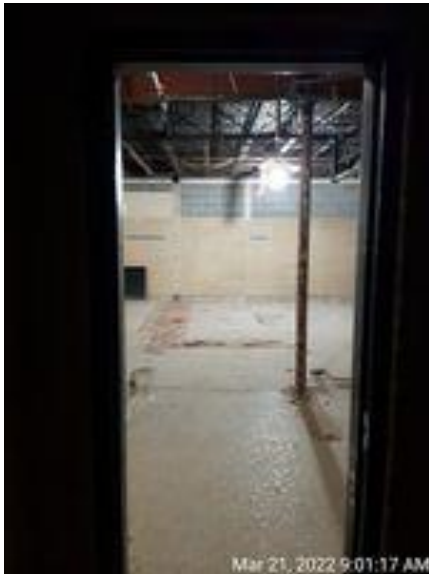
## Safety Items:

### 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 ~



## Fee Proposal and Agreement

Colliers Project Leaders has prepared a fee proposal based on the project schedule outlined in the RFP. We've assumed that Colliers would be involved in the design phase from June 2023 through August 2023, bidding from September 2023 through October 2023, construction from November 2023 through November 2024. In addition to the scheduled noted in the RFP, we have included four months for closeout with the construction manager and six months to assist with commissioning as noted in the fee proposal form.

As outlined in our proposal cover letter, we've assembled a unique team to serve this project specifically. We've combined our in-house experts from both the owner's project management division as well as our commissioning and energy services division. Combined, we believe this unique team will provide the highest quality service for an HVAC upgrade project.

During the design phase Mr. Blair Richardson will serve as the technical director. As a licensed professional mechanical engineer, Blair will be reviewing the design from a technical perspective. Blair's primary involvement will be during the design phase where he can provide the greatest value. Mark Schweitzer, who has served as the project manager for many Fairfield projects, will serve the project throughout the duration as the primary day-to-day point of contact with the building committee and Fairfield Public Schools.

During the 13-month construction phase, we are assuming six months of procurement time. As such, we have reduced the amount of time involved during that time frame to roughly one day per week of which Mark Schweitzer will be the primary person providing any service. We have Mr. Ravi Chavan assigned a few hours to review any technical submittals.

The remaining seven months we have added Ms. Sierra Keon to serve assist Mark Schweitzer in the field. Given Sierra's technical background in mechanical engineering, we believe this project will be best served with her in the field during installation of the systems. Mark will still be involved in the field but focused on schedule, phasing and coordination with school operations as well as attending building committee meetings and managing the financials for the project.

We have added four months of time for closeout of the project with the construction manager as well as closeout of the project financials. We have also added six months of minor technical assistance, if required, with the final commissioning of the systems.



Our total proposed fee, based on the services requested and the project schedule noted above, is **\$358,729** plus applicable reimbursable expenses such as mileage to and from the site. We are providing a breakdown of the fees by phase to support our pricing response form.

Pre-Construction Phase (includes bidding):	\$62,390
Construction Phase:	\$225,112
Closeout Phase:	\$41,885
Commissioning Closeout:	\$14,342
Final OSCG&R Pre-Audit Closeout:	\$15,000

The final OSCG&R closeout has historically taken months or even years to complete depending on how quickly OSCG&R staff review and respond to the state change orders. As such, we include a separate fee that is held separately until all the required reviews and approvals are complete so that we can properly close out the project out with the state.

Our services are based on our current 2023 hourly rates. We have enclosed our hourly rate sheets for your review. Should our services extend beyond the anticipated schedule, we would request utilizing the rates at the current point in time which are typically escalated at 4% per year commencing on January 1<sup>st</sup> of each year.

We are confident that the level of service we are proposing is adequate for this project. Having served the Town of Fairfield for the past nine years, I am personally committed to continuing our high level of service to the Town.

The table below provides an hourly rate schedule for each team member for work that may exceed the scope.

2023 Hourly Rates	
Category	Hourly Rate
Managing Director	\$350
Senior Director	\$285
Director	\$260
Associate Director	\$220
Senior Project Manager	\$210
Project Manager	\$175
Assistant Project Manager	\$150
Senior Construction Representative	\$185
Construction Representative	\$170
Financial & Analytical Support	\$145

**Note:** Hourly rates do not include reimbursable expense such as mileage, tolls, parking, and sustenance. Escalation of hourly rates is 4% per year.

***Our completed Pricing Response Form can be found on the following pages.***

**Pricing Response Form:**

**1. Proposed Monthly Fees:**

Pre-construction Phase Services:	Proposed Monthly Fee	\$ 12,478
Construction Phase Services	Proposed Monthly Fee	\$ 17,316
Construction Close-Out Phase Services	Proposed Monthly Fee	\$ 10,471
Building Occupancy & Commissioning Phase Services	Proposed Monthly Fee	\$ 2,390

Final OSCGR Pre-Audit Closeout Lump Sum \$15,000

**2. For informational purposes please identify the estimated time in working hours for each phase:**

Pre-construction Phase Services:	Total Monthly Hours	58 hours/month
Construction Phase Services	Total Monthly Hours	95 hours/month
Construction Close-Out Phase Services	Total Monthly Hours	51 hours/month
Building Occupancy & Commissioning Phase Services	Total Monthly Hours	9 hours/month

3. Identify the key team members who will provide these services. Quantify their involvements (X%) for each phase of the program. Provide an estimate of proposed monthly hours along with the proposed hourly rate for each team member.

**A. Pre-Construction Phase:**

Name	Title	% Involved	Monthly Hours	Hourly Rate
A. Blair Richardson	Director (MEP)	20%	24 average	\$260
B. Mark Schweitzer	Project Manager	20%	24 average	\$185
C				

**B. Construction Phase:**

Name	Title	% Involved	Monthly Hours	Hourly Rate
A. Blair Richardson	Director (Tech)	5%	9 average	\$270 (2024 rate)
B. Mark Schweitzer	Project Manager	20%	30 average	\$192 (2024 rate)
C Ravi Chavan	Project Manager (Tech)	10%	17 average	\$192 (2024 rate)
D. Sierra Keon	Asst. Project Manager (Tech)	50%	85 average	\$156 (2024 rate)

**C. Construction Close-Out Phase:**

Name	Title	% Involved	Monthly Hours	Hourly Rate
A. Mark Schweitzer	Project Manager	20%	34 average	\$192 (2024 rate)
B. Sierra Keon	Asst. Project Manager (Tech)	5%	9 average	\$156 (2024 rate)
C				

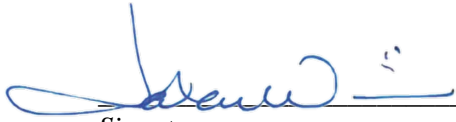
**Continued on Next Page**



D. Building Occupancy & Commissioning Phase:

Name	Title	% Involved	Monthly Hours	Hourly Rate
A. Blair Richardson	Director (Tech.)	5%	9 average	\$281 (2025 rate)
B.				
C				

OSCGR Pre-Audit Closeout: Performed primarily by Mark Schweitzer and Chuck Warrington as the OSCGR technical experts. Performed on an hourly basis with a not-to-exceed limit of \$15,000.



*Signature*

Jonathan F. Winikur

*Printed name*

135 New Road

*Address*

(860) 395-0055

*Phone*

Colliers Project Leaders USA NE, LLC

*Company*

Division Director

*Title*

Madison, CT 06443

*City / State / Zip*

charles.warrington@collierseng.com (contact person)

*E-mail*



Colliers is pleased to provide on the following pages the required forms and statements listed below as requested in the Town of Fairfield's Request for Proposal:

- References
- Subcontractors
- Proposed Sample Contract
- Addendum No. 1

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## REFERENCES

Provide reference details of most recent similar scope projects performed.

### REFERENCE #1:

Name of Company Town of Madison Phone (203) 245-6470  
Contact Person William McMinn, Director of Facilities Cell (203) 410-1317  
Company Address 284 Green Hill Road, Madison, CT 06443 Email mcminnwh@madison.k12.ct.us  
Project, Location, & Date Completed Polson Middle School HVAC Upgrades, Madison, CT  
The project is currently in the design phase.

### REFERENCE #2:

Name of Company South Windsor Public Schools Phone (860) 291-1205  
Contact Person Kate Carter, Superintendent Cell N/A  
Company Address 1737 Main Street, South Windsor, CT 06074 Email kcarter@swindsor.k12.ct.us  
Project, Location, & Date Completed 4 New Elementary Schools: Orchard Hill (2017),  
Eli Terry (2020), Philip R. Smith (2020), and Pleasant Valley, (2023)

### REFERENCE #3:

Name of Company Town of Fairfield/Fairfield Public Schools Phone (203) 255-7363  
Contact Person Sal Morabito, Manager of Construction, Security, and Safety Cell (203) 650-0083  
Company Address 501 Kings Highway E, Unit 201, Fairfield, CT 06825 Email smorabito@fairfieldschools.org  
Project, Location, & Date Completed Mill Hill Elementary School Renovations, Fairfield, CT, 2022

### REFERENCE #4

Name of Company Westport Public Schools Phone (203) 341-1026  
Contact Person Thomas Scarice, Superintendent Cell (203) 980-4860  
Company Address 10 Myrtle Ave., Westport, CT 06880 Email tscarice@westportps.org  
Project, Location, & Date Completed Westport Capital Improvements Plan, Westport, CT, Ongoing

### REFERENCE #5:

Name of Company East Hampton Public Schools Phone (860) 365-4000  
Contact Person Paul Smith, Superintendent Cell N/A  
Company Address 1 Community Drive, East Hampton, CT 06424 Email psmith@easthamptonct.org  
Project, Location, & Date Completed East Hampton High School Renovations, East Hampton, CT  
Completed in 2018

**SUBCONTRACTORS**

Provide subcontractor details if any are to be employed as part of this contract:

**Subconsultants will not be used for this project. We will be self-performing all work.**

**SUBCONTRACTOR #1:**

Name of Company _____	Fed ID # _____
Contact Person _____	Title _____
Company Address _____	Phone _____
Trade _____	Email _____

**SUBCONTRACTOR #2:**

Name of Company _____	Fed ID # _____
Contact Person _____	Title _____
Company Address _____	Phone _____
Trade _____	Email _____

**SUBCONTRACTOR #3:**

Name of Company _____	Fed ID # _____
Contact Person _____	Title _____
Company Address _____	Phone _____
Trade _____	Email _____

**NOTE: All sub-Contractors are subject to approval by the Town of Fairfield and are required to provide Fed ID #.**

## **PROJECT MANAGEMENT AGREEMENT**

This Agreement made as of the [REDACTED] day of [REDACTED] by and between [REDACTED] having an office located at [REDACTED] (hereinafter "Client") and Colliers Project Leaders USA NE, LLC having an office located at 135 New Road, Madison, Connecticut (hereinafter "Project Manager").

### **WITNESSETH**

**WHEREAS**, Client desires to retain the advisory services of Project Manager ("Services") in connection with its renovation/construction at [REDACTED] (hereinafter the "Project"), as more fully described in Exhibit A annexed hereto, and Project Manager desires to be so retained.

**WHEREAS**, Project Manager desires to furnish such advisory services during planning and implementing of the Project;

**NOW THEREFORE**, for the consideration hereinafter stated, the parties hereto, intending to be legally bound, covenant and agree as follows:

### **ARTICLE 1 – SERVICES**

1.1 Project Manager shall make available to Client its knowledge, skills, ideas, experience and abilities with respect to all matters within the scope of its Services described herein.

1.2 In addition to Project Manager's Scope of Work annexed hereto as Exhibit A, Project Manager shall advise Client on the status of all aspects of the Project during the preconstruction and construction phase of the Project, assisting Client in: i) developing the budget and tracking costs, ii) establishing the schedule; iii) tracking work progress; iv) monitoring the standards of quality; v) assisting Client in the selection of commercially reasonable services necessary to complete the Project. Notwithstanding anything to the contrary in this Agreement, Project Manager's obligations under this Agreement are not in any way intended to require or imply that Project Manager is to assume any of the responsibilities of other consultants or any contractor or architect and the consultants, architect and contractor shall be solely responsible for their services related to the Project and the performance of their obligations under their relevant agreement with Client. It is expressly acknowledged and agreed that the Scope of Work at Exhibit A is not intended to require or imply that Project Manager shall be responsible or liable for the failures, breach and/or negligence of any consultants, contractors, architects or engineers with regard to their performance and/or respective obligations in connection with the Project.

1.3 Project Manager shall not be required to provide any services in connection with the remediation, abatement or rendering harmless any hazardous material or substances, asbestos or asbestos related products.

1.4 Project Manager has the responsibility to assign personnel who, in the judgement of Project Manager, can and will provide Services. Insert Executive Managing Director or Managing Director Name will act on behalf of Project Manager as the Executive Managing Director or Managing Director for the oversight and administration of services provided to Client, unless such person is replaced by Project Manager with notice to Client. . Project Manager will also assign additional personnel to the team providing the Services as needed. If it is determined by Client, in its reasonable discretion, that a specific individual assigned by Project Manager is not adequately providing the Services, Client will promptly contact Project Manager to request adjustment to the individual's work or replacement of that individual as mutually agreed by Client and Project Manager. Client's approval of personnel assigned by Project Manager shall not be unreasonably withheld.

### **ARTICLE 2 – FEES**

2.1. Client shall pay Project Manager a fee (“Fee”) equal to \$\_\_\_\_\_. The Fee for the Project shall be payable \_\_\_\_\_.

2.2 The Fee shall be the sole compensation to Project Manager, and is inclusive of its general and office overhead, insurance, profit, and all other costs, except for Reimbursable Expenses as provided for in Article 4.

2.3 Client shall pay Project Manager's Fee and approved Reimbursable Expenses for the Services within thirty (30) days after submission by Project Manager of an invoice covering such Fee and Reimbursable Expenses due each month for the Project.

2.4 Project Manager’s services within this Agreement are based on the Project’s duration shown in the Project timeline provided by Project Manager to Client. Any Services to be provided beyond such timeline shall be subject to mutual agreement between the parties regarding additional fees.

### **ARTICLE 3 – INSURANCE**

3.1 Project Manager shall maintain with respect to the Project, Professional Liability insurance coverage of \$1,000,000.00 per occurrence. Such coverage shall protect Client with respect to any acts or omissions of Project Manager in connection with this Agreement.

3.2 Project Manager shall maintain with respect to the Project, General Liability insurance coverage of \$2,000,000.00 each occurrence and in the aggregate (which may be comprised of a combination of primary and umbrella/excess policies). Such coverage shall include Client as additional insured with respect to any grossly negligent acts or omissions or willful misconduct of Project Manager resulting in third party bodily injury, property damage or wrongful death arising in connection with this Agreement.

3.3 Project Manager shall also maintain worker’s compensation insurance coverage in statutorily required amounts and Employer’s Liability insurance with limits of liability of no less than \$1,000,000 each accident, \$1,000,000 disease each employee and \$1,000,000 disease policy limit covering all employees of Project Manager employed in, on or about the Project in the state where the project is to take place.

3.4 Client shall maintain primary and non-contributory Commercial General Liability Insurance with minimum per occurrence limits of \$5,000,000 inclusive for bodily injury, including death, personal injury and damage to property with blanket contractual liability, product and completed operations, non-owned auto, broad form property damage and sudden & accidental pollution liability. Such policy shall contain a cross-liability and severability of interests provisions naming Project Manager and the PM Indemnified Parties (as defined below) as additional insureds and include a waiver of subrogation in favor of Project Manager and the PM Indemnified Parties.

3.5 Consultant shall provide commercial automobile insurance for any owned autos (symbol 1 or equivalent) in the amount of \$1,000,000 each accident covering bodily injury and property damage on a combined single basis. Such coverage shall include hired and non-owned automobile coverage.

3.6 Client will (a) cause its general contractors and their subcontractors involved in the construction of the Project to carry Commercial General Liability Insurance with minimum per occurrence limits of \$5,000,000 covering bodily injury, including death, personal injury and damage to property with blanket contractual liability, product and completed operations, non-owned auto, broad form property damage and sudden & accidental pollution liability on a primary basis to name Client and Project Manager including the PM Indemnified Parties as additional insured with a cross-liability and severability of interests provisions and provide a waiver of subrogation in favor of Client and Project Manager, (b) cause its consultants involved in the design of the Project to carry usual and customary professional liability insurance, (c) cause the construction work to be covered under all risk construction insurance on a replacement cost value against physical loss or damage to the Project during the performance of the work to completion providing a waiver of subrogation in favor of Project Manager and the PM Indemnified Parties and/or Client and the Client



Indemnified Parties, and (d) if applicable, cause the Project to be covered under a wrap-up liability policy in amounts customary for projects similar to the Project insuring Client, Project Manager, PM Indemnified parties, general contractors and their subcontractors, and consultants' liability arising out of their performance for the Project as named or additional insured listed on the policy declaration. In any and all trade contracts and agreements between Client and its consultants, construction manager, contractors, architect and other service providers, Client shall have both itself and Project Manager (including the PM Indemnified Parties) named as additional insureds with respect to all such liability insurance policies.

3.7 Each party shall provide the other with certificates of insurance evidencing the aforementioned coverages prior to commencement of this agreement and upon renewal of such policies for the duration of this agreement and any extensions thereof.

#### **ARTICLE 4 – REIMBURSABLE EXPENSES**

4.1 In addition to the Fee set forth in Article 2.1 herein, Client shall reimburse Project Manager for the actual cost, without markup, of reimbursable expenses such as mail, express postage, mileage to and from the Project, third party printing and copying and blueprinting costs and Client approved out of town travel and related expenses.

#### **ARTICLE 5 – CLIENT'S REPRESENTATIVE**

5.1 Client shall designate \_\_\_\_\_ to act for Client and Client shall be bound by any consents or approvals given by said representatives. The designation of Client to be made hereunder shall be in writing and may be changed by Client from time to time by written notice to Project Manager.

#### **ARTICLE 6 – TERMINATION**

6.1 Either party may cancel this Agreement for any reason or no reason by giving the other party thirty (30) day prior written notice of cancellation. In such event Client shall pay to Project Manager a minimum fee of twenty percent (20%) of the remaining Fee or an amount equal to the Fee to be accrued to the last day of the cancellation notice period, whichever is greater, plus all approved Reimbursable Expenses incurred through such date.

#### **ARTICLE 7 – MISCELLANEOUS**

7.1. All notice required by or permitted to be given pursuant to this agreement shall be deemed validly given three (3) days after the same shall be deposited in the United States Mail, certified or registered, return receipt requested, postage prepaid, or by overnight courier addressed as noted herein to the parties as follows:

##### **TO CLIENT:**

with a copy to:

##### **TO PROJECT MANAGER:**

Colliers Project Leaders USA NE, LLC  
135 New Road  
Madison, Connecticut  
Attention: Jonathan Winikur

with a copy to:

Colliers Engineering and Design

101 Crawfords Corner Road, Suite 3400  
Holmdel, NJ 07733  
Attention: Legal Department

7.2 The captions and subheadings contained herein are for information only and shall in no way modify or limit terms, provisions or conditions hereof.

7.3 This Agreement constitutes the entire agreement between the parties with respect to the Services. No provisions of this Agreement shall be changed or modified, nor shall this Agreement be discharged, in whole or in part, except by an agreement in writing signed by the party against whom the change, modification or discharge is claimed or sought to be enforced.

7.4 No waiver of any of the conditions or provisions of this Agreement or of any of the rights of either party hereunder shall be effective or binding unless such waiver shall be given in writing and signed by the party claimed to have given, consented or suffered the waiver.

7.5 To the extent not covered by Client's insurance, Project Manager shall indemnify and hold harmless Client and its respective agents, officers, directors, officials, members, invitees and employees (collectively, the "Client Indemnified Parties") from any third party claims, judgments, costs, injuries, damages, liabilities and expenses, including reasonable attorneys' fees, to which the Client Indemnified Parties may be subject because of any gross negligence of Project Manager, or its respective agents, officers, directors, employees, arising out of or in connection with this Agreement which causes or results in third party personal injury, property damage or wrongful death. Client will indemnify, defend and save harmless Project Manager and its affiliated companies, their agents, consultants, principals, officers, representatives and employees ("PM Indemnified Parties") from all liability, costs, claims, expenses, damages and loss (including reasonable attorneys' fees incurred in defending claims and responding to subpoenas) (but excluding liability that is due to the gross negligence or willful misconduct of Project Manager or its affiliates and agents) that may occur or may alleged to have occurred arising out of or related to the Project, the Services and/or any written contracts or other agreement that Client or Project Manager may enter into in connection therewith. In the event of a claim, the indemnified party agrees to: (i) give the indemnifying party prompt notice of the claim; (ii) cooperate with the reasonable request of the indemnifying party in the defense of the claim, at no cost to the indemnified party; (iii) permit the indemnifying party to choose counsel to defend, subject to the reasonable approval of the indemnified party and (iv) not settle any claim without the written consent of the indemnifying party.

7.6 Nothing contained in this Agreement shall be construed to mean that Project Manager and Client are joint venturers or partners.

7.7 It is expressly agreed that Project Manager is not responsible for Project design which services shall remain the responsibility of the architect, nor shall Project Manager be responsible for the actions of the contractor, subcontractors, and for any means and methods used for the construction of the Projects. Client shall secure and pay for all necessary permits, approvals, easements, assessments and charges required in connection with the Project. All contracts relating to the Project shall be in the name of Client and executed by Client.

7.8 This Agreement shall be governed by the laws of the State of New Jersey both as to interpretation and performance. In the event of a dispute, the parties shall negotiate in good faith. Should the dispute remain unresolved after such good faith effort, either party may pursue their legal remedies in the Supreme Court of the State of New Jersey, Monmouth County, for all purposes in connection with any action or proceeding which arises from or relates to this Agreement. Neither party shall be liable to the other for, and each party hereby waives any and all rights to claim against the other, any special, indirect, incidental, consequential, punitive or exemplary damages in connection with this Agreement, including, but not limited to, lost profits, even if the party has knowledge of the possibility of such damages. If a legal or equitable action is brought to enforce the terms of this Agreement, the prevailing party shall be entitled to collect its costs, including reasonable attorneys' fees and expenses of appeal, if any.

7.9 Client agrees that it shall not, directly or indirectly, hire or engage, or arrange for or attempt to arrange for, or persuade any other person to hire or engage, any employee of Project Manager while such employee is employed by Project Manager and for a period of ninety (90) days after the termination of such person's employment by Project Manager; including, without limitation, engaging such Project Manager employee or former employee as an independent contractor or as an employee of any person other than Project Manager or any affiliate of Project Manager. In addition to all other remedies available to Project Manager for breach of this provision, Client agrees to pay Project Manager, as liquidated damages and not as a penalty, the agreed upon sum equal to six (6) months' base salary or wages (measured using the employee's rate of salary or wages as of his or her last day of employment with Project Manager) of each employee hired directly or indirectly by Client or any other person in violation of this Section 7.9.

7.10 This Agreement is intended to employ Project Manager in a consulting role so that Client can seek the opinions of Project Manager as Client makes various Project decisions, and for Project Manager to be able to provide its opinions without reservation. More specifically, Client will be employing designers, construction managers, attorneys, architects, testing and inspection services, and other specialized consultants and vendors who will be responsible for all matters related to their respective specialty. Client and Project Manager will both rely on the proper performance of and information provided by such specialists, and Client hereby waives and releases all claims against Project Manager that arise out of or relate to (1) the failure of others engaged by or through Client (for example, designers, construction managers, architects, attorneys, testing and inspection services, and other specialized consultants and vendors) to properly perform their responsibilities, (2) matters that are not the sole responsibility of Project Manager as specifically required by this Agreement, or (3) any action or inaction taken or withheld by Project Manager because it reasonably believed that such action or inaction was in the best interests of Client. Project Manager's aggregate liability under this Agreement shall be deemed limited to Fees and Reimbursable Expenses received by Project Manager.

7.11 Client will provide a temporary office for Project Manager's use to conduct the Services on or near the Project site. The office space will be mutually agreed by Client and Project Manager within an existing building on the campus or through provision of a temporary structure such as an office trailer. This temporary office will be secured and provided with lighting, heating and cooling and furnishings for Project Manager's use for the duration of the Project(s). In addition, the office will be equipped with the following: cable internet 16mb download/2mb upload speeds, wireless N-router, 10/100 Network Switch and 5+ ports, telephone service to land lines for the duration of the Project, surge protectors (3) and an all-in-one printer (Printer/Copier/Fax/Scanner). This office is where record file materials will be collected and maintained by Project Manager for transmittal to Client at the conclusion of the Project. Project Manager will have the authority to retain copies of these files as it deems appropriate for project services record purposes.

7.12 If mutually agreed, Client and Project Manager may expand or extend the scope of services and adjust fees for such services to incorporate other facility repair, modernization, expansion or new construction projects.

7.13 Client hereby grants Project Manager the nonexclusive right and license to use and display Client's name, logo and similar indicia ("Client Marks") (a) to the extent any customization or implementation of the Services involve the incorporation of Client Marks in furtherance of this Agreement and (b) on its website, advertising and marketing collateral identifying Client as a customer of Project Manager. Project Manager obtains no rights in the Client Marks except for the limited right described in the preceding sentence, and Client retains all right, title and interest in the Client Marks. All use of the Client Marks by Project Manager will inure to Client.

**IN WITNESS WHEREOF**, the parties hereto have executed this Agreement effective the day and year first above written:

**Client:**

By: \_\_\_\_\_  
Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_

**Project Manager: Colliers Project Leaders USA NE, LLC**

By: \_\_\_\_\_  
Name: Jonathan F. Winikur  
Title: Division Director  
Date: \_\_\_\_\_

**EXHIBIT A**

**SCOPE OF SERVICES**

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## Town of Fairfield

Sullivan Independence Hall  
725 Old Post Road

Fairfield, Connecticut 06824  
Purchasing Department

(203) 256-3060  
FAX (203) 256-3080

**ADDENDUM #1  
BID #2023-148  
Program Management Oversight Services  
HVAC Upgrades**

**24<sup>th</sup> May 2023** – It is intended that this Addendum incorporating the following corrections, revisions, additions, deletions and clarifications become part of the Contract Documents, including pricing as submitted.

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**New Information:**

*1. A pre-bid meeting for this bid solicitation was held at 11:30am on Thursday, May 18<sup>th</sup>, 2023 at 725 Old Post Road, 1<sup>st</sup> Floor Conference Room, Fairfield, CT 06824. A copy of the sign-in sheet from the pre-bid meeting is posted on the Purchasing Department's page of the Town's website. For your convenience, a direct link to the sign-in sheet is provided below.*

[2023-148 Pre-Bid Sign-In Sheet](#)

**Questions:**

1. Under pre-construction services, section Q, asks for an electronic budget management system. We have used Procore in the past and would recommend it for a project of this size, however this platform is costly. Does the Town have a particular platform in mind?

*Response: The Town has used Procore and BlueBeam in previous projects. The Town does not have a particular platform in mind.*

2. Does the Town want the cost for this platform separated from the bid for management and engineering labor?

*Response: Please provide cost for this platform separated from the bid for management and engineering labor.*

3. Under pre-construction services, section G, asks for state and federal approvals for this HVAC project. Other than permitting, what does Fairfield foresee for other necessary approvals?

*Response: Fairfield has already secured 'HVAC Grants' for these projects from the state. There may be applications for OSCGR school construction grants along with the typical construction permitting on the local level.*

4. Under introduction and background, the RFP mentions a Design Consultant and Construction Manager. Is the selected design consultant eligible to provide CM or PMO services?

*Response: No.*

**End of Addendum #1**

Company: Colliers Project Leaders  
USA NE, LLC Name: Jonathan F. Winikur Signature:  Date: June 1, 2023



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**REFUNDS SUBMITTED FOR APPROVAL**  
**6/19/2023**

<u>Name</u>	<u>List No.</u>	<u>Tax</u>	<u>Interest</u>	<u>DMV</u>	<u>Bill</u>	<u>Reason</u>
<b><u>2021 REAL ESTATE</u></b>						
COPPOLA DAVID L	2021 01 02737	\$3,343.58				OVERPAID IN ERROR
CROTTY PAUL & TARA RICHARDS	2021 01 03009	\$2,335.83				OVERPAID IN ERROR
TRAN PHUOC H & VAN T	2021 01 10046	\$4,293.16				OVERPAID IN ERROR
390 JENNINGS ROAD FAIRFIELD	2021 01 15741	\$525.80				OVERPAID IN ERROR
VERRELLI SARAH ELIZABETH	2021 01 17390	\$2,309.14	\$ 69.27			PAID IN ERROR-ESCROWS
<b>TOTAL</b>		<b><u>\$12,807.51</u></b>	<b><u>\$ 69.27</u></b>			
<b><u>2021 MOTOR VEHICLE</u></b>						
DAIMLER TRUST	2021 03 59346	\$380.16				OVERPAID DUE TO ADJUSTMENT
HENRY BRIAN J & DEBORAH	2021 03 68264	\$151.23				OVERPAID IN ERROR
MAHER BARBARA	2021 03 76268	\$260.01				OVERPAID IN ERROR
NISSAN INFINITI LT LLC	2021 03 80642	\$581.00				OVERPAID DUE TO ADJUSTMENT
SAKAI KIYE M	2021 03 86582	\$73.05	\$ 1.95			OVERPAID DUE TO ADJUSTMENT
SEQUEIRA RICHARD E	2021 03 87659	\$18.59				OVERPAID IN ERROR
SULLIVAN NANCY	2021 03 89963	\$58.93				OVERPAID IN ERROR
NISSAN INFINITI LT LLC	2021 04 85335	\$270.90				OVERPAID DUE TO ADJUSTMENT
NISSAN INFINITI LT LLC	2021 04 85356	\$197.41				OVERPAID DUE TO ADJUSTMENT
<b>TOTAL</b>		<b><u>\$1,991.28</u></b>	<b><u>\$ 1.95</u></b>			
<b><u>2021 SEWER USE</u></b>						
HENRY NIANDRA A	2021 08 00528	\$292.32	\$ 15.17			OVERPAID IN ERROR
FEINBERG MARK	2021 08 01810	\$180.42				OVERPAID IN ERROR
COPPOLA DAVID L	2021 08 02737	\$733.32				OVERPAID IN ERROR
FASANO LAURA SIMENS	2021 08 03624	\$221.16				OVERPAID IN ERROR
FAIRFIELD GRACE E	2021 08 05011	\$100.00				OVERPAID IN ERROR
FLYNN PAULA M	2021 08 05992	\$15.72				OVERPAID IN ERROR
RYAN STEPHEN M JR & MARIE P	2021 08 15593	\$232.80				OVERPAID IN ERROR
<b>TOTAL</b>		<b><u>\$1,775.74</u></b>	<b><u>\$ 15.17</u></b>			
<b><u>2019 REAL ESTATE</u></b>						
SAINES WHENDY	2019 01 17362	\$1,049.99				OVERPAID IN ERROR
<b>TOTAL</b>		<b><u>\$1,049.99</u></b>				
<b><u>2013 SEWER USE</u></b>						
				<b>LIEN</b>	<b>COLL FEE</b>	
JUNKER STEVE & DEBORAH	2013 08 05161	\$276.55	\$ 1,244.28	\$ 24.00	\$231.73	PAID TWICE IN ERROR
<b>TOTAL</b>		<b><u>\$276.55</u></b>	<b><u>\$ 1,244.28</u></b>	<b><u>\$ 24.00</u></b>	<b><u>\$231.73</u></b>	
<b><u>2012 SEWER USE</u></b>						
JUNKER STEVE & DEBORAH	2012 08 05161	\$603.20	\$ 1,004.33	\$ 24.00	\$241.13	PAID TWICE IN ERROR
<b>TOTAL</b>		<b><u>\$603.20</u></b>	<b><u>\$ 1,004.33</u></b>	<b><u>\$24.00</u></b>	<b><u>\$241.13</u></b>	
<b><u>2011 SEWER USE</u></b>						
JUNKER STEVE & DEBORAH	2011 08 05161	\$59.61	\$ 684.26		\$175.72	PAID TWICE IN ERROR
<b>TOTAL</b>		<b><u>\$59.61</u></b>	<b><u>\$684.26</u></b>		<b><u>\$175.72</u></b>	
<b>TOTAL TAX</b>		<b>\$18,563.88</b>				
<b>TOTAL INTEREST</b>			<b>\$3,019.26</b>			

TOTAL LIEN	\$48.00
TOTAL COLLECTION FEE	\$648.58
<u>GRAND TOTAL</u>	<u>\$22,279.72</u>