Colliers INTERNATIONAL
PROJECT LEADERS

Westport Public Schools

QUALIFICATIONS TO PROVIDE CAPITAL PROJECTS PROGRAM MANAGER SERVICES

#21-012-RFQ

June 4, 2021

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

PREPARED FOR:
Elio Longo
Chief Financial Officer
Westport Public Schools

135 New Road
Madison, CT 06443
www.cplusa.com

MAIN +1 860 395 0055
FAX +1 203 779 5661

Colliers INTERNATIONAL
PROJECT LEADERS

June 3, 2021

Mr. Elio Longo
Chief Financial Officer
Westport Public Schools
110 Myrtle Avenue
Westport, CT 06880

Subject: ***Qualifications to Provide Capital Projects Program Manager Services #21-012-RFQ***

Dear Mr. Longo:

We are pleased to submit our statement of qualifications to provide capital projects program manager services to assist with Westport Public Schools' master facilities plan.

Colliers Project Leaders is a project management firm based in Madison, CT with more than 20 years of experience in the design and construction industry with our primary sector being educational facilities. Our team of more than 120 industry professionals provides a breadth of expertise in many facets of the industry including planning, architecture, engineering, construction, commissioning, and finance.

Colliers has become a leading expert in the Connecticut public K-12 sector. We are experts in the Office of School Construction Grants & Review (OSCG&R) process and have developed a strong relationship with OSCG&R that assist our clients in partnering with them.

The following are some of our representative public school programs and projects where we have served, or are currently serving, in the role of program of program/project manager:

- ***Madison's Capital Improvement Plan***
- ***South Windsor's Elementary Schools Master Plan***
- ***Cheshire's School Modernization Plan***
- ***Wethersfield's Elementary School Master Plan***
- ***Stonington's School Modernization Project***
- ***Fairfield's Project Management Oversight Consultant (Riverfield, Holland Hill, Mill Hill and Sherman Elementary Schools)***
- New Fairfield's New High School and Meeting House Hill School
- Regional School District 14 Nonnewaug High School
- East Hampton High School
- Windham High School
- North Haven Middle School
- Branford's Francis Walsh Intermediate School
- Rocky Hill's Moser School
- New London's Bennie Dover Jackson Middle School
- Mansfield's New Elementary School
- Newington's Anna Reynolds Elementary School
- CREC's Ana Grace Academy of the Arts

Based on the scope of services contained in the Request for Qualifications, we believe our breadth of experience and specialization in the education sector make us uniquely qualified to serve as your capital projects program manager.

We look forward to the opportunity to formally present 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.

We hope that this submission meets with your expectations. If you have questions or require additional information, you can contact me at charles.warrington@colliers.com or (860) 395-0055 ext. 202.

Sincerely,

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

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EXECUTIVE SUMMARY

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 program and project manager services in the marketplace.*** Our focus upon early planning, budgeting, due diligence, scheduling, and project management provides our clients with the confidence that their projects will receive the consistent oversight and quality assurance that leads to the successful completion of their projects.

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

$7+ BILLION UNDER MANAGEMENT

120+ PROJECT MANAGERS IN THE NORTHEAST

115+ CURRENT PUBLIC SECTOR PROJECTS

Our team of seasoned professionals currently includes more than 120 experts of virtually all aspects of building planning, design, and construction. Additionally, with over $7+ Billion in projects currently under management, our team is extremely familiar with the latest trends and issues affecting the design and construction industry. Our firm's business structure is Limited Liability Company (LLC).

SYNOPSIS OF SERVICES

Colliers has steadily developed the core services necessary to assess the facilities needs of our clients by developing fiscally and strategically responsible solutions. ***The diverse technical backgrounds of our highly qualified staff allow Colliers to offer a comprehensive set of services aimed at one goal – that our clients receive the best value for their capital investments.*** Our clients' satisfaction with this approach is reflected in the numbers who have requested multiple services. Provided below is a listing of the services offered within each of our core areas:

SERVICE	OVERVIEW OF SERVICE
Planning & Advisory	› Building Programming & Feasibility Analysis › Comprehensive Strategic Planning › Facilities Conditions Assessments › Capital Improvements Plans › Space Modernization Planning › Space Quantification & Utilization Analysis
Program & Project Management	› Budget & Schedule Development › Design & Construction Team Selection & Contract Negotiation › Design Oversight, Review & Management › Value Engineering › Coordinate & Monitor Construction › Financial & Schedule Tracking & Reporting › Manage FF&E & Move Coordination › Punch List & Closeout Management
Commissioning & Energy	› Energy Audits › Commissioning (new building/space/equipment) › Existing Building Commissioning (re-commissioning & retro-commissioning) › Building Envelope Commissioning › On-going (continuous or monitoring-based) Commissioning › Fault Detection/Data Analytics › Performance Monitoring & Reporting › Central Plant & Building Optimization › Operational Support & Training › Existing Systems Evaluations › ENERGY STAR Ratings › LEED® Certified & High Performance Buildings/Spaces › Leverage External Funding, Incentives, Rebates and Credits
Engineering & Design	› Bridge Engineering › Civil/Site Engineering › Coastal/Marine Engineering › Construction (Engineering & Inspection, Quality Control)

- Dam Engineering
- Energy – Oil & Gas
- Environmental Services
- Federal Services
- Geotechnical Engineering
- GIS/Asset Management Services
- Governmental Services
- Grants & Funding Services
- Hydrogeologic Services
- Landscape Architecture Services
- Natural Resource Services
- Planning (Land Use & Zoning, Municipal)
- Recreational/Sports Services
- Regulatory Compliance & Permitting
- Renewable Design
- Right-of-Way Acquisition
- Stormwater Management Services
- Structural Engineering
- Survey (3D Laser Scanning, Land Measurement, LiDAR, Rail & Tunnel, Subsurface Utility Engineering, Unmanned Aerial System)
- Telecommunication Services
- Transportation Planning & Highway Design
- Traffic Engineering & ITS
- Utilities/Energy Services
- Water/Wastewater Engineering

RELEVANT PROJECT EXPERIENCE

CONNECTICUT PUBLIC K-12 PROGRAM MANAGER EXPERIENCE

With respect to Westport Public School's Request for Qualifications for capital projects program manager, Colliers has served in similar capacities for other Connecticut school districts. Specifically, we have served as the project management oversight consultant for the Town of Fairfield, Connecticut since 2017. During our tenure in Fairfield, we have provided planning and project management services for four school projects, multiple town capital projects, and we are currently assisting Fairfield Public Schools with updating their waterfall (a.k.a. capital improvements) program. We are proud to say that all projects to date have been delivered within the budgets approved by the representative town meeting (RTM).

BY THE NUMBERS

- ***400 +*** Education Projects
- ***100 +*** Public K-12 School Projects
- ***$3 Billion*** Construction Value of School Projects

Colliers has served as the project manager for the Town of South Windsor overseeing their Elementary School Master Plan since 2014. Since then, the Town has constructed three new elementary schools and is currently designing their final elementary school. The total program budget for South Windsor's master plan is $162 Million. Seven years into the ten-year program and it is under budget and on schedule. The success of this project can be attributed to the leadership of the Town and South Windsor Public Schools, the Permanent Building Commission, and the project process which Colliers has orchestrated.

Colliers has been representing the Town of Madison and Madison Public Schools since 2016. Colliers has provided master planning, pre-referendum, pre-construction, and construction services for multiple school projects. Specifically, Colliers developed the Madison Public Schools $100 Million Capital Improvement Plan in 2018. Colliers has also assisted the Town with procurement of architectural and design services for their facilities master plan and is currently providing pre-referendum services for their proposed new elementary school.

PUBLIC K-12 EXPERIENCE

Colliers has a well-established reputation for providing program and project manager services within the educational marketplace and is well-versed in guiding our clients through the complex process of district-wide master planning. As a result of our project experience throughout the Northeast, Colliers has developed a unique perspective and understanding of the very specialized needs of educational master planning – allowing us to identify the holistic needs of the District and to develop strategies to successfully lead Westport Public Schools through their program.

For more than 20 years, we have provided program and project manager services for numerous clients based on our reputation for quality service, client satisfaction, and unique expertise. We are proud to state that nearly all of our clients have gone on to request additional services.

In addition to the programs noted above, the table below provides a sampling of our other public K-12 school clients. ***Furthermore, we have provided on the following pages detailed descriptions highlighting programs similar in scope to what this RFQ requires.***

PUBLIC K-12 SCHOOL EXPERIENCE		
Clients		
Achievement First	Glastonbury Public Schools	Old Saybrook Public Schools
Assabet Valley School District	Granby Public Schools	Oxford Public Schools
Bloomfield Public Schools	Hartford Public Schools	Regional School District 14
Branford Public Schools	Holyoke Public Schools	Rocky Hill Public Schools
Bridgeport Public Schools	Madison Public Schools	Seymour Public Schools
Bristol County Agricultural SD	Mansfield Public Schools	South Windsor Public Schools
Cape Cod Regional Technical HS	Middletown Public Schools	Southwick-Tolland-Granville RSD
Chatham Central School District	Narragansett Regional SD	Stonington Public Schools
Clinton Public Schools	New Fairfield Public Schools	West Bridgewater Public Schools
East Hampton Public Schools	New Haven Public Schools	West Haven Public Schools
Easthampton Public Schools	New London Public Schools	West Springfield Public Schools
Fairfield Public Schools	Newtown Public Schools	Westbrook Public Schools
Farmington Public Schools	North Adams Public Schools	Weston Public Schools
Fitchburg Public Schools	North Haven Public Schools	Wilton Public Schools
Foxborough Public Schools	Northborough Public Schools	Windham Public Schools
Gardner Public Schools	Norwalk Public Schools	Worcester Public Schools

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Madison Public Schools

Capital Improvement Plan

Madison, CT

Project Overview

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

Services Overview

Colliers' project management services included:

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

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

Completion
Ongoing

Project Size
All BOE Facilities

Project Budget
$100 Million

Services Provided
Project Management

Planning Services

Architect
N/A

Contractor
N/A

www.cplusa.com

Client Contact
William McMinn

Facilities Director

203 245 6470

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 Phillip 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 – Summer 2023

Project Size

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

Project Budget

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

Services Provided

Project Management

Architect

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

Contractor

Gilbane Building Company

www.cplusa.com

Client Contact

Dr. Kate Carter
Superintendent of Schools
860 291 1205

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Town of Fairfield

Multiple Projects

Fairfield, CT

Project Overview

Colliers has been engaged to provide 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 will provide 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.

Services Provided

Project Management

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Town of Cheshire

School Modernization Plan

Cheshire, CT

Project Overview

Colliers was engaged to provide project management services for the planning, development, and implementation of a School Modernization Plan for the Cheshire Public Schools that will address the aging infrastructure of the Town's school system.

Services Overview

Colliers will develop multiple, multi-project options for the Cheshire School Modernization Committee to consider for implementation. As part of the process, Colliers has facilitated selection of a demographer to update the district enrollment projections.

Colliers will develop multiple, multi-project scenarios for the School Modernization Committee to consider for the future of Cheshire Public Schools. These scenarios will consider future enrollment projections, space utilization and facility capacity, facility conditions, code violations, total project cost and debt impact to the tax-payers of Cheshire.

Colliers will also facilitate communications with the State of Connecticut Office of School Construction Grants & Review upon approval of the preferred scenario to ensure that the state is in support of such scenario.

Completion
Fall 2021

Project Size
TBD

Project Budget
TBD

Services Provided
Project Management

Architect
TBD

Contractor
TBD

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Client Contact
Sean Kimball
Town Manager
203 271 6660

Colliers
Project Leaders

Wethersfield Public Schools

Elementary School Master Plan

Wethersfield, CT

Project Overview

Colliers has been engaged to provide project management oversight services to assist Wethersfield Public Schools in the planning of the elementary school modernization program.

Currently the district has five elementary schools: Alfred W. Hanmer, Charles Wright, Emmerson-Williams, Highcrest, and Samuel B. Webb Elementary Schools. Many of the facilities do not meet current codes (ADA, energy), and do not have the latest school security measures in place. A multi-phase program has been established to address all the elementary schools and possibly re-district from five to four elementary schools.

Services Overview

Colliers will develop space standard calculations for the various enrollment projections developed by Milone & MacBroom. The space standard calculations will be used to determine the size of the proposed schools. This will allow the project team to evaluate each site with respect to constructability and layout. The space standards will also drive the development of the probable budgets for each option as well as the reimbursement by the state.

Colliers will provide multiple master plan options for the elementary school master plan that will take into consideration phasing, re-districting, available space, transportation, and debt service to the town.

As noted above, Colliers will develop budget ranges for each of the selected options. The budgets will primarily be driven by the space standard calculation (size of schools) and the project schedule (escalation costs). As each option is developed in the future, the budget will be further refined as we perform additional due diligence measures.

Completion

Ongoing

Project Size

Multiple Schools

Project Budget

$165 Million

Services Provided

Project Management
Planning

Architect

N/A

Contractor

N/A

www.cplusa.com

Client Contact

Michael Emmett
Superintendent of Schools
860 571 8110

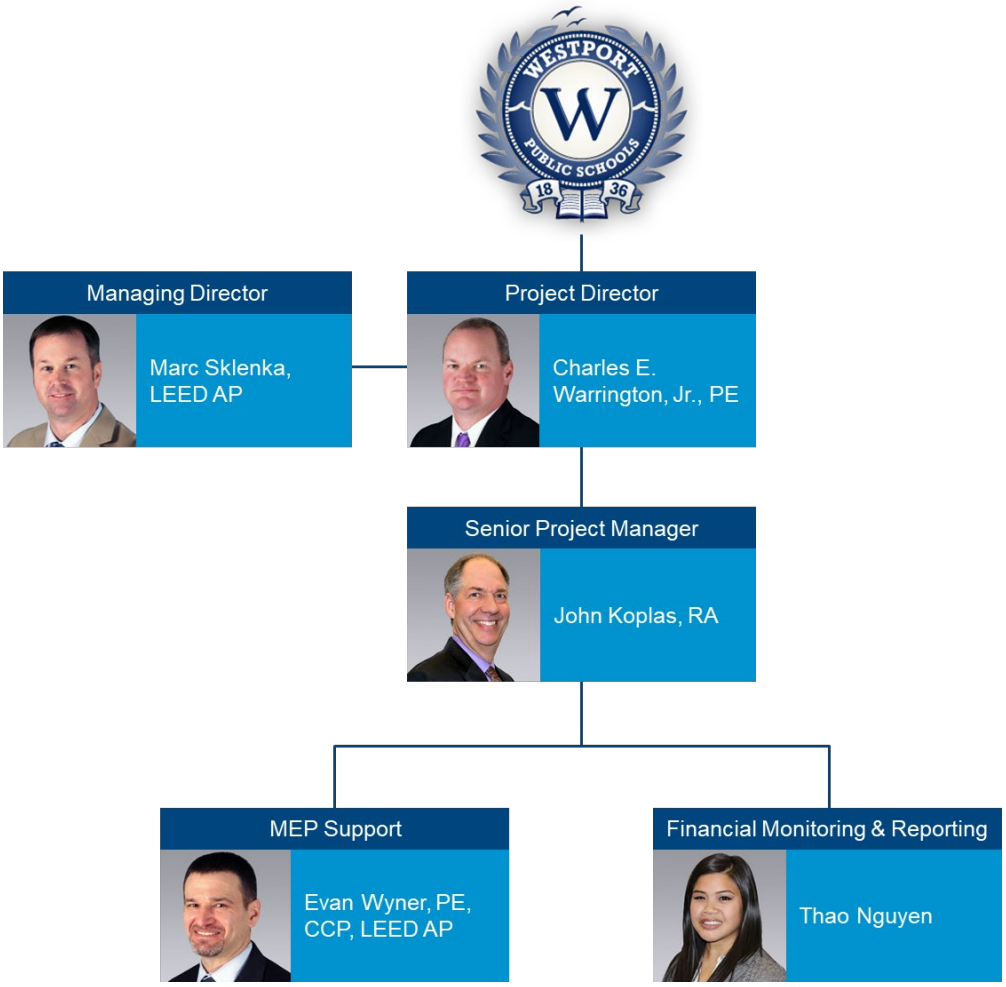
PROPOSED PROJECT TEAM

ORGANIZATION CHART

Colliers is confident that we are uniquely qualified to deliver the necessary capital projects program manager services for Westport Public Schools as required by the RFQ. We firmly believe you will be hard pressed to find another team with the local project experience matched with the depth of talent and resources that Colliers is proposing for this project.

Colliers is committed to serving the District with a team approach that allows the strengths of our individuals to complement each other and provide a superior level of service. Charles “Chuck” Warrington, Project Director, will serve as the lead for our services and provide overall management for the program. John Koplas, Senior Project Manager, will team with Chuck on the delivery of our services and will serve as the daily contact for the program. Both Chuck and John are licensed professionals in Connecticut. Chuck is a licensed civil engineer and John is a registered architect.

In addition to Chuck and John, Colliers has additional in-house resources to support Westport Public Schools as needed. The organization chart below illustrates some of the additional key members who will be involved and provide support to the program.



ROLES AND RESPONSIBILITIES

Provided below is a brief overview of the proposed project team's roles and responsibilities. ***In addition, resumes detailing the key personnel's educational background and experience can be found on the following pages.***

KEY PERSONNEL	ROLES AND RESPONSIBILITIES	TIME COMMITTMENT
Managing Director Marc Sklenka, LEED AP	Overall service delivery, quality control and management of the project team.	As needed
Project Director Charles E. Warrington, Jr., PE	Ensure satisfactory project completion with an emphasis upon planning, master scheduling, quality assurance and coordination between the project team's various disciplines and the project owner.	Estimated 2 to 4 hours per week on average but may increase depending on specific scope of work occurring
Senior Project Manager John Koplas, RA	Deliver quality control and management for the project, schedule oversight & management, project report development, provide day-to-day project team management, develop contracts and manage negotiations, assist in development of total project budget, financial control/oversight of projects, and create contingency and change order expenditure reports.	Estimated 4 to 8 hours per week on average but may increase depending on specific scope of work occurring
MEP Support Evan Wyner, PE, CCP, LEED AP	Provide specialized technical support as needed to review HVAC and electrical systems strategies, drawings and components at various intervals during the design process.	Support as needed
Financial Monitoring & Reporting Thao Nguyen	Responsible for the regular monitoring, analysis and reporting of capital program finances.	Support as needed

Marc Sklenka LEED AP, MCPPO

Managing Director

marc.sklenka@colliers.com

Colliers Project Leaders

Education and Qualifications

Bachelor of Science Architectural Engineering – Wentworth Institute of Technology

Accreditations and Memberships

LEED Accredited Professional (LEED AP)

Massachusetts Certified Public Purchasing Official Program (MCPPO)

Contract Document Specialist

Construction Management Certificate

Member, Construction Specifications Institute

Years of Experience

27 years

Years with Firm

19 years

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Area of Expertise

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

Relevant Experience

Madison Public Schools – Elementary & Middle School Capital Program – Madison, CT
Project management services for the Madison Public Schools during the early planning and public approval process for the elementary and middle school capital program.

Town of Fairfield – Multiple Projects – Fairfield, CT
Project management services for multiple projects on behalf of the Town of Fairfield including Holland Hill, Mill Hill, Riverfield, and Roger Sherman Elementary Schools.

South Windsor Public Schools – School Modernization Project – South Windsor, CT
Project management services for the South Windsor's School Modernization Project as part of the district's multi-phased 10-Year Master Plan. Projects include Orchard Hill, Eli Terry, Philip R. Smith, and Pleasant Valley Elementary Schools

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

Town of Branford – Francis Walsh Intermediate School – Branford, CT
Project management services for the $88.2 Million renovate-as-new and construction of a new academic addition to the 191,000 gsf Francis Walsh Intermediate School.

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

Charles E. Warrington, Jr. PE, MCPPO

Director

charles.warrington@colliers.com

Colliers Project Leaders

Education and Qualifications

Bachelor of Science Civil Engineering – Worcester Polytechnic Institute

Accreditations and Memberships

Licensed Professional Engineer (CT)

Massachusetts Certified Public Purchasing Official Program (MCPPO)

Years of Experience

26 years

Years with Firm

8 years

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Area of Expertise

Mr. Warrington is a professional civil engineer with more than 25 years of experience in the construction industry primarily being in the Connecticut public sector. Chuck leads Collier's Connecticut Public K-12 Division and is an expert in the OSCGR process from pre-referendum through project closeout. Chuck's expertise in this area as well as his expertise in the Connecticut construction public sector provides clients with depth of knowledge to successfully navigate the complexities of large-scale school construction projects.

Relevant Experience

Madison Public Schools – Capital Improvement Plan Oversight – Madison, CT
Project management services for the 10-Year Capital Improvement Plan for the Madison Board of Education for a long-range planning of maintenance and improvements to the existing school facilities and associated properties. The Plan addresses long term deferred maintenance issues, equipment replacement, re-programming of facilities, and proposed security upgrades.

Town of Fairfield – Multiple Projects – Fairfield, CT
Project management services for multiple projects on behalf of the Town of Fairfield including Holland Hill, Mill Hill, Riverfield, and Roger Sherman Elementary Schools.

South Windsor Public Schools – School Modernization Project – South Windsor, CT
Project management services for the South Windsor's School Modernization Project as part of the district's multi-phased 10-Year Master Plan. Projects include Orchard Hill, Eli Terry, Philip R. Smith, and Pleasant Valley Elementary Schools

Town of Cheshire – School Modernization Plan – Cheshire, CT
Project management services for the planning, development, and implementation of a School Modernization Plan for the Cheshire Public Schools that will address the aging infrastructure of the Town's school system.

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

Town of Stonington – School Modernization Project – Stonington, CT
Project management services for the School Modernization Project which includes renovations to three of the district's schools: West Vine Elementary School, Deans Mill Elementary School, and Pawtucket Middle School. The Elementary Schools are both new addition and renovate-as-new projects.

John Koplas RA

Senior Project Manager

john.koplas@colliers.com

Colliers Project Leaders

Education and Qualifications

Bachelor of Architecture – University of Notre Dame

Accreditations and Memberships

Registered Architect (CT)

Years of Experience

30 years

Years with Firm

1 year

www.cplusa.com

Area of Expertise

Mr. Koplas is a licensed architect with 30 years of project management experience. He possesses extensive expertise in managing complex, phased projects within occupied facilities, as well as overseeing various multimillion-dollar projects concurrently. Prior to joining Colliers, John served as an internal Senior Project Administrator for a hospitality and gaming organization where he managed a team of Project Managers as well as various new and renovation projects for gaming, retail, dining, and hotel components within the 9 Million gsf complex. In his role as Senior Project Manager, John will manage projects for public and private clients with focus on contractor and consultant coordination, design assistance, contracts, scheduling and invoicing, and overall budget oversight.

Relevant Experience

Town of Cheshire – School Modernization Plan – Cheshire, CT
Project management services for the planning, development, and implementation of a School Modernization Plan for the Cheshire Public Schools that will address the aging infrastructure of the Town's school system.

Town of Newington – Anna Reynolds Elementary School – Newington, CT
Project management services during the pre-referendum phase for the renovation project at Anna Reynolds Elementary School.

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

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

Regional School District #4 – Chester Elementary School – Chester, CT
Project management services for the $3 Million school renovations and addition. The scope of work included an entire new wing for the expanding school, as well as interior renovations to the existing classrooms and various site work modifications to the school parking lot and perimeter

Evan Wyner PE, CCP, LEED AP

Senior Director

evan.wyner@colliers.com

Colliers Project Leaders

Education and Qualifications

Bachelor of Science Mechanical Engineering – University of Massachusetts Amherst

Accreditations and Memberships

Licensed Professional Engineer (CT)

Certified Commissioning Professional (CCP)

LEED Accredited Professional (LEED AP)

Years of Experience

27 years

Years with Firm

22 years

www.cplusa.com

Area of Expertise

Mr. Wyner is a Professional Engineer with more than 25 years of experience providing commissioning and energy management services. In his current role as Senior Director, Evan leads the Commissioning & Energy Services team with over 20 experienced engineers and commissioning specialists. His responsibilities include developing systems and processes, technical oversight, managing complex projects, client management, and internal team management. Evan has direct experience performing commissioning services, retro-commissioning services, facilities management, owner's project management, operations and maintenance system development, energy system optimization, and operator training.

Relevant Experience

Bloomfield Public Schools – Bloomfield High School – Bloomfield, CT
Commissioning services during the phased renovations and additions to the Bloomfield High School. This 180,500 gsf renovation included upgrades to the sites vehicular and pedestrian traffic circulation, window replacements, new HVAC systems and controls, finishes, technology upgrades, and security controls.

Town of Seymour – Chatfield-LoPresti Elementary School – Seymour, CT
Commissioning services relative to the oversight and coordination of the mechanical system installations as well as the presentation of recommendations to the school board regarding performance of building systems for this $28 Million, 88,728 gsf renovation and expansion project. The project featured replacement of the existing heating and ventilation systems and included within its budget approximately $1.25 Million for alternative energy systems to support geothermal wells.

Wilton Public Schools – Wilton High School – Wilton, CT
Commissioning services during the $17 Million HVAC upgrade project which included the replacement of all air handling equipment, an expansion of the AC system, replacement of split systems with a central air system, upgrade of hydronic heating system, and replacement of the building management system.

Middletown High School and Vocational Agricultural Center – Middletown, CT
Commissioning services related to the final inspection and hands-on performance testing of HVAC systems as part of the construction of a new 283,000 gsf vocational/agricultural high school.

Emmett O'Brien Vocational Technical High School – Ansonia, CT
Commissioning services for the renovation and addition to the Emmett O'Brien Vocational Technical High School, which included approximately 46,000 gsf of new construction and 124,000 gsf of renovation. The project was constructed in two phases requiring the temporary relocation of some of the students and installation of portable classrooms. The project also included refurbishment of the school's athletic fields located on Ford Street, the installation of new technology, HVAC systems, plumbing systems, roofs, windows, and sprinkler systems.

Thao Nguyen

Project Accountant

thao.nguyen@colliers.com

Colliers Project Leaders

Education and Qualifications

Bachelor of Arts Accounting – Emmanuel College

Accreditations and Memberships

Board of Directors, Edward Street Child Services

Years of Experience

8 years

Years with Firm

2 years

www.cplusa.com

Area of Expertise

Ms. Nguyen has more than 5 years of financial and business experience. Thao lends the benefit of her strong analytical skills, audit experience, and client management skills to the development, implementation and summary of budgets and expenses for Colliers' client portfolio. In her role as Project Accountant, Thao utilizes her financial acumen to assist Colliers' Project Managers with the financial tracking of their projects and to interact with clients to reconcile the tracking of expenses within their own internal systems.

Relevant Experience

South Windsor Public Schools – Orchard Hill Elementary School – South Windsor, CT
Financial, cost estimating and schedule support services for the new 75,600 gsf Orchard Hill Elementary School that included the construction of a new Pre-K facility that will serve 564 students.

Town of Fairfield – Multiple Projects – Fairfield, CT
Financial, cost estimating and schedule support services for multiple projects on behalf of the Town of Fairfield including Holland Hill, Mill Hill, and Roger Sherman Elementary Schools.

Town of Branford – Francis Walsh Intermediate School – Branford, CT
Financial, cost estimating and schedule support services for the $88.2 Million renovate-as-new and construction of a new academic addition to the 191,000 gsf Francis Walsh Intermediate School.

Town of Stonington – School Modernization Project – Stonington, CT
Financial, cost estimating and schedule support services for the School Modernization Project which included renovations to the district's West Vine Street School and Deans Mill School. The West Vine Street School and Deans Mill School are both new addition and renovate-as-new projects. The Pawcatuck Middle School project involves the replacement of the roof.

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

City of New London – Bennie Dover Jackson Middle School – New London, CT
Financial, cost estimating and schedule support services during the design, renovation and expansion of the $49 Million, 126,000 gsf Bennie Dover Middle School. The campus will be designed to house Grades 6 through 8 of the STEM Middle School and the International Education with Dual Language Middle School.

PROJECT APPROACH

PROJECT UNDERSTANDING

Colliers understands that Westport Public Schools is seeking a capital projects program manager to assist with the development and management of the District's Master Facility Plan, as well as to manage individual capital projects as needed. In general, we understand that our primary role is to provide support to Mr. Elio Longo (Chief Financial Officer) and Mr. Theodore Hunyadi (Director of Facilities) as directed with developing and managing the capital plan. Our fimr was originally created to provide this type of support, expertise, and guidance for owners.

We understand that the assignment will be on an as-needed basis only. We believe we are uniquely qualified to provide these services as we have the staffing and flexibility to provide as much or as little support as Westport Public Schools requires. We have the technical expertise to assist and manage at a broader planning level or to provide specific project management oversight. In summary, Colliers is prepared to support Westport Public Schools as needed and does not require a minimal amount of dedicated time or projects to provide such services.

Colliers' general approach to project development and management can be found on the following pages. This approach applies to both program management (capital plan) and specific project management. Colliers will modify this approach as required to meet the needs of Wesport Public Schools' capital plan.

APPROACH AND METHODOLOGY

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 Westport Public Schools 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 ***high-level master schedules*** that complement the proposed capital forecast but also considers constructability and technical requirements for proper phasing of the work. The schedule must also take into consideration the required ***lead times for funding approvals***, grant approvals, proper investigative time, design time, bidding and construction durations just to name a few.

MAINTAIN Construction Quality Assurance throughout the process by ***confirming the proper design and construction*** of materials and equipment, and ultimately, ***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.

Assessing and Modifying the Capital Program

Upon award Colliers will thoroughly review the district proposed capital plan with Mr. Longo, Mr. Hunyadi and other stakeholders to ensure that we have a thorough understanding of how it was originally established and what the goals of the plan are. We'll also review the District Master Facility Plan developed by Antinozzi Associates and identify any additional needs and assessment that may be required.

Colliers will also schedule preliminary site visits to each of the schools to familiarize ourselves with the district as a whole.

Verify and Develop Project Budgets

Within the RFQ we foresee two major budgetary requirements. The first is to evaluate and assist with the management and development of the current five-year capital forecast. In doing so Collier review the scope of work for each project and compare it to the proposed budget to ensure they align. We'll review how the budgets were established and ensure they represent a total project budget. Once the five-year forecast is verified, we expect to support Mr. Longo and Mr. Hunyadi with maintaining and updating it as required.

The second major budgetary effort is developing budgets for major capital projects that are identified in the future as a result of future master planning and initiatives by the Board of Education. To do this, Colliers has developed a proprietary budget template broken down into the following categories:

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

In addition to providing total project budgets for the specific project, Colliers will also provide anticipated reimbursement from funding sources other than the town as well as provide detailed cash flow analysis for the project. Providing the cash flow analysis for the project allows the town's department of finance to assess the financial impact to the town for that specific project.

Develop Project Schedules

Similar to the developing the project budgets, development of an ***overall master schedule*** in addition to individual project schedules will be required to properly manage the capital project program. Development typically occurs concurrently with the development of the budgets as budgets must account for inflation which is driven by the schedule.

Upon verification of the five-year capital forecast, Colliers will develop a high-level macro-schedule that identifies key planning milestones for the program such as budget approvals, consultant procurement (designer services), funding authorizations, bidding

and construction time frames just to name a few. This overall macro-schedule will assist in creating a yearly ***milestone schedule*** that will provide specific milestones dates necessary to keep the overall schedule on track.

For individual capital projects, 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

Cost 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

Manage Consultant Selection

When necessary, ***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 District 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 District 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 District to review and discuss the proposal submissions
- Coordinate/facilitate interviews
- Develop, working with the District 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.

PHASE II: DESIGN SERVICES

Upon completion of feasibility and planning activities, an individual capital project typically continues with the design phase. The design phase has many time-consuming components to it that require pro-active management in order be successful. Colliers process below outlines some of the major activities of a typical 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 District 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 District 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.

Manage Construction Phasing/Logistics

Colliers will also facilitate the construction phasing and logistics efforts. ***Colliers will proactively figure out the best way for the District to stage the work. We will identify what will impact the day-to-day life at Westport Public Schools 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 the District 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.

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 District, ***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
- District approval dates (prior to submission)
- hearing dates
- 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 the District, 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 District'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 Westport to allow the project to move forward. We then assist the construction manager to:

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

Manage Project Costs

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

PHASE III: CONSTRUCTION SERVICES

Upon completion of the pre-construction phase that hopefully leads to a bid within the project budget, the construction phase will commence. The construction phase is an exciting time for the owner and future occupants but one that is intense and requires a large amount of time and dedication to properly manage. Below are some of the major activities that occur during the construction phase.

Coordinate Construction Activities

If not properly managed, construction activities can significantly disrupt neighborhood and community members. 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, campus visitors, and community residents will be reviewed to ensure that all safety precautions are being implemented and modified as required. Colliers will continually review the safety plan and bring to the team's attention any deficiencies noted in the field to ensure a safe environment for everyone. ***All of this ensures the project is moving forward in a positive direction.***

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
- 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 District 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 District a thorough status snapshot of project finances at any given time. ***This process ensures we have an accurate account of all possible financial exposures.***
- 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. With a focused effort on proactive quality control and schedule maintenance throughout the construction phase, Colliers will limit the amount of punch list items at project completion making for a more efficient closeout process.

Oversee Construction Schedule

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

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

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

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 District:

- 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 District 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 District move coordinators to share key needs, disseminate information, and serve as a point of contact

Procure Movers

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

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

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

Coordinate Furniture, Fixtures & Equipment (FF&E)

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

Monitor & Manage Contractor Correction of Problems

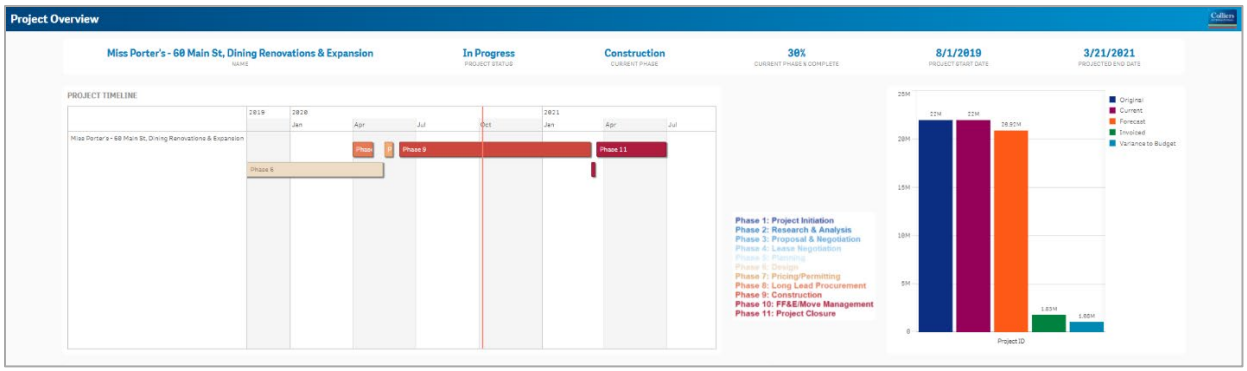
Every building is a prototype, therefore problems are likely to occur. Once identified, Colliers will monitor the contractor's troubleshooting efforts to address any problems. Depending upon the type of system being corrected, additional performance testing may be the only means of insuring proper operation.

WEB-BASED DATA SHARING SYSTEM – COLLIERS360

Colliers Project Leaders has our own proprietary, web-based project management platform, Colliers360, for use by our project teams and our clients at no added cost to the overall project. Our platform makes real-time project data always available for client viewing with user-friendly, flexible dashboards. From a single site we can manage project financials and schedules, store key documents in our document storage portal, and create meeting minutes and daily reports, as well as manage project related risks. Multiple team members can log in and understand exactly what stage of the process a current project is in, along with any critical path issues or risks, and make informed decisions on the best next steps. Colliers360 is mobile-optimized for easy viewing on all mobile devices to get project visibility in the office or on-the-go. Key features of the platform include:

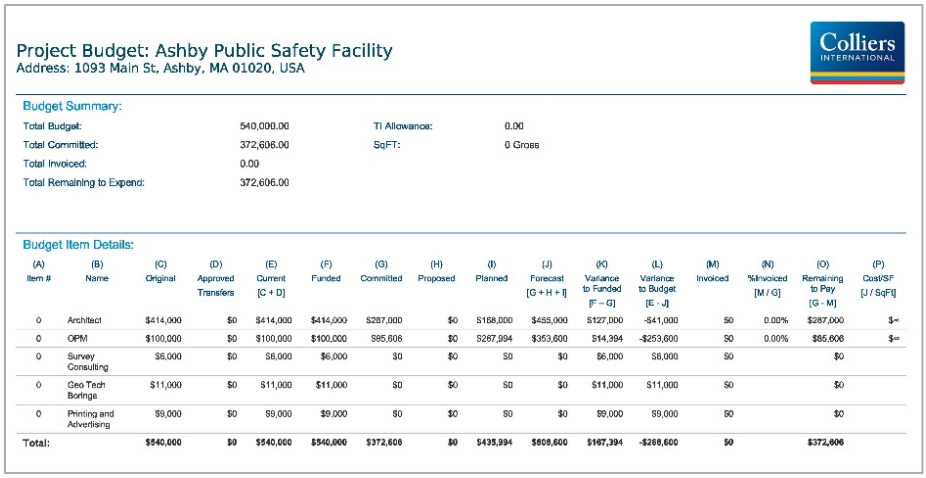
DASHBOARD VIEWING

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



FINANCIAL AND SCHEDULE MANAGEMENT

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



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

Budget Summary:

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

Budget Item Details:

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

DAILY REPORTS, MEETING MINUTES, TRACKING OF ISSUES

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

MEETING MINUTES

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

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

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

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

Additional Distribution:

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

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

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

MEETING MINUTES

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

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

DOCUMENT STORAGE PORTAL

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

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

Documents

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

KEY DIFFERENTIATORS

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

- **Extensive Connecticut Public School Experience**
- **Educational Project Experience in Excess of 400 Projects**
- **Management Systems with Dramatic Project & Life Cycle Cost Savings**
- **In-House Financial, Schedule, and Quality Assurance Services**
- **Multi-Disciplined Technical Capability**
- **Mechanical, Electrical and Plumbing Systems Expertise**

EXTENSIVE CONNECTICUT PUBLIC SCHOOL EXPERIENCE

Colliers has long established itself as a known provider of premier program and project manager services in the State of Connecticut and we have extensive experience working with the ***Office of School Construction Grants & Review***. Our project manager experience includes multiple public K-12 construction, renovation and modernization projects, many high-performance building projects, and several new and/or addition/renovation projects on the site of an occupied school.

In addition, we have assisted several communities with the all-important ***Feasibility/Pre-referendum Phase Services*** and have gone on to successfully manage and implement voter approved projects. We recently provided these services in South Windsor as they evaluated the feasibility options for Pleasant Valley Elementary School.

EDUCATIONAL PROJECT EXPERIENCE IN EXCESS OF 400 PROJECTS

With more than ***400 education projects and a total value in excess of $3 Billion***, Colliers has a well-established reputation for providing program and project manager 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 throughout the Northeast, 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 Westport Public Schools 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 District 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 and project manager services include the capability to support Westport Public Schools 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.

MULTI-DISCIPLINED TECHNICAL CAPABILITY

Colliers has assembled a multi-disciplined team with the necessary skill sets and training to support our clients through all aspects of capital projects. Our team includes experienced professionals with backgrounds in architecture, mechanical & electrical engineering, construction, financial management, facilities planning, and physical plant operations. Our team's depth in these technical areas allows us to draw on their experience at various stages of a project. The value of this balance comes across in the quality Colliers is able to deliver from planning and cost analysis to construction and ultimately occupancy.

MECHANICAL, ELECTRICAL AND PLUMBING SYSTEMS EXPERTISE

As a firm committed to providing comprehensive program and project manager services for over 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.

FEE FOR SERVICE PROPOSAL AND AGREEMENT

FEE FOR SERVICE PROPOSAL

Colliers has reviewed Westport Public Schools' Request for Qualifications for capital projects program manager services. We understand that all services will be provided on an as-needed basis and as requested by the Chief Financial Officer and Facilities Director. Given the nature of the assignment, we're assuming that the services will be paid for on an hourly basis. As such, the table below provides an hourly rate schedule for each team member category. These rates are valid for the first one-year contractual period as noted in the RFQ.

Colliers requests to invoice monthly with backup support showing the hours expended for each team member.

2021 HOURLY RATES	
Category	Hourly Rate
Managing Director/Senior Director	$300
Director	$200
Senior Project Manager	$150
Project Manager	$140
Assistance Project Manager	$120
MEP Support	$150
Financial & Analytical Support	$115

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

Should Colliers be assigned a major capital project, Colliers will be pleased to provide a total project fee proposal for such project(s). Such proposal would be based upon the enclosed hourly rates and be invoiced with hourly backup as noted above.

SAMPLE AGREEMENT

Colliers has provided on the following pages our proposed sample contract as requested in the RFQ.

PROJECT MANAGEMENT AGREEMENT

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

W I T N E S S E T H

WHEREAS, Client desires to retain the advisory services of Project Manager ("Services") in connection with its renovation/construction at _____ (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 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.

3.6 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
331 Newman Springs Road, Suite 203
Red Bank, NJ 07701
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 York 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 York, New York 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:

Project Manager: Colliers Project Leaders USA NE, LLC

By:_____
Name:
Title:

EXHIBIT A

SCOPE OF SERVICES

ADDITIONAL INFORMATION

MINIMUM AND PREFERRED QUALIFICATIONS

Colliers has provided below acknowledgment that we meet the minimum qualifications outlined in Westport Public Schools' Request for Qualifications.

1. CONNECTICUT PUBLIC K-12 SCHOOL EXPERIENCE

Listed below is a sampling of our relevant experience as project manager for school construction projects in Connecticut, with a budget of at least $1 Million, in the last 10 years.

- South Windsor's Eli Terry Elementary School ***$37.4 Million*** *(trending on time/under budget)*
- Stonington's Deans Mill School ***$35.9 Million*** *(on time/under budget)*
- Mansfield's New Elementary School ***$39.9 Million*** *(trending on time/under budget)*
- CREC's Ana Grace Academy of the Arts ***$108 Million*** *(trending on time/under budget)*
- Regional School District 14 Nonnewaug High School ***$63.8 Million*** *(on time/under budget)*
- Branford's Francis Walsh Intermediate School ***$88.2 Million*** *(trending on time/under budget)*
- Rocky Hill's Moser School ***$48.3 Million*** *(on time/under budget)*
- North Haven Middle School ***$70 Million*** *(on time/under budget)*
- New London's Bennie Dover Jackson Middle School ***$49.5 Million*** *(trending on time/under budget)*
- New Fairfield's New High School and Meeting House Hill School ***$113.4 Million*** *(trending on time/under budget)*
- Windham High School ***$112 Million*** *(trending on time/under budget)*
- East Hampton High School ***$51.7 Million*** *(on time/under budget)*
- Achievement First's Amistad High School ***$35 Million*** *(on time/under budget)*

2. RENOVATE AS NEW / WORK IN AN OCCUPIED SCHOOL EXPERIENCE

The following highlights our school building project experience working within an occupied school:

- South Windsor's Eli Terry Elementary School – New Construction
- Stonington's West Vine Street School and Deans Mill School – Addition/Renovation
- Fairfield's Riverfield and Holland Hill Elementary Schools – Addition/Renovation
- Regional School District 14 Nonnewaug High School – Addition/Renovation
- Branford's Francis Walsh Intermediate School – Addition/Renovation
- North Haven Middle School – Addition/Renovation
- Windham High School – Addition/Renovation
- East Hampton High School – Addition/Renovation
- Northborough's Lincoln Street Elementary School – Addition/Renovation
- West Bridgewater Middle-Senior High School – New Construction

- West Springfield High School – New Construction
- Easthampton High School – New Construction
- Assabet Regional Technical High School – Renovations
- Cape Cod Technical Regional High School – Addition/Renovation
- Southwick-Tolland-Granville Regional High School – Addition/Renovation

3. EXPERIENCE WORKING WITH STATE-APPROVED PROJECTS

Colliers has provided program and project manager services for many State approved projects in CT, MA and RI. ***The value of the projects managed, where state funding was provided, exceed $1 Billion.*** Currently, Colliers is working with our many municipal clients and assisting them in understanding how the new State guidelines may be impacting their projects. Colliers has met with the Office of School Construction Grants & Review (OSCG&R), as well as Commissioner Josh Geballe with the Department of Administrative Services, to better understand how the State perceives school projects. These conversations have helped our school construction clients immensely.

4. EXPERIENCE WORKING WITH MULTIPLE PUBLIC SCHOOL DISTRICTS IN CONNECTICUT

Colliers has long established itself as a known provider of premier program and project manager services in the State of Connecticut. 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 Westport Public Schools through the process. Listed below is a sampling of our local school district clients.

CONNECTICUT PROJECT EXPERIENCE	
Branford Public Schools	Old Saybrook Public Schools
Darien Public Schools	Oxford Public Schools
East Hampton Public Schools	Regional School District #14
Fairfield Public Schools	Ridgefield Public Schools
Farmington Public Schools	Rocky Hill Public Schools
Madison Public Schools	Simsbury Public Schools
Mansfield Public Schools	South Windsor Public Schools
New London Public Schools	Stonington Public Schools
New Fairfield Public Schools	Westbrook Public Schools
Newtown Public Schools	Wethersfield Public Schools
North Haven Public Schools	Windham Public Schools

We have also provided in Section II of this proposal project descriptions which highlight a sampling of similar projects and include information specifically requested in Westport Public Schools' Request for Qualifications.

5. EXTENSIVE OWNER'S REPRESENTATIVE AND PROJECT MANAGEMENT EXPERIENCE

For more than two decades, the Colliers' Project Management team has provided clients with managerial, technical, and analytical support for the planning, design, construction, and commissioning of major capital construction projects. Our focus upon owner's representation and 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.

We assist 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 experienced professionals has an extensive background in construction, change order evaluation, critical path scheduling, and budget oversight.

Colliers has been working with many municipalities for over two decades to ensure their construction projects are successful. We have the ability to work collaboratively with towns, school boards, building committees, architects, construction managers, governing bodies, and the public.

6. OFFICE OF SCHOOL CONSTRUCTION GRANTS & REVIEW (OSCG&R) EXPERIENCE

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