

Colliers

Project Leaders



Town of Ledyard

Select Capital Projects,
RFQ/RFP Bid #23-1

Owner's Representative Services

February 3, 2023

Prepared for

Wayne Donaldson
Facilities Director
Ledyard Public Schools

Prepared by

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

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February 2, 2023

Mr. Wayne Donaldson
Director of Facilities
Ledyard Public Schools
4 Blonders Boulevard
Ledyard, CT 06339

**Subject: *Qualifications to Provide Owner's Representative Services
for Select Capital Projects, RFQ/RFP Bid #23-1***

Dear Mr. Donaldson and Town of Ledyard Permanent Municipal Building Committee:

We are pleased to submit our statement of qualifications to continue our relationship with the Town of Ledyard. Having worked alongside many of the members of the Ledyard community, we have developed a strong understanding of the needs and expectations of the Town and School District. With this relationship in mind, we would be honored to continue as a trusted partner on the Select Capital Projects.

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

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

I am personally committed to helping you meet your objectives. If you have questions or require additional information, you can contact me at charles.warrington@collierseng.com or (203) 318-6570.

Sincerely,



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



Jonathan Winikur
Division Director



Colliers Project Leaders

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

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



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



Firm Profile

Provided below is information specifically requested in the Town of Ledyard's Request for Qualifications and Proposals.

Company Information							
Name of Firm	Colliers Project Leaders USA NE, LLC						
Firm's Representative	Jonathan F. Winikur, Division Director, is the authorized individual to negotiate and execute a contract for owner's representative services on behalf of Colliers Project Leaders USA NE, LLC, the legal entity submitting this statement of qualifications/proposal.						
Firm Representative's Contact Information	- Email: jonathan.winikur@collierseng.com - Phone: (203) 504-9183						
Location of Principal and Branch Offices	Colliers Project Leaders has 10 locations across the country, with nine of them located in the Northeast. Each office has experienced experts ready to collaborate, advise, or to serve as a resource, as needed. Our office locations include: <table> <tr> <td> Corporate Headquarters 135 New Road Madison, CT 06443 </td><td> New Jersey Office 331 Newman Springs Road Suite 203, Red Bank, NJ 07701 </td></tr> <tr> <td> New York Office 20 West 37th Street, 11th Floor New York, NY 10018 </td><td> Westchester County, NY Office 400 Columbus Avenue, Suite 180E Valhalla, NY 10595 </td></tr> <tr> <td> Rhode Island Office 72 Pine Street Providence, RI 02903 </td><td> Stamford Office 1055 Washington Boulevard Stamford, CT 06901 </td></tr> </table>	Corporate Headquarters 135 New Road Madison, CT 06443	New Jersey Office 331 Newman Springs Road Suite 203, Red Bank, NJ 07701	New York Office 20 West 37 th Street, 11 th Floor New York, NY 10018	Westchester County, NY Office 400 Columbus Avenue, Suite 180E Valhalla, NY 10595	Rhode Island Office 72 Pine Street Providence, RI 02903	Stamford Office 1055 Washington Boulevard Stamford, CT 06901
Corporate Headquarters 135 New Road Madison, CT 06443	New Jersey Office 331 Newman Springs Road Suite 203, Red Bank, NJ 07701						
New York Office 20 West 37 th Street, 11 th Floor New York, NY 10018	Westchester County, NY Office 400 Columbus Avenue, Suite 180E Valhalla, NY 10595						
Rhode Island Office 72 Pine Street Providence, RI 02903	Stamford Office 1055 Washington Boulevard Stamford, CT 06901						

	Boston Office 100 Federal Street, 33rd Floor Boston, MA 02110 Washington, DC Office 1625 Eye Street NW, Suite 950 Washington, DC 20006	Agawam Office 67 Hunt Street, Suite 119 Agawam, MA 01001 Los Angeles, CA Office 865 S. Figueroa Street, Suite 3500 Los Angeles, CA 90017
Length of Time in Business	26 years	
Firm's History	Strategic Building Solutions, LLP was formed on December 3, 1996. On January 13, 2000, Strategic Building Solutions discontinued its use of LLP and registered as Strategic Building Solutions, LLC. On April 20, 2015, Strategic Building Solutions, LLC became part of the Colliers' team and conducted business as Strategic Building Solutions, LLC (dba Colliers International). On June 24, 2019, the company changed its name and now operates as Colliers Project Leaders USA NE, LLC.	
Firm's Philosophy Regarding Cost Control, Scheduling, Safety and Quality Assurance	Colliers will protect your interests, reduce costs, maximize value, preserve the project schedule, and ensure safety and construction quality assurance. Providing the breadth of experience that world-class project management requires, our multi-disciplined team possesses the necessary skill sets to support our clients through all aspects of their capital projects. Our team includes seasoned professionals with deep backgrounds in architecture, engineering, construction, facilities planning, operations, and financial management. Our goal is to ensure that clients' best interests are well represented and that projects are delivered on time, within budget, and up to the desired quality standard. The Colliers' Project Management team customizes our approach to each client's specific needs and priorities to create buildings that are well built and operate efficiently. Whether you are developing a new property or re-developing an existing one, we provide all the services necessary to analyze your needs and optimize your results. The diverse technical backgrounds of our team allow us to offer a comprehensive set of services all aimed at one goal – ensuring our clients receive the best value for their capital investments.	

Project Experience and References

State of Connecticut Experience

Colliers has a well-established reputation for providing owner's representative services within the Connecticut marketplace and is well-versed in guiding our clients through the complex process of capital construction projects. As a result of our project experience, Colliers has developed a unique perspective and understanding of the very specialized needs of construction projects – allowing us to view the larger issues at hand and to develop strategies and tactics to successfully lead the Town of Ledyard through the process.

By the Numbers

- **50+** Public Contracts in the State of Connecticut
- **3 Million** gsf
- **\$1 Billion** Construction Cost

Over the past two decades, we have provided owner's representative services for numerous clients because of our reputation for quality service, client satisfaction, and unique expertise. Listed below is a sampling of our local clients. ***In addition, we have also provided at the end of this section descriptions highlighting projects of a similar nature.***

State of Connecticut Experience		
Clients		
Achievement First	Hopkins School	Town of Cheshire
Area Cooperative Education Services	JCC of Greater New Haven	Town of Fairfield
Booker T. Washington Academy	Miss Porter's School	Town of Madison
Brass City Charter School	New Britain EMS	Town of Mansfield
Children's Kozlowski Orthodontics	New Fairfield Public Schools	Town of Newington
Choate Rosemary Hall	Newtown Public Schools	Town of North Haven
Community Health Center	Old Saybrook Public Schools	Town of Oxford
CT Dept. of Administrative Services	Regional School District #14	Town of Rocky Hill
Connecticut Service Plazas	Ridgefield Public Schools	Town of Stonington
Cooper Church LLC	Riverbrook Regional YMCA	Town of Wilton
Digital First	Rocky Hill Public Schools	Town of Windham
East Hampton Public Schools	Sacred Heart University	University of Connecticut
Ethel Walker School	Salisbury School	University of Hartford
Fairview at Thames Edge	Simsbury Public Schools	University of New Haven



Work in an Occupied School Experience

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

- Regional School District 14 Nonnewaug High School – addition/renovate-as-new
- East Hampton High School – addition/renovate-as-new
- North Haven Middle School – addition/renovate-as-new
- Branford's Francis Walsh Intermediate School – addition/renovate-as-new
- Fairfield's Riverfield and Holland Hill Elementary Schools – addition/renovation
- Stonington's West Vine and Deans Mill Elementary Schools – addition/renovate-as-new
- Southwick-Tolland-Granville Regional High 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
- Northborough's Lincoln Street Elementary School – addition/renovation
- Windham High School – addition/renovation
- Lincoln High School – addition/renovation
- Cape Cod Technical Regional High School – addition/renovation

Public School Project Experience

Colliers provided on the following pages highlights of Connecticut school building projects completed in the past five (5) years, including information specifically requested in the RFQ/RFP.

South Windsor Pleasant Valley Elementary School

Principal Contact:	Dr. Kate Carter, Superintendent
Contact Email:	kcarter@swindsor.k12.ct.us
Contact Phone Number:	(860) 291-1205
Project Architect:	Drummey Rosane Anderson, Inc. James A. Barret 225 Oakland Road, Studio 205, South Windsor, CT 06074
Total Project Cost:	\$58.5 Million (Original Budget), \$61.3 Million (current budget), project under construction thus final cost unknown. Due to material increases due to material shortages resulting from the COVID pandemic, the bids came in higher than the budget could afford. Due to diligent budget management on the three prior projects which Colliers managed, the town was able to transfer \$2.8M to the project from bond proceeds to fund the construction.
Number of Change Orders:	Approximately 70 Individual PCOs at this time
Brief Explanation for Number of Change Orders:	Total value of change orders issues are currently \$1,470,722. \$1,318,921 were attributed to owner's request. One change order consists of \$1,102,607 for the addition of one classroom to the project that was requested by the board of education. The district's enrollment growth has exceeded 10% since 2017 when the first new school was open. Dr. Kate Carter can attest to the growth. \$84,085 are attributed to field conditions. This consists of 19 individual PCOs. \$43,137 in change orders were due to errors or omissions attributed to the design team. This consists of 20 individual PCOs. <i>Note: The value is based solely on Colliers professional opinion as to the cause.</i>
Time Extensions:	None. The project is scheduled for completion in May 2023 with occupancy in August 2023.
How our services succeeded in advancing the owner's interest:	Colliers has served as the Owner's Representative for the town of South Windsor and the South Windsor Public Schools since 2014. The first two phases consisting of one new school in phase one, and two new schools in phase two, were constructed per the original 2013 Elementary School Master Plan. Orchard Hill was completed and occupied in the fall of 2017 and Eli Terry and Philip R. Smith were completed and occupied in the fall of 2020 despite the COVID pandemic occurring in the middle of construction. These three projects came in collectively \$3.6 million under budget which allowed the town to fund the bid overage on this project and keep the project on schedule. Opening this school this fall is vital to provide enough classroom space for the ever-increasing enrollment in South Windsor. Although we feel Colliers was a vital part of the success of this program and this individual project, the program has been a true team success which was led by Dr. Carter with support by the board of education, town council, permanent building commission, and most importantly the residents of South Windsor who voted to fund these projects. Collier was fortunate to have been part of this successful program.

Branford Francis Walsh Intermediate School

Principal Contact:	Peter Banca, Building Committee Chair
Contact Email:	peterbanca@aol.com
Contact Phone Number:	(203) 488-1779
Project Architect:	Antinozzi Associates Inc. Michael LoSasso 271 Fairfield Avenue, Bridgeport, CT 06604
Total Project Cost:	\$88.2 Million (Budget), Projected Cost \$84.5 Million
Number of Change Orders:	233 Individual PCOs
Brief Explanation for Number of Change Orders:	Total value of change orders issues was \$4,646,498. 35 of the change orders were due to Owner Request with one consisting of \$2.7 Million for pool improvements that were not part of the original scope. \$1,651,232 in change orders were due to Field Conditions as the project was partially alterations/renovations. 24 PCOs amounting to \$587,000 were due to field conditions at the existing pool. \$141,803 in change orders were due to errors or omissions attributed to the design team. <i>Note: The value is based solely on Colliers professional opinion as to the cause.</i>
Time Extensions:	The base bid project was completed per the original schedule. However, the project was extended due to an owner request to do the major upgrades to the pool.
How our services succeeded in advancing the owner's interest:	Colliers leadership in the preliminary planning for the complex phasing of the project as well as our move management lessened the burden on the district. Certain classrooms and functions were required to be moved to temporary locations prior to moving to their final location. Colliers coordinated all the moves as well as the movers ensuring that operations were maintained. Our proactive budget management and diligent review of change orders during the construction phase permitted the owner to make major improvements to their pool at the end of the project as well as come in under budget by approximately \$3.7 Million.

Region 14 – Nonnewaug High School Renovations

Principal Contact:	George Bauer, Building Committee Chair
Contact Email:	gbauer@ctreg14.org
Contact Phone Number:	(203) 558-6994
Project Architect:	The S/L/A/M Collaborative, Inc Kemp Morhardt 80 Glastonbury Boulevard, Glastonbury, CT 06033
Total Project Cost:	\$63.8 Million
Number of Change Orders:	221 Individual PCOs
Brief Explanation for Number of Change Orders:	Total value of change orders issues was \$3,606,091. \$2,315,346 was due to owner requests consisting of 84 individual PCOs. \$1,230,245 were attributed to field conditions. This consisted of 91 individual PCOs. \$580,270 in change orders were due to errors or omissions attributed to the design team. <i>Note: The value is based solely on Colliers professional opinion as to the cause.</i>
Time Extensions:	The project is still ongoing due to problems with the MEP design issues which Colliers facilitated 26 major trade meetings to resolve and we are still facilitating the final

	resolution of them. The issues are close to being resolved.
How our services succeeded in advancing the owner's interest:	The project is complex phased occupied renovation project approximately 135,000 GSF. Colliers managed all the phase moves during construction which can be very stressful on the school administration and staff. Due to our budget management the client was able to procure a new synthetic turf field, lighting and bleachers within the project budget. Colliers also led the process of replacing the existing on-site septic tanks that were not originally intended to be replaced.

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

Stonington Deans Mill School Addition & Renovation Project

Principal Contact:	James Sullivan (Director of Finance)
Contact Email:	jsullivan@stonington-ct.gov
Contact Phone Number:	(860) 535-5070
Project Architect:	Drummey Rosane Anderson (DRA Architects) Jim Barrett 225 Oakland Rd, South Windsor, CT 06074
Total Project Cost:	\$35.9 Million (Original Budget), \$33.4 Million (Final Cost)
Number of Change Orders:	132 Individual PCOs
Brief Explanation for Number of Change Orders:	Total value of change orders issues was \$3,553,839. \$2,315,346 was due to owner requests consisting of 84 individual PCOs. \$2,918,775 were attributed to field conditions. This consisted of 87 individual PCOs. Of the \$2.9 Million, \$2 Million was due to abatement of PCBs that were not identified prior to budget development. <i>(Note: Colliers was not involved with the project at budget development.)</i> PCBs primarily from window caulk and caulk between structural concrete columns and CMU walls was the major culprit. Many options were explored to address than as this was required by the Environmental Protection Agency. Other major field conditions were due to unforeseen rock in the expanded site area. Borings were taken in the area but did not indicate the individual boulders that were uncovered during excavation. \$256,557 (1.02% of the GMP) in change orders were due to errors or omissions attributed to the design team. <i>Note: The value is based solely on Colliers professional opinion as to the cause.</i>
Time Extensions:	A one-year time extension was granted due to the abatement of PCBs required by the EPA. The construction manager did complete the project within the time extension. The existing portion of the building is now asbestos and PCB safe. The existing structural columns were encapsulated due to the leaching of PCBs into them. They could not be removed due to structural considerations.
How our services succeeded in advancing the owner's interest:	Upon retaining Colliers, we immediately identified a schedule flaw to the project. The town had already passed the referendum for the project which made all costs eligible for reimbursement moving forward subject to the grant commitment. The building committee was going to wait one-year to start the design of the project when they received the grant commitment. Colliers evaluated the escalation cost of waiting one year for the project and it exceeded \$1 Million for this project. As such, the owner proceeded immediately saving \$1 Million in calculated escalation. The owner was in the midst of hiring the design team and signing a contract when Colliers was brought on board. The contract provided by the architect lacked the depth of protection that Colliers modified AIA contracts possess. In addition, the contract did not reference any project schedules or control budgets for the architect to be held to. The owner ended up using Collier's modified AIA contracts that provided them better protection. The same applies to the construction manager's contracts as well. At project completion the building committee chair expressed his appreciate for our efforts and the expertise we brought to their project specifically noting our diligent efforts to manage and protect their budget but also to facilitate solutions during construction and bring the right professionals to the table to resolve issues.

References (Projects Completed)

Colliers is pleased to provide the following references for its key team members. The references provided below have experience with both Colliers as a firm and with the proposed project team. Colliers strongly encourages the Town of Ledyard to further explore these examples through direct contact to gain a firsthand account of our approach, capabilities, value, and integrity.



South Windsor Public Schools

High School Roof Replacement project

Darrell Crowley
Facilities Director
860-550-4838



Westport Public Schools

Saugatuck ES and Staples High School Roof Replacements

Elio Longo
Director of Finance
203-984-8614



Town of Stonington

Pawcatuck Middle School Roof Replacement

James Sullivan
Director of Finance
860-535-5070

Town of Mansfield

Mansfield Middle School Roof Replacement

Mansfield, CT

Project Overview

Colliers provided part-time Clerk of the Works Services for the replacement of the roofs and a new photovoltaic system for the Mansfield Middle School, under the auspices of Mansfield Public Schools.

These projects were partially funded with a grant from the Office of School Construction Grants & Review through the State of Connecticut.

Services Overview

As Clerk of the Works, Colliers provided the following services:

- Perform on-site observations during the active construction phase
- Monitor the Contractor's progress as it relates to the construction schedule and alerted the Architect and Town of conditions that might have led to delays in completion of the work
- Attend all construction coordination and other meetings as directed by the Town
- Record and distribute field reports documenting construction activities observed during regular field visits
- Review Contractor's pay applications for payment ensuring correct quantities and forwarded to the Town for approval and payment
- Review the work and prepare interim and final punch lists for the Contractor, in cooperation with the Architect
- On the Town's behalf, Colliers collected project close-out documentation, O&M manuals, and as-built drawings

Completion

December 2022

Project Size

90,500 gsf

Project Budget

\$1.8 Million

Services Provided

Project Management

Architect

Silver Petrucelli & Associates

Contractor

The Imperial Company Restoration

www.cplusa.com

Client Contact

Allen Corson

Director, Facilities Management

860 429 3326



Town of Stonington

School Modernization Project

Stonington, CT

Project Overview

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

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

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

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

Services Overview

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

Completion

Fall 2019

Project Size

West Vine Street School – 54,625 gsf

Deans Mills School – 65,375 gsf

Project Budget

West Vine Street School – \$31.6 Million

Deans Mills School – \$35.9 Million

Pawcatuck Middle School – \$1.4 Million

Services Provided

Project Management

Architect

DRA Architects

Contractor

Gilbane Building Company

www.cplusa.com

Client Contact

June Strunk

Board of Selectmen Representative

860 235 0677

Town of Willington

Hall Memorial School & Center Elementary School Roof Replacement

Willington, CT

Project Overview

Colliers provided project management services for the partial roof replacement at Center Elementary School (CES) and full roof replacement at Hall Memorial School (HMS). The CES project was approximately 22,203 square feet. The HMS project was approximately 33,279 square feet (flat roofs: 24,719 square feet; shingle roofs: 8,560 square feet).

Services Overview

As project manager, Colliers provided advice and consultation with respect to design, value engineering, scope of the work, cost estimating, general contractor and subcontractor prequalification, scheduling, and construction for the project. Colliers ensured the preparation of time schedules to minimize schedule delays and ensure quality of services.

Colliers' additional responsibilities included but were not limited to:

- Attend periodic meetings with the Superintendent and/or Board and provide status reports
- Prepare monthly updates and other reports related to the Project as directed by the Building Committee
- Understand, direct, and help prepare all documents required for compliance with the Department of Administrative Services grant requirements
- Assist the Building Committee with architect and construction company selection and with the selection of other consultants that may be needed to complete the project

Completion

August 2021

Project Size

Hall Memorial School – 33,279 gsf

Center Elementary School – 22,203 gsf

Project Budget

\$1 Million

Services Provided

Project Management

Architect

TBD

Contractor

TBD

www.cplusa.com

Client Contact

Phil Stevens

Superintendent of Schools

860 429 9367



Project Leaders

University of Connecticut

On-Call Program Management

Various

Project Overview

Colliers has provided project management for pre-construction, construction administration and construction activities, coordination of building inspections, scheduling, estimating, documenting, and reporting for **more than 125 projects** for the University of Connecticut Storrs.

Specific projects have included:

- Fac-Ops Building Roof Repairs
- Babbidge Library Roof Repairs
- Depot Campus Laundry Building Roof Repair
- DRL Depot Storehouse Roof Replacement
- Hilltop Apartments Roof Replacement
- Laundry Building Roof Repair
- Towers Student Center Roof Replacement
- Art Wood Quad & Student Union Quad
- Gampel Pavilion Roof Repairs
- Student Union Water Infiltration

Services Overview

Colliers was among a handful of firms contracted on an "on-call" basis to provide project management oversight, construction inspection, and owner's representation support to the University. This contract may also require technical assistance in budget development and documentation as well as written reports. Pre-inspection of work completed for quality assurance and scheduling of building inspections may also be required, as may the maintenance of physical and electronic files for project documents.

Services Provided

Project Management

www.cplusa.com

Client Contact

Richard Vollaro, PE

Director of Accelerated Projects

860 486 6426

Bridgeport Superior Court

Roof & Masonry Replacement

Bridgeport, CT

Project Overview

Colliers provided project management services for the Bridgeport Superior Court Roof & Masonry Replacement Project as part of Colliers' on-call contract with the Connecticut Department of Administrative Services (CT DAS).

The project included replacement of roofing and masonry wall and associated components. It also included the coordination of 7th floor replacement of fire proofing above ceiling, new acoustic tile ceilings, gypsum board ceilings with access panels, LED light fixtures, HVAC diffusers, sprinkler head cover plates and re-installation of ceiling mounted equipment.

Services Overview

As project manager, Colliers provided the following services:

- Review the construction schedule for compliance with the contract documents and inform the State of any deficiencies
- Obtain from the GC updated monthly schedules and reviewed them to identify potential variances from scheduled completion dates
- Inspect all work of the GC, subcontractors, and any additional service providers for compliance with contract documents, and review shop drawings for compliance with contract documents
- Establish and monitor project meetings
- Monitor and update the construction budget on a weekly basis
- Receive, review, and submit as-built drawings
- Prepare a punch list

Completion

June 2022

Project Size

18,000 gsf

Project Budget

\$2.5 Million

Services Provided

Project Management

Architect

OakPark Architects

Contractor

Greenwood Industries

www.cplusa.com

Client Contact

Steven Udeh, AIC, RA

Project Manager

860 713 5100



Project Leaders



Massachusetts School Building Authority Accelerated Repair Program

Various Locations, MA

Project Overview

Colliers has provided and/or is providing project management services to assist the Massachusetts School Building Authority (MSBA) with projects that fall under its Accelerated Repair Program. The program involves various window, door, roof, HVAC and/or boiler replacements for a number of school districts throughout the Commonwealth.

Some of our clients/projects include:

- Amherst-Pelham Regional Public Schools – Window Replacement
- Blackstone Valley Regional Vo/Tech High School – Roof Replacement
- Franklin County Technical School – Window & Door Replacement
- Hadley's Hopkins Academy – Roof Replacement
- Melrose's Hoover Elementary School – Window & Door Replacement
- Nauset Regional Middle School – Roof Replacement
- North Brookfield Elementary School – Window Replacement
- Northampton's Leeds Elementary School and Bridge Street School – Roof Replacement
- Rutland's Naquag Elementary School – Roof, Window & Boiler Replacement
- Seekonk's Mildred H. Aitken Elementary School – Window & Door Replacement
- Tri-County Regional Vo/Tech High School – Boiler Replacement
- Westford's Norman E. Day School & Colonel John Robinson School – Window Replacement
- Weymouth's Ralph Talbot Primary School – Boiler Replacement

Services Provided

Project Management

www.cplusa.com

Southwick-Tolland-Granville RSD

Powder Mill Middle School

Southwick, MA

Project Overview

Colliers provided project management services during the renovation to the Powder Mill Middle School.

The Powder Mill Middle School project included moderate renovations to the existing school building with a small alternate gym addition. All the existing MEP systems were replaced with new, more energy efficient ones along with a new sprinkler system.

Other improvements to the school included a new roof, windows, heating, air conditioning and ventilation systems, and upgrades to make the buildings handicap accessible.

Services Overview

Colliers provided project manager services during the feasibility study and schematic design phases as well as throughout the construction phase.

Completion

August 2015

Project Size

96,000 gsf

Project Budget

\$17.8 Million

Services Provided

Project Management

Architect

JCJ Architecture, PC

Contractor

PDS Engineering and Construction, Inc.

www.cplusa.com

Client Contact

Jay Barry, Ed.D.

Former Superintendent (Retired)

413 537 1362



Project Leaders

Central Falls School District

Capital Improvement Projects

Central Falls, RI

Project Overview

Colliers provided project management services for the capital improvement projects at multiple school facilities for the Central Falls School District.

Capital improvements included hazardous material abatement, door replacement, light fixture replacement, roof repairs, electrical repairs, mechanical repairs, and miscellaneous health and safety repairs at the following schools:

- Captain Hunt Early Learning Center
- Ella Risk Elementary School
- Robertson Elementary School
- Veterans Memorial Elementary School
- Calcutt Middle School
- Central Falls High School

All projects complied with Northeast Collaborative for High Performance Schools (NE-CHPS).

Services Overview

Colliers worked collaboratively with the City of Central Falls and the Rhode Island Department of Education to manage the SBA Capital Funds on behalf of the Central Falls School District. As owner's project manager, Colliers provided procurement proposal assistance for the design and construction contracts, performed periodic on-site construction inspections, evaluated vendor's applications for payment and made recommendations to the Owner, and received and assembled close out documents and permits.

Completion

December 2017

Project Budget

\$3 Million

Services Provided

Project Management

Architect

Torrado Architects

Contractor

Varies

www.cplusa.com

Client Contact

Rory Marty

Director of Operations & Safety

401 935 7679



JAMESTOWN MELROSE SCHOOL

Jamestown School Department

Capital Improvements

Jamestown, RI

Project Overview

Colliers provided project management services for Jamestown School Department's Capital Improvement Program. The Jamestown School Department's Capital Projects encompassed the Melrose Avenue School (grades PreK-4) and Lawn School (grades 5-8). Both schools needed interior refurbishing and painting, exterior renovations, and heating oil tank upgrades, amongst other repairs including roofs and HVAC equipment. Melrose also needed parking lot repairs and Lawn needed a diesel fuel tank replacement. In addition, Colliers assisted with maximizing their Rhode Island Department of Education (RIDE) reimbursement.

Services Overview

Colliers' project management services included:

- Run project progress and construction meetings
- Provide onsite construction representation, overall project administration and financial management
- Review the overall project schedule and develop any supplemental schedules that may be required
- Provide periodic field reports
- Review and comment on all requisitions for payment
- Facilitate the review and negotiation of change orders
- Maintain a running punch list of any non-conforming work
- Manage the project closeout process

Completion

Summer 2022

Project Size

Melrose Avenue School – 54,104 gsf

Lawn School – 54,593 gsf

Project Budget

\$5 Million

Certification

NE-CHPS

Services Provided

Project Management

Commissioning

Architect

Saccoccio & Associates

Contractor

Various

www.cplusa.com

Client Contact

Kenneth A. Duva, Ed.D

Superintendent of Schools

401 423 7020



Toms River Regional Schools

Capital Improvements

Toms River Township, NJ

Project Overview

Colliers is providing project management services for the Toms River Schools' \$147 Million referendum project to complete and upgrade many capital improvements on 24 existing schools. The improvements will take place while school is in session. The plan includes funding for:

- Safety and security upgrades
- Improving accessibility through the Americans with Disabilities Act (ADA)
- Heating, ventilation, and air conditioning (HVAC) units and controls
- Door, roof, and window replacements
- Renovation and upgrade of high wear and high use areas like science labs and playgrounds, with updated safety standards
- Repair and repaving of parking lots and driveways

The goal of the project is to provide learning environments that meet both the physical and social-emotional needs of students, while preparing them for success in a highly competitive and globally-connected society.

Services Overview

Colliers is working closely with the designers to increase and maximize the phasing of the work and minimize the impact of the construction during the school day.

On the majority of the schools, the work includes all new roofs, window replacement, façade restoration, abatement, new sprinkler systems, new air conditioning systems, plumbing upgrades, security upgrades, new electrical services upgrades, upgrading bathroom areas, playgrounds, and parking areas.

Completion

September 2023

Project Size

TBD

Project Budget

\$147 Million

Services Provided

Project Management

Architect

CDI Architects

Netta Architects LLC

Contractor

TBD

www.cplusa.com

Client Contact

Joseph Nardini

Board Member

732 505 5500

Projects in Progress and References

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

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

Detailed project descriptions including information specifically requested in the RFQ/RFP can be found on the following pages.

Current Workload			
Client & Project Name	Architect	Budget	Projected Services Completion
Bethel's On-Call Capital Projects	TBD	TBD	TBD
Bloomfield Town Libraries	TSKP STUDIO	\$30M	June 2024
Bristol (CT) City Hall	QA+M Architects	\$31M	April 2024
Central Connecticut State University – Elihu Burritt Library	Perkins Eastman	\$13M	December 2023
Hartford's Betances Learning Lab Magnet School	TSKP Studio	\$44M	June 2026
Hartford's E.B. Kennelly School	Tecton Architects	\$51M	June 2026
Hartford's Fred D. Wish Museum School	JCJ Architecture	\$49M	June 2025
Madison's School Renewal Plan	Tecton Architects	TBD	TBD
New Fairfield's New High School and Meeting House Hill School	JCJ Architecture	\$113.4M	September 2023
New London's Bennie Dover Jackson Middle School	Perkins Eastman	\$49.5M	August 2024
South Windsor's Pleasant Valley Elementary School	DRA Architects	\$58.5M	September 2023
Southington Public Schools – Elementary Schools Assessment (Pre-Referendum)	TBD	TBD	TBD
Westport Public Schools – Capital Improvements (On-call assignment)	Varies by Project	Varies	TBD
Willington's PreK-8 Consolidated School (Pre-Referendum)	TBD	TBD	TBD
Windham High School	Friar Architecture	\$112M	January 2024

References (Projects in Progress)

Colliers is pleased to provide the following references for its key team members. The references provided below have experience with both Colliers as a firm and with the proposed project team. Colliers strongly encourages the Town of Ledyard to further explore these examples through direct contact to gain a firsthand account of our approach, capabilities, value, and integrity.



Town of Ledyard

Gallup Hill and Ledyard Middle School Closeout

Matthew Bonin
Director of Finance
860-464-3235



South Windsor Public Schools

South Windsor Elementary School Master Plan

Dr. Kate Carter
Superintendent
860-291-1205



Town of Branford

Francis Walsh Intermediate School

Peter Banca
Public Building Commission Chair
203-488-1779

Town of Bloomfield

Town Libraries

Bloomfield, CT

Project Overview

Colliers has been engaged to provide comprehensive project management services for the Bloomfield Town Libraries Project. The project consists of the demolition of the existing 21,840 gsf Prosser Library and construction of an approximately 28,000 gsf new library on the same site, as well as the renovation and expansion of the 6,023 gsf McMahon Wintonbury Library to approximately 8,918 gsf.

The project will provide programming space for public library purposes and their activities including housing of adult, children and youth books and non-print collections; spaces for small group meetings/training, individual/group study, and public computer access; and a café. LEED certification will be sought for the project.

Services Overview

As project manager, Colliers' responsibilities include but are not limited to:

- Coordinate the design process with design team, users, and operators
- Commissioning Agent procurement, management and coordination
- Budget development, tracking and coordination
- Conduct technical review and critique of systems designs and details
- Establish and manage the bidding and contracting process
- Coordinate construction activities and inspection for quality assurance
- Mover management and FF&E coordination

Completion

June 2024

Project Size

36,918 gsf

Project Budget

\$30 Million

Services Provided

Project Management

Architect

TSKP STUDIO

Contractor

Downes Construction Company

www.cplusa.com

Client Contact

Nancy P. Haynes

Purchasing and Risk Manager

860 243 2913

City of Bristol

City Hall Renovations

Bristol, CT

Project Overview

Colliers was engaged to provide project management services for the Bristol City Hall Renovations Project.

The intent of the scope of this project is to fully renovate the existing 61,513 square foot City Hall building, the 1,709 square foot facilities garage on site, and update the 573 square foot North Connector Bridge at the 3rd level. The essential driver of need for this project is the necessary replacement of the nearly 60-year-old mechanical systems, as well the transformation to a fully accessible ADA compliant building. To help accomplish these goals, a new 7,158 square foot entrance atrium addition is being added on the North Main Street facing side of the structure.

Services Overview

As project manager, Colliers is providing the following services:

- Review and advise the City on project planning, implementation strategies, and procedures
- Assist the City with high level project budget development, and review and advise the City on the design team and CM's schedule development and budget, providing recommendations to the City
- Attend all meetings between the City, design team and CM
- Assist the City with the bid evaluation and review process concerning all FF&E submissions
- Manage all construction closeout requirements with City, state and federal agencies as required
- Prepare and issue a final close-out report including a financial reconciliation

Completion

April 2024

Project Size

TBD

Project Budget

\$31 Million

Services Provided

Project Management

Architect

QA+M Architecture

Contractor

D'Amato+Downes

www.cplusa.com

Client Contact

Roger D. Rousseau

Purchasing Agent

860 584 6195

ELIHU BURRITT LIBRARY

Central Connecticut State University

Elihu Burritt Library

New Britain, CT

Project Overview

Colliers has been engaged to provide project management services for the Elihu Burritt Library Renovation and Addition Project at Central Connecticut State University, as part of Colliers' on-call contract with the Connecticut Department of Administrative Services (CT DAS). The project will include air conditioning for the existing stacks within the library as well as a 15,000 gsf addition.

Services Overview

Colliers will serve as the project representative for CT DAS. As project manager, Colliers' responsibilities include but are not limited to the following:

- Review and comment on the accuracy and completeness of the initial construction cost estimate
- Inspect all work of the general contractor, subcontractors, and any additional service providers for compliance
- Conduct on-site daily inspections and monitor the work in progress to assist CT DAS in determining if the work is in general proceeding in accordance with the contract documents
- Verify that tests, equipment and systems start-ups, and operating and maintenance training are conducted in the presence of appropriate personnel
- Maintain a weekly photo log of events of any major activity
- Monitor and update the construction budget on a weekly basis and submit a monthly report to CT DAS

Completion

December 2023

Project Size

15,000 gsf

Project Budget

\$13 Million

Services Provided

Project Management
Commissioning

Architect

Perkins Eastman

Contractor

TBD

www.cplusa.com

Client Contact

Lisa Humble
Project Manager
860 713 5823

Hartford Public Schools

School Construction Projects

Hartford, CT

Project Overview

Colliers has been engaged to provide program management services for three (3) long-range school construction projects including Fred D. Wish Museum School (PreK-5), E.B. Kennelly School (PreK-8), and Betances Learning Lab Magnet School (PreK-4/professional development center for elementary school teachers).

Renovations will be made to make the school buildings more energy efficient and designed for 21st century learning and will include classrooms, auditoriums, cafeterias, gymnasiums and other school spaces. Building systems for all three schools will be updated for compliance with building, fire safety, and accessibility codes and high-performance building standards. Kennelly and Museum Schools will be occupied during construction, whereas Betances will be unoccupied.

Services Overview

Colliers will act as the program manager and will provide program management and project oversight services through the design, construction, and commissioning process. Colliers is responsible for furnishing technical and professional services, including support staff, materials, office supplies, equipment, transportation, and supervision to perform all tasks set forth in the scope of the services and will act as an independent contractor. Colliers will assist with budget analysis, schedule development and consultant selection, among other tasks.

Completion

Wish Museum School – June 2025
E.B. Kennelly School – June 2026
Betances Learning Lab – June 2026

Project Size

Wish Museum School – TBD
E.B. Kennelly School – TBD
Betances Learning Lab – TBD

Project Budget

Wish Museum School - \$49 Million
E.B. Kennelly School – \$51 Million
Betances Learning Lab – \$44 Million

Services Provided

Project Management

Architect

TBD

Contractor

TBD

www.cplusa.com

Client Contact

Susan Sheppard
Purchasing Agent
860 757 9616

WALTER C. POLSON
MIDDLE SCHOOL

Town of Madison

School Renewal Plan

Madison, CT

Project Overview

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

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

Services Overview

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

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

Completion

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

Project Size

New PreK-5 – 88,000 gsf
Brown Intermediate School – 107,077 gsf
Polson Middle School – 150,000 gsf

Project Budget

New PreK-5 – \$89.3 Million
Brown Intermediate School – TBD
Polson Middle School – TBD

Services Provided

Project Management

Architect

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

Contractor

TBD

www.cplusa.com

Client Contact

William H. McMinn
Director of Facilities
203 245 6470



Project Leaders

New Fairfield Public Schools

New High School & Meeting House Hill School

New Fairfield, CT

Project Overview

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

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

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

Services Overview

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

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

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

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

Completion

CELA – 2022

High School – September 2023

Project Size

CELA – 44,000 gsf

High School – 143,000 gsf

Project Budget

CELA – \$29.2 Million

High School – \$84.2 Million

Certification

CT High Performance

Services Provided

Project Management

Architect

JCJ Architecture

Contractor

O&G Industries, Inc.

www.cplusa.com

Client Contact

Dr. Richard Sanzo

Director of Business and Operations

203 312 5770



Project Leaders

City of New London

Bennie Dover Jackson Middle School

New London, CT

Project Overview

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

Services Overview

As project manager, Colliers' responsibilities include:

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

Completion

August 2024

Project Size

126,000 gsf

Project Budget

\$49.5 Million

Services Provided

Project Management

Architect

Perkins Eastman

Contractor

TBD

www.cplusa.com

Client Contact

Kate H. McCoy

Executive Director for Strategic Planning, Government and Media Relations

860 271 4005



Project Leaders



South Windsor Public Schools

Pleasant Valley Elementary School

South Windsor, CT

Project Overview

Colliers has been engaged to provide project management services for the construction of the new Pleasant Valley Elementary School.

The project is Phase III of the South Windsor Public Schools' 10-Year Elementary Schools Master Plan and includes a new two-story, 101,288 gsf building with two new entrances and a wing specifically to serve students with special needs enrolled in certain programs.

Services Overview

As the project manager, Colliers is providing comprehensive project oversight for the Town of South Windsor.

Colliers is providing support and coordination with the Office of School Construction Grants & Review (OSCG&R) including filing of the grant application, coordination of design phase meetings, submission of ineligible cost worksheets, and preparation of reimbursement requests to the state.

Colliers is responsible for the management of the total project budget and ensuring the project remains within budget.

Colliers is also responsible for assisting with procurement and coordination of all professional services as well as design phase oversight including estimate reconciliation management and design review. Colliers will assist with bidding of the project as well as construction oversight.

Other responsibilities will include oversight of FF&E deliveries, move management, submission of state change orders to OSCG&R, and ultimately the submission of the final reimbursement request to the state.

Completion

September 2023

Project Size

101,288 gsf

Project Budget

\$58.5 Million

Services Provided

Project Management

Architect

DRA Architects

Contractor

Gilbane Building Company

www.cplusa.com

Client Contact

Dr. Kate Carter
Superintendent of Schools
860 291 1205



Project Leaders

Westport Public Schools

Capital Projects

Westport, CT

Project Overview

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

Services Overview

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

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

Completion

TBD

Project Size

Various

Project Budget

\$95.3 Million

Services Provided

Project Management

Architect

TBD

Contractor

TBD

www.cplusa.com

Client Contact

Thomas Scarice
Superintendent
203 341 1026

Town of Windham

Windham High School

Windham, CT

Project Overview

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

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

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

Services Overview

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

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

Completion

December 2024

Project Size

222,568 gsf

Project Budget

\$112 Million

Services Provided

Project Management

Architect

Friar Architecture

Contractor

Downes Construction Company

www.cplusa.com

Client Contact

Dawn Thomacos

Director of Facilities

860 465 2335

Experience with Current State Requirements

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

As the owner's representative 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 an owner's representative. 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 to maximize reimbursement to municipalities.

State of Connecticut High Performance Building Standards Experience

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

As active members of the U.S. Green Building Council (USGBC), Colliers has been a leader in the advocacy of the sustainable building movement. Our professional staff has received formal LEED training with a significant number having achieved LEED Accredited Professional Certification. Colliers' LEED project experience includes ***more than 200 LEED Certified Buildings.***



Basic Certification
40+ Buildings



Silver Certification
70+ Buildings



Gold Certification
70+ Buildings



Platinum Certification
15+ Buildings

Colliers is experienced in providing owner's representative services as well as leadership and oversight to numerous sustainable building projects. In addition to our significant number of LEED projects, our service on school projects throughout Connecticut incorporates the requirements and guidelines of the State of Connecticut High Performance Building Standards. While most of our private clients pursue all levels of LEED Certification, most of our public projects are constructed to meet Connecticut High Performance Building Standards.

[Colliers Project Leaders](#)

Proposed Staffing

Colliers is confident that we are uniquely qualified to deliver the necessary owner's representative services for the Town of Ledyard's Select Capital Projects as outlined within the RFQ/RFP and as may be required. We firmly believe you will be hard pressed to find another team with the local project experience matched with the depth of talent and resources that Colliers is proposing for this project.

Colliers is committed to serving the Town of Ledyard with a team approach that allows the strengths of our individuals to complement each other and provide a superior level of service. To accomplish this goal, your project will be assigned a Project Director who will oversee all Colliers activities related to the project and ensure that the Town is well served. In addition, a Senior Project Manager will be responsible for the day-to-day operations and the final success of the project. The Senior Project Manager will be supported throughout the project by the team members outlined below.



These projects will be led by the Director, Chuck Warrington, who is a Ledyard resident and is currently working with the PMBC on the closeout of the Gallup Hill School and Ledyard Middle School Projects. Ray Wiley will be the day-to-day Project Manager during design and through construction managing the project schedule and project budget. Ray can/will assist with submission of the grant application documents to OSCG&R (assuming

reimbursement is being sought. Ray will also assist the District with preparing any reimbursement requests and final closeout of the projects. Ms. Robin Mantzaris will serve as our quality assurance staff by providing periodic inspections on site and preparing field observations reports. Ray and Robin will work as a team to manage the projects during construction.

Chuck will serve as the main contract person with the town, but Ray Wiley is also available when necessary.

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

Sub-Consultants

Colliers prides itself on having assembled a team with the expertise and capacity to deliver our owner's representative services through the use of in-house personnel. We have found this approach highly successful, allowing us to control the cost and quality of service delivery. As such, Colliers has no plans to subcontract any portion of work to outside firms.



Project Leaders

Charles E. Warrington, Jr. PE, MCPPO

Director

charles.warrington@collierseng.com

Education and Qualifications

Bachelor of Science Civil Engineering – Worcester Polytechnic Institute

Accreditations and Memberships

Licensed Professional Engineer (CT)

Massachusetts Certified Public Purchasing Official (MCPPO)

Years of Experience

29 years

Years with Firm

10 years

Colliers Project Leaders

135 New Road
Madison, CT 06443

www.cplusa.com

Area of Expertise

Mr. Warrington is a professional civil engineer with nearly 30 years of experience in the construction industry. As a member of the Colliers Project Leaders team, Chuck lends the benefit of his extensive facility knowledge and experience towards the provision of comprehensive project management services. Chuck's previous responsibilities include serving as construction administrator and liaison with general contractors in the field, oversight and inspection of construction, coordination with testing agencies, review of schedules, RFIs, change order proposals and submittals, and review of consultant designs and specifications.

Relevant Experience

Town of Willington – Hall Memorial School & Center Elementary School Roof Replacement – Willington, CT

Project management services for the partial roof replacement at Center Elementary School (CES) and full roof replacement at Hall Memorial School (HMS). The CES project is approximately 22,203 square feet. The HMS project is approximately 33,279 square feet (flat roofs: 24,719 square feet; shingle roofs: 8,560 square feet).

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 West Vine Elementary School and Deans Mill Elementary School are both new addition and renovate-as-new projects. The Pawtucket Middle School project involves the replacement of the roof.

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 Elementary School – New \$33.5 Million, 75,600 gsf Orchard Hill Elementary School. The Orchard Hill Elementary School project includes the construction of a new Pre-K facility that will serve 564 students.
- Eli Terry Elementary School – New 63,750 gsf school constructed on the existing site while the school remain in operation. New school will house grades K-5 and be designed for a 437-student enrollment.
- Philip R. Smith Elementary School – New school for grades K-5 for 390 students encompassing 55,660 gsf.
- Pleasant Valley Elementary School – New school encompassing 101,288 gsf.

Eastern Connecticut State University – Sports Center Renovation & Roof Replacement – Willimantic, CT

Project management services for the exterior spandrel and column cover replacement and coordination during the second phase roof replacement project.



Project Leaders

Raymond Wiley

Senior Project Manager

ray.wiley@collierseng.com

Education and Qualifications

Bachelor of Science Civil Engineering – Norwich University

United States Air Force

Years of Experience

37 years

Years with Firm

Less than 1 year

Colliers Project Leaders

135 New Road
Madison, CT 06443

www.cplusa.com

Area of Expertise

Mr. Wiley brings more than 35 years of civil engineering, project management and construction administration expertise to Colliers. Ray's extensive experience include all facets of the design and construction process from scope evaluation and development stage through construction, including budgeting, bidding, contracting, and administration. In addition, Ray's experience with mechanical and electrical systems has enabled him to manage highly technical projects with detailed engineering systems. Ray has cultivated his knowledge and experience through a variety of projects in different sectors with a particular focus in the Connecticut public school system.

Relevant Experience

Hartford Public Schools – School Construction Projects – Hartford, CT

Project management services for three long-range school construction projects. Renovations will be made to make the school buildings more energy efficient and designed for 21st century learning and will include classrooms, auditoriums, cafeterias, gymnasiums and other school spaces. Building systems for all three schools will be updated for compliance with building, fire safety, and accessibility codes and high-performance building standards. Projects include Fred D. Wish Museum School (PreK-5), E.B. Kennelly School (PreK-8), Betances Learning La Magnet School (PreK-4/professional development center for elementary school teachers). Kennelly and Museum Schools will be occupied during construction, whereas Betances will be unoccupied.

O&G Industries – Torrington, CT

Program and project management services for the school construction program in the Cities of Bridgeport and Waterbury. Direct management of projects from the grant process, through design, and final audit. Responsibilities included eight new elementary schools, two middle schools, three new high schools, and renovations to over 25 other schools. As Project Manager, Raymond was responsible for various projects from tenant fit-outs, new construction, schools, hospitals, and parks.

Work performed with previous firm.

Pinnacle One – Middletown, CT

Project management services for complex construction projects, managing highly technical projects with detailed engineering systems to completion. Served as the direct contact between the town committees, municipalities, and contractors. Projects included a high school tech school, three elementary schools and a regional water treatment plant.

Work performed with previous firm.

Diversified Technology Consultants – North Haven, CT

Project management services for major construction project. Duties included project meetings, site visits, review shop drawings, change order design, change order cost reviews, for UConn's Rentschler Stadium, Connecticut Convention Center, schools in Fairfield, Newtown and University of Connecticut's Waterbury campus.

Work performed with previous firm.



Project Leaders

Robin Mantzaris

Construction Representative

robin.mantzaris@collierseng.com

Education and Qualifications

Bachelor of Arts
Architectural Interior
Design – The American
College

Years of Experience

33 years

Years with Firm

3 years

Colliers Project Leaders

135 New Road
Madison, CT 06433

www.cplusa.com

Area of Expertise

Ms. Mantzaris is a highly experienced construction professional with more than 30 years of experience in providing design, project management, and construction representative services for a variety of clients throughout New England. As Construction Representative, Robin provides support for the project team including quality assurance, quality control oversight, adherence to project scope, budget, and schedule at all phases of design, construction, and close out, as well as continuous auditing, inspection, punch-list remediation, technical construction support, and sub-contractor coordination.

Relevant Experience

City of New London – Bennie Dover Jackson Middle School – New London, CT

Project management 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.

South Windsor Public Schools – Pleasant Valley Elementary School – South Windsor, CT

Project management services for the construction of the new 101,288 gsf Pleasant Valley Elementary School. The project is Phase III of the South Windsor Public Schools' 10-Year Elementary Schools Master Plan and includes a new two-story, 101,288 gsf building with two new entrances and a wing specifically to serve students with special needs enrolled in certain programs.

Town of Madison – School Renewal Plan – Madison, CT

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

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

Connecticut Department of Administrative Services – Ella T. Grasso Technical High School – Groton, CT

Project management services for the new \$134.9 Million, 220,000 gsf technical high school which serves students from 24 towns in Southeastern Connecticut with an annual enrollment of over 500 students. Programs offered at the school include Automotive Technology, Culinary Arts, Electrical, Manufacturing Technology, Plumbing & Heating, HVAC and Information Systems Technology.

Work performed with previous firm.

Disclosure of Past Claims or Disputes

As a leading diversified professional services and investment management company, Colliers has had the type and scope of litigation of similarly situated global full-service providers. In addition, there have been no material legal or financial actions taken against the company or any of its officers/principals in the past five (5) years.

Financial/Professional Capacity of the Firm

Financial Capacity

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

Total Dollar Value of Work Performed				
2021	2020	2019	2018	2017
\$28 Million	\$27.3 Million	\$29.8 Million	\$24.6 Million	\$23.9 Million

Provided at the end of this section is an overview of the financial stability of Colliers International Group Inc. Copies of our consolidated financial statements for the most recent fiscal years can be provided upon request.

Professional Capacity

Ability to Complete the Project

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

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

Capacity & Skills

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

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

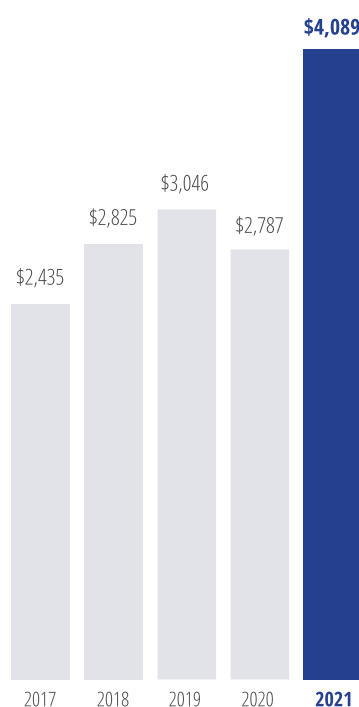
* Our diverse team of architects, engineers, and constructors review construction documents independently and provide their unique perspective.

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

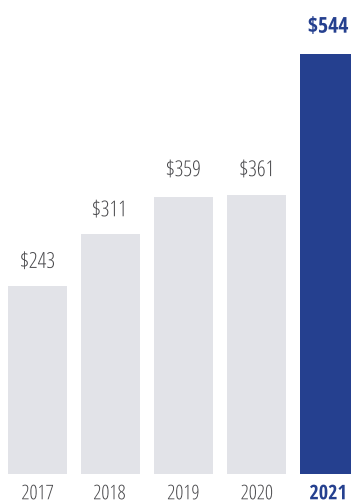
Colliers has an established reputation for providing owner's representative services within the municipal marketplace and is ***well-versed in guiding municipal construction authorities and building committees through the complex process of capital construction projects.*** As a result of our project experience and team diversity, Colliers has developed a unique perspective and understanding of the very specialized project management needs of Connecticut public facilities – allowing us to view the larger issues at hand and to develop strategies and tactics to successfully lead the Town of Bethel through the process.

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

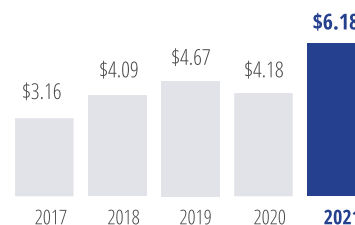
Financial Highlights



Revenues US\$ millions



Adjusted EBITDA US\$ millions



Adjusted EPS US\$

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

¹ Includes \$471.9 million settlement of Long-Term Incentive Arrangement (LTIA) with the Company's Chairman & CEO.

² Excluding warehouse credit facilities and convertible notes.

³ Financial leverage expressed in terms of (long term debt less cash) / pro forma adjusted EBITDA.

⁴ Adjusted EBITDA is defined as net earnings before income tax, interest, depreciation, amortization, gains attributable to mortgage servicing rights, acquisition-related items, restructuring costs, stock-based compensation expense and settlement of LTIA.

⁵ Adjusted EPS is defined as diluted net earnings per common share, adjusted for the effect, after income tax, of non-controlling interest redemption increment, amortization, gains attributable to mortgage servicing rights, acquisition-related items, restructuring costs, stock-based compensation expense and settlement of LTIA.

Price Proposal

Colliers has reviewed the Town of Ledyard's Request for Qualifications and Proposals for owner's representative services for the Select Capital Projects and we are pleased to provide, ***under separate cover***, our fee proposal based on our understanding of the Town's needs and expectations as well as our experience in providing similar services for roof replacement projects throughout the Northeast.



Colliers is currently working with the Town of Ledyard on the closeout of the Ledyard Middle School and Gallup Hill School. We are approximately 90% complete with this effort and only awaiting final review of state change orders on the Ledyard Middle School. We believe that our services to date have provided value to the Town and hope that we can continue to provide such value. Our Director, Chuck Warrington, is also a resident of Ledyard (Gales Ferry) and has intimate knowledge of the Town having been a resident since 1997.

Affirmative Action

Colliers is an Equal Employment Opportunity employer and has adopted an Affirmative Action Plan. No employee or applicant for employment will be discriminated against because of race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, veteran status, or other qualified status.

When new employment opportunities occur in the company, we make every effort to advertise with websites that focus on minority and female candidates such as Professional Women in Construction, Society for Women Engineers, Historically Black College & Universities, State Department of Labor and others as identified, in an effort to increase our diversity.

Colliers certifies that we understand that projects involving the Ledyard Public Schools must adhere to the Town of Ledyard and the Ledyard Board of Education's non-discrimination clause, as outlined in Section E-11 of the Request for Qualifications and Proposals.

Project Approach

Architect Selection

Given Colliers' current engagement with the town, we are already familiar with the projects. We understand that architectural services are currently being solicited and interviews have been conducted. Based on our understanding of where this process is, we would recommend a scope review with the three interviewed firms to confirm they have captured the complete scope of work as well as confirming the proposals are comparable in nature. At this time we do not foresee any need to re-advertise for such services thus we have not included efforts to do so in our fee proposal.

Design Phase:

Upon final selection of the architects Colliers anticipates assisting the district with developing the contract with the selected architect. We expect that the selected architect will proceed at-risk with starting the design phase of the project. We anticipate the design phase to take approximately three months to complete. During the design phase our role is relatively simple. We'll attend periodic design review meetings with the design team (assumed to be mostly virtual meetings) and review progress design documents as the architect prepares them. We expect the design to proceed directly to the construction documents phase versus the typical three milestones in a major project such as the Gallup Hill and Ledyard Middle School projects.

OSCG&R Approval

Upon completion of the construction documents Colliers will provide a detailed review of the plans and specification and provide written comments to design team while capturing any comments from Mr. Donaldson as well. We'll also coordinate the code review with the building official and fire marshal. Such review and sign off is required if the projects will be seeking reimbursement from OSCGR. Upon the completion of the review and the code sign off Colliers will manage the compilation of the PCR (Plan Completion Review) documents required to be submitted to OSCGR in order to obtain approval to bid. We'll also coordinate with Mr. Donaldson to obtain the board of education and building committee approvals of the plans, specifications and estimate. Once these approvals are complete, the meeting with the state will be held with approval to bid following.

Bidding

Once the state has provided approval of the PCR documents and granted permission to bid, the project can be advertised for bidding. Please note the advertisement for bidding cannot occur prior to receiving written

authorization to do so by OSCGR (where seeking reimbursement by the state.) Colliers will assist Mr. Donaldson with scheduling pre-bid site visits as needed and assist with drafting any addenda required resulting from bidder questions. We expect the bidding to take approximately 6 weeks to complete from date of advertisement.

Note: If reimbursement is being sought by OSCGR, the state may require three separate bids for the buildings. We'll recommend having a conversation with the state to solicit one bid that breaks out the pricing of each building in order support the costs of each one in the reimbursement request.

Bid Assessment

Colliers will assist the district assess bids and coordinate a scope review with the apparent low bidder to assess that their bid is complete and they are qualified to perform the work. Colliers will call references as required to confirm past performance of the contractor. Given our extensive experience in the state, many times we find that we have worked with the contractor on many past projects and can provide insight on performance as well. Colliers will be happy to assist with drafting the agreement with the contractor and the Owner.

Construction Phase

Given that it is February already, we do not anticipate being able to complete any of the work this summer. As such, we expect that the work will be completed in the summer of 2024 with the possible exception being the central office building re-roofing. This may be able to be completed in the fall of 2023 assuming the project design is completed and bid by the end of August. We anticipate the central office roof replacement to take approximately two months. During construction we'll have our construction representative visit the site 2 to 3 times per week. Ms. Mantzaris lives locally in Pawcatuck, Connecticut thus access to the sites will be simple to achieve. This would also apply to the Gales Ferry and Juliet Long sites as well during the summer of 2024.

Our fee proposal (***submitted separately***) assumes that the central office will be completed in the fall of 2024 ahead of the Gales Ferry and Juliet Long schools. In our fee proposal we are provide pricing for this scenario as well as one where all three buildings are completed in the summer of 2024.

During construction Colliers will also assist with the review of all contractor requisitions and change orders if they arise. We'll provide insight on the legitimacy of the change and whether the pricing is reasonable and fair.

Project Closeout

Upon the project completion, Colliers will ensure all the warranties and manuals are submitted for the projects. We'll then assist the district with preparing the final SCG-046 reimbursement request to the state. We'll also provide a thumb drive containing all the project documents to allow a smooth audit of the project by the state.

Exceptions

Colliers Project Leaders USA NE, LLC entered into negotiations with the Town of Ledyard to provide Project Management Services in connection with the closeout and audit services for the Ledyard Middle School and Gallup Hill Renovation Projects, which resulted in a contract dated May 5, 2022. If selected, we respectfully request to use a similar contract for our Owner's Representative Services for Select Capital Projects.