



Project
Leaders

A Division of Colliers Engineering & Design



Town of Ledyard

Juliet Long School HVAC Installation,
RFP/RFQ Bid #24-8

Owner's Representative Services

November 26, 2024

Prepared for

Wayne Donaldson
Director of Facilities
Ledyard Public Schools

Prepared by

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

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Note: Colliers Project Leaders has provided our Price Proposal under separate cover in a sealed envelope accompanying this submission.



November 22, 2024

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

**Subject: *Qualifications to Provide Owner's Representative Services
for Juliet Long School HVAC Installation, RFP/RFQ Bid #24-8***

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 Juliet Long School HVAC Installation project.

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. Colliers acknowledges receipt of Addenda No.1, issued November 21, 2024. If you have questions or require additional information, you can contact me at charles.warrington@collierseng.com or (203) 318-6570.

Sincerely,

A handwritten signature in blue ink, appearing to read "Charles E. Warrington, Jr." with a stylized flourish at the end.

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

A handwritten signature in blue ink, appearing to read "Jonathan Winikur" with a stylized flourish at the end.

Jonathan Winikur
Division Director



Executive Summary

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 \$10+ 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	<ul style="list-style-type: none"> Email: jonathan.winikur@collierseng.com Phone: (203) 504-9183 						
Location of Principal and Branch Offices	<p>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:</p> <table border="0"> <tr> <td> <p>Corporate Headquarters 135 New Road Madison, CT 06443</p> </td> <td> <p>New Jersey Office 331 Newman Springs Road Suite 203, Red Bank, NJ 07701</p> </td> </tr> <tr> <td> <p>New York Office 20 West 37th Street, 11th Floor New York, NY 10018</p> </td> <td> <p>Westchester County, NY Office 400 Columbus Avenue, Suite 180E Valhalla, NY 10595</p> </td> </tr> <tr> <td> <p>Rhode Island Office 72 Pine Street Providence, RI 02903</p> </td> <td> <p>Stamford Office 1055 Washington Boulevard Stamford, CT 06901</p> </td> </tr> </table>	<p>Corporate Headquarters 135 New Road Madison, CT 06443</p>	<p>New Jersey Office 331 Newman Springs Road Suite 203, Red Bank, NJ 07701</p>	<p>New York Office 20 West 37th Street, 11th Floor New York, NY 10018</p>	<p>Westchester County, NY Office 400 Columbus Avenue, Suite 180E Valhalla, NY 10595</p>	<p>Rhode Island Office 72 Pine Street Providence, RI 02903</p>	<p>Stamford Office 1055 Washington Boulevard Stamford, CT 06901</p>
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<p>Rhode Island Office 72 Pine Street Providence, RI 02903</p>	<p>Stamford Office 1055 Washington Boulevard Stamford, CT 06901</p>						

	<p>Boston Office 100 Federal Street, 33rd Floor Boston, MA 02110</p> <p>Washington, DC Office 1625 Eye Street NW, Suite 950 Washington, DC 20006</p> <p>Florida Office 5471 West Waters Avenue, Suite 100 Tampa, FL 33634 USA</p>	<p>Agawam Office 67 Hunt Street, Suite 119 Agawam, MA 01001</p> <p>Los Angeles, CA Office 865 S. Figueroa Street, Suite 3500 Los Angeles, CA 90017</p> <p>Pennsylvania Office 1500 John F. Kennedy Blvd., Suite 624 Philadelphia, PA 19102</p>
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Length of Time in Business	27 years
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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.
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Firm's Philosophy Regarding Cost Control, Scheduling, Safety and Quality Assurance	<p>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.</p> <p>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.</p> <p>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.</p>
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Project Experience & 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.

Town of Ledyard –Ledyard Middle School and Gallup Hill Closeouts

Principal Contact:	Matthew Bonin
Contact Email:	finance.director@ledyardct.org
Contact Phone Number:	(860) 464-3235
Project Architect:	Silver Petrucelli + Associates
Total Project Cost:	\$61.5M
How our services succeeded in advancing the owner’s interest:	Colliers was engaged to assist the town and the school district with the OGA closeout process. During the process Colliers was able to reverse ineligible change orders that resulted in reimbursement that exceeded Colliers fees. Additionally, Colliers assisted the town in obtaining \$7.9M in reimbursement prior to the project proceeding to the audit phase. This allowed the town to avoid additional borrowing costs. The project is now in audit and anticipated to be closed soon.

Town of Somers – Somers Elementary School HVAC Project

Principal Contact:	Stephanie Levin
Contact Email:	stephanie.levin@somers.k12.ct.us
Contact Phone Number:	(860) 749-2270 x2035
Project Architect:	Consulting Engineering Services (CES)
Total Project Cost:	\$15M
Discussion of Project while occupied with staff and students.	<p>Upon engaging with the district, Colliers’ first question to the building committee was about which construction delivery method they were using for the project, e.g. General Contractor or Construction Manager. The building committee had not determined that yet. We then asked if work was to be conducted during the school year and if so, first or second shift. The committee noted the work would occur during the school year and during the summers but had not contemplated which shift. Their initial response was second shift. Based on the response that work would be occurring the school year, Colliers recommended they consider utilizing a construction manager (CM) versus a general/mechanical contractor as CMs who do school construction often are better equipped to work with the school administration and understand the restrictions, challenges and strict safety concerns of working in an elementary school.</p> <p>The building committee selected the construction manager delivery. As a result, they also engaged the CM to prepare an updated construction cost estimate with the assumption that work would occur on second shift without providing any dedicated swing space to work in. In other words, the contractors would have to work in active classrooms at night and have the room ready for school the following morning. This resulted in a construction cost 50% higher than the cost estimate prepared by an independent estimator a year prior. Ultimately the district has opted to provide swing space for the work to occur and perform it on first to shift to avoid and estimated \$1M premium for second shift.</p>

Town of Fairfield – Fairfield Public Schools HVAC Upgrades Project

Principal Contact:	Sal Morabito
Contact Email:	(203) 255-7363
Contact Phone Number:	smorabito@fairfieldschools.org
Project Architect:	BL Companies
Total Project Cost:	\$39.1M
Discussion of Project while occupied with staff and students.	This program consists of three school HVAC upgrades, roofing replacements, and security upgrades. Colliers has been engaged with Fairfield Public Schools for the past ten years along with Gilbane Building Company. The past experience with many school projects between Fairfield Public Schools (Sal Morabito), the building committee, Colliers and Gilbane Building Company has led to a well thought out construction phasing plan for these projects that the district is comfortable with. The project team's knowledge of the town requirements and building official and fire marshal requirements allows for these projects to run smoothly with minimal disruption to the school operations.

Town of Madison – Polson Middle School HVAC Project

Principal Contact:	Peter Anderson, Director of Facilities
Contact Email:	Anderson.peter@madisonps.org
Contact Phone Number:	203-980-3105
Project Architect:	BL Companies
Total Project Cost:	\$21.5M
Discussion of Project while occupied with staff and students.	Due to a simplification of the project scope, this work will occur during the summers only when school is out. This was requested by the school administration.

Town of 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.
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.

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.



Town of Ledyard

Gallup Hill and Ledyard Middle School Closeout

Matthew Bonin
Director of Finance
Finance.director@ledyardct.org
860-464-3235



South Windsor Public Schools

South Windsor Elementary School Master Plan

Dr. Kate Carter
Superintendent
superintendent@swindsor.k12.ct.us
860-291-1205



Fairfield Public Schools

HVAC Upgrades at Various Locations, Multiple School Addition & Alteration Projects

Sal Morabito
Manager of Construction, Security & Safety
smorabito@fairfieldschools.org
203-650-0083



Project Leaders



Town of Fairfield

HVAC Upgrades at Various Fairfield Public Schools

Fairfield, CT

Project Overview

Colliers Project Leaders has been engaged to provide project management services for Phase I of upgrades to air conditioning systems at Osborn Hill Elementary School, North Stratfield Elementary School, and Fairfield Woods Middle School.

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

Services Overview

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

- Develop detailed milestone schedules for the pre-construction phase outlining all working group meetings, town meetings, required approvals, review times, and major milestones
- Provide recurring construction observation and oversight
- Attend all Town/Architect/Contractor (TAC) meetings
- Review and provide recommendations regarding the CM/GC initial submittal for the construction schedule of values
- Manage and track all proposed change orders
- Prepare and issue a final close-out report including a financial reconciliation

Completion

September 2025

Project Size

TBD

Project Budget

\$22 Million

Services Provided

Project Management

Architect

BL Companies

Contractor

Gilbane Building Company

www.cplusa.com

Client Contact

Sal Morabito

Director of Construction & Energy Management

203 255 7363



Project Leaders



Madison Public Schools

Walter C. Polson Middle School HVAC Improvements

Madison, CT

Project Overview

Colliers Project Leaders initially provided pre-referendum and project management services for Madison Public Schools' \$100 Million Capital Improvement Plan (CIP). Upon completing the CIP plan, we were then engaged to develop several options for consolidating and modernizing the existing elementary, intermediate school, and middle school.

Following a successful referendum in February 2022, we were engaged to provide project management services for HVAC and electrical improvements at Polson Middle School. This \$21.6 Million project encompasses enhancements to the HVAC and electrical systems, upgrades to the auditorium, and the addition of a generator and renewable energy systems.

Services Overview

Colliers Project Leaders' 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

TBD

Project Size

150,000 gsf

Project Budget

\$21.6 Million

Services Provided

Project Management

Architect

BL Companies

Contractor

Gilbane Building Company

www.cplusa.com

Client Contact

Peter Anderson
Director of Facilities
203 245 6470



Project Leaders



Town of Somers

Somers Elementary School HVAC Improvements

Somers, CT

Project Overview

Colliers Project Leaders is providing project management services for the \$9.6 Million HVAC and electrical improvements at Somers Elementary School. The project includes extensive HVAC enhancements within the 100,885 gsf school facility, involving the installation of 16 rooftop units, ductwork distribution, VRF indoor and outdoor units, structural supports, new sprinkler distribution, lighting, and architectural ceilings.

Services Overview

As project manager, Colliers Project Leaders' responsibilities include:

- Advise on use of general contractor versus construction manager delivery
- Facilitate estimate reconciliations, value manage project back into budget
- Develop detailed milestone schedules, manage budgets, and ensure all necessary approvals and procedures are in place
- Coordinate activities among town departments, boards, consultants, and manage required work and 3rd party reviews
- Provide recurring construction observation with written reports and submit monthly progress report
- Review CM/GC schedules, invoices, change orders, and expenditures, and manage all program invoices
- Assist in preparing punch lists, manage construction closeout requirements, coordinate the commissioning process, and ensure all documentation is submitted and deficiencies corrected

Completion

TBD

Project Size

100,885 gsf

Project Budget

\$9.6 Million

Services Provided

Project Management

Architect

DRA Architects

Contractor

Gilbane Building Company

www.cplusa.com

Client Contact

Stephanie Levin

Director of Business Services

860 749 2270 ext. 2035



South Windsor Public Schools

Elementary Schools Master Plan

South Windsor, CT

Project Overview

Colliers Project Leaders provided project management services for the South Windsor Public Schools' 10-Year Elementary Schools Master Plan.

Phase I included the construction of a new PK-5 school building for Orchard Hill Elementary School, which occurred on site while the original building remained in operation.

Phase II included the construction of two new school buildings to replace the Philip R. Smith and Eli Terry Elementary Schools. The students and staff of Eli Terry remained in their original building during construction. The occupants of Philip R. Smith relocated to the former Orchard Hill facility during construction of their new school and moved back upon completion of their new school in 2020.

Phase III built a new elementary school for Pleasant Valley. The former school remained in operation while the new school was constructed but ultimately it was abated and demolished.

Services Overview

As the project manager since 2014, Colliers Project Leaders provided comprehensive project management services for the Elementary Schools Master Plan. Our services included coordination with the Office of Grants Administration (formerly 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, we provided consistent oversight for all four school projects. All three phases were completed on time and under budget.

Completion

Phase I – September 2017
Phase II – Summer 2020
Phase III – December 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 - \$61.3 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



Project Leaders



Rocky Hill Public Schools

Griswold Middle School HVAC

Rocky Hill, CT

Project Overview

Colliers Project Leaders provided project management services for the Rocky Hill Public Schools' Griswold Middle School HVAC Project.

Services Overview

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

- Perform value engineering at the completion of the design phase
- Perform cost estimating for all building construction and site development work
- Review and maintain a detailed construction schedule
- Monitor construction progress and control construction quality
- Develop and implement a procedure for the review and processing of contractor payment
- Coordinate, monitor and document testing, calibration, and start-up of all equipment and building systems
- Coordinate and assist in training of Owner's personnel on the operation and maintenance of building systems and equipment

Completion

October 2017

Project Size

N/A

Project Budget

\$1.4 Million

Services Provided

Project Management

Architect

Bemis Associates

Contractor

West State Mechanical

www.cplusa.com

Client Contact

Ron Lamontagne

Director of Facilities

860 258 7700



Project Leaders



City of New London

Bennie Dover Jackson Middle School

New London, CT

Project Overview

Colliers Project Leaders provided project management services for the renovation and expansion of Bennie Dover Jackson Middle School. The campus was developed to accommodate Grades 6 through 8 for both the STEM Middle School and the International Education with Dual Language Middle School programs. The design and construction emphasized energy efficiency and easy maintenance, incorporating sustainable materials and systems in line with the Connecticut High Performance Building Standards.

Services Overview

As project manager, Colliers Project Leaders' responsibilities included:

- Lead the City of New London through the Office of Grants Administration process
- Oversee project budgets, schedules, and cash flow projections
- Oversee and coordinate cost estimating and any required reconciliation between estimates and budgets
- Provide oversight for efficient and comprehensive communications and tracking of critical project elements
- Assist in the monitoring and reporting on contract manager, contractor, and subcontractor compliance with all local, state, and federal requirements
- Attend and, where required, represent the City at all project meetings
- Coordinate with the Commissioning Agent in conducting inspections and testing to determine conformance with design documents
- Assist with the State of Connecticut High Performance Building Certification process

Completion

December 2024

Project Size

126,000 gsf

Project Budget

\$49.5 Million

Services Provided

Project Management

Architect

Perkins Eastman

Contractor

O&G Industries

www.cplusa.com

Client Contact

Kate H. McCoy

Executive Director for Strategic Planning, Government and Media Relations

860 271 4005



Project Leaders



Town of Stonington

School Modernization Project

Stonington, CT

Project Overview

Colliers Project Leaders 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 Project Leaders 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



Project Leaders



Regional School District 14

Nonnewaug High School

Woodbury, CT

Project Overview

Colliers Project Leaders provided project management services for the addition and renovate-as-new alterations for Nonnewaug High School. The high school is also home to the Ellis Clark Regional Agriscience and Technology Program that includes students from surrounding towns.

The project included programmatic improvements to areas including Liberal Arts, Visual & Performing Arts, STEM and Athletic areas as well as the creation of flexible classroom spaces. Also included were operational improvements such as energy-efficient HVAC, electrical, and plumbing systems, as well as upgraded safety and security features and improved traffic flow that all meet ADA compliance and codes.

Services Overview

As project manager, Colliers Project Leaders served as the owner's representative for the entire school construction project. We provided consultation services and advice by working closely with Region 14's architects/engineer, construction manager, Board of Education staff, relevant Town and State offices and officials, and the community at large.

Our team was responsible for reviewing and overseeing schedules for design and construction, project budgets, and cash flow projections. We oversaw and coordinated detailed cost estimating and any required reconciliation between estimates and budgets.

During construction, we monitored and reported on the construction manager and trade contractors work, reviewed all invoices and applications for payment, provided detailed phased move management services. We also coordinated the completion and construction phase closeout of both projects.

Completion

November 2020

Project Size

159,827 gsf

Project Budget

\$63.8 Million

Certification

CT High Performance

Services Provided

Project Management

Architect

The S/L/A/M Collaborative

Contractor

O&G Industries

www.cplusa.com

Client Contact

George Bauer

Building Committee Member

203 558 6994



Project Leaders



Hartford Public Schools School Construction Projects

Hartford, CT

Project Overview

Colliers Project Leaders 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 Project Leaders is acting as the program manager and will provide program management and project oversight services through the design, construction, and project close out.

Services include consultant selection, detailed project budget development and oversight, schedule development and coordination, coordination of all state submissions, construction oversight, project phasing review and coordination, move management coordination, attendance at all project related meetings, detailed financial oversight and review of all project invoices, applications and change orders, community outreach, State reimbursement and close out coordination.

Completion

- Wish Museum School – June 2027
- 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

- JCJ Architects (Wish)
- Tecton Architects (Kennelly)
- TSKP Studios (Betances)

Contractor

- Newfield Construction (Wish)
- Downes Construction (Kennelly & Betances)

www.cplusa.com

Client Contact

Susan Sheppard
Purchasing Agent
860 757 9616



Project Leaders



City of New London

Bennie Dover Jackson Middle School

New London, CT

Project Overview

Colliers Project Leaders provided project management services for the renovation and expansion of Bennie Dover Jackson Middle School. The campus was developed to accommodate Grades 6 through 8 for both the STEM Middle School and the International Education with Dual Language Middle School programs. The design and construction emphasized energy efficiency and easy maintenance, incorporating sustainable materials and systems in line with the Connecticut High Performance Building Standards.

Services Overview

As project manager, Colliers Project Leaders' responsibilities included:

- Lead the City of New London through the Office of Grants Administration process
- Oversee project budgets, schedules, and cash flow projections
- Oversee and coordinate cost estimating and any required reconciliation between estimates and budgets
- Provide oversight for efficient and comprehensive communications and tracking of critical project elements
- Assist in the monitoring and reporting on contract manager, contractor, and subcontractor compliance with all local, state, and federal requirements
- Attend and, where required, represent the City at all project meetings
- Coordinate with the Commissioning Agent in conducting inspections and testing to determine conformance with design documents
- Assist with the State of Connecticut High Performance Building Certification process

Completion

December 2024

Project Size

126,000 gsf

Project Budget

\$49.5 Million

Services Provided

Project Management

Architect

Perkins Eastman

Contractor

O&G Industries

www.cplusa.com

Client Contact

Kate H. McCoy

Executive Director for Strategic Planning, Government and Media Relations

860 271 4005

Projects in Progress & 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.

Current Workload			
Client & Project Name	Phase	Budget	Projected Services Completion
Bloomfield Town Libraries	Construction	\$30M	December 2024
Bristol (CT) City Hall	Closeout	\$31M	February 2024
Central Connecticut State University – Elihu Burritt Library	Construction	\$13M	December 2024
Connecticut Children’s Medical Center	Construction	TBD	August 2025
Connecticut College – Multiple Projects	Various	Various	Various
Connecticut Department of Health (DAS)	Bidding	\$5M	March 2025
Fairfield Public Schools – HVAC Upgrades	Construction	\$22M	September 2025
Greenwich Country Day School’s Performing Arts Center (PAC)	Bidding	\$35M	TBD
Hartford’s Betances Learning Lab Magnet School	Design	\$44M	June 2026
Hartford’s E.B. Kennelly School	Design	\$51M	June 2026
Hartford’s Fred D. Wish Museum School	Design	\$49M	June 2025
Madison Academy School – Community Center Project	Design	\$15.9M	Summer 2025
Marriott (Starwood) – 333 Ludlow Street (Stamford, CT) – Various Projects	Various	Various	Various
New Fairfield’s New High School and Meeting House Hill School	Construction	\$113.4M	December 2024
New London’s Bennie Dover Jackson Middle School	Construction	\$49.5M	December 2024
Stamford’s Westhill High School	Design	\$301M	Fall 2029
The Hotchkiss School – Dining Facility	Design	\$51M	September 2025
Webster’s Bartlett High School	Construction	\$103M	December 2027

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.



Fairfield Public Schools

HVAC Upgrades at Various Locations

Sal Morabito

Manager of Construction, Security & Safety

smorabito@fairfieldschools.org

203-650-0083



Somers Public Schools

Somers Elementary School HVAC and Electrical Upgrades

Stephanie Levin

Director of Business Services

stephanie.levin@somers.k12.ct.us

860-749-2270



Westport Public Schools

Capital Program Project Management

Elio Longo

Chief Financial Officer

elongo@westportps.org

203-341-1001

Experience with Current State Requirements

Office of Grants Administration (OGA) Experience

As the owner's representative for multiple public-school districts in Connecticut, Colliers is well versed with the constantly evolving process of the OGA. Providing services from pre-referendum, planning, and studies through project closeout, we are knowledgeable in all aspects of the OGA process. Coupled with our personal relationships with the OGA 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

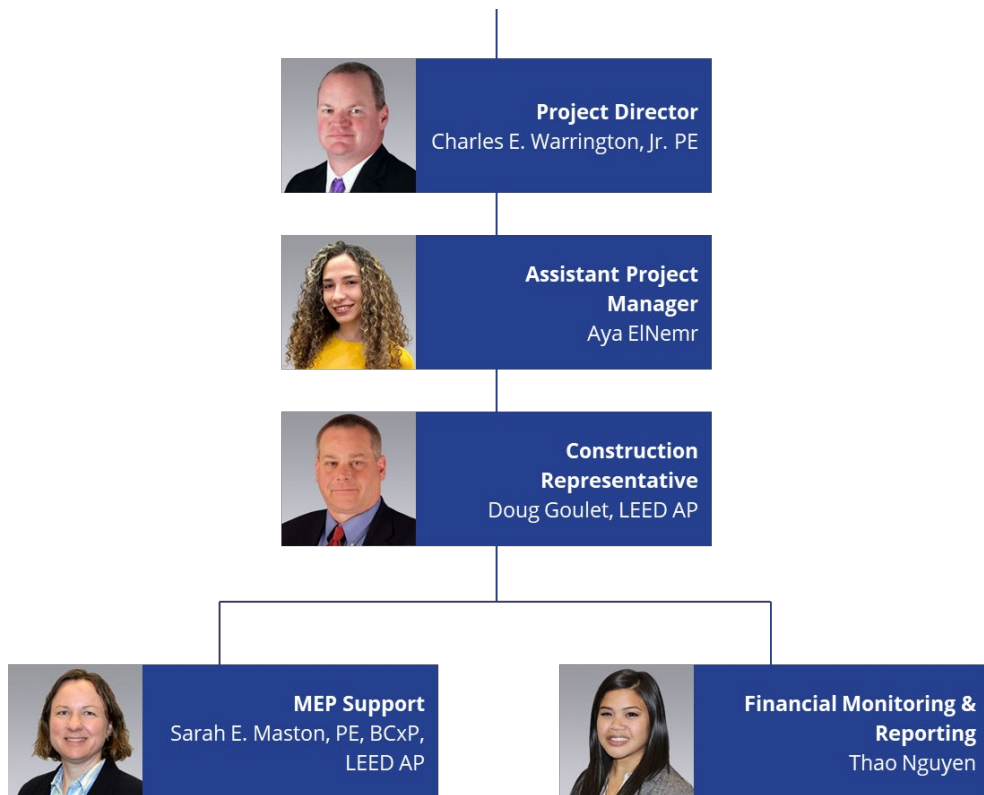
Colliers is experienced in providing owner's representative services as well as leadership and oversight to numerous sustainable building projects. In addition to our significant number of LEED projects, our service on school projects throughout Connecticut incorporates the requirements and guidelines 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 Juliet Long School HVAC Installation 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, an Assistant Project Manager will be responsible for the day-to-day operations and the final success of the project. The Assistant 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 led the closeout efforts for the Ledyard Middle School and Gallup Hill School projects. Chuck will be supported by Aya ElNemr managing financials, change orders, and ensuring all project correspondence are properly filed and saved for future audit by the state. Doug Goulet will serve as the construction representative in the field during construction. Doug will evaluate the quality of the work against the contract documents to ensure the project is delivered as specified.

Sarah Maston is the director of Colliers energy and commissioning services. Sarah and her team will serve in a supportive role when required during the HVAC project. As a leader in commissioning services, Colliers' unique ability to provide such support sets us apart from our competitors. Thao Nguyen will provide financial analysis support to ensure the project financials remain in good order.

Chuck will serve as the main contract person with the town and attend all building committees, but Aya 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

30 years

Years with Firm

11 years

www.cplusa.com

Area of Expertise

Mr. Warrington is a professional civil engineer with 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 Ledyard – Ledyard Middle School & Gallup Hill Elementary School – Ledyard, CT

Project management services for the project closeout and audit preparation for the Ledyard Middle School and Gallup Hill School Renovate-as-New Projects.

Town of Madison – School Renewal Plan – Madison, CT

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:

- **Polson Middle School:** Renovations to the 150,000 gsf school include improvements of the HVAC system, electrical system, and auditorium, as well as the addition of a generator and renewable energy systems.

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.

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 was designed to house Grades 6 through 8 of the STEM Middle School and the International Education with Dual Language Middle School.

Town of Fairfield – Multiple Projects – Fairfield, CT

Project management services for multiple projects including:

- **Holland Hill Elementary School:** \$18.5 Million temporary expansion and proposed renovation / addition to the 42,732 gsf Holland Hill Elementary School.
- **Mill Hill Elementary School:** \$22 Million renovation and addition to the Mill Hill Elementary School.
- **Roger Sherman Elementary School:** Third phase of the \$3.2 Million renovations and additions to the Roger Sherman Elementary School.



Aya ElNemr

Project Coordinator

aya.elnemr@collierseng.com



Project Leaders

Education and Qualifications

Bachelor of Engineering
Civil Engineering, Minor
Construction
Management –
University of Connecticut

Years of Experience

1 year

Years with Firm

1 year

www.cplusa.com

Area of Expertise

Ms. ElNemr is a self-motivated professional and a recent graduate of the University of Connecticut, holding a degree in Civil Engineering with a minor in Construction Management. With a strong academic foundation, Aya has honed her skills in project management, design, and various software applications such as AutoCAD, Revit, and Primavera. Her practical experience includes internships in site engineering, construction management, and independent research on concrete deterioration. Her technical knowledge, hands-on experience, and diverse background contribute to her adaptability and resilience in various professional settings.

Relevant Experience

Town of Ledyard – Ledyard Middle School & Gallup Hill Elementary School – Ledyard, CT

Project management services for the project closeout and audit preparation for the Ledyard Middle School and Gallup Hill School Renovate-as-New Projects.

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

Project management services for the construction of a new \$58.5 million, 101,288 gsf elementary school as part of the district's multi-phased 10-Year Master Plan.

Town of Mansfield – New Elementary School – Mansfield, CT

Project management services for the construction of the \$50 Million Mansfield Elementary School, which will replace the Town's existing three elementary schools and bring all students together into one building. The school's net-zero status will be accomplished mainly via geothermal and solar technologies. When completed, the project will be one of the first Net Zero energy public schools in New England.

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.

Stamford Public Schools – Westhill High School – Stamford, CT

Project management services for the replacement of the existing Westhill High School with a state-of-the-art new facility. The project will include new academic classrooms, CTE (Career and Technical Education) rooms, specialty learning spaces, dispersed media center, a new auditorium, food service, physical education spaces, and a new natatorium.



Project Leaders

Doug Goulet LEED AP

Senior Construction Representative

doug.goulet@collierseng.com

Education and Qualifications

Bachelor of Science –
Construction
Management –
Wentworth Institute of
Technology

Accreditations and Memberships

LEED Accredited
Professional (LEED AP)

Years of Experience

30 years

Years with Firm

15 years

www.cplusa.com

Area of Expertise

Mr. Goulet has more than 30 years of experience in the construction industry. In his role as Senior Construction Representative, Doug provides construction quality assurance for architectural and MEP disciplines, facilitates communications between on-site and off-site project team members, monitors schedules, documents construction activities, manages construction records, reviews and processes project financial documentation, organizes owner activities with construction, coordinates consultants and regulatory agency involvement, and manages owner move in.

Relevant Experience

Regional School District 14 – Nonnewaug High School – Woodbury, CT

Project management services for the \$63.8 Million, 159,827 gsf addition and renovate-as-new alterations for the Nonnewaug High School. The project includes 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.

Town of Mansfield – New Elementary School – Mansfield, CT

Project management services for the construction of the \$50 Million Mansfield Elementary School, which will replace the Town's existing three elementary schools and bring all students together into one building. The school's net-zero status will be accomplished mainly via geothermal and solar technologies. When completed, the project will be one of the first Net Zero energy public schools in New England.

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 North Haven – North Haven Middle School – North Haven, CT

Project management services for 90,000 gsf of additions, 56,000 gsf of like new renovations and demolition of approximately 84,000 gsf of existing spaces. The addition includes academic classrooms, a media center, science and art class-rooms, as well as athletic fields. The renovations include two gyms, a cafeteria, a kitchen, and auditorium spaces, as well as the outdoor track. The existing school remained operational during all phases of construction and the project was designed to meet the Connecticut High Performance Building Standards.

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.



Sarah E. Maston

PE, BCxP, LEED AP



Project Leaders

Director

sarah.maston@collierseng.com

Education and Qualifications

Bachelor of Science
Mechanical Engineering
– Rensselaer Polytechnic
Institute

Accreditations and Memberships

Licensed Professional
Engineer (MA)

Building Commissioning
Professional (BCxP)

LEED Accredited
Professional (LEED AP)

American Society of
Heating, Refrigerating
and Air Conditioning
Engineers (ASHRAE)

ASHRAE Board of
Directors, Treasurer
(2024-2025)

Epidemic Task Force
Building Readiness Team
(2020-2021)

Years of Experience

28 years

Years with Firm

3 years

www.cplusa.com

Area of Expertise

Ms. Maston is a professional mechanical engineer with nearly 30 years of experience in mechanical/HVAC systems evaluation, troubleshooting, design, startup, and commissioning for a variety of project types. Prior to working at Colliers, she served as lead commissioning authority for new construction projects as well as building commissioning projects. Her responsibilities included facilitating Owner's Project Requirement (OPR) workshops, project management, performing building system assessments, developing commissioning plans, design reviews, specifications, system readiness, system evaluations and facilitating functional performance tests. She has also designed systems utilizing terminal units, radiant heat, central air systems, humidity controls, building automation, energy recovery, and central plants. Additionally, Ms. Maston has performed building efficiency studies, and LEED feasibility studies.

Relevant Experience

Massachusetts School Building Authority (MSBA) – Accelerated Repair Program

Commissioning services for projects that fall under the MSBA's Accelerated Repair Program. The program involves various window, door, roof, HVAC and/or boiler replacements for a number of school districts throughout the Commonwealth.

Pawtucket School Department – District-Wide Repair Program – Pawtucket, RI

Commissioning services for multiple programs with a combined value in excess of \$600 Million. The various programs were executed district-wide intended to address the most critical life safety, infrastructure and educational modernization needs of 17 school facilities serving over 8,000 students.

Smithfield Public Schools – Capital Improvements Plan – Smithfield, RI

Commissioning services for the design and construction of a five-year capital improvement plan that includes additions, renovations, and district wide repairs. The plan will be consistent with RIDE guidelines, Stages III and IV.

Westerly Public Schools – School Building Project – Westerly, RI

Commissioning services for the renovations at Springbrook Elementary School, renovations and additions at Dunn's Corner Elementary School and construction of the new State Street Elementary School with an overall budget of \$50 Million.

Town of Lincoln – High School – Lincoln, RI

Commissioning services for the 169,000 gsf, \$60 Million renovation that added a new main entrance, science labs, an auditorium, a media center, and a gymnasium and dining commons among other amenities.

Town of Danvers – Ivan G. Smith Elementary School – Danvers, MA

Commissioning services for the new \$42.1 Million, 82,723 gsf elementary school that will accommodate 465 students in grades PK through 5.



Thao Nguyen

Senior Financial Analyst

thao.nguyen@collierseng.com



Project Leaders

Education and Qualifications

Bachelor of Arts
Accounting – Emmanuel
College

Accreditations and Memberships

Board of Directors,
Edward Street Child
Services

Years of Experience

12 years

Years with Firm

6 years

www.cplusa.com

Area of Expertise

Ms. Nguyen brings more than 10 years of financial and business acumen to her role, where she plays a crucial part in Colliers Project Leaders' financial operations. With a deep understanding of valuation services and expertise in domestic and international equities, fixed income securities, and investment accounting systems, Thao contributes significantly to our financial processes. Her analytical skills, refined through audit experience, is instrumental in developing, implementing, and summarizing budgets and expenses for our diverse client portfolio. As a Senior Financial Analyst, Thao not only assists Project Managers in financial tracking, but also collaborates with clients to ensure seamless reconciliation of expenses within their internal systems. Additionally, Thao excels in employee training and management, further contributing to the efficiency and success of our financial processes.

Relevant Experience

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.

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.

Town of Mansfield – New Elementary School – Mansfield, CT

Financial, cost estimating and schedule support services for the construction of the \$50 Million Mansfield Elementary School, which will replace the Town's existing three elementary schools and bring all students together into one building. The school's net-zero status will be accomplished mainly via geothermal and solar technologies. When completed, the project will be one of the first Net Zero energy public schools in New England.

Town of Rocky Hill – Moser School – Rocky Hill, CT

Financial, cost estimating and schedule support services for the Moser School, a 79,000 gsf intermediate school with a construction budget of \$48.3 Million.

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.

Disclosure of Past Claims or Disputes

As a leading diversified professional services company, Colliers Project Leaders has had the type and scope of litigation of similarly situated national 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. Established in 1996, Colliers Project Leaders has demonstrated substantial financial growth and stability since its inception. Below is a concise overview of our financial performance over the past five years.

Total Dollar Value of Work Performed				
2023	2022	2021	2020	2019
\$33.2 Million	\$32.5 Million	\$28 Million	\$27.3 Million	\$29.8 Million

Provided on the following pages is an overview of the financial stability of our parent company, Colliers Engineering & Design, Inc., for the most recent fiscal year. Full financial statements 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:

AIA & RA	Registered Architects	CCCA	Certified Construction Contract Administrators
RLA	Registered Landscape Architect	CCP	Certified Commissioning Providers
PE	Professional Engineers	CEM	Certified Energy Managers
LEED AP	LEED Accredited Professionals	CEA	Certified Energy Auditors
LEED GA	LEED Green Associates	BCxP	Building Commissioning Professionals
WELL AP	WELL Accredited Professionals	CDSM	Certified Demand-Side Managers
PMP	Project Management Professionals	CLEP	Certified Lighting Efficiency Professionals
CSL	Construction Supervisor Licensing	CGD	Certified Geo-Exchange Designers

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 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 and team diversity, Colliers has developed a unique perspective and understanding of the very specialized project management needs of municipalities 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.

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.



COLLIERS ENGINEERING & DESIGN, INC. AND SUBSIDIARIES
Consolidated Financial Statements
December 31, 2023
With Independent Auditor's Report

INDEPENDENT AUDITOR'S REPORT

To the Board of Directors and Stockholders of
Colliers Engineering & Design, Inc.:

Opinion

We have audited the consolidated financial statements of Colliers Engineering & Design, Inc. and Subsidiaries, which comprise the consolidated balance sheet as of December 31, 2023, the related consolidated statements of income, changes in stockholders' equity and cash flows for the year then ended, and the related notes to consolidated financial statements.

In our opinion, the accompanying consolidated financial statements present fairly, in all material respects, the financial position of Colliers Engineering & Design, Inc. and Subsidiaries as of December 31, 2023, and the results of their operations and their cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America ("GAAS"). Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of Colliers Engineering & Design, Inc. and Subsidiaries and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the consolidated financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the consolidated financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about Colliers Engineering & Design, Inc. and Subsidiaries' ability to continue as a going concern for one year after the date that the consolidated financial statements are available to be issued.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the consolidated financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the consolidated financial statements.

In performing an audit in accordance with GAAS, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the consolidated financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the consolidated financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of Colliers Engineering & Design, Inc. and Subsidiaries' internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the consolidated financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about Colliers Engineering & Design, Inc. and Subsidiaries' ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Withum Smith + Brown, PC

May 13, 2023

Colliers Engineering & Design, Inc. and Subsidiaries
Consolidated Balance Sheet
December 31, 2023

Assets

Current assets

Cash	\$ 2,214,425
Accounts receivable - net	114,492,773
Contract assets	20,165,244
Prepaid expenses and other current assets	6,042,445
Income taxes receivable	<u>8,790,097</u>
Total current assets	151,704,984

Property and equipment - net	31,178,178
Right-of-use asset, operating	62,019,048
Right-of-use asset, finance	4,015,037
Goodwill	74,146,363
Other intangible assets - net	75,600,035
Deferred income taxes	7,457,233
Other assets	<u>2,430,283</u>
	<u>\$ 408,551,161</u>

Liabilities and Stockholders' Equity

Current liabilities

Current portion of notes payable	\$ 196,105
Current portion of lease liability - operating	11,402,528
Current portion of lease liability - finance	611,707
Accounts payable	21,695,957
Accrued expenses and other current liabilities	53,395,190
Contract liabilities	<u>5,393,947</u>
Total current liabilities	92,695,434

Notes payable - net of current portion	270,482
Contingent purchase price payable	3,033,856
Notes payable - parent	41,913,568
Lease liability - operating - net of current portion	53,741,578
Lease liability - finance - net of current portion	3,466,339
Other liabilities	<u>201,485</u>
Total liabilities	<u>195,322,742</u>

Stockholders' equity

Controlling interest	
Common stock - no par value; 1,500,000 shares authorized, 850,472 shares issued and outstanding	147,335,655
Retained earnings	<u>58,245,929</u>
Total controlling interest	205,581,584
Non-controlling interest	<u>7,646,835</u>
	<u>213,228,419</u>
	<u>\$ 408,551,161</u>

The Notes to Consolidated Financial Statements are an integral part of this statement.

Colliers Engineering & Design, Inc. and Subsidiaries
Consolidated Statement of Income
Year Ended December 31, 2023

Revenue	<u>\$ 456,882,418</u>
Cost of revenue	
Direct labor	127,176,431
Subcontractors	48,777,500
Other job expenses	<u>8,387,314</u>
Total cost of revenue	<u>184,341,245</u>
Gross margin	<u>272,541,173</u>
Operating expenses	
Indirect labor and related expenses	135,699,528
General and administrative expenses	99,745,352
Depreciation and amortization	<u>23,303,483</u>
	<u>258,748,363</u>
Income from operations	<u>13,792,810</u>
Other income (expense)	
Interest expense	(3,925,552)
Interest income	33,239
Gain on sale of property and equipment	153,036
Other expense	<u>(3,644,597)</u>
	<u>(7,383,874)</u>
Income before provision for income taxes	6,408,936
Provision for income taxes	<u>3,337,632</u>
Consolidated net income	3,071,304
Net income attributable to non-controlling interest	<u>2,753,498</u>
Net income attributable to controlling interest	<u>\$ 317,806</u>

The Notes to Consolidated Financial Statements are an integral part of this statement.

Price Proposal

Colliers has reviewed the Town of Ledyard's Request for Qualifications and Proposals for owner's representative services for the Juliet Long School HVAC Installation 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 partnered with the Town of Ledyard on the closeout of the Ledyard Middle School and Gallup Hill School. We believe that our services 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

Phase 1

Pre-Construction Phase

Understanding of Current Project Status

We understand that the pre-construction phase is well underway already for the Juliet Long School HVAC Installation project. As such, it appears the PMO will be on-boarding towards the end of the design phase. Given that the project is anticipated to bid in late-May or early-June, we'll only have about six weeks to become familiar with the project and get up to speed with the specifics of the project. Given our experience with these projects we don't anticipate this being an issue.

Our primary focus will be reviewing project design, construction sequencing proposed by CES, and becoming familiar with town's project team. Colliers has worked with CES on many projects in the past, so we anticipate an easy onboarding with their team.

Interaction with the Building Committee and other Town Departments

Colliers has worked with numerous building committees, towns and school districts. We understand that understanding the proper protocol between the three entities is vital to the success of a project. As the PMO, it is our responsibility to lead, manage and facilitate the project on their behalf. Typically, our key points of contact are the building committee chair and the superintendent (or their designee such as the Facilities Director). We would request an initial kickoff meeting with them, as well as the design team, to review protocols for communication to ensure we understand them clearly. Unless directed otherwise, we do not take direction from anyone within the town other than the superintendent and/or the building committee.

Colliers will typically lead the process of obtaining building committee and board of education approvals for the plans, specifications, and estimates for projects that are under an OGA grant commitment. For this project, we'll coordinate with CES to ensure all the documents are in place to do so and assist the district (or lead if they request) with scheduling of the PCR meeting with OGA.

With respect to interacting with other town departments and bodies we're willing and capable to lead this effort as well. For this project we anticipate a majority of the communication will be with the building official and fire marshal (or their designee). Given the anticipated multi-phased



approach to this project and the nature of the work, it's vital to ensure that the project is complying with life safety requirements and egress requirements to ensure the students, faculty and staff are always safe. We'll also need to coordinate the third-party code review required for OGA approval assuming the local building official does not have the capacity to review the project documents.

When requested, Colliers will prepare and present project status presentations to the Board of Selectmen, Board of Finance and Board of Education. We're well versed in providing such presentations and updates to these bodies.

Additional Services

Upon review of the RFP, the scope of services appears to be comprehensive for PMO services. However, we have included in our costs one design review of the final contract documents. This was not specifically mentioned but we are including in our services as we believe this review is vital given that a construction manager is not being utilized.

Given that a construction manager at risk delivery is not being utilized, we recommend hiring a third-party estimator if not done already. We do not recommend it be contracted under our contract as an additional service but that it be contracted under the project to ensure the project design is generally in conformance with the approved budget. We understand that Construction Cost Solutions has been hired for the conceptual estimate, but we recommend a second estimator be hired and have both firms estimate the 90/100% bid documents prior to bidding. Given the current bidding climate, we believe this will be of benefit to the town to ensure the scope is within or close to the budget.

Design Review/Construction Phasing/Logistics

As noted above, Colliers will perform a design review of the construction documents prepared by CES. Given the relatively short amount of time to bid, we'll also review the construction phasing and logistics prepared by the design team. We have found that our reviews help the quality of the design documents and ultimately reduce change orders.

Under a general contractor bid process for a multi-phased project such as this one, it is critical to clearly state any restrictions to the bidders. If the bid documents do not clearly state what the contractor cannot do, then they'll assume they can do it. This will otherwise lead to change orders by the contractor stating that they bid the project a specific way and they are not being permitted to construct it as such. This is one of the challenges of utilizing a GC bid delivery on this type of project.

Schedule Management

To properly execute the project, a detailed master schedule will be developed and managed by Colliers. Working off of the project timeline provided in the RFP, ***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
- working group meetings
- approvals by the building committee and board of education
- third-party code reviews
- PCR (Plan Completion Review) meetings with OGA
- Advertisement dates (only after receiving permission to bid)

Additionally, we will include key milestone dates for the estimating (if applicable) 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.

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

Colliers will fully coordinate the code review process and if necessary assist with hiring a third-party code reviewer with the building official and fire marshal. We'll also assist with any planning and zoning approvals if necessary. Given the nature of this project we do not anticipate this being a complex approval for PnZ.

Manage Project Costs

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



Construction Phase

Interaction with the Building Committee and other Town Departments

Once the project is under construction, Colliers will continue to lead, manage, and facilitate the project as noted in the pre-construction phase. Our key points of contact are still the building committee chair and the superintendent (or designee) but at this point we must add the school principal as well. The project phasing and logistics will need to be coordinated with the principal during pre-construction, but the level of communication and coordination is heightened.

During construction, and especially during the academic year, our project manager will meet with the principal weekly to review upcoming activities and ensure they are aware of any activities that could potentially impact normal school operations. We understand that OAC meetings will occur however we have found that separate meetings with the principal have allowed a more focused dialogue. The principal is very busy, so we want to be as efficient with her time and only discuss matters that are of interest to them. This meeting would also include the facilities director and building committee chair to ensure everyone is on the same page and communicating directly.

During construction we'll need to continue to coordinate with the facilities director, building official, and fire marshal as well.

Coordinate Construction Activities

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

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, building official, special inspector, etc.

Our job is to make sure each consultant is engaged appropriately. We typically develop a detailed RFP for each required service, level the proposals, recommend for approval, then schedule the service. Since we actively participate with each consultant, we fully understand and are the communicators of any issues to the contractor, designer or Town of Ledyard representatives.

By fully engaging ourselves and coordinating the activities of all the consultants, **we can ensure that the entire team is working harmoniously with one another and that each of their activities have been coordinated with the contractor's overall schedule to avoid conflicts.**

Manage Change Orders and Pay Applications

Colliers will thoroughly review all proposed change orders submitted by the contractor. We know contractors historically inflate change order costs during construction. Our reviews seek to minimize those added costs by verifying the legitimacy of the change order submissions. Colliers will:

- Monitor and manage any project changes as well as the contracts and payments to the various contracted entities.
- Track for possible financial exposures to the Owner's contingency. This is done by continuously monitoring RFI responses and flagging any direction provided to the contractor or Owner that may have financial implications.
- Document discussions had in the field that relate to possible scope gaps in the design documents. We add these possible exposures to a contingency log with an estimated value to provide the Town of Ledyard 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.



Construction Close-Out Phase

Closeout Project

Project closeout is key to the successful completion of a project. There are many steps that need to be taken for a successful and expeditious closeout process which we will manage for the Town of Ledyard:

- Monitor all punch-list items to the closeout of each item
- Schedule Owner training on MEP systems
- Facilitate the MEP commissioning process
- Track submission of all Owner attic stock materials, as-builts, operation and maintenance manuals, and warranty information and ensure that all materials are being provided in the format(s) necessary

In addition to the management of construction closeout, Colliers will actively manage the move, furniture, fixtures, and equipment (FF&E), and equipment startup/operation process for the Town of Ledyard in coordination with the third-party operator. Our detailed Master schedule will outline the sequencing of the work.

Train Operating Staff

Any new system will require training for the operations and maintenance staff. Frequently, the mechanical systems installed in modern buildings are significantly more complicated to operate and maintain than those in older buildings. Without proper training, those responsible for the regular troubleshooting and preventative maintenance of the newly installed systems will likely compromise the systems' operations or life through either the bypass of procedures or the improper usage of components.

Colliers will ensure the operations staff are properly trained on all new systems. This process starts with field visits during construction and concludes with physical training once the building is completed.

Test Systems Performance

Ultimately, the responsibility for the operation and maintenance of installed building systems will fall to the Owner's staff. Therefore, prior to accepting the newly installed systems and delivering final payments to the contractors, Colliers will test the various systems under operating conditions. Testing under these conditions will reveal for certain if systems will operate as intended while there is still financial incentive for the contracted parties to remedy any problems.



Manage the Master Move Plan

To maintain an accurate and up-to-date Master Move Plan, Colliers will attend many regularly scheduled meetings. Our role within each of the meetings may differ – from that of leader to collaborator to observer. We will lead all relocation and Furniture, Fixtures, & Equipment (FF&E) team meetings using an action agenda to maintain accountability and visibility into all efforts. In our role, we will:

- Identify key project milestones and installation sequences
- Distribute regular communication updates
- Collaborate with Town of Ledyard and the school administration on move coordinators to share key needs, disseminate information, and serve as a point of contact

Procure Movers

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

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

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

Monitor & Manage Contractor Correction of Problems

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



Exceptions

Colliers Project Leaders USA NE, LLC entered into negotiations with the Town of Ledyard to provide owner's representative 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 Juliet Long School HVAC Installation.