

INTERVIEW QUESTIONS

Date: October 1, 2020

Project: Consentino Middle School

1. Summarize your firm's experience with the successful management of MSBA funded K-12 public school major renovation and new construction projects within the last five (5) years.

Colliers has a well-established reputation for providing owner's project management services within the Commonwealth and is well-versed in guiding our clients through the complex process of capital school construction projects.

Over the past two decades, we have provided owner's project management services for **more than 35 MSBA funded school projects** because of our reputation for quality service, client satisfaction, and unique expertise. Listed below is a sampling of our MSBA funded K-12 public school major renovation and new construction projects within the last five (5) years.

- › West Bridgewater Middle-Senior High School
- › North Adams' Colegrove Park (K-7) Elementary School
- › Northborough's Lincoln Street Elementary School
- › Easthampton's New Pre-K to Grade Eight School
- › Southwick-Tolland-Granville RSD's High School
- › Assabet Valley Regional Technical High School
- › Bristol County Agricultural High School
- › Greater Fall River's Diman Regional Vocational Technical High School
- › Cape Cod Regional Technical High School
- › Webster's Bartlett High School
- › Foxborough's Mabelle M. Burrell Elementary School
- › Fitchburg's Crocker Elementary School
- › Granby's East Meadow Elementary School
- › Narragansett's Templeton Elementary School
- › Gardner's New Elementary School

2. What separates and/or differentiates your firm's qualifications to serve as Haverhill's OPM over those of the other firms seeking to be selected and hired for this project?

Colliers is the firm that will listen to you and make sure you are heard. We know this is your building and the entire project team, starting with the Project Manager, will remember that and act accordingly. We have immense amounts of applicable experience that will benefit Haverhill on multiple fronts, but we have no preconceived opinions about what your project should be.

We commit to you that we will listen to you, hear what you are saying, and respond with information and options that give you the most comprehensive intelligence available in the industry. You can then make the decisions that are best for the City and assure that the project is truly Haverhill made and Haverhill successful.

Your Colliers’ OPM team is supported by a team of in-house subject matter experts. We have a range of in-house professionals that will be available to you throughout the duration of the project including: site and building security specialists; building systems (MEP and building envelope) commissioning agents; “green” building specialists; energy rebates, reimbursements and incentives experts; social media experts; community outreach liaisons; healthcare provider advisors; air quality control specialists; and architects and engineers with a focus on infection control.

Together with the core OPM team, our team of subject matter experts will benefit Haverhill on multiple fronts, from attending the visioning and community consultation events, peer reviewing the design team’s documents, to providing their expertise throughout the construction and move-in period.

Collectively, we will provide you with the most comprehensive and current industry information and options. You can then make the decisions that are best for the City and School and rest assured that the project will ultimately be successful.

3. Identify your key project team members, their primary roles, and the percentage of time each will be able to commit to this engagement over the multi-year life of the project?

Colliers’ owner’s project management services are provided through a team-based approach that allows each individuals’ strengths to complement each other and provide a superior level of service. The key personnel outlined below will be led by Colliers’ Project Director, Ken Guyette.

PROJECT TEAM		
Key Personnel	Role	Time Commitment
Joe Naughton, AIA, LEED AP, MCPPO	Principal	› Design: ½ day a week › Construction: ½ day a week
Ken Guyette, MCPPO	Project Director	› Design: 1 day a week › Construction: 1 day a week
Phil Palumbo, MCPPO	Senior Project Manager	› Design: ½ day a week › Construction: 1 day a week
Elizabeth Geldres, PMP, AIA, NCARB, LEED AP BD+C	Project Manager	› Design: 1 day a week › Construction: 3 days a week
John Bates, AIA	Assistant Project Manager	› Design: 1 day a week › Construction: 3 days a week
Arry Charles	Construction Representative	› Design: As needed (design reviews, construction logistics development etc.) › Construction: 5 days a week

In addition to our key personnel, we are also proposing the following Subject Matter Experts and Support Team who will assist the key personnel highlighted above on the Consentino Middle School Project.

COVID-19 Guidelines & Green Team Liaison – Teresa Wilson, AIA, ACHA, LEED AP, Fitwel Ambassador

Ms. Wilson has more than 25 years of health care design and planning experience and is currently working with the Healthcare Associated Infections Organization (HAIO) on an initiative to provide guidelines on designing post-acute care for COVID-19 patients in non-traditional health care settings. Teresa will be responsible for the infection control/facilities guidelines of the project.

Community Outreach – Oriana Padron

Ms. Padron is a marketing and communications professional with more than 7 years of experience in the architecture, engineering, and construction industry and is responsible for Colliers Project Leader's internal and external marketing efforts. She also has extensive experience creating and distributing content across multiple digital and social media channels. Oriana will provide support for the community outreach efforts of the project through online resources such as the website and on-line surveys.

Mass Save Program & Supplemental Reimbursement Programs – Mark Stafford, Assoc. AIA

Mr. Stafford is an accomplished strategic leader with more than 25 years of architectural and energy management experience with public and private projects throughout the Commonwealth. Mark will manage Mass Save programs and other supplemental reimbursement systems for the project.

MEP Support – Frank Baldino, PE, CCP

Mr. Baldino is a professional mechanical engineer with more than 25 years of experience in mechanical design and commissioning. In his role as Director of Commissioning & Energy Services, Frank provides direct oversight for a variety of public and private projects throughout the Northeast, including Haverhill's Caleb Dustin Hunking School. Frank will provide specialized technical support, as needed, to review HVAC and electrical systems strategies, drawings, and components at various intervals during the design process.

Financial Monitoring & Reporting – Thao Nguyen

Ms. Nguyen has more than 5 years of financial and business experience. She lends the benefit of her strong analytical skills, audit experience, and client management skills to the development, implementation and summary of budgets and expenses for Colliers' client portfolio. Thao will be responsible for the regular monitoring, analysis, and reporting of capital program finances on MSBA Pro-Pay.

4. Describe your proposed Project Director's experience with successfully facilitating large MSBA funded K-12 public school projects.

Mr. Guyette has more than 25 years of experience within the design and construction industry having served in a variety of capacities including Project Manager, Designer, Builder, And Owner. Ken has extensive experience providing strategic planning, programming, and project management oversight services on several large MSBA K-12 projects over the last decade. He has been intimately involved in every detail of his projects from MSBA Module 2 (Forming the Team) through Module 8 (Project

Completion and Final Audit). Ken has led his team to consistently bring these projects in on time, and on budget.

5. Describe any innovative or unique approaches/practices that your firm uses to facilitate and manage large MSBA funded public school projects.

Colliers Project Leaders has our own proprietary, web-based project management platform, Colliers360, for use by our project teams and our clients at no added cost to the overall project. Our platform makes real-time project data always available for client viewing with user-friendly, flexible dashboards.

From a single site, we can manage project financials and schedules, store key documents in our document storage portal, and create meeting minutes and daily reports as well as manage project-related risks. Multiple team members can log in, view the project's exact stage of the process along with any critical path issues or risks, and make informed decisions on the best next steps. Colliers360 is mobile-optimized for easy viewing on all mobile devices to get project visibility in the office or on-the-go. Key features of the platform include:

Dashboard Viewing

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

Financial And Schedule Management

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

Daily Reports, Meeting Minutes, Tracking Of Issues

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

In addition to the above mentioned Colliers360 platform, Colliers is able to differentiate from others with several services that can be leveraged to better serve our clients such as:

- › Project financial database that aligns with the MSBA Pro-Pay system
- › In-house MEP commissioning team to assist with design reviews
- › Marketing department to assist with the social media / community outreach deliverables, as needed

6. Explain the pros and cons of the CM-at-Risk delivery method, and why you like or dislike it.

The Construction Manager at Risk (CM-at-Risk) method requires a commitment by the Construction Manager (CM) to deliver the project within a Guaranteed Maximum Price (GMP). That price is based

on the construction documents and specifications at the time of the GMP plus any reasonably inferred items or tasks. This method provides professional services and acts as a consultant to the owner in the design development and construction phases. In addition to acting in the owner's interest, the CM-at-Risk must manage and control construction costs in relation to the GMP because contractually any costs exceeding the GMP that are not change orders are the financial liability of the CM-at-Risk. Negotiating these costs can often be managed through value-engineering or cash allowances negotiated early in the process.

Some advantages of the CM-at-Risk method include:

- › Construction cost are known and fixed during design
- › CM has total control of construction and all subcontractors
- › Construction may start before design completion, reducing project schedule

Some considerations of the CM-at-Risk method include:

- › Reduced owner control of construction
- › Potentially costly design changes after construction begins
- › Potentially conflicting interests as both CM and contractor

There are very real trade-offs when selecting the CM-at-Risk delivery method versus the more traditional Design/Bid/Build approach. As a result of our experience serving as a trusted advisor and owner's advocate for both approaches, we will lead the Haverhill through that decision-making process including seeking approval by MA Inspector General Office for the CM-at-Risk delivery method if so selected. The selection of a construction delivery method must be weighed carefully based on the project's details and dynamics. Colliers has served numerous clients who have chosen to use the CM-at-Risk delivery method. The choice of CM-at-Risk delivery method versus Design/Bid/Build for Massachusetts school projects is an important one. Colliers team can provide insight and guidance to the City in that evaluation if so desired.

7. [What are the major considerations for seeking to include LEED or "green" building requirements in the design and construction of a new or renovated public school facility?](#)

First and foremost, undertaking a project seeking MSBA reimbursement requires that the project team include "green schools" requirements into the design, construction, and proposed operation of the project in order to be eligible for any MSBA reimbursement.

Beyond the baseline core program "green schools" requirements, the major consideration to pursue any additional LEED or NE-CHPS credits will vary depending on whether the preferred solution is a full renovation, addition with renovation, or new construction project. In any case, as the OPM we will be looking to balance the need to meet the "green schools" certifications requirements with the limits of the upfront construction costs; long-term operational costs; any potential rebates, reimbursements or incentives for which the project is eligible; and **most importantly the health and safety of the School's students, staff and public visitors.**

Another consideration will be building up an experienced project team. Colliers will guide you through the selection of the architect, engineers, other specialty consultants and a GC/CM team that has proven experience with the LEED certification and/or NE-CHPS process to make sure the design, documentation, and certification process runs smoothly and efficiently.

8. How do you approach the development of operating and life-cycle cost projections for a new school, and how important are they in the scoping and design processes?

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

Colliers has developed a robust financial management system for budgeting, tracking, and anticipating all project-related expenditures in the most thorough and accurate manner possible, greatly reducing the possibility of unwanted financial surprises and always looking to maximize MSBA reimbursement.

Throughout the feasibility and design phases, the estimate reconciliation process and our value engineering techniques help ensure that the project is designed and adheres to a realistic budget. Our bid phase management techniques help to keep the initial construction contract within budget. Our technical design reviews and our change order review process reduce unwanted change order costs during the construction phase and help the Owner receive fair pricing for those change orders that are legitimate and maximize MSBA reimbursement. Our commissioning process management continuously pursues options that create ongoing energy and operational savings that last long after project completion. ***Colliers has built our reputation on providing dramatic savings throughout a project, striving to exceed our cost of service.***

9. Explain the tools and processes you use to ensure the design and construction of large MSBA funded school project stays on schedule and on budget?

Through Colliers' extensive experience serving as an owner's project manager for more than 400 educational projects throughout the Northeast, we have developed protocols and procedures to ensure projects stay on schedule and on budget.

Project Schedule

As quickly as we develop a total project budget for the project, we also develop a very detailed ***Milestone Schedule***. Typically working off of a macro project schedule (big picture schedule), we establish a list of key deliverables during the design, bidding, move/relocation, construction, and closeout phases. Having a tailored schedule for each phase in concert with the unique attributes of the project is critical to ensuring schedule success.

Typical design phase deliverables include design phase meetings, regulatory approvals, and estimating efforts, to name a few.

Bidding deliverables include, pre-bid meetings, bid receipt, scope review meetings, and contract approval dates. Once we have identified all of the activities we will need to track, we assign a specific date to each. For example, We would identify the dates for Request for Qualifications for hazmat construction services, Request for Qualifications for Construction Manager Services, etc. During the design and bidding phases, this milestone schedule will be tracked and discussed at every progress meeting.

Once the project is in construction, **our focus continues to be on the project's cost, quality, and schedule.** Instead of looking at the project in 2D (drawings and specification), we are now looking at the 3D (the actual building). Through proactive processes and protocols, **we ensure the project is built per the plans and specifications, within the approved budget, and on schedule.** Our protocols during the construction phase are intended to avoid claims by the contractor.

Project Budget

Colliers understands that a project includes many other items than construction and architectural costs. Items such as moving, furniture, fixtures, & equipment, escalation, and contingencies need to be accounted for in the total project budget. Many times, we will inherit a budget only to learn some of the necessary costs are missing. Therefore, it is our objective to capture this information at the onset of the project.

Once we have the overall budget established, we test the design, relative to the construction budget, by facilitating an estimating process. Colliers frequently engages an independent estimator to reconcile the estimates. This estimating process repeats itself three times during the design period.

During the estimating period, we look to maximize the value of the project by engaging in a value management (also known as value engineering) process. Value management is only required if the estimates are over budget. If any of the estimates are over budget, we look for creative ways to trim the cost of the work, while not sacrificing program space. Having an in-house staff of architects and MEP engineers, Colliers can analyze any of the proposed systems and suggest alternative approaches, if needed.

Additionally, throughout the project, we are actively managing the entire project budget (not just during the estimating process in the design phase). By reviewing and recommending for approval all project related invoices, we are proactively thinking about the anticipated costs for each of the budgetary line items. We refer to this as "Planned but not Contracted." At any point, we can confidently state where we stand with the project budget. This proactive management approach to financial control allows us to **ensure the project remains on budget.**

10. Describe your experience with soliciting community input and addressing stakeholder concerns during the feasibility and preliminary design phases of K-12 public school projects.

Colliers has extensive experience supporting numerous school districts in advising and guiding the district through not only the MSBA regimented process but also assisting in the information dissemination and public outreach necessary for a successful public vote to approve the project. Colliers has assisted and coached several districts through the planning, scheduling, and presentation of project plans through public forums, presentations to local constituency groups, online resources, and other media.

Colliers realizes that this process cannot begin shortly before the public referendum. Community outreach must begin with early communications to allow the public to understand the need, present the options, and provide reasons that explain how the project is the best value and in the best long-term interest of the district, community, and students. These efforts must include multiple strategies including:

- › Plan for frequent open and honest presentations during the planning phase

- › Carefully and methodically work with community leaders to properly understand the full educational and financial ramifications of the plan
- › Encourage the city leaders to be part of the solution and public presentation of the plan
- › Organize the leadership of the “get out the vote” campaign
- › Listen carefully to negative remarks of key constituents and narrow that difference early
- › Encourage dedicated leadership of volunteers and constantly reinforce their efforts
- › Undertake strong outreach to key constituencies

11. What are the most common problems encountered with contractors during the construction phase of a large K-12 public school project, and how do you effectively manage them.

Over-billing

It's common for contractors to bill for work that's not completed or material that's not furnished yet. Through our construction rep on site and his/her knowledge of the construction status, we mark-up the monthly pay apps to ensure the Owner is only paying for work completed and materials furnished.

Unfair / Unreasonable Proposal Change Orders

It's not unusual for contractors to submit unfair and unreasonable proposal change orders. We work closely with the design team to ensure a proposed change order is not approved until all the appropriate information has been provided from the contractor and the price and scope is deemed fair and reasonable.

Schedule

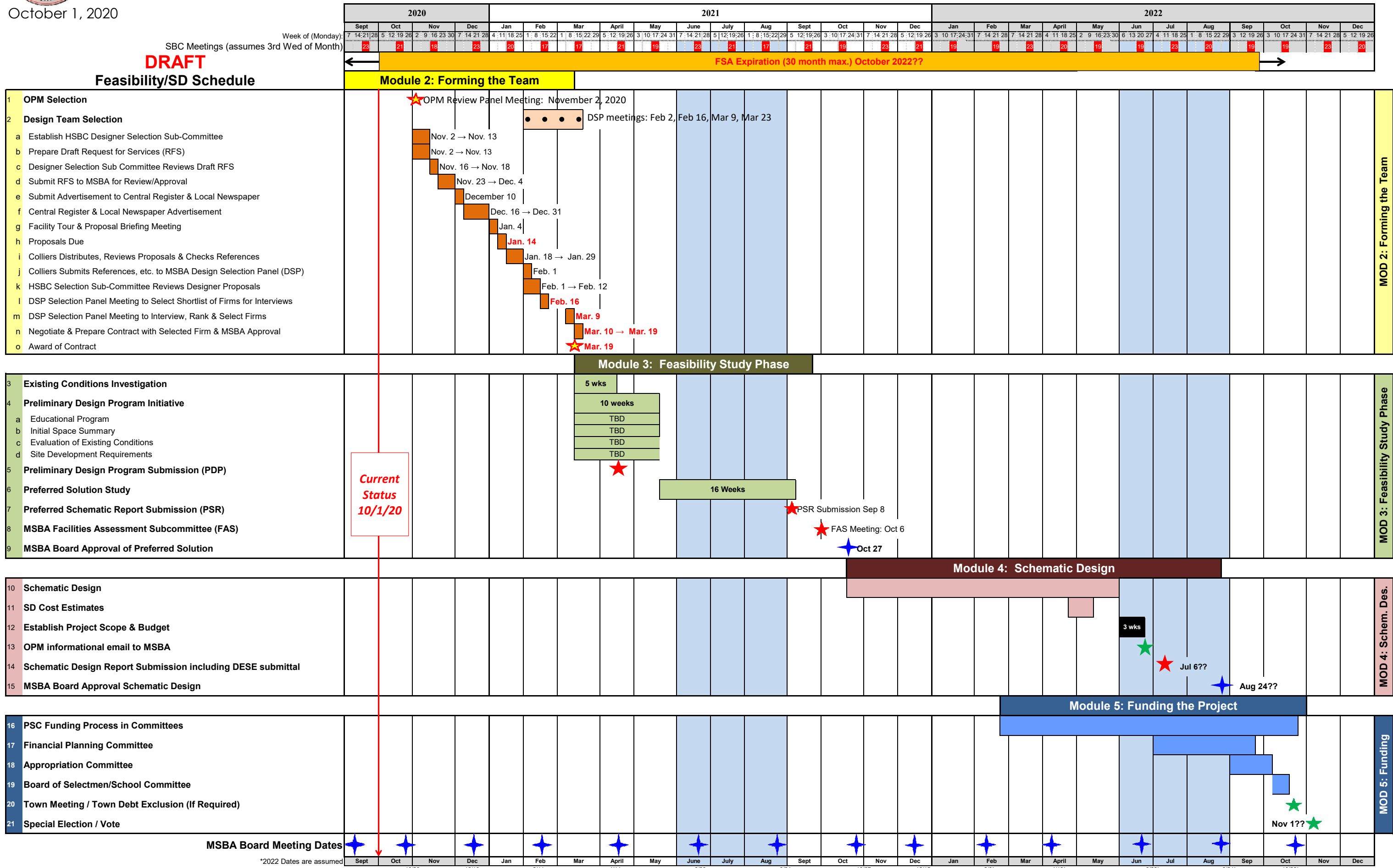
Some contractors are worse than others with understanding the phasing of an Owner-occupied renovation project and the importance to the school calendar of meeting all the construction phasing dates. We make sure we drill into the contractor's head early on and often of that importance and make sure we stay proactive versus reactive with the project schedule.

12. Provide a rough draft of a project schedule for the Consentino Middle School Project that includes all phases of a MSBA funded major school renovation/building project.

Provided on the following page is rough draft of the project schedule for the Consentino Middle School Project.

October 1, 2020

DRAFT



DESCRIPTION OF THE PROJECT & REFERENCES

PROJECT UNDERSTANDING

There is a clear need for major improvement of Consentino Middle School as evidenced during the online Pre-Bid Informational Meeting on August 5, in the SOI, and further substantiated by the MSBA’s invitation into the grant program. Clearly, the disruptive effects of the current facility prevents Haverhill from fully serving all the students enrolled there. We recognize the school has little or no flexibility of space usage with severe overcrowding that restricts the school’s programming. For example, the band program and other STEM programs have been greatly diminished by the necessity of reallocating their dedicated spaces. There is limited or lack of space for the special education, treatment, and ELL programs as well as storage and parking spaces. Additionally, the building’s systems and infrastructure is obsolete and does not meet current environmental, security, and accessibility standards.

One of the challenges we will help Haverhill overcome is how to most effectively evaluate the multiple enrollment projections and design alternatives to ensure we maximize the benefits for both Consentino and the larger Haverhill School District. A careful consideration of all options will also provide a higher degree of flexibility for additional programming, scheduling, and logistical flexibility in a post-COVID-19 world. ***Our proposed team includes a subject matter expert in COVID-19 guidelines.***

Colliers’ feasibility study will consider new building, addition, and renovation scenarios. As part of the study process, we will create state-of-the-art academic solutions for each of these scenarios. This allows you to compare each option and assures the City is getting the most optimal educational solution possible.

REFERENCES

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.

MSBA FUNDED K-12 PUBLIC SCHOOL PROJECTS	
Client and Project Name	Client Contact
City of Fitchburg Crocker Elementary School	Mary Delaney, Chief Procurement Officer (978) 829-1850
Town of West Springfield West Springfield High School	Michael Richard, <i>Former</i> Superintendent of Schools (413) 243-0276
Northborough Public Schools Lincoln Street Elementary School	John Coderre, Town Administrator (508) 393-5040
North Adams Public Schools Colegrove Park Elementary School	Nancy Ziter, <i>Former</i> Business Manager (619) 322-1092