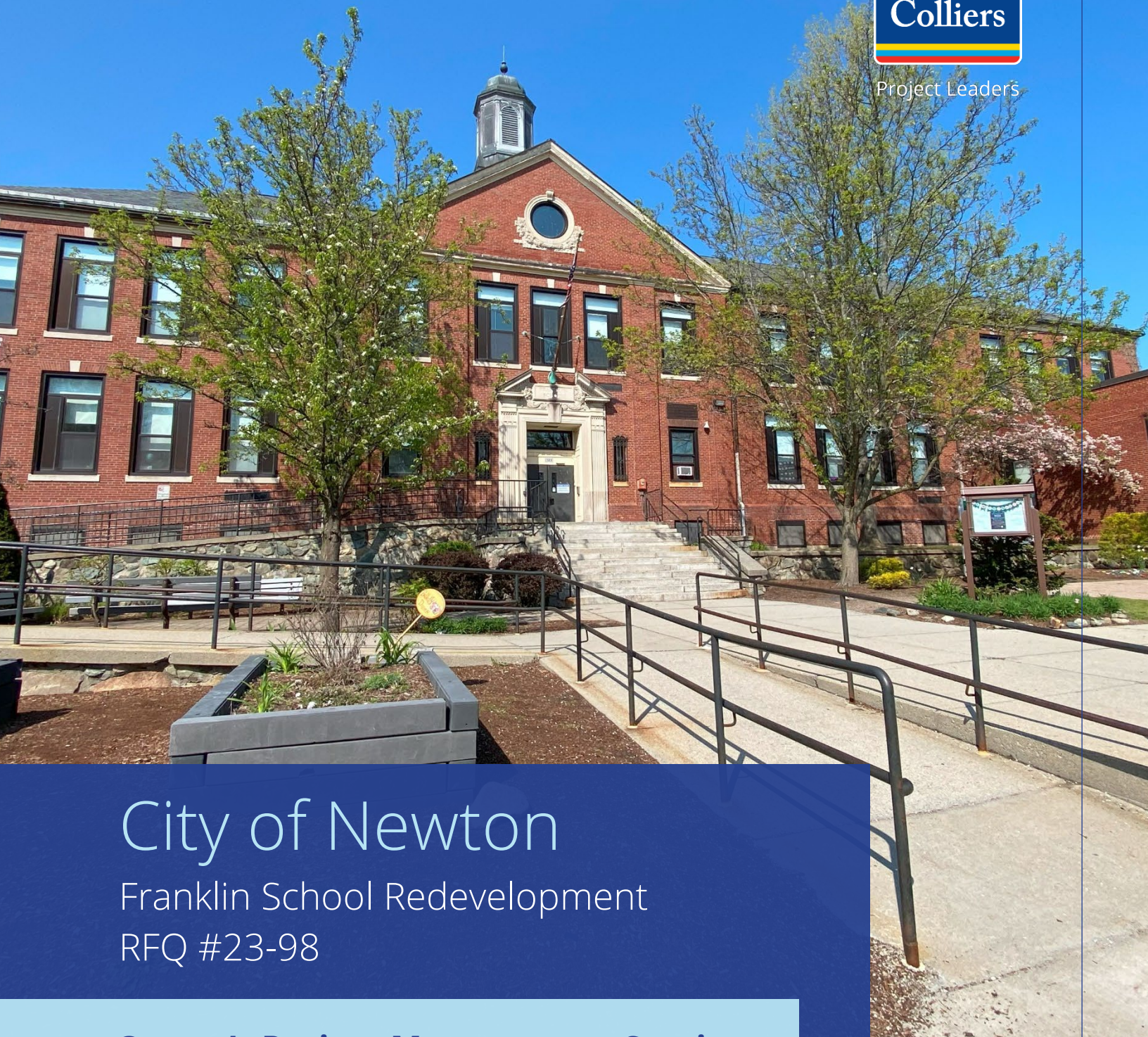




Colliers

Project Leaders



# City of Newton

Franklin School Redevelopment  
RFQ #23-98

## Owner's Project Management Services

May 4, 2023

**Prepared for**

Nicholas Read  
Chief Procurement Officer  
City of Newton

**Prepared by**

Derek Osterman, Assoc. AIA, LEED AP, MCPPO  
Senior Director, Project Management Services  
Colliers Project Leaders

Accelerating success.



May 2, 2023

Mr. Nicholas Read  
Chief Procurement Officer  
Purchasing Department, Room 108  
Newton City Hall  
1000 Commonwealth Avenue  
Newton, MA 02459

**Subject: *Qualifications to Provide Owner's Project Management Services for the Franklin School Redevelopment Project, RFQ #23-98***

Dear Mr. Read, Franklin School Building Committee, and Designer Selection Committee:

Colliers has been following the Franklin School Redevelopment Project with great interest. We understand the challenges posed by the existing school facility as well as the need to reshape an educational environment that will advance the ambitions of the Newton community well into the future.

We recognize the significant benefit a modernized facility would have for the students and staff. With appropriately sized and comfortable classrooms, dedicated state-of-the-art space for school programs, and an overall environment that embraces 21<sup>st</sup> century learning in a post-pandemic world, the Franklin School will be an inclusive, comprehensive, and successful school of the future.

Engaging Colliers as Owner's Project Manager (OPM) will provide the City of Newton with the additional tools it needs to successfully complete this project in a fiscally responsible manner and provide its residents and their children with an educational facility that is a safe environment for learning and creativity.

Colliers understands that the Franklin School Redevelopment Project will take place outside of the MSBA Grant Program. Colliers has served as the OPM on similar projects for the Town of Hopkinton and Town of North Andover as well as various schools throughout the Northeast. Our team is intimately familiar with overcoming any potential obstacles associated with this approach.

Why should you consider Colliers and what can we provide that our competitors cannot?

- 25+ years dedicated to providing OPM services to educational institutions with a portfolio of **450+ Education Projects, 125+ Public K-12 School Projects, and 50+ projects with MSBA's requirements.**
- **Public Outreach Program (POP)** that utilizes virtual surveys, interactive websites, controlled messaging, and integrated meeting schedules to get to YES in the Newton community.
- **Energy rebates and incentives up to \$2 per square foot** by leveraging our Energy and Carbon Consulting services group.



Project Leaders

- Eco Partner Solutions partnership that facilitates the decommissioning and recycling of your existing furniture.

Finally, we have proposed a team of diverse individuals who together will be an effective, multi-dimensional project management solution. Our multi-disciplined professionals will be responsive to the needs of Newton and the unique concerns of the school project. Our team is reflective of our commitment to diversity, equity, and inclusion (DEI) and consistent with an expanding awareness on Environment, Social, and Government (ESG) issues in the \$1.4 Trillion construction industry in the U.S.

Colliers has provided below the specific requirements outlined in the City of Newton's RFQ:

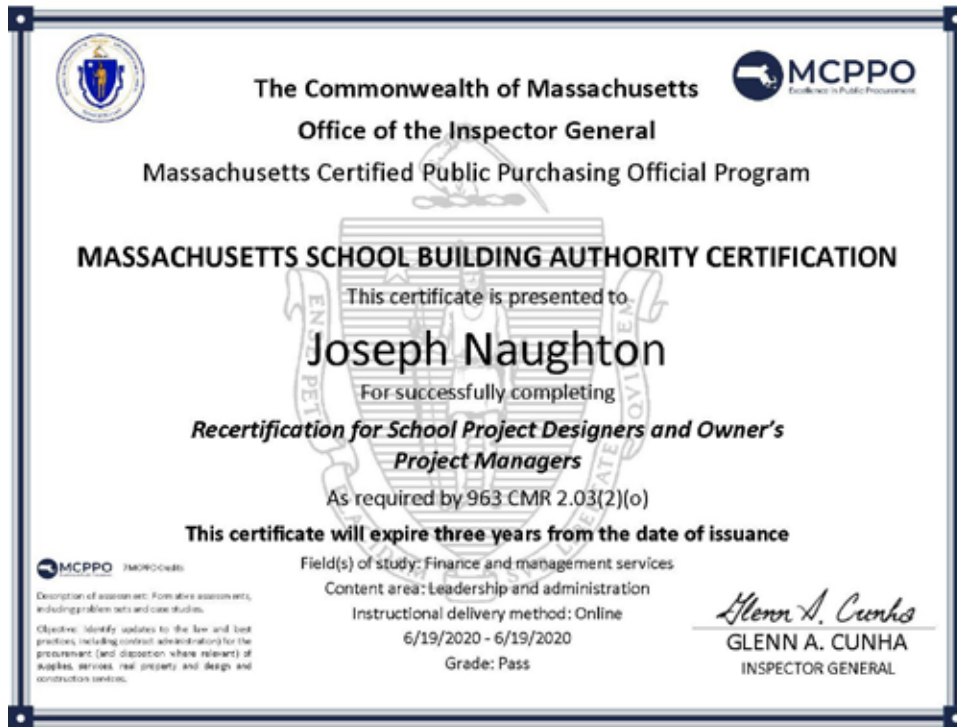
- a. Colliers has received and reviewed Addendum #1 issued on April 28, 2023, and Addendum #2 issued on May 1, 2023.
- b. Colliers has read the Request for Qualifications and does not take any exceptions.
- c. Colliers has read the Standard Contract and Standard Amendments. We respectfully request the exceptions provided on the following pages.
- d. Project Director, Joseph Naughton, AIA, LEED AP, MCPPO, meets the minimum requirements as outlined below:
  - Mr. Naughton is a registered architect in Massachusetts (MA #9386) with more than 30 years of experience in the construction and supervision of construction and design of public buildings. In addition, Joe received his renewed MCPPO certification in June of 2020 (copies of key personnel MCPPOs attached).
- e. Colliers Project Leaders was founded in 1996 as Strategic Building Solutions and has operated for more than 25 years with a simple mission in mind – to be the premier provider of owner's project management services.
- f. Jonathan F. Winikur, Division Director, is the authorized individual to negotiate and execute a contract for owner's project management services on behalf of Colliers Project Leaders USA NE, LLC, the legal entity submitting this statement of qualifications.
- g. Contact Person:
  - Name & Title: Derek Osterman, Senior Director
  - Address: 100 Federal Street, Floor 33, Boston, MA 02110
  - Email & Phone: derek.osterman@collierseng.com | (617) 997-3047

We look forward to the opportunity to meet with you to further discuss our qualifications and how we can support the City of Newton through specific milestone requirements and help create the ideal learning environment for your students.

Sincerely,

Derek Osterman, Associate AIA, LEED AP, MCPPO  
Senior Director, Project Management Services

Jonathan F. Winikur, MCPPO  
Division Director



# Exceptions

Colliers has reviewed City of Newton's Request for Qualifications and respectfully requests the modifications provided below. (Changes are highlighted in red).

## Attachment B

### Base Contract for Project Management Services

#### Article 14: Indemnification of Owner And Authority

- 14.1 With respect to professional services rendered by Owner's Project Manager, to the fullest extent permitted by law, Owner's Project Manager shall ~~defend~~, indemnify and hold harmless the Owner, and its officers and employees from and against all claims, damages, liabilities, injuries, costs, fees, expenses, or losses, including, without limitation, ~~reasonable~~ attorney's fees and costs of investigation and litigation, whatsoever which may be incurred by the Owner to the proportionate extent caused by the negligence of or the breach of any of the provisions of this Contract by the Owner's Project Manager, a person employed by the Owner's Project Manager, or any of its Subconsultants.
- 14.2 With respect to non-professional services rendered by Owner's Project Manager, to the fullest extent permitted by law, Owner's Project Manager shall ~~defend~~, indemnify and hold harmless the Owner and the Authority, and their officers and employees from and against all claims, damages, liabilities, injuries, costs, fees, expenses, or losses, including, without limitation, reasonable attorney's fees and costs of investigation and litigation, whatsoever which may be incurred by the Owner and/or the Authority to the proportionate extent, arising out of or resulting from the performance of its services provided that such claims, damages, liabilities, injuries, costs, fees, expenses, or losses are attributable to bodily injury or death or injury to or destruction of tangible property and to the extent caused by an act or omission of the Owner's Project Manager, a person employed by the Owner's Project Manager, or any of its Subconsultants.

#### Article 15: Insurance

- 15.7.2 Commercial General Liability Insurance (including Premises/Operations; Products/ Completed Operations; Contractual; Independent Contractors; ~~Broad-Form~~ Property Damage; and Personal Injury) with a minimum limit of \$1,000,000 per occurrence, \$2,000,000 aggregate. The Owner's Project Manager shall maintain such insurance in full force and effect for a minimum period of one year after final payment and shall continue to provide evidence of such coverage to the Owner and the Authority. The Owner shall

be added as an additional insured on this policy. The policy shall be endorsed to waive the insurer's rights of subrogation against the Owner.

#### **Article 16: Ownership of Documents**

- 16.1 Unless provided otherwise by law, ownership and possession of all information, data, reports, studies, designs, drawings, specifications, materials, documents, models, and any other documentation, product or tangible materials authored or prepared, in whole or in part, or purchased, obtained, created by the Owner's Project Manager pursuant to this Contract (collectively, the "Materials"), other than the Owner's Project Manager's administrative communications, records, and files relating to this Contract, shall be the sole property of, and shall vest in, the Owner as "works made for hire" or otherwise. Any use or reuse of OWNER'S PROJECT MANAGER's Documents by TOWNSHIP for projects they were not intended and/or without the professional involvement of OWNER'S PROJECT MANAGER shall be at TOWNSHIP's sole risk without liability to OWNER'S PROJECT MANAGER.

# Contents

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## I. Evaluation Criteria

- 1) Relevant Experience
- 2) Knowledge of Codes, Procurement, and Sustainability
- 3) Project Understanding and Approach
- 4) Project Team / Commitments / Availability
- 5) Firm Qualifications / Capacity

## II. Attachment C: OPM Application Form *Including Project Supplement*

## III. Attachment D: Required Certifications

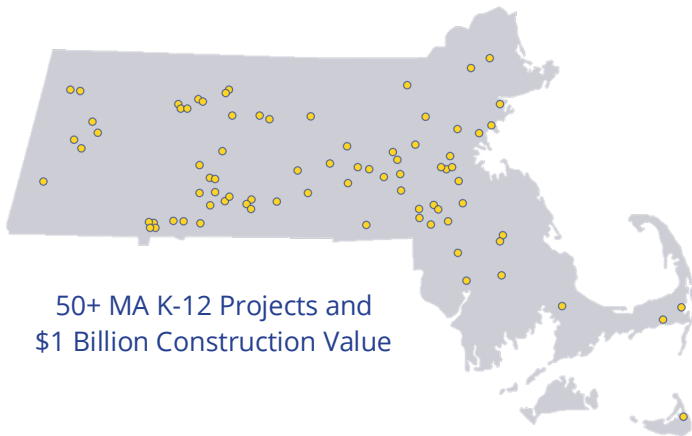


# Evaluation Criteria

## 1) Relevant Experience

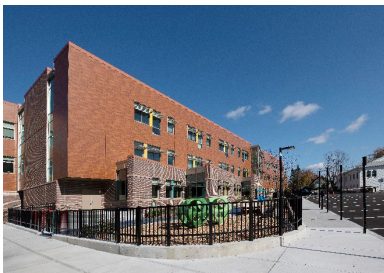
### Documented Performance on Previous Projects

Colliers has extensive experience and a long-standing history of providing owner's project management (OPM) services throughout the Commonwealth including numerous K-12 school construction and renovation projects. Listed below is a sampling of our project experience.



### Owner's Project Management Highlights

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



- Foxborough's Mabelle M. Burrell Elementary School
- Northborough's Lincoln Street Elementary School
- Maynard's Green Meadow Elementary School
- Fitchburg's Crocker Elementary School
- Gardner Elementary School
- Narragansett's Templeton Elementary School
- Southwick-Tolland RSD's Woodland Elementary School
- Granby's East Meadow Elementary School
- Easthampton's Mountain View School (Elementary School)
- North Adam's Greylock/Brayton Elementary School
- North Adam's Colegrove Park Elementary School
- Spencer-East Brookfield RSD's David Prouty High School
- Bristol County Agricultural High School
- Cape Cod Regional Technical High School

***Please refer to Section 7 of Attachment C for additional information regarding the above referenced projects.***

Colliers Project Leaders



## Relationships with Designers, Contractors, Owner, and Local Officials



Colliers' firm and fair reputation with designers and contractors emphasizes that all parties provide their services within the terms of their agreement with the Owner. A thorough understanding of the expectations of each party allows us to quickly address and resolve any disputes on your behalf and keep the entire team moving effectively toward success. There are roughly 12 architectural firms and ten contractors known for specializing in Massachusetts K-12 projects. Given our 50+ K-12 project experience in the Commonwealth, it is likely we have worked with all the firms that will be considered for the Franklin School Redevelopment.

We pride ourselves on providing Owners with exceptional service and a high return on their investment, delivering your educational vision and completing the project **on time and on budget**. Our established processes and protocols increase the likelihood of a successful project. Colliers' review of the design will ensure the highest quality of drawings and specifications to minimize change orders and ensure the highest quality building design. A successful project is a win for the entire team.

Finally, the most essential ingredient to project success is the endorsement of the entire Newton community. Our experience shows that the most successful projects feature an active and robust community engagement process that has been implemented through all phases of planning, design, and construction. To facilitate this engagement, we will schedule update meetings, coordinate site tours, and organize informational sessions and other public outreach initiatives to build energy, awareness, and support.

## 2) Knowledge of Codes, Procurement, and Sustainability

### Knowledge of Massachusetts State Building Code

Colliers' Project Management team features registered architects, **including members of your proposed team, Joseph Naughton and Teresa Wilson**, and building officials who have a strong understanding of the Americans with Disabilities Act and all other relevant building codes and regulations. Project examples can be found in **Section 7 of Attachment C**.

Our licensed architects and building officials perform design reviews and ensure that all applicable codes are being followed. Potential codes issues are identified to the design team and tracked by the Project Manager to ensure resolution before construction begins. All Colliers' Project Managers undergo annual training to keep current on any changes to the state building code and the latest regulations.

Additionally, we know energy efficiency is an important and ever-changing part of the state building code. Colliers' team thoroughly understands the requirements of ASHRAE 90.1-2007 and how this will impact of cost of the Franklin School Redevelopment as well as its long-term life cycle cost.

We aim for our school projects to exceed the standard mandated, which helps maximize your awarded energy points within the LEED rating system. Our in-house Carbon and Energy Services Group conducts ongoing training sessions to keep our Project Managers current with any and all changes to the code.

### Knowledge of Commonwealth Construction Procurement Laws

Our team members, Joseph Naughton and Derek Osterman, are Massachusetts Certified Public Purchasing Officials (MCPPO) and thoroughly understand the original 2004 Construction Reform Laws and their current revisions, which had a significant impact on construction statutes, thresholds, and procedures for public

construction. Additionally, our project management team consists of **11 MCPPO certified personnel** who are available to support the Franklin School Redevelopment if necessary.

As a result of our experience serving as owner's project manager for more than **50 Massachusetts public schools**, examples of which can be found in **Section 7 of Attachment C**, our team has extensive knowledge and a thorough understanding of the Massachusetts Procurement Laws including Ch. 149a CM-at-Risk, Ch. 149 requirements for general contracting, Ch. 30b requirements for supplies and services, and Ch. 7 for Architect / Designer Requirements.

In summary, we've procured more than \$300 Million in architectural and engineering contracts, \$2 Billion in construction contracts, \$500 Million in furniture and Equipment, and \$300 Million of technology contracts under the Commonwealth of Massachusetts procurement laws. **We know how to procure in Massachusetts.**

## Knowledge of CM-at-Risk Procurement Methodology

A key element of the 2004 Construction Reform Laws was the CM-at-Risk procurement methodology, a potential construction delivery method for the Franklin School Redevelopment if approved by the Inspector General's Office.

CM-at-Risk offers several advantages to the City of Newton:

1. Qualifications-based selection as opposed to low-bid
2. Early involvement during design to aid estimating, scheduling/phasing, and coordination of construction issues
3. Through the GMP process, the CM has the ability to adjust work parameters responding to changing conditions particularly in complicated phased construction projects

There are, however, very real trade-offs when selecting the CM-at-Risk delivery method over the more traditional Design/Bid/Build approach. As a result of our experience serving as a trusted advisor and owner's advocate, we will thoroughly analyze the pros and cons of each available delivery method and will lead Newton 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 weighted 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. Provided below is an overview of CM-at-Risk projects where Colliers has served as Project Manager:

- Bristol County Agricultural High School
- Diman Regional Vocational Technical High School
- New London's Bennie Dover Jackson Middle School
- Branford's Francis Walsh Intermediate School
- Lincoln High School
- South Windsor's School Building Program
- Fitchburg City Hall Campus
- David Prouty High School
- Regional 14 Schools' Nonnewaug High School
- Rocky Hill's Moser School
- East Hampton High School
- North Haven Middle School

## Familiarity with NE-CHPS Criteria and LEED for Schools

Colliers is well experienced in providing owner's project management as well as leadership and oversight to numerous sustainable building projects. 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 AP certification. Colliers' LEED Project experience includes **more than 200 LEED Certified Buildings**, including West Springfield High School (LEED Silver), Granby's East Meadow Elementary School (LEED Silver), North Adam's Colegrove Park Elementary School (LEED

Gold), Narragansett's Templeton Elementary School (LEED Silver), and Southwick-Tolland-Granville RSD's High School (LEED Certified), to name a few.

In addition to our significant number of LEED projects, our service on school projects throughout the Commonwealth incorporates the requirements and guidelines of **Northeast Collaborative for High Performance Schools (NE-CHPS)**. Highlights of such projects include West Bridgewater Middle-Senior High School and Northborough's Lincoln Street Elementary School.

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



Complete financial control of any project is perhaps the most fundamental determinant of its eventual success or failure. Establishing financial control becomes particularly complicated when balancing the issues of upfront project 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.

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. 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, always exceeding the cost of service.**

### Knowledge of Building Commissioning Consultants



Colliers recognizes building commissioning as a major factor in the successful planning, design, construction, and ultimate operation of a building project. In fact, **Colliers is a major provider of building commissioning services on many Massachusetts public school projects.** Our extensive experience in provides us with a unique understanding of the role and importance of commissioning services. The advantage of Colliers is that our OPM teams have access and use the expertise of our commissioning staff, particularly in the mechanical and electrical disciplines to assist in our OPM services. This capability provides added benefit to our projects through additional expertise particularly in reviewing designs, ensuring quality control in construction, and assisting clients in building operational success.

Colliers intimate knowledge of the commissioning process and services benefits our OPM services to ensure our OPM team appropriately manages and integrates the services of the commissioning agent. It becomes critical to involve the commissioning agent into the project from early design throughout any value engineering, submittal approvals, construction observations, operational testing, and personnel training. The involvement of the commissioning agent is critical for the LEED or NE-CHPS certification process. **Colliers OPM's are well versed and experienced in ensuring the value of the commissioning services are maximized in the successful completion and continued operation of your project.**

### 3) Project Understanding and Approach

#### Project Understanding

Based on our review of the RFQ, Colliers understands that the City of Newton is seeking an OPM to complete a Feasibility Study, which will include the development and evaluation of multiple solutions and continue initially through the Schematic Design Phase with the preferred alternative. We understand the potential project will include the renovation of and addition or demolition and new construction to the structure at 125 Derby Street.

#### Project Approach

Colliers' philosophy in the management of capital projects has been shaped by more than two decades of experience representing owners in the design, construction, and management of educational facilities. Colliers has assembled a diverse team of talented professionals with varied backgrounds and competencies from across the design and construction industry to help cities and towns navigate through this complex and risky environment. Our approach is proactive and highly collaborative. With this perspective in mind, Colliers has adopted the following core objectives for delivering our services:



**Protect** the interests of the City of Newton through careful oversight to ensure that newly created and/or renovated spaces are **functionally** appropriate for the occupants, **aesthetically** conforming to design standards, and **financially** managed to the established budget.



**Reduce** costs and maximize value throughout the project with **design critiques** that provide options for best value, avoid high-cost change orders, and utilize **bidding and contracting strategies** that reap benefits from a competitive marketplace.



**Preserve** the project schedule by establishing **critical milestones** throughout the design and construction process, facilitating meetings and document reviews, and **identifying critical path** issues that can create delays before they materialize.



**Maintain** construction quality assurance throughout the process by **confirming the proper design and construction** of materials and equipment and **verifying the performance** of installed systems.

Keeping in mind these project objectives, we have developed a general Management Plan delineated across the major and sequential phases of the proposed project.



#### Feasibility and Schematic Design Phase

##### Develop Building Program in Support of Educational Plan

Colliers will work with Newton and Raymond Design Associates (RDA) to establish a building program which delineates the space needs for each grade configuration and enrollment to be addressed by the Project. Having clear criteria up front, eliminates a trial-and-error design process that is labor intensive, time consuming, and costly.

##### Establish the Preferred Solution

Once the space programs are completed, Colliers will lead the Project Team through the process of establishing the preferred solution. Ultimately, the preferred solution will be identified which best suits the School District's educational plan and fiscal limits.



## **Develop Project Budget**

Colliers will develop a total project budget broken down into the following categories: building construction, site/related construction, furniture, fixtures & equipment (FF&E), fees and expenses, contingency, and escalation. With the budget established, we will ensure the design team designs to budget and manage all projects costs to the established budget.

## **Develop and Manage the Project Schedule**

Concurrent to developing a total project budget, Colliers will also establish a project schedule with both macro (big picture overview) and milestone (detailed breakouts) summaries. These schedules are used on a daily/weekly basis, continually updated as needed, and distributed at all meetings. Working off the macro schedule, the milestone schedule identifies key project deliverables during design, bidding, construction, and closeout phases in concert with the unique attributes of the project.



## **Detailed Design Phase**

### **Coordinate the Design Process with Design Team, Users, Operators & Regulatory Groups**

The design of a building project is an interactive process involving multiple designers with varied specialties as well as numerous representatives of the Owner's constituencies, each of which must have access to the design evolution appropriate to their respective roles. Communications with and presentations by the Design Team must be facilitated to manage the logistics and political dynamics while simultaneously ensuring the appropriate level of input and critique. This coordination doesn't happen absent facilitation and leadership by the project manager.

### **Reconcile Design Solutions with Program Expectations, Cost Estimates, and Budget Parameters**

At several critical junctures throughout the design process, Colliers will independently review the solutions proposed by the Design Team to ensure conformance with the direction provided at the outset. Frequently, the many involved parties lose sight of the originally established program objectives and financial constraints. The project manager will perform regular reconciliations of design solutions with the program, estimates and the established budget to keep the Franklin School Redevelopment on track.

### **Conduct Technical Review and Critique of Systems Designs and Details**

To analyze the conformance of the Design Team's physical solutions to the needs of the City of Newton several reviews of the proposed solution must be undertaken. In particular, Colliers will review drawings and specifications as they evolve to ensure suggestions do not compromise operational practices, meet programmatic expectations, include appropriate level of detail, minimize capital costs, and are physically attainable given the construction parameters and logistics.

### **Establish and Manage the Bidding and Contracting Process**

To minimize construction costs and maximize value, Colliers will assist in determining the project delivery method and develop a strategy for the procurement of contracted services. During this process, focus must be paid to protect the quality of bidders and clarify the scope of work, allowing for more accurate bids and minimizing future change orders. Opportunities also exist to ensure that local companies, including small and minority-owned businesses, are well informed of the project and are given an even opportunity to bid. Supporting the bidding process includes properly verifying

qualifications, soliciting proposals from contractors, reviewing and discussing the submissions, negotiating contract terms and executing agreements.



## Construction Phase

### **Coordinate Construction Activities**

If not properly managed, construction activities can significantly disrupt neighborhood and community members. Ongoing construction will likely require the 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.

### **Monitor & Manage Construction Changes and Project Finances**

In any renovation or new construction project unanticipated changes are likely to occur while the construction activities are underway. The reasons for changes are varied including unforeseen conditions, material and/or furniture changes, or drawing modifications to name a few. To control expenditures during this period, Colliers will carefully monitor and manage any project changes as well as the contracts and payments to the various contracted entities.

### **Conduct Inspections of Construction for Quality Assurance**

As is the case with any purchased service, the quality of workmanship varies according to the individuals assigned to the task. To assure the quality of workmanship on a project and compliance with the contract documents, Colliers will regularly conduct inspections of contractor work and quickly identify and resolve any problems that may be identified.

### **Manage Building Occupancy**

As the project nears completion, Colliers will coordinate and manage the process of purchasing the furniture, fixtures and equipment for the facility. Once installed, Newton personnel will be assisted with the physical move into the building.



## Closeout and Training Phase

### **Ensure Systems Performance through Testing**

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 is the only way to tell for certain if systems will operate as intended while there is still financial incentive for the contracted parties to remedy problems.

### **Monitor & Manage Contractor Correction of Problems**

Every building is a prototype, therefore problems are likely. Once identified, Colliers will monitor the contractor's 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.

## **Train Operating Staff in Systems Operations & Maintenance**

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

## **Project & Information Management System**

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

## **Problem-Solving Approaches**

Through Colliers' extensive experience serving as owner's project manager for municipal projects across the Commonwealth and throughout the Northeast, we have encountered many unusual circumstances and problems and have developed protocols and procedures to specifically address and overcome these issues. Many of these problems are avoidable if properly addressed early on. At Colliers, our primary objective as owner's project manager is to protect the City of Newton's interests to ensure that the Franklin School Redevelopment is delivered on time, within budget, and to the highest quality standards. Provided below is an overview of some unusual circumstances and/or anticipated problems we have encountered along with our proposed solutions

- **Projects Being Over Budget:** Colliers understands that a project includes much more than simply construction and architectural costs. 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 our budget established, we test the design, relative to the construction budget, by facilitating an estimating process. Colliers frequently engages an independent estimator and, working with the design team's estimator and construction manager, reconciles the estimates.
- **Delays in the Project Schedule:** As quickly as we develop a total project budget for the project, we are also developing a very detailed Milestone Schedule. Typically working off of a macro project schedule (big picture schedule), we will establish a list of key deliverables during the design, bidding, move/relocation, construction, and closeout phases. Having a tailored schedule for design, bidding, move/relocation, construction, and closeout in concert with the unique attributes of this project will be critical to ensuring schedule success.
- **Poor Quality of Completed Buiding:** During the design phase, as it relates to the quality of the project, we will engage in a detailed design review process. At the conclusion of each stage of design (Schematic Design, Design Development, and Construction Documentation), we will perform a multi-disciplined

design review. Utilizing our in house multi-disciplined staff members (architects, MEP engineers), we can ensure our clients are receiving a thorough review of their design documents.

## 4) Project Team / Commitments / Availability

Colliers' owner's project manager 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 listed below will be led by our **Project Director, Joseph Naughton**, who will be responsible for project strategy, detailed messaging, public outreach, and successful implementation.

Joe will be supported by **Project Executive, Derek Osterman**, who will provide planning, design, and sustainable programs expertise, and **Project Manager, Matthew Sturz**, who will handle the day-to-day management of the project schedule and budget, as well as the community outreach initiatives.

Provided below is our core team's time commitment to your project, experience, and personal references.

Key Personnel	Time Commitment	Experience	References
<b>Project Director</b> Joseph Naughton, AIA, LEED AP, MCPPO	<ul style="list-style-type: none"> <li>Design: ½ day a week</li> <li>Construction: ½ day a week</li> </ul>	<ul style="list-style-type: none"> <li>MA Registered Architect</li> <li>30+ years of experience</li> </ul>	Webster Public Schools Monique Pierangeli Asst. Superintendent for Business & Finance (508) 943-0104 option 1
<b>Project Executive</b> Derek Osterman, Associate AIA, LEED AP, MCPPO	<ul style="list-style-type: none"> <li>Design: 1 day a week</li> <li>Construction: 1 day a week</li> </ul>	<ul style="list-style-type: none"> <li>20+ years of experience</li> </ul>	Town of North Andover Laurie Burzlaff Assistant Town Manager / Director of Operations (978) 688-9510
<b>Project Manager</b> Matthew Sturz, RLA, ASLA	<ul style="list-style-type: none"> <li>Design: 2 days a week</li> <li>Construction: 3 days a week</li> </ul>	<ul style="list-style-type: none"> <li>10+ years of experience</li> </ul>	City of Lynn Andrew Young Project Manager (781) 953-2326
<b>Construction Representative</b> Rui Almeida	<ul style="list-style-type: none"> <li>Design: As needed</li> <li>Construction: 5 days a week</li> </ul>	<ul style="list-style-type: none"> <li>25+ years of experience</li> </ul>	Bristol County Agricultural School District Adele Sands Former Superintendent (617) 737-6400

Please refer to **Section 5 of Attachment C for an organization chart** that depicts the interrelationships of key personnel and **Section 6 of Attachment C for our key personnel's roles and relevant experience**.

### Subject Matter Experts and Support Team

Provided below is a brief overview of the roles and experience of the Subject Matter Experts and Support Team who will assist the key personnel highlighted above and in Section 6 of Attachment C.

#### Health & Wellness – Teresa Wilson, AIA, ACHA, LEED AP, Fitwel Ambassador

Ms. Wilson has more than 25 years of health care design and planning experience and is 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. Though not yet adopted by the Commonwealth, indoor health and wellness guidelines have developed a heightened focus in the wake of COVID. Teresa will be responsible for the infection control/facilities guidelines of the project.

**Sustainability – Adam Troidl, LEED AP**

Mr. Troidl has more than 15 years of experience in the construction industry. Adam’s depth and breadth of experience spans design, project management, and owner representation while a focus on sustainability permeates his work. He is an invaluable resource for the latest information about sustainable building technology. Adam will support the team’s sustainability efforts and serve as a liaison with Colliers’ Sustainability Group.

**MEP Support – Sarah Maston**

Ms. Maston has more than 20 years of experience in mechanical/HVAC systems evaluation, troubleshooting, design, startup, and commissioning for a variety of project types. Sarah’s in-depth background provides her with the perspective and ability to provide technical insight throughout the project. Sarah has served as the commissioning agent for multiple LEED certified projects as well as numerous projects throughout the Commonwealth. She will provide specialized technical support as needed.

**Financial Monitoring & Reporting – Thao Nguyen**

Ms. Nguyen is an accounting expert with nearly 10 years of financial business expertise. Thao utilizes her strong analytical skills, audit experience, and client management skills to assist cities and towns in the development, implementation and summary of budgets and expenses.

## 5) Firm Qualifications / Capacity

**Capacity and Skills**

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

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

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

In addition, all 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 management services within the K-12 education marketplace and is **well-versed in guiding school leaders and building committees through the complex processes 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 Massachusetts public schools allowing us to view the larger issues at hand and to develop strategies and tactics to successfully lead the City of Newton through the process.

[Colliers Project Leaders](#)

Additionally, Colliers prides itself on having assembled a team with the expertise and capacity to deliver our owner’s project management 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.

**References**

Please refer to **Section 9 of Attachment C** for a list of references who have collaborated with Colliers on projects of similar size and complexity.

**Current and Projected Workload**

Our proposed project team was carefully selected to match both the unique needs of this project and the appropriate level of availability. All members are immediately available to fill their roles on the Franklin School Redevelopment. **Please refer to Section 8 of Attachment C for additional information regarding our firm’s current workload for projects estimated to cost in excess of \$1.5 Million.**

**Financial Stability**

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

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

Condensed copies of Colliers Engineering & Design’s audited financial statements for the last two years including current balance sheet and income statement, as well as sample insurance certificates can be found on the following pages. Full financial statements could not be included due to the page limit but are available upon request.

**Quality of Work and Level of Performance**

Colliers maintains a high level of quality assurance or quality control throughout all phases of the project. Our project management process utilizes tried and proven standardized approaches and forms to ensure all of the projects under Colliers’ guidance receives this focused attention to quality assurance.

**Ability to Schedule, Undertake, and Complete Responsibilities in a Timely Manner**

Colliers will approach the Franklin School Redevelopment with the same mindset it has with all of its projects, to ensure the City of Newton receives what it wants, when it needs it, for the funds available. If engaged as the owner’s project manager, Colliers will schedule an immediate kick off meeting with the City to ensure we are on the same page relative to the cost, quality, and schedule goals for the project. All of these can play a significant role in determining the costs and the success of the project. It is also critical during this period to establish the level of expectations for all parties. We want to ensure the City understands what they are getting for the money they are spending.

**Colliers Engineering & Design, Inc. and Subsidiaries**  
**Consolidated Balance Sheet**  
**December 31, 2021**

**Assets**

Current assets	
Cash	\$ 2,852,918
Accounts receivable - net	68,809,006
Contract assets	15,801,324
Prepaid expenses and other current assets	5,424,317
Income taxes receivable	<u>3,300,723</u>
Total current assets	96,188,288
Property and equipment - net	23,835,550
Right-of-use asset, operating	27,813,206
Goodwill	38,948,717
Other intangible assets - net	23,223,653
Other assets	<u>771,199</u>
	<u>\$ 210,780,613</u>

**Liabilities and Stockholders' Equity**

Current liabilities	
Current portion of notes payable	\$ 1,233,184
Current portion of operating right-of-use liability	7,266,370
Accounts payable	16,438,759
Accrued expenses and other current liabilities	24,199,021
Contract liabilities	<u>3,595,923</u>
Total current liabilities	52,733,257
Notes payable - net of current portion	1,038,741
Notes payable, parent - net of current portion	17,939,045
Operating right-of-use liability - net of current portion	21,010,634
Contingent purchase price payable	1,851,017
Deferred income taxes	11,095,350
Other liabilities	<u>141,663</u>
Total liabilities	<u>105,809,707</u>
Stockholders' equity	
Controlling interest	
Common stock - no par value; 1,500,000 shares authorized, 619,375 shares issued and outstanding	51,232,497
Retained earnings	<u>54,024,009</u>
Total controlling interest	105,256,506
Non-controlling interest	<u>(285,600)</u>
	<u>104,970,906</u>
	<u>\$ 210,780,613</u>

**CONFIDENTIAL**

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, 2021**

---

<b>Revenue</b>	<u>\$ 244,361,334</u>
<b>Cost of revenue</b>	
Direct labor	72,571,420
Subcontractors	20,203,909
Other job expenses	<u>10,426,373</u>
Total cost of revenue	<u>103,201,702</u>
Gross margin	<u>141,159,632</u>
<b>Operating expenses</b>	
Indirect labor and related expenses	66,666,895
General and administrative expenses	52,640,929
Depreciation and amortization	<u>8,483,722</u>
	<u>127,791,546</u>
Income from operations	<u>13,368,086</u>
<b>Other income (expense)</b>	
Interest expense	(245,060)
Interest income	52,614
Gain on sale of property and equipment	118,553
Other income	<u>43,672</u>
	<u>(30,221)</u>
Income before provision for income taxes	13,337,865
<b>Provision for income taxes</b>	<u>2,361,539</u>
Consolidated net income	10,976,326
<b>Net income attributable to non-controlling interest</b>	<u>(277,378)</u>
<b>Net income attributable to controlling interest</b>	<u>\$ 11,253,704</u>

**CONFIDENTIAL**

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



**Colliers Engineering & Design, Inc. and Subsidiaries (dba Maser Consulting)**  
**Consolidated Balance Sheet**  
**December 31, 2020**

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**Assets**

Current assets	
Cash	\$ 28,161
Accounts receivable - net	38,762,097
Notes receivable - related party	9,014,779
Contract assets	6,263,389
Prepaid expenses and other current assets	2,695,678
Income taxes receivable	<u>1,459</u>
Total current assets	56,765,563
Property and equipment - net	17,427,080
Goodwill	2,727,711
Other assets	<u>530,263</u>
	<u>\$ 77,450,617</u>

**Liabilities and Stockholders' Equity**

Current liabilities	
Current portion of notes payable	\$ 680,358
Current portion of obligations under capital lease	21,468
Accounts payable	2,928,440
Accrued expenses and other current liabilities	9,871,523
Contract liabilities	3,040,242
Income taxes payable	<u>7,427,017</u>
Total current liabilities	23,969,048
Notes payable - net of current portion	961,109
Other liabilities	17,480
Deferred income taxes	<u>6,491,468</u>
Total liabilities	<u>31,439,105</u>
Stockholders' equity	
Controlling interest	
Common stock - no par value; 1,500,000 shares authorized, 495,422 shares issued and outstanding	3,249,429
Retained earnings	<u>42,770,305</u>
Total controlling interest	<u>46,019,734</u>
Non-controlling interest	<u>(8,222)</u>
	<u>46,011,512</u>
	<u>\$ 77,450,617</u>

**CONFIDENTIAL**

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

**Colliers Engineering & Design, Inc. and Subsidiaries (dba Maser Consulting)**  
**Consolidated Statement of Income**  
**Year Ended December 31, 2020**

<b>Revenue</b>	<u>\$ 176,901,482</u>
<b>Cost of revenue</b>	
Direct labor	52,526,751
Subcontractors	14,762,279
Other job expenses	<u>3,599,596</u>
Total cost of revenue	<u>70,888,626</u>
Gross margin	<u>106,012,856</u>
<b>Operating expenses</b>	
Indirect labor and related	50,843,821
General and administrative expenses	34,640,290
Depreciation and amortization	<u>4,871,483</u>
	<u>90,355,594</u>
Income from operations	<u>15,657,262</u>
<b>Other income (expense)</b>	
Interest expense	(233,519)
Interest income	54,454
Loss on sale of property and equipment	(23,849)
Other income	<u>5,456</u>
	<u>(197,458)</u>
Income before provision for income taxes	15,459,804
<b>Provision for income taxes</b>	<u>8,639</u>
<b>Consolidated net income</b>	15,451,165
Net loss attributable to non-controlling interest	<u>(4,491)</u>
Net income attributable to controlling interest	<u>\$ 15,455,656</u>

**CONFIDENTIAL**

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



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
3/2/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER: Ames & Gough, 859 Willard Street, Quincy, MA 02169
CONTACT NAME:
PHONE (A/C, No, Ext): (617) 328-6555
FAX (A/C, No): (617) 328-6888
E-MAIL ADDRESS: boston@amesgough.com
INSURER(S) AFFORDING COVERAGE: Berkshire Hathaway Specialty Insurance Company
INSURER A: Berkshire Hathaway Specialty Insurance Company 22276

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

Table with columns: INSR LTR, TYPE OF INSURANCE, ADDL INSD, SUBR WVD, POLICY NUMBER, POLICY EFF (MM/DD/YYYY), POLICY EXP (MM/DD/YYYY), LIMITS. Rows include Commercial General Liability, Automobile Liability, Umbrella Liab, Workers Compensation and Employers' Liability, Professional Liab, and Pollution.

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
All Coverages are in accordance with policy terms and conditions.
\*NAMED INSUREDS INCLUDE: Colliers Engineering & Design, Inc., Colliers Engineering CT, P.C., Colliers Engineering & Design/Maser Consulting Inc., & Colliers Land Services, LLC.

For Proposal Only

CERTIFICATE HOLDER: For Proposal Only
CANCELLATION: SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
AUTHORIZED REPRESENTATIVE: Jared Maxwell



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
**3/02/2023**

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).**

<b>PRODUCER</b> <b>Marsh &amp; McLennan Agency LLC</b> 18000 Horizon Way Mount Laurel, NJ 08054	<b>CONTACT NAME:</b> <b>PHONE (A/C, No, Ext):</b> _____ <b>FAX (A/C, No):</b> _____ <b>E-MAIL ADDRESS: somersetclsupport@mma-ne.com</b>														
<b>INSURED</b> <b>Colliers Project Leaders USA NE, LLC*</b> 135 New Road Madison, CT 06443	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%;">INSURER(S) AFFORDING COVERAGE</th> <th style="width: 20%;">NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A : National Union Fire Ins Co PittsburghPA</td> <td style="text-align: center;"><b>19445</b></td> </tr> <tr> <td>INSURER B : Travelers Property Casualty Co of Amer</td> <td style="text-align: center;"><b>25674</b></td> </tr> <tr> <td>INSURER C : New Hampshire Insurance Company</td> <td style="text-align: center;"><b>23841</b></td> </tr> <tr> <td>INSURER D : Navigators Insurance Company</td> <td style="text-align: center;"><b>42307</b></td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </tbody> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : National Union Fire Ins Co PittsburghPA	<b>19445</b>	INSURER B : Travelers Property Casualty Co of Amer	<b>25674</b>	INSURER C : New Hampshire Insurance Company	<b>23841</b>	INSURER D : Navigators Insurance Company	<b>42307</b>	INSURER E :		INSURER F :	
INSURER(S) AFFORDING COVERAGE	NAIC #														
INSURER A : National Union Fire Ins Co PittsburghPA	<b>19445</b>														
INSURER B : Travelers Property Casualty Co of Amer	<b>25674</b>														
INSURER C : New Hampshire Insurance Company	<b>23841</b>														
INSURER D : Navigators Insurance Company	<b>42307</b>														
INSURER E :															
INSURER F :															

**COVERAGES                                  CERTIFICATE NUMBER:                                  REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
<b>A</b>	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> CLAIMS-MADE <input type="checkbox"/> OCCUR <input checked="" type="checkbox"/> GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			<b>GL9925559</b>	<b>03/01/2023</b>	<b>03/01/2024</b>	EACH OCCURRENCE      \$ <b>2,000,000</b> DAMAGE TO RENTED PREMISES (Ea occurrence)      \$ <b>1,000,000</b> MED EXP (Any one person)      \$ <b>25,000</b> PERSONAL & ADV INJURY      \$ <b>2,000,000</b> GENERAL AGGREGATE      \$ <b>4,000,000</b> PRODUCTS - COMP/OP AGG      \$ <b>4,000,000</b> \$
<b>A</b>	<input checked="" type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY			<b>CA4773685</b>	<b>03/01/2023</b>	<b>03/01/2024</b>	COMBINED SINGLE LIMIT (Ea accident)      \$ <b>2,000,000</b> BODILY INJURY (Per person)      \$ BODILY INJURY (Per accident)      \$ PROPERTY DAMAGE (Per accident)      \$ \$
<b>B</b>	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input type="checkbox"/> EXCESS LIAB OCCUR <input checked="" type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ <b>0</b>			<b>CUP1T66744423NF</b>	<b>03/01/2023</b>	<b>03/01/2024</b>	EACH OCCURRENCE      \$ <b>10,000,000</b> AGGREGATE      \$ <b>10,000,000</b> \$
<b>C</b>	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y / <input checked="" type="checkbox"/> N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	<b>WC025893715</b>	<b>03/01/2023</b>	<b>03/01/2024</b>	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT      \$ <b>1,000,000</b> E.L. DISEASE - EA EMPLOYEE      \$ <b>1,000,000</b> E.L. DISEASE - POLICY LIMIT      \$ <b>1,000,000</b>
<b>D</b>	<b>Excess Liability</b>			<b>NY23MXEZ07LHXIV</b>	<b>03/01/2023</b>	<b>03/01/2024</b>	<b>\$15,000,000</b>

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
**Evidence of Insurance**

**\*NAMED INSURED INCLUDE:**  
**Colliers Engineering & Design Inc. dba Bolton Perez & Associates Inc.;**  
**Bolton Perez & Associates Inc.;**  
**(See Attached Descriptions)**

<b>CERTIFICATE HOLDER</b> Colliers Project Leaders USA NE, LLC 135 New Road Madison, CT 06443	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
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# Owner's Project Manager Application Form – March 2017

**1. Project Name/Location for Which Firm is Filing:** Owner's Project Management Services for the Franklin School Redevelopment, Newton, MA  
**1a. MSBA Project Number:** Not Applicable



**2a. Respondent, Firm (Or Joint-Venture) – Name & Address Of Primary Office To Perform The Work:** Colliers Project Leaders  
 100 Federal Street, Floor 33  
 Boston, MA 02110

**2b. Name And Address Of Other Participating Offices Of The Prime Applicant, If Different From Item 2a Above:** Not Applicable

**2c. Date Present And Predecessor Firms Were Established:** 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 an 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.

**2d. Name And Address Of Parent Company, If Any:** Colliers Engineering & Design  
 101 Crawfords Corner Road,  
 Suite 3400  
 Holmdel, NJ 07733

**2e. Federal ID #:** 06-1468602

**2f. Name of Proposed Project Director:** Joseph Naughton, AIA, LEED AP, MCPPO

**3. Personnel From Prime Firm Included In Question #2 Above By Discipline (List Each Person Only Once, By Primary Function – Average Number Employed Throughout The Preceding 6 Month Period. Indicate Both The Total Number In Each Discipline):**

Admin. Personnel	19	Cost Estimators		Project Managers	72
Architects	12	Electrical Engrs.	1	Engineer Specialists	5
Acoustical Engrs.		Environmental Engrs.		Financial Analyst	2
Civil Engrs.	3	Licensed Site Profs.		ME Specialists	5
Code Specialists		Mechanical Engrs.	5	Total	124
Construction Inspectors					

**4. Has this joint-venture previously worked together?** Not Applicable  Yes  No


**5. List ONLY Those Prime and Sub-Consultant Personnel identified as Key personnel in the Response to Request for Services. This Information Should Be Presented Below In The Form Of An Organizational Chart modified to fit the firm's proposed management approach. Include Name of Firm And Name Of The Person:**



\* additional support staff to supplement the key personnel noted in Section 6 below. All are immediately available to fill their roles on the Franklin School Redevelopment Project.



6. Brief Resume for Key Personnel **ONLY** as indicated in the Request for Services. Resumes Should Be Consistent With The Persons Listed On The Organizational Chart In Question # 5. Additional Sheets Should Be Provided Only As Required For The Number Of Key Personnel And They Must Be In The Format Provided. By Including A Firm As A Subconsultant, The Prime Applicant Certifies That The Listed Firm Has Agreed To Work On This Project, Should The Team Be Selected.

**a. Name & Title Within Firm:** Joseph Naughton, AIA, LEED AP, MCPPO, Managing Director 

---

**b. Project Assignment:** Project Director

**c. Name & Address of Office:** Colliers Project Leaders  
100 Federal Street, Floor 33  
Boston, MA 02110

---

**d. Years of Experience:** **With this Firm:** 3 years **With other Firms:** 32 years

**e. Education:** Master of Architecture/Harvard University/1993/Urban Design  
Bachelor of Architecture/University of Notre Dame/1988/Architecture

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**f. Date MCPPO Certified:** June 2020 (Renewed)

**g. Registrations / Certifications:** AIA (MA #9386)  
LEED Accredited Professional

---

**h. Current Work Assignments & Availability for this Project:**

- Haverhill's Consentino Middle School – Currently in Design
- Webster's Bartlett High School – Currently in Feasibility
- Diman Regional Vocational Technical High School – Currently in Design

Joe will be immediately available to fill his role for the Franklin School Redevelopment Project.

**i. Other Experience & Qualifications Relevant to the Proposed Project:**  
Mr. Naughton is an architect with more than 30 years of experience guiding large scale construction and design projects, including high-rise towers, mixed-use developments, residential and commercial buildings, educational facilities, hotels, hospitals and healthcare facilities, research facilities, cultural facilities, and parking structures. Joe's areas of expertise include project and construction management, architecture, urban/regional planning, and contract administration. In addition, Joe has provided owner's project management services during all project phases and is an expert in meeting client objectives through lean thinking and supply chain management.

**Relevant Completed Project Experience:**

- Revere's James J. Hill Elementary School (Hill International)
- Revere's Paul Revere Elementary School (Hill International)
- Middleton's Howe Manning Elementary School (Hill International)
- Webster's Park Avenue Elementary School (Hill International)
- Lexington Diamond Middle School (Hill International)
- Lexington Clark Middle School (Hill International)
- Bourne Middle School (RF Walsh Company, Inc.)
- East Bridgewater Junior-High School (Hill International)
- Medford John J. McGlynn Middle School (RF Walsh Company, Inc.)
- Whitman-Hanson Regional High School (RF Walsh Company, Inc.)

**a. Name & Title Within Firm:** Derek Osterman, Assoc. AIA, LEED AP, MCPPO Senior Director 

---

**b. Project Assignment:** Project Executive

**c. Name & Address of Office:** Colliers Project Leaders  
100 Federal Street, Floor 33  
Boston, MA 02110

---

**d. Years of Experience:** **With this Firm:** 8 years **With other Firms:** 14 years

**e. Education:** Master of Architecture/The Boston Architectural College  
Bachelor of Design/The Boston Architectural College

---

**f. Date MCPPO Certified:** March 2022

**g. Registrations / Certifications:** LEED Accredited Professional

---

**h. Current Work Assignments & Availability for this Project:**

- Whitman Middle School – Currently in Planning
- Haverhill's Consentino Middle School – Currently in Design
- Johnston PS' Capital Improvements Program – Currently in Design

Derek will be immediately available to fill his role for the Franklin School Redevelopment Project.

**i. Other Experience & Qualifications Relevant to the Proposed Project:**  
Mr. Osterman is an Associate AIA with more than 20 years of leadership experience in project management, planning and design. He specializes in professional services for corporate and commercial, institutional, federal, and advanced technology clients. Derek approaches his role as Senior Director as an opportunity personally connect with clients leading them to their goals through exemplary customer service.

**Relevant Completed Project Experience:**

- MSBA Accelerated Repair – Tri-County Regional Vocational Technical High School
- MSBA Accelerated Repair – Orleans Elementary School
- MSBA Accelerated Repair – Westford's Colonel John Robinson School and Norman E. Day School
- Lincoln (RI) High School
- North Providence's School Building Projects
- Chariho RSD's Alternative Learning Academy
- Central Falls SD's Capital Improvement Projects

6. Brief Resume for Key Personnel **ONLY** as indicated in the Request for Services. Resumes Should Be Consistent With The Persons Listed On The Organizational Chart In Question # 5. Additional Sheets Should Be Provided Only As Required For The Number Of Key Personnel And They Must Be In The Format Provided. By Including A Firm As A Subconsultant, The Prime Applicant Certifies That The Listed Firm Has Agreed To Work On This Project, Should The Team Be Selected.

**a. Name & Title Within Firm:** Matthew Sturz, RLA, MCPPO  
Project Manager



**b. Project Assignment:** Project Manager

**c. Name & Address of Office:** Colliers Project Leaders  
100 Federal Street, 33<sup>rd</sup> Floor  
Boston, MA 02110

**d. Years of Experience:** **With this Firm:** 1 year **With other Firms:** 11 years

**e. Education:** Bachelor of Science/Cornell University/Landscape Architecture

**f. Date MCPPO Certified:** June 2021

**g. Registrations / Certifications:** Registered Landscape Architect (MA #4216)

**h. Current Work Assignments & Availability for this Project:**

- Maynard's Green Meadow Elementary School – Currently in Feasibility
- Fitchburg's Crocker Elementary School – Currently in Bidding
- North Adams' Brayton/Greylock Elementary School – Currently in Planning


Matt will be immediately available to fill his role for the Franklin School Redevelopment Project.

**i. Other Experience & Qualifications Relevant to the Proposed Project:**  
Mr. Sturz has more than 10 years of experience in the architecture and construction industries which has served to provide him a unique insight into the management of complex projects. On behalf of Colliers, Matt serves as a Project Manager and is responsible for the management of a variety of projects for both public and private institutions. His responsibilities include providing schedule oversight and management, financial and budget oversight, and day-to-day onsite project management. Before joining Colliers, Matt performed architectural design and project management services for previous architectural firms.

**Relevant Completed Project Experience:**

- Southborough's Mary Finn Elementary School (Hill International)
- Orange's Fisher Hill School (Hill International)
- Blackstone Valley Regional Vocational Technical High School (Hill International)
- Lynn Vocational Technical Institute (Hill International)

**a. Name & Title Within Firm:** Rui Almeida  
Construction Representative



**b. Project Assignment:** Construction Representative

**c. Name & Address of Office:** Colliers Project Leaders  
100 Federal Street, Floor 33  
Boston, MA 02110

**d. Years of Experience:** **With this Firm:** 3 years **With other Firms:** 26 years

**e. Education:** Master of Arts History of Art/New University of Lisbon/2008/Architecture and Urbanism XV-XVIII Century  
Bachelor's Degree/Technical University of Lisbon/1989/Architecture  
Associate's Degree/Roger Williams University/1983/Architectural Engineering Technology

**f. Date MCPPO Certified:**

**g. Registrations / Certifications:**

**h. Current Work Assignments & Availability for this Project:**

- Cumberland SD's Capital Improvements Program – Currently in Design

Rui will be immediately available to fill his role for the Franklin School Redevelopment Project.

**i. Other Experience & Qualifications Relevant to the Proposed Project:**  
Mr. Almeida offers a unique perspective of the construction industry with more than 25 years of experience as a trained architect, urban planner, and designer. With experience in architectural and interior design as well as project management and space planning, Rui brings his innovative problem-solving skills to complex construction projects.

**Relevant Completed Project Experience:**

- Seekonk's Mildred Aitken Elementary School (Blueskies Construction & Design)
- Woonsocket's Multiple Planning Projects (Previous Firm)
- Westerly's Multiple Planning Projects (Previous Firm)
- Central Falls' Quinn Plaza (Previous Firm)
- Central Falls' Historic Jenks Park Improvement Project (Previous Firm)
- Woonsocket's "Re-imagine Main Street" Master Plan (Previous Firm)
- Westerly's Harbor Management Plan (Previous Firm)
- Westerly's Comprehensive Infrastructure Plan (Previous Firm)

7a Past Performance: List all Completed Projects, in excess of \$1.5 million, for which the Prime Applicant has performed, or has entered into a contract to perform Owner's Project Management Services for all Public Agencies within the Commonwealth within the past 10 years.										
Project Name & Location Project Director	Brief Description of Project & Services	Project Dollar Value	Completion Date (Actual Or Estimate)	On Time (Yes Or No)	Original Construction Contract Value	Change Orders	Number of Accidents & Safety Violations	Dollar Value of any Safety fines	Number & Outcome Of Legal Actions	
<b>1 Mabelle M. Burrell Elementary School</b> Foxborough, MA PD: Alan Minkus	<ul style="list-style-type: none"> <li>Renovations to the existing building and new additions for Pre-K classrooms and a gymnasium</li> <li>LEED Certification (In Progress)</li> </ul>	\$34.7M	December 2021 (Actual)	Yes	\$25.9M	\$0.8M	0	\$0	0	
<b>2 Lincoln Street Elementary School</b> Northborough, MA PD: Alan Minkus	<ul style="list-style-type: none"> <li>Renovation of 45,000 gsf elementary school built in 1965</li> <li>Addition of 8,000 gsf Gym/Music room, upgrade of building's HVAC, electrical, and plumbing systems</li> <li>NE-CHPS Verified Leader</li> </ul>	\$25.5M	August 2016 (Actual)	Yes	\$18.5M	\$0.2M	0	\$0	0	
<b>3 Green Meadow Elementary School</b> Maynard, MA PD: Ken Guyette	<ul style="list-style-type: none"> <li>Potential project may include new construction of 80,000-110,000 square feet or renovation of 76,378 square feet</li> </ul>	TBD	TBD	N/A	Feasibility Phase	Feasibility Phase	0	\$0	0	
<b>4 Crocker Elementary School</b> Fitchburg, MA PD: Phil Palumbo	<ul style="list-style-type: none"> <li>New 114,714 gsf school to be built on the existing school site</li> </ul>	\$76M	September 2025 (Estimate)	N/A	Bidding Phase	Bidding Phase	0	\$0	0	
<b>5 Gardner Elementary School</b> Gardner, MA PD: Alan Minkus	<ul style="list-style-type: none"> <li>New three-story building with the replacement of both Waterford Street School and Elm Street School</li> <li>Pre-K through 5<sup>th</sup> grade</li> </ul>	\$89.5M	August 2023 (Actual)	Yes	\$61.8M	\$2.4M	0	\$0	0	
<b>6 Templeton Elementary School</b> Templeton, MA PD: Alan Minkus	<ul style="list-style-type: none"> <li>New 93,000 gsf facility</li> <li>Pre-K through 5<sup>th</sup> grade</li> <li>LEED Silver Certified</li> </ul>	\$45.1M	August 2019 (Actual)	Yes	\$32.6M	\$0.7M	0	\$0	0	
<b>7 East Meadow Elementary School</b> Granby, MA PD: Alan Minkus	<ul style="list-style-type: none"> <li>Addition / renovation of East Meadow Elementary School with closure of the West Street facility upon completion</li> <li>LEED Silver Certified</li> </ul>	\$32.4M	September 2018 (Actual)	Yes	\$23.6M	\$0.5M	0	\$0	0	
<b>8 Mountain View School</b> Easthampton, MA PD: Alan Minkus	<ul style="list-style-type: none"> <li>New Pre-K to eight school</li> <li>Project combined the City's three elementary schools and former middle school into one school</li> <li>LEED Certification (In Progress)</li> </ul>	\$104.2M	September 2022 (Actual)	Yes	\$84.8M	\$3.2M	0	\$0	0	
<b>9 Colegrove Park Elementary School</b> North Adams, MA PD: Ken Guyette	<ul style="list-style-type: none"> <li>Renovation of an existing 1916 school encompassing 78,000 gsf</li> <li>K through 7th grade</li> <li>LEED Gold Certified</li> </ul>	\$29.7M	Spring 2016 (Actual)	No	\$23.7M	\$2.5M	0	\$0	0	

<b>10</b>	<b>Greylock/Brayton Elementary School</b> North Adams, MA PD: Ken Guyette	<ul style="list-style-type: none"> <li>Potential project may include the reduction of three elementary school facilities to two with the focus on the renovation to the Brayton Elementary School</li> </ul>	TBD	TBD	N/A	Planning Phase	Planning Phase	0	\$0	0
<b>11</b>	<b>Consentino Middle School</b> Haverhill, MA PD: Mike Carroll	<ul style="list-style-type: none"> <li>Potential project may include new construction of 150,000 gsf or renovation of 110,000 gsf</li> </ul>	\$124.9M	September 2026 (Estimate)	N/A	Design Phase	Design Phase	0	\$0	0
<b>12</b>	<b>Whitman Middle School</b> Whitman, MA PD: Derek Osterman	<ul style="list-style-type: none"> <li>Potential project may include new construction of 100,000 square feet or renovation of 150,000 square feet</li> </ul>	TBD	TBD	N/A	Planning Phase	Planning Phase	0	\$0	0
<b>13</b>	<b>Powder Mill Middle School</b> Southwick, MA PD: Jon Winikur	<ul style="list-style-type: none"> <li>Renovations of 96,000 gsf</li> <li>New roof, MEP systems, upgrades to make building ADA compliant</li> </ul>	\$17.8M	August 2015 (Actual)	Yes	\$13.6M	\$0.9M	0	\$0	0
<b>14</b>	<b>David Prouty High School</b> Spencer, MA PD: Alan Minkus	<ul style="list-style-type: none"> <li>126,823 gsf phased renovation and addition</li> <li>Site layout will remain largely the same as it is today with some critical improvements</li> </ul>	\$112M	December 2026 (Estimate)	N/A	Design Phase	Design Phase	0	\$0	0
<b>15</b>	<b>Bartlett High School</b> Webster, MA PD: Mike Carroll	<ul style="list-style-type: none"> <li>Potential project may include renovation of the existing 186,000 gsf school, renovation and/or addition of existing school, or the construction of a new school</li> </ul>	TBD	TBD	N/A	Feasibility Phase	Feasibility Phase	0	\$0	0
<b>16</b>	<b>West Bridgewater Middle-Senior High School</b> West Bridgewater, MA PD: Alan Minkus	<ul style="list-style-type: none"> <li>New 141,000 gsf Middle-Senior High School built on the athletic fields at the rear of the school</li> <li>Once complete, the old school was demolished to make way for relocated athletic fields</li> <li>NE-CHPS Verified Leader</li> </ul>	\$63.1M	Fall 2016 (Actual)	Yes	\$46.3M	\$1.4M	0	\$0	0
<b>17</b>	<b>West Springfield High School</b> West Springfield, MA PD: Jon Winikur	<ul style="list-style-type: none"> <li>New 257,000 gsf High School</li> <li>MSBA Model School Program</li> <li>LEED Silver Certified</li> </ul>	\$104.8M	January 2015 (Actual)	Yes	\$85M	\$3.1M	0	\$0	0
<b>18</b>	<b>Assabet Valley Regional Technical High School</b> Marlborough, MA PD: Alan Minkus	<ul style="list-style-type: none"> <li>Infrastructure modernization and upgrades to the 372,000 gsf High School</li> </ul>	\$62.4M	December 2015 (Actual)	Yes	\$46.8M	\$4.4M	0	\$0	0
<b>19</b>	<b>Bristol County Agricultural High School</b> Dighton, MA PD: Alan Minkus	<ul style="list-style-type: none"> <li>Six new and updated buildings</li> <li>LEED Certification (In Progress) for the Center for Science and the Environment</li> <li>LEED Certification (In Progress) for Gilbert Hall (historic building)</li> </ul>	\$103.8M	May 2022 (Actual)	Yes	\$84.6M	\$3.8M	0	\$0	0

<b>20</b>	<b>Diman Regional Vocation Technical High School</b> Fall River, MA PD: Alan Minkus	<ul style="list-style-type: none"> <li>New 395,000 gsf High School</li> <li>New building will be constructed on the site of the current school's athletic fields, then demolish the current building</li> </ul>	\$293M	2027 (Estimate)	N/A	Design Phase	Design Phase	0	\$0	0
<b>21</b>	<b>Cape Cod Regional Technical High School</b> Harwich, MA PD: Ken Guyette	<ul style="list-style-type: none"> <li>New 228,000 gsf High School</li> <li>New building was constructed while the existing school remained in operation</li> <li>Once completed, the old school was demolished</li> <li>LEED Certification (In Progress)</li> </ul>	\$128.1M	Summer 2023 (Actual)	Yes	\$91.4M	\$3.4M	0	\$0	0

**7b. Past Performance: Provide the following information for those completed Projects listed above in 7a for which the Prime Applicant has performed, or has entered into a contract to perform Owner's Project Management Services for all Public Agencies within the Commonwealth within the past 10 years.**

Project Name & Location Project Director	Original Project Budget	Final Project Budget	If different, provide reason(s) for variance	Original Project Completion	Actual Project Completion On Time (Yes or No)	If different, provide reason(s) for variance.
<b>1 Mabelle M. Burrell Elementary School</b> Foxborough, MA PD: Alan Minkus	\$34.7M	\$33M	Under Budget	December 2021	December 2021 On Time - Yes	
<b>2 Lincoln Street Elementary School</b> Northborough, MA PD: Alan Minkus	\$25.5M	\$23.8M	Under Budget	August 2016	August 2016 On Time - Yes	
<b>3 Green Meadow Elementary School</b> Maynard, MA PD: Ken Guyette	TBD	TBD		TBD	Feasibility Phase	
<b>4 Crocker Elementary School</b> Fitchburg, MA PD: Phil Palumbo	\$76M	TBD		September 2025	Bidding Phase	
<b>5 Gardner Elementary School</b> Gardner, MA PD: Alan Minkus	\$89.5M	\$82.3M	Under Budget	August 2023	August 2023 On Time - Yes	
<b>6 Templeton Elementary School</b> Templeton, MA PD: Alan Minkus	\$45.1M	\$42.7M	Under Budget	August 2019	August 2019 On Time - Yes	
<b>7 East Meadow Elementary School</b> Granby, MA PD: Alan Minkus	\$32.4M	\$29.5M	Under Budget	September 2018	September 2018 On Time - Yes	
<b>8 Mountain View School</b> Easthampton, MA PD: Alan Minkus	\$104.2M	\$105.8M	Added Scope	September 2022	September 2022 On Time - Yes	
<b>9 Colegrove Park Elementary School</b> North Adams, MA PD: Ken Guyette	\$29.7M	\$29.1M	Under Budget	Fall 2015	Spring 2016 On Time - No	General Contractor had scheduling complications that they were unable to overcome, and these complications extended the construction duration



<b>10</b>	<b>Greylock/Brayton Elementary School</b> North Adams, MA PD: Ken Guyette	TBD	TBD		TBD	Planning Phase
<b>11</b>	<b>Consentino Middle School</b> Haverhill, MA PD: Mike Carroll	\$124.9M	TBD		September 2026	Design Phase
<b>12</b>	<b>Whitman Middle School</b> Whitman, MA PD: Derek Osterman	TBD	TBD		TBD	Planning Phase
<b>13</b>	<b>Powder Mill Middle School</b> Southwick, MA PD: Jon Winikur	\$17.8M	\$17M	Under Budget	August 2015	August 2015 On Time - Yes
<b>14</b>	<b>David Prouty High School</b> Spencer, MA PD: Alan Minkus	\$112M	TBD		December 2026	Design Phase
<b>15</b>	<b>Bartlett High School</b> Webster, MA PD: Mike Carroll	TBD	TBD		TBD	Feasibility Phase
<b>16</b>	<b>West Bridgewater Middle-Senior High School</b> West Bridgewater, MA PD: Alan Minkus	\$63.1M	\$63.1M		Fall 2016	Fall 2016 On Time - Yes
<b>17</b>	<b>West Springfield High School</b> West Springfield, MA PD: Jon Winikur	\$104.8M	\$99.4M	Under Budget	January 2015	January 2015 On Time - Yes
<b>18</b>	<b>Assabet Valley Regional Technical High School</b> Marlborough, MA PD: Alan Minkus	\$62.4M	\$59.2M	Under Budget	December 2015	December 2015 On Time - Yes
<b>19</b>	<b>Bristol County Agricultural High School</b> Dighton, MA PD: Alan Minkus	\$103.8M	\$105.2M	Added Scope	May 2022	May 2022 On Time - Yes
<b>20</b>	<b>Diman Regional Vocational Technical High School</b> Fall River, MA PD: Alan Minkus	\$293M	TBD		2027	Design Phase
<b>21</b>	<b>Cape Cod Regional Technical High School</b> Harwich, MA PD: Ken Guyette	\$128.1M	\$116.4M	Under Budget	Summer 2023	Summer 2023 On Time - Yes

8. Capacity: Identify all current/ongoing Work by Prime Applicant, Joint-Venture Members or Subconsultants. Identify project participants and highlight any work involving the project participants identified in the response.

Project Name & Location Project Director	Brief Description of Project & Services	Original Project Budget	Current Project Budget	Project Completion Date	Current forecast completion date On Time (Yes Or No)	Original Construction Contract Value	Number & dollar value of Change Orders	Number & dollar value of claims
<b>1 Green Meadow Elementary School</b> Maynard, MA PD: Ken Guyette <b>Project Participants:</b> Joe Naughton, Matt Sturz, Thao Nguyen	<ul style="list-style-type: none"> <li>Potential project may include new construction of 80,000-110,000 square feet or renovation of 76,378 square feet</li> </ul>	TBD	TBD	TBD	TBD	Feasibility Phase	Feasibility Phase	0
<b>2 Crocker Elementary School</b> Fitchburg, MA PD: Phil Palumbo <b>Project Participants:</b> Joe Naughton, Matt Sturz, Thao Nguyen	<ul style="list-style-type: none"> <li>New 114,714 gsf school to be built on the existing school site</li> </ul>	\$76M	\$76M	September 2025	September 2025 On Time - Yes	Bidding Phase	Bidding Phase	0
<b>3 Greylock/Brayton Elementary School</b> North Adams, MA PD: Ken Guyette <b>Project Participants:</b> Joe Naughton, Matt Sturz, Thao Nguyen	<ul style="list-style-type: none"> <li>Potential project may include the reduction of three elementary school facilities to two with the focus on the renovation to the Brayton Elementary School</li> </ul>	TBD	TBD	TBD	TBD	Planning Phase	Planning Phase	0
<b>4 Consentino Middle School</b> Haverhill, MA PD: Mike Carroll <b>Project Participants:</b> Joe Naughton, Derek Osterman, Thao Nguyen	<ul style="list-style-type: none"> <li>Potential project may include new construction of 150,000 gsf or renovation of 110,000 gsf</li> </ul>	\$124.9M	\$124.9M	September 2026	September 2026 On Time - Yes	Design Phase	Design Phase	0
<b>5 Whitman Middle School</b> Whitman, MA PD: Derek Osterman <b>Project Participants:</b> Joe Naughton, Derek Osterman, Thao Nguyen	<ul style="list-style-type: none"> <li>Potential project may include new construction of 100,000 square feet or renovation of 150,000 square feet</li> </ul>	TBD	TBD	TBD	TBD	Planning Phase	Planning Phase	0
<b>6 David Prouty High School</b> Spencer, MA PD: Alan Minkus <b>Project Participants:</b> Joe Naughton, Thao Nguyen	<ul style="list-style-type: none"> <li>126,823 gsf phased renovation and addition</li> <li>Site layout will remain largely the same as it is today with some critical improvements</li> </ul>	\$112M	\$112M	December 2026	December 2026 On Time - Yes	Design Phase	Design Phase	0
<b>7 Bartlett High School</b> Webster, MA PD: Mike Carroll <b>Project Participants:</b> Joe Naughton, Derek Osterman, Thao Nguyen	<ul style="list-style-type: none"> <li>Potential project may include renovation of the existing 186,000 gsf school, renovation and/or addition of existing school, or the construction of a new school</li> </ul>	TBD	TBD	TBD	TBD	Feasibility Phase	Feasibility Phase	0
<b>8 Diman Regional Vocational Technical High School</b> Fall River, MA PD: Alan Minkus <b>Project Participants:</b> [Joe Naughton, Thao Nguyen	<ul style="list-style-type: none"> <li>New 395,000 gsf High School</li> <li>New building will be constructed on the site of the current school's athletic fields, then demolish the current building</li> </ul>	\$293M	\$293M	2027	2027 On Time - Yes	Design Phase	Design Phase	0

9. References: Provide the following information for completed and current Projects listed above in 7 and 8 for which the Prime Applicant has performed, or has entered into a contract to perform Owner's Project Management Services for all Public Agencies within the Commonwealth within the past 10 years.

Project Name & Location Project Director	Client's Name, Address and Phone Number. Include Name of Contact Person	Project Name & Location Project Director	Client's Name, Address and Phone Number. Include Name of Contact Person	Project Name & Location Project Director	Client's Name, Address and Phone Number. Include Name of Contact Person
<b>Crocker Elementary School</b> Fitchburg, MA PD: Phil Palumbo	Mary Delaney Chief Procurement Officer City of Fitchburg 266 Boulder Drive Suite 118 Fitchburg, MA 01420 978- 829-1850	<b>Crocker Elementary School</b> Fitchburg, MA PD: Ken Guyette	Bob Jokela Superintendent Fitchburg Public Schools 376 South Street Fitchburg, MA 01420 978-345-3200	<b>Mabelle M. Burrell Elementary School</b> Foxborough, MA PD: Alan Minkus	Bill Yukna SBC Chairman Town of Foxborough 40 South Street Foxborough, MA 02035 508-543-1665
<b>Lincoln Street Elementary School</b> Northborough, MA PD: Alan Minkus	John Coderre Town Administrator Town of Northborough 63 Main Street Northborough, MA 01532 508-393-5040	<b>Templeton Elementary School</b> Templeton, MA PD: Alan Minkus	Christopher Casavant Superintendent of Schools Narragansett RSD 462 Baldwinville Road Baldwinville, MA 01436 978-939-5661	<b>Gardner Elementary School</b> Gardner, MA PD: Alan Minkus	Mark Pellegrino Superintendent Gardner Public Schools 70 Waterford Street Gardner, MA 01440 978-632-1000
<b>Mountain View School</b> Easthampton, MA PD: Alan Minkus	Dr. Allison LeClair Superintendent Easthampton Public Schools 50 Payson Avenue Easthampton, MA 01027 413-529-1500	<b>East Meadow Elementary School</b> Granby, MA PD: Alan Minkus	Christopher Martin Town Administrator Town of Granby 10-B W State Street, Route 202 Granby MA 01033 413-467-7177	<b>West Springfield High School</b> West Springfield, MA PD: Jon Winikur	Michael Richard <i>(Former Superintendent)</i> Superintendent of Schools Lee Public Schools 300 Greylock Street Lee, MA 01238 413-243-0276
<b>Bartlett High School</b> Webster, MA PD: Mike Carroll	Monique Pierangeli Asst. Superintendent for Business & Finance Webster Public Schools 77 Poland Street Webster, MA 01570 508-943-0104 option 1	<b>Assabet Valley Regional Technical High School</b> Marlborough, MA PD: Alan Minkus	Kris Luoto <i>(Former Assistant Superintendent Finance &amp; Operations)</i> Chief Financial Officer Saint John's High School 378 Main Street Shrewsbury, MA 01545 508-842-893 ext. 269	<b>Diman Regional Vocational Technical High School</b> Fall River, MA PD: Alan Minkus	Donald DiBiasio School Building Committee Chair Diman Regional Vocation Tech HS 251 Stonehaven Road Fall River, MA 02723 774-930-5112

10. Use This Space To Provide Any Additional Information Or Description Of Resources Supporting The Qualifications Of Your Firm And That Of Your Subconsultants. If Needed, Up To Three, Double-Sided 8 1/2" X 11" Supplementary Sheets Will Be Accepted. **APPLICANTS ARE REQUIRED TO RESPOND SPECIFICALLY IN THIS SECTION TO THE AREAS OF EXPERIENCE REQUESTED**

Colliers is pleased to provide at the end of this form supplemental material that provides additional information highlighting our experience providing owner's project management services. In addition, we have provided in Section I of this response information that specifically addresses the City of Newton's evaluation criteria set forth in the RFQ.

11. I hereby certify that the undersigned is an Authorized Signatory of Firm and is a Principal or Officer of Firm. The information contained in this application is true, accurate and sworn to by the undersigned under the pains and penalties of perjury.

Submitted By  
(Signature)



Printed Name & Title Jonathan F. Winikur, Division Director

Date May 2, 2023

# Project Supplement

## Mabelle M. Burrell Elementary School | Foxborough, MA



**Project Size:** 61,550 gsf

**Project Budget:** \$34.7 Million

### Project Overview

Colliers provided project management services for the renovation and addition to the Mabelle M. Burrell Elementary School, which serves students from pre-Kindergarten through 4<sup>th</sup> grade. The project consisted of a phased renovation of the entire existing building and new additions for Pre-K classrooms and a Gymnasium. The building was partially occupied during construction and renovations. The new construction areas were used as swing space during the renovation phases. The project also included extensive site activities and utility upgrades. The project will achieve LEED certification, which is in progress.

## Lincoln Street Elementary School | Northborough, MA



**Project Size:** 53,000 gsf

**Project Budget:** \$25.5 Million

### Project Overview

Colliers provided owner's project management services for the Lincoln Street Elementary School. The renovation consisted of upgrading the building systems, including both heating and electrical systems. The addition included adding an 8,000 gsf Gym/Music space. In addition, the school's programmatic spaces were improved upon including a new library, computer lab, gymnasium, music room, and nurse's office. Separate driveways for buses and cars were also created to alleviate congestion.

The project earned NE-CHPS recognition.

## Green Meadow Elementary School | Maynard, MA



**Project Size:** TBD

**Project Budget:** \$25 to \$48.5 Million

### Project Overview

Colliers has been engaged to provide owner's project management services during the feasibility study and schematic design phases of the Green Meadow Elementary School.

A potential approved project may include new construction of 80,000-110,000 square feet or renovation of 76,378 square feet. Colliers will guide the project through the MSBA process in developing the project scope and budget agreement with the MSBA which determines the MSBA Grant that will be eligible for completion of the project.

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# Project Supplement

## Crocker Elementary School | Fitchburg, MA



**Project Size:** 114,714 gsf

**Project Budget:** \$72 Million

### Project Overview

Colliers has been engaged to provide owner's project management services for the new Crocker Elementary School. After evaluating three options, the preferred design for the project is to construct a new school. The design option offers a two-story, 114,714-square-foot school to be built on the existing Crocker Elementary School site.

Colliers served as the project manager during the feasibility study and schematic design phases of the project and will continue to provide owner's project management services during the design, construction, and closeout phases of the project.

## Gardner Elementary School | Gardner, MA



**Project Size:** 200,000 gsf

**Project Budget:** \$89.5 Million

### Project Overview

Colliers provided owner's project management services for the City of Gardner's New Elementary School Project.

The new three-story building houses preschool through grade four and is organized into three wings, with a centrally located cafeteria, gymnasium, and library.

In addition, the project replaced both Waterford Street School and Elm Street School.

## Templeton Elementary School | Templeton, MA



**Project Size:** 93,000 gsf

**Project Budget:** \$45.1 Million

### Project Overview

Colliers provided owner's project management services for the construction of a new 93,000 gsf Pre-K through 5<sup>th</sup> grade school facility. The project consisted of the demolition of the former school building, and improvements to the site and adjacent roadways. As part of the overall plan, the District consolidated the Templeton Center School, the Baldwinville Elementary School, and the Kindergarten students from the East Templeton School.

The project earned LEED Silver certification.

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# Project Supplement

## East Meadow Elementary School | Granby, MA



**Project Size:** 68,760 gsf

**Project Budget:** \$32.4 Million

### Project Overview

Colliers provided owner's project management services for the East Meadow Elementary School. Colliers oversaw the selection of a design team to conduct the feasibility/schematic design study which included the development and evaluation of seven potential alternative solutions. The agreed upon solution was an addition and complete renovation of the Town's East Meadow Elementary School with closure of the West Street facility upon completion of that construction. The project earned LEED Silver certification.

## Mountain View School | Easthampton, MA



**Project Size:** 176,000 gsf

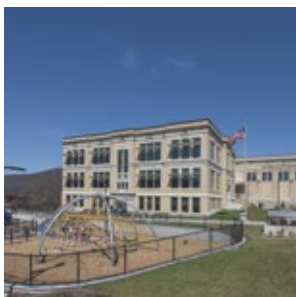
**Project Budget:** \$104.2 Million

### Project Overview

Colliers provided owner's project management services for the construction of the City of Easthampton's new Pre-K to Eight School Project.

The project consolidated the City's three elementary schools – Maple, Center and Pepin – with White Brook Middle School, which was demolished. The new school was constructed on the middle school's previous site. Components of the school include: a running track, a roundabout at the new school's entrance, terrazzo flooring in high-pedestrian traffic areas, and a maintenance building. The project will achieve LEED certification, which is in progress.

## Colegrove Park Elementary School | North Adams, MA



**Project Size:** 78,000 gsf

**Project Budget:** \$29.7 Million

### Project Overview

Colliers provided owner's project management services during the \$29.7 Million renovation project. In partnership with the MSBA, the District preserved an existing 1916 school building through renovations to meet 21<sup>st</sup> century educational standards, current codes, and building standards as well as modern system designs. The project achieved LEED Gold certification.

*"The entire Colliers' team was a pleasure to work with. We had a lot of challenges on this project and Colliers was there every step clearing the way." Nancy Ziter, Former Business Manager.*

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# Project Supplement

## Greylock/Brayton Elementary School | North Adams, MA



**Project Size:** 85,247 gsf

**Project Budget:** \$30 to \$50 Million

### Project Overview

Colliers has been engaged to provide owner's project management services for a potential approved project to include the reduction of three elementary school facilities to two with the focus on the renovation to the Brayton Elementary School to accommodate a consolidated enrollment of Greylock Elementary School and Brayton Elementary School students.

Colliers will guide the project through the MSBA process in developing the project scope and budget agreement with the MSBA which determines the MSBA Grant that will be eligible for completion of the project.

## Dr. Albert B. Consentino Middle School | Haverhill, MA



**Project Size:** TBD

**Project Budget:** \$124.9 Million

### Project Overview

Colliers has been engaged to provide owner's project management services for the addition to and/or renovation of the Consentino Middle School.

Colliers served as the project manager during the feasibility study and schematic design phases of the project and will continue to provide owner's project management services during the design, construction, and closeout phases of the project.

## Whitman Middle School | Whitman, MA



**Project Size:** TBD

**Project Budget:** \$50 to \$85 Million

### Project Overview

Colliers has been engaged to provide owner's project management services for new construction of 100,000 square feet or renovation of 150,000 square feet of the Whitman Middle School. The school was constructed in 1972 and has served the school district for over 40 years. The building currently serves students in grades six (6) through eight (8).

Colliers will guide the project through the MSBA process in developing the project scope and budget agreement with the MSBA which determines the MSBA Grant that will be eligible for completion of the project.

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# Project Supplement

## Powder Mill Middle School | Southwick, MA



**Project Size:** 96,000 gsf

**Project Budget:** \$17.8 Million

### Project Overview

Colliers provided owner's project management services during the 96,000 gsf renovation to the Powder Mill Middle School.

The project included moderate renovations to the existing school building with a small alternate gym addition. All of the existing MEP systems were replaced with new, more energy efficient ones along with a new sprinkler system. Other improvements to the school included a new roof, windows, heating, air conditioning and ventilation systems, and upgrades to make the buildings handicap-accessible.

## David Prouty High School | Spencer, MA



**Project Size:** 126,823 gsf

**Project Budget:** \$112 Million

### Project Overview

Colliers has been engaged to provide owner's project management services for the addition to and renovation of the David Prouty High School.

The proposed building consists of 126,823 gsf. One quarter of the proposed square footage will consist of the fully renovated existing auditorium wing and the remaining three-quarters will consist of new construction. The site layout will remain largely the same as it is today – with some critical improvements to access off Route 9, parking, circulation around the school, access to the playing fields, and new outdoor educational spaces.

## Bartlett High School | Webster, MA



**Project Size:** 161,450 gsf

**Project Budget:** \$101.4 Million

### Project Overview

Colliers has been engaged to provide owner's project management services for the addition to and/or renovation of Bartlett High School. The existing 186,000 square foot building was constructed in 1978 and has numerous mechanical, electrical, lighting, and plumbing issues.

Colliers is guiding the the town through the MSBA process. The facility requires infrastructure upgrades and building envelope improvements in order to serve the district's needs while providing operational stabilit/cost savings and meeting newly updated energy and building codes. The renovation will be performed in phases with the building and site occupied.

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# Project Supplement

## West Bridgewater Middle-Senior High School | West Bridgewater, MA



**Project Size:** 141,000 gsf

**Project Budget:** \$63.1 Million

### Project Overview

Colliers provided owner's project management services for the new \$63.1 Million facility. The project consisted of new construction built on the existing athletic fields at the rear of the existing school site. Once the new school was completed, the existing school was demolished to make way for new relocated athletic fields. The project earned NE-CHPS recognition.

*"There is simply no way that we would have been successful in seeing this project come to a successful completion without the care and diligence that we received from Colliers during each phase." Gary Keith, Former School Building Committee Chairman*

## West Springfield High School | West Springfield, MA



**Project Size:** 257,000 gsf

**Project Budget:** \$104.8 Million

### Project Overview

Colliers provided owner's project management Services for the new high school facility. The project included the construction of a new 257,000 gsf school, as well as the demolition of the existing high school. The school was part of the *MSBA's Model Schools Program*, which effectively adapts and reuses design elements from successful, recently constructed schools. This simplifies the design process, reducing the amount of time projects are in the design phase and lowering design fees.

The project achieved LEED Silver certification.

## Assabet Valley Regional Technical High School | Marlborough, MA



**Project Size:** 372,000 gsf

**Project Budget:** \$62.4 Million

### Project Overview

Colliers provided owner's project management services during the feasibility study, schematic design, and construction phases of the \$62.4 Million project.

The entire facility required infrastructure modernization/code upgrades, new science rooms, and building envelope improvements in order to serve the next generation of students and to realize significant gains in cost and energy efficiencies by means of this major project. The project consisted of renovations that were implemented in 10 phases over 3 years to ensure ongoing and continued operations of the building.

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**ATTACHMENT D.1**

**CITY OF NEWTON**

**BIDDER'S QUALIFICATIONS AND REFERENCES FORM**

All questions must be answered, and the data given must be clear and comprehensive. Please type or print legibly. If necessary, add additional sheet for starred items. This information will be utilized by the City for purposes of determining bidder responsiveness and responsibility with regard to the requirements and specifications of the Contract.

- 1. FIRM NAME: Colliers Project Leaders USA NE, LLC
- 2. WHEN ORGANIZED: 1996
- 3. INCORPORATED?  YES  NO DATE AND STATE OF INCORPORATION: \_\_\_\_\_
- 4. IS YOUR BUSINESS A MBE?  YES  NO WBE?  YES  NO or MWBE?  YES  NO
- \* 5. LIST ALL CONTRACTS CURRENTLY ON HAND, SHOWING CONTRACT AMOUNT AND ANTICIPATED DATE OF COMPLETION:

Please reference Section 8 of Attachment C: OPM Application Form for this information.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- \* 6. HAVE YOU EVER FAILED TO COMPLETE A CONTRACT AWARDED TO YOU?  
 YES  NO  
IF YES, WHERE AND WHY?

\_\_\_\_\_  
\_\_\_\_\_

- \* 7. HAVE YOU EVER DEFAULTED ON A CONTRACT?  YES  NO  
IF YES, PROVIDE DETAILS.

\_\_\_\_\_  
\_\_\_\_\_

- \* 8. LIST YOUR VEHICLES/EQUIPMENT AVAILABLE FOR THIS CONTRACT:  
Not Applicable

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- \* 9. IN THE SPACES FOLLOWING, PROVIDE INFORMATION REGARDING CONTRACTS COMPLETED BY YOUR FIRM SIMILAR IN NATURE TO THE PROJECT BEING BID. A MINIMUM OF FOUR (4) CONTRACTS SHALL BE LISTED. PUBLICLY BID CONTRACTS ARE PREFERRED, BUT NOT MANDATORY.

PROJECT NAME: West Springfield High School  
OWNER: Town of West Springfield  
CITY/STATE: West Springfield, MA  
DOLLAR AMOUNT: \$ 104.8 Million DATE COMPLETED: January 2015  
PUBLICLY BID?  YES  NO  
TYPE OF WORK?: Project Management Services



RFQ for Owner's Project Management Services  
Franklin Elementary School

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CONTACT PERSON: Michael Richard TELEPHONE #: 413 ) 243-0276  
 CONTACT PERSON'S RELATION TO PROJECT?: Former Superintendent of Schools  
 (i.e., contract manager, purchasing agent, etc.)

---

PROJECT NAME: Colegrove Park Elementary School  
 OWNER: North Adams Public Schools  
 CITY/STATE: North Adams, MA  
 DOLLAR AMOUNT: \$ 29.7 Million DATE COMPLETED: Spring 2016  
 PUBLICLY BID?  YES  NO  
 TYPE OF WORK?: Project Management Services  
 CONTACT PERSON: Richard Alcombright TELEPHONE #: ( 413 ) 695-3164  
 CONTACT PERSON'S RELATION TO PROJECT?: Former Mayor  
 (i.e., contract manager, purchasing agent, etc.)

---


PROJECT NAME: City Hall Complex  
 OWNER: City of Fitchburg  
 CITY/STATE: Fitchburg, MA  
 DOLLAR AMOUNT: \$ 23 Million DATE COMPLETED: January 2021  
 PUBLICLY BID?  YES  NO  
 TYPE OF WORK?: Project Management Services  
 CONTACT PERSON: Mary Delaney TELEPHONE #: ( 978 ) 829-1850  
 CONTACT PERSON'S RELATION TO PROJECT?: Project Management Services  
 (i.e., contract manager, purchasing agent, etc.)

---

PROJECT NAME: Mabelle M. Burrell Elementary School  
 OWNER: Town of Foxborough  
 CITY/STATE: Foxborough, MA  
 DOLLAR AMOUNT: \$ 33 Million DATE COMPLETED: December 2021  
 PUBLICLY BID?  YES  NO  
 TYPE OF WORK?: Project Management Services  
 CONTACT PERSON: Bill Yukna TELEPHONE #: ( 508 ) 543-1665  
 CONTACT PERSON'S RELATION TO PROJECT?: School Building Committee Chairman  
 (i.e., contract manager, purchasing agent, etc.)

---

10. The undersigned certifies that the information contained herein is complete and accurate and hereby authorizes and requests any person, firm, or corporation to furnish any information requested by the City in verification of the recitals comprising this statement of Bidder's qualifications and experience.

DATE: May 2, 2023 BIDDER: Colliers Project Leaders USA NE, LLC  
 SIGNATURE:   
 PRINTED NAME: Jonathan F. Winikur TITLE: Division Director

**ATTACHM3NT D.2**

**CERTIFICATE OF AUTHORITY – BUSINESS CORPORATIONS**

As duly authorized meeting of the Board of Directors of Colliers Project Leaders USA NE, LLC  
(name of corporation)  
held on May 1, 2021 at which all Directors were present or waived notice, it  
was voted that, Jonathan F. Winikur (name) of this company be and hereby is  
authorized to execute contracts and bonds in the name and behalf of said company, and affix  
its Corporate Seal thereto, and such execution of any contract of obligation in this  
company's name on its behalf by such Division  
Director under seal of the company, shall be valid and  
binding upon this company.

A TRUE COPY

ATTEST (clerk or secretary)

  
Brian E. Curtis, Esq., VP/Secretary/General Counsel

100 Federal Street, Floor 33, Boston, MA 02110


Place of Business

**ATTACHMENT D.3**

**CERTIFICATION OF VOTE**

I hereby certify that I am the clerk/secretary of the Colliers Project Leaders USA NE, LLC  
(name of company)  
that is the duly elected VP, General Counsel, Corporate Secretary of said company, and the  
above vote has not been amended or rescinded and remains in full force and  
effect as of the  
May 1, 2023, date on which the corporation's  
authorized representative, named above, affixed his/her signature to this contract.

Clerk or Secretary  
(Corporate Seal)



Brian E. Curtis, Esq.  
VP/Secretary/General Counsel

**ATTACHMENT D.4**

**SATISFACTION OF STATE TAX REQUIREMENTS**

**ATTEST FORM**

Pursuant to M.G.L. Chapter 49A, I certify under the penalties of perjury that I, to my best knowledge and belief, have filed all state tax returns and paid all state taxes required under law.

06-1468602

Social Security Number or  
Federal Identification Number



Jonathan F. Winikur  
Signature of Individual  
or Corporate Name

May 2, 2023

Date:

Jonathan F. Winikur, Division Director

Corporate Officer (if applicable)

**ATTACHMENT D.5**

**CERTIFICATE OF FOREIGN CORPORATION**

The undersigned hereby certifies that it has been duly established, organized, or chartered as a corporation under the laws of:

Connecticut

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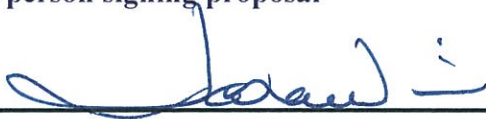
**(Jurisdiction)**

The undersigned further certifies that it has complied with the requirements of M.G.L. c. 30, §39L (if applicable) and with the requirements of M.G.L. c. 156D, §15.03 relative to the registration and operation of foreign corporations within the Commonwealth of Massachusetts.

Jonathan F. Winikur, Division Director

---

**Name of person signing proposal**



**Signature of person signing proposal**

---

Colliers Project Leaders USA NE, LLC

---

**Name of Business (Please Print or Type)**

*Affix Corporate Seal here*





**ATTACHMENT D.6**

**CERTIFICATE OF NON-COLLUSION**

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person, business, partnership, corporation, union committee, club or other organization, entity or group of individuals.



Jonathan F. Winikur, Division Director

---

Signature of individual submitting bid or proposal

Colliers Project Leaders USA NE, LLC

---

Name of Business

ATTACHMENT D.7

City of Newton



Mayor  
Ruthanne Fuller

**Purchasing Department**  
Nicholas Read ☎ *Chief Procurement Officer*  
1000 Commonwealth Avenue  
Newton Centre, MA 02459-1449  
purchasing@newtonma.gov

Telephone  
(617) 796-1220  
Fax:  
(617) 796-1227  
TDD/TTY  
(617) 796-1089

Date:

Vendor

Re: Debarment Letter for Invitation For Bid # 23-98

As a potential vendor on the above contract, the City requires that you provide a debarment/suspension certification indicating that you are in compliance with the below Federal Executive Order. Certification can be done by completing and signing this form.

Debarment:

**Federal Executive Order (E.O.) 12549 "Debarment and Suspension" requires that all contractors receiving individual awards, using federal funds, and all sub-recipients certify that the organization and its principals are not debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal department or agency from doing business with the Federal Government.**

I hereby certify under pains and penalties of perjury that neither I nor any principal(s) of the Company identified below is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.

Jonathan F. Winikur, Division Director \_\_\_\_\_ (Name)  
Colliers Project Leaders USA NE, LLC \_\_\_\_\_ (Company)  
100 Federal Street, Floor 33 \_\_\_\_\_ (Address)  
Boston, MA 02110 \_\_\_\_\_ (Address)  
PHONE (844) 727-0055 \_\_\_\_\_ FAX N/A

EMAIL jonathan.winikur@collierseng.com

 \_\_\_\_\_ Signature

May 2, 2023 \_\_\_\_\_ Date

If you have questions, please contact Nicholas Read, Chief Procurement Officer at (617) 796-1220.

ATTACHMENT D.8

<p><b>Form W-9</b> (Rev. October 2018) Department of the Treasury Internal Revenue Service</p>	<p><b>Request for Taxpayer Identification Number and Certification</b></p> <p>▶ Go to <a href="http://www.irs.gov/FormW9">www.irs.gov/FormW9</a> for instructions and the latest information.</p>	<p>Give Form to the requester. Do not send to the IRS.</p>
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<p>Print or type. See Specific Instructions on page 3.</p>	<p>1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>Colliers Project Leaders USA NE, LLC</b></p> <p>2 Business name/disregarded entity name, if different from above</p> <p>3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.  <input type="checkbox"/> Individual/sole proprietor or single-member LLC                    <input type="checkbox"/> C Corporation                    <input type="checkbox"/> S Corporation                    <input type="checkbox"/> Partnership                    <input type="checkbox"/> Trust/estate  <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ <b>P</b>  <small>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</small>  <input type="checkbox"/> Other (see instructions) ▶</p> <p>4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):                  Exempt payee code (if any) _____                  Exemption from FATCA reporting code (if any) _____  <small>(Applies to accounts maintained outside the U.S.)</small></p> <p>5 Address (number, street, and apt. or suite no.) See instructions. <b>135 New Road</b></p> <p>6 City, state, and ZIP code <b>Madison, CT 06443</b></p> <p>7 List account number(s) here (optional)</p> <p>Requester's name and address (optional)</p>
--	---

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number												
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0	6	-	1									
4	6	8	6									
0	2											

**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶	Date ▶ <b>May 2, 2023</b>
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**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*



**ATTACHMENT D.9**

**Business Category Information Form\***

**IFB No. 23-98**

**Owner's Project Manager Franklin School**

<b>Business Type Categories*</b>	<b>Select All That Apply</b>
MBE: Minority-Owned Business Enterprise	
WBE: Women-Owned Business Enterprise	
VBE: Veteran Business Enterprise	
SDVOBE: Service-Disabled Veteran-Owned Business Enterprises	
DOBE: Disability-Owned Business Enterprise	
LGBTBE: Lesbian, Gay, Bisexual, Transgender Business Enterprise	

\*Information is being collected as part of a City initiative to open contract opportunities to underrepresented vendors.

I do not wish to complete this form.

There is no penalty for persons who do not complete this Form, and whether or not the Form is completed will not be taken into consideration in awarding a bid.

I certify that the foregoing information is true and correct.



By: Jonathan F. Winikur, Division Director

Date: May 2, 2023