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## INTEROFFICE MEMORANDUM

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**TO:** DR. JAMES FRANCHINI, SUPERINTENDENT  
**FROM:** MICHAEL OUMET, ASSISTANT SUPERINTENDENT FOR BUSINESS  
**SUBJECT:** OWNER'S REP CONTRACT: PRE-REFERENDUM PLANNING  
**DATE:** OCTOBER 15, 2019  
**CC:** BOARD OF EDUCATION

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Please find attached, for the Board's approval, an addendum to the Owner's Representative contract with Saratoga Project Management (SPM) covering the extension of the pre-referendum planning period. Also attached for Board approval is the contract for the original pre-referendum planning period that has been completed and paid-in-full by the District. We have been unable to find a signed copy of the original contract in Dr. Hoffman's files, nor do we see that the contract was originally submitted for the Board's approval. Jeff Honeywell has reviewed both the original contract and the addendum and he recommends we include both of these documents for Board approval on the October 21, 2019 agenda.

Please do not hesitate to contact me know if you have any questions regarding this information.

# Saratoga Project Management, Inc.

Program & Construction Management Services

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September 25, 2019

Dr. James Franchini  
Superintendent  
Averill Park Central School District  
146 Gettle Road  
Averill Park, New York 12018

Re: District-Wide Facilities Improvement Project  
Owner's Representation Services Proposal  
Pre-Referendum Services – Extension of Services  
Amendment #1

Dear Dr. Franchini,

Please find our proposal to provide extended Owner's Representative services for the potential District-Wide Facilities Improvement Project.

We have included a fee proposal for extended Pre-Referendum Planning Services. SPM's original agreement (dated April 24, 2017) provided services for Long Range Planning and Pre-Referendum Services from October 2017 through May 2019. The Long Range Planning is complete and the referendum is currently scheduled for May 2020. In addition to the extended timeframe of one year for the referendum, Mosaic Associates has been contracted to perform architecture/engineering services in lieu of CSARCH for the project. Engaging a new design team will require additional effort to get Mosaic up to speed and to finalize a referendum prior to May 2020. We have already begun the efforts needed to get Mosaic up to speed and we look forward to working with Mosaic to provide a successful referendum for the district.

SPM's previous terms and condition of the original agreement remain intact, but we request modifications for the following sections:

- Section E – Engagement Duration – Revised to read October 2017 through the anticipated vote in May 2020
- Section F – Project Compensation – Extended planning services from May 2019 to May 2020 an additional \$10,000

We would be happy to sit down with you and the Board of Education to review the proposal, or any aspects the project at your convenience.

# Saratoga Project Management, Inc.

Program & Construction Management Services

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Thank you for your continued confidence in our firm to assist the district in planning and completing this potential project. The relationship we have developed with the district over the past years has been remarkable and is very important to us.

Please do not hesitate to call me if you have any questions, need clarification or require any further information.

Sincerely,

Bill McMordie  
Principal

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Dr. James Franchini  
Superintendent

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Bill McMordie  
Principal

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**Averill Park Central School District**  
**District-Wide Capital Improvement Project**  
**Long Range Planning**  
**Proposal to Provide Owner's Representative Services**

Presented: April 24, 2017

It is with our pleasure that Saratoga Project Management, Inc. presents its proposal to provide Owner's Representation services to assist Averill Park Central School District with its planning and management of its potential District-Wide Capital Improvement Project. We have prepared our proposal based on the understanding of the project and the scope of services that the district has requested to assist in successfully completing the project.

**A. Project Description**

The current project is scheduled to be presented to the voters for approval in May of 2019. The overall project consists of potential work at all of the District's buildings:

- Algonquin Middle School
- Averill Park High School
- George Washington Elementary School
- Miller Hill Elementary School
- Poestenkill Elementary School
- West Sand Lake Elementary School
- Transportation Facility

The final scope of work will be developed during the pre-referendum phase. The basis for the scope of work will be developed by a Long Range Planning Committee. The Long Range Planning Committee will develop a list of Needs, Deficiencies and Concerns. The items categorized will be given a priority ranking. As part of the pre-referendum process SPM will assist the Board of Education, district staff and Architect in selecting which items to address in the scope of the referendum.

**B. Project Organizational & Decision-Making Structure**

Our proposal is predicated on the district's continued engagement of the below listed groups through the completion of the project as well as the district's retaining of other required consultants and sub-consultants as deemed necessary and prudent to successfully complete the project in an efficient manner and in a manner which meets the requirements of the State Education Department. The additional consultants include, but are not limited to: geotechnical consultants, surveyors, asbestos and hazardous materials testing and monitoring consultants, construction inspection consultants, professional mechanical electrical and civil engineers and so on.

CSArch – Project Architect  
Fiscal Advisors & Marketing – Project Financial Consultant  
Barclay & Damon, LLP – Bond Counsel  
Honeywell Law Firm, PLLC – Construction Legal Counsel

### **C. Scope of Services**

The following section details the overall project, its proposed structure and organization, as well as the required activities and associated Scope of Services required to successfully deliver and complete the District-Wide Capital Improvement Project.

Based on the above, our understanding of the existing facilities, our work with the District on previous projects, we propose to provide the following scope of services with the goal of assisting the District in delivering each of the individual building projects in the most efficient and economical manner.

The primary role of the Owner’s Representative is to act as the district’s project point person responsible for the day-to-day management of activities of the district in its role as the owner of the construction project. As the point person, the Owner’s Representative is the district’s project leader responsible to oversee and coordinate the activities of the design professional and construction team and to provide the primary coordination between the district (Board of Education, administration and staff) and the design and construction team. The Owner’s Representative works closely with the Superintendent, Assistant Superintendent, and the Assistant Superintendent for Business in the financial administration of the project as it relates to budget status and reporting, contract change order approval, and project financial tracking and reporting for the district and State Education Department (SED). All direction and communication to the design team and construction team from the district runs through and is coordinated by the Owner’s Representative. All communication from the design and construction team to the district should also be direct to and through the Owner’s Representative.

The Owner’s Representative works for the Board of Education and reports to the Superintendent of Schools. The Owner’s Representative, as the district’s agent, is responsible to represent and advocate for its interests in working with the design and construction team during the design and construction process. In this capacity, the Owner’s Representative will work closely with key district officers, district administration, the Board of Education, building principals, Director of Buildings & Grounds, other district staff, related programs and organizations as required.

It is mutually agreed that the services required under this proposal do not require the full time efforts of the Owner’s Representative to satisfactorily complete the services outlined in this proposal and that efforts will vary from time-to time depending on the stage and nature of the project as it progresses. We will meet not less than monthly (and on a weekly basis during the construction phase) with the Superintendent, attend Board of Education meetings to report on project status and progress regularly or as requested by the Board or Superintendent.

We have detailed below the services we feel are necessary to deliver a project of this type and size and have broken them down into the four (4) primary areas for the project:

- 1. Referendum Planning Services**
- 2. Pre-Construction & Design Management Services**
- 3. Bid, Award & Construction Phase Services**
- 4. System Start-up, Building Acceptance & Construction Contract Close-out Phase Services**

#### **D. Project Delivery**

SPM’s project team will work in concert with District personnel, building administrators and other district staff as required during the course of the project. It is our understanding that we would report directly to the Superintendent of Schools throughout the course of the engagement. It is also understood that we will be working closely with the Assistant Superintendent for Business and Director of Buildings & Grounds; as well as any other required district personnel during the course of the project.

The position of Project Manager will be determined once a schedule and scope is fully understood. SPM is committed to providing the same caliber of project management for this project as it has provided in the past projects. Principal and lead for the project will be Bill McMordie. Project administration will be performed by Jerri Wassenaar.

#### **E. Engagement Duration**

Referendum Planning Services: Based on our initial discussion with the district and CSArch, the referendum planning services are anticipated to take approximately eighteen (18) months from their initiation in October 2017 through the anticipated vote in May 2019.

Post Referendum Services: The scope and schedules for the design, bid, award, construction and close-out phases are currently not determined. Once these phases become finalized, a supplemental schedule and fee proposal will be submitted and negotiated with the District.

#### **F. Project Compensation**

Referendum Planning Services: Based on our initial discussion with the district and CSArch, the referendum planning services are anticipated to take approximately eighteen (18) months from their initiation in October 2017 through the anticipated vote in May 2019. We understand that the district most likely has limited resources and may not be able to fully fund the required services at this early phase. We are proposing a limited fee for referendum planning services of \$15,000.00.

Post Referendum Services: The scope and schedules for the design, bid, award, construction and close-out phases are currently not determined. Fee for services provided as the district’s owner’s representative for any capital projects that may result from the initial planning phase will be based on the size of the project, duration, complexity, required staffing, level of difficulty, project duration and other considerations and shall be presented as an extended service of this engagement if we are selected by the Board of Education for this proposal. Our typical fee approach for these services is based on assessing the above factors, developing a staffing plan, proposed project duration and presenting a fixed-fee proposal for that specific project. Once these phases become finalized, a supplemental schedule and fee proposal will be submitted and negotiated with the District.

Payment of the fee is to be made monthly in equal increments based on the fee assigned for each phase of service. Standard reimbursable expenses such as reproduction, express mail, postage, delivery, authorized out-of-town-travel, etc. shall also be reimbursed monthly at 1.0 times the expense incurred by Saratoga Project Management, Inc.

The engagement may be extended at any time during the course of this contract based upon mutually agreeable terms and conditions.

It has been a pleasure to work with your staff and the Board of Education over the past years and we hope that you find this proposal acceptable so that we may continue to work together over the upcoming months.

Thank you again for the opportunity to submit this proposal to continue to work with the district as it moves forward with this much needed and important project.

Submitted by:

**Saratoga Project Management, Inc.**

\_\_\_\_\_  
Bill McMordie  
Principal

Accepted by Owner:

**Averill Park Central School District**

By:\_\_\_\_\_

\_\_\_\_\_  
Date

Cc:

Michael Ouimet – APCSD

# **Project Management & Owner's Representation Scope of Services**

We have detailed below the services we feel are necessary to deliver a project of this type and size and have broken them down into the four (4) primary areas required for the project.

- 1. Project Planning Phase Services**
- 2. Pre-Construction & Design Management Phase Services**
- 3. Bid, Award & Construction Phase Services**
- 4. System Start-up, Building Acceptance & Construction Contract Close-out Phase Services**

### **1. PROJECT PLANNING PHASE SERVICES**

#### **A. Assessment of Pre-Referendum Project Plan**

The Consultant shall assist the District to complete or monitor the following:

1. Organize a project planning team – architects, financial planners, bond counsel, etc.
2. Review district's 5-yr. plan, AHERA reports, building condition surveys and Long Range Planning Priority List to develop a potential scope of work for each building.
3. Review State of New York State Education Department's rules, regulations and requirements concerning traditional Building Aid and compare with potential scope of work to assess what qualifies.
4. Present overview of planning process to District Administration & Board of Education for review and approval.

#### **B. Project Scope, Cost Budget & Project Financing Plan**

The Consultant shall assist the District to complete or monitor the following:

1. Working with the Architect & Financial Advisors, evaluate and categorize initial potential scope of work with State Aid categories and assess potential cost investment for each scope item. Review Architect's conceptual estimate, building-by-building, and assess aid qualification per SED's rules and requirements.
2. Working with the Architect & Financial Advisors, assess district's Building Aid Ratio, qualification of potential scope of work for Building Aid – meeting all tests and criteria
3. Refine project scope to align with all aid tests and criteria
4. Assess Local Share tax impacts of proposed scope with all qualified aid streams
5. Develop conceptual project schedule and cash flow
6. Compile the above into a scope of work, conceptual budget, cash flow and overall project Financial Plan and present to District Administration and the BOE for review, discussion and action.

#### **C. Project Plan Preparation & Presentation**

The Consultant shall assist the District to complete or monitor the following:

1. Working with the District's Financial Advisors, the Architect and Bond Counsel review authorizing resolutions for issuance of Voter Referendum, Bond Resolutions, and all SEQR actions and related authorizing documents, verify project plan compliance.
2. Make presentations to the BOE to review the project plan – budgets, phasing, aidability, anticipated cash flows, planning logic and constraints, key objectives and milestones.



3. Make presentations to district staff, BOE, public/stakeholder workshops, community groups, etc. concerning project plan development.

### **2. PRE-CONSTRUCTION & DESIGN MANAGEMENT PHASE SERVICES**

#### **A. Preconstruction**

The Consultant shall assist the District to complete or monitor the following:

1. Develop a Project Delivery System (Construction Packages)
2. Review Architect's Pre-Construction Cost Estimate and Develop Construction Schedule
3. Review Project Team/Assignments and District personnel
4. Establish Clearly Defined Owner's Project Organizational & Decision-Making Chart, including roles and responsibilities
5. Develop Bid Packaging of Project Scope and Bid Schedule

#### **B. Development Cost Budget & Project Financing**

The Consultant shall assist the District to complete or monitor the following:

1. Review project cost information and develop initial Project Budgets based on Architect's Pre-Ref. Costs Estimates.
2. Review/Develop Anticipated Cash Flow Schedule for Construction Period
3. Preparation and presentation Project Cost, Schedule and Management Program to the Superintendent and Board of Education as required.
4. Provide regular updates of project budget and schedule status.

#### **C. Design Management & Coordination**

The Consultant shall assist the District to complete or monitor the following:

1. Review scope of work, program and project criteria with the appropriate district personnel and identify and confirm that the district's criteria are being met.
2. Negotiate (with District's Construction Legal Counsel and the Superintendent of Schools) contracts with the Architect and other Design Professionals. Administer these contracts through their final completion including the negotiation and resolution of any changes which are required from the owner's perspective on its behalf and subject to its approval. Enforce contract provisions. Review and process requests for payment.
3. Lead the project team in regularly reviewing the client program requirements, project criteria and District Standards and seek consensus of all affected district user groups.
4. Review, evaluate and recommend to the District required scope or design changes that may be presented or become necessary in accordance with the District's established program requirements & standards and seeking consensus of affected User groups.
5. Attend project review meetings, monitor design professional progress and adherence to defined scope, standards and objectives.
6. Coordinate and manage Drawing Review, Constructability Review and Value Engineering Analysis Process
7. Assess the need for a project commissioning process.
8. Review & Confirm with Design Professionals that all SED Review & Approvals have been completed

#### **D. Construction Contracting Process Management - Bid, Negotiation, Award**

The Consultant shall assist the District to complete or monitor the following:

1. Review (and modify or develop with District's Legal Counsel as necessary) forms of Construction Agreement and related Documents (Form of Contract, General Conditions, Supplementary Conditions, Bid Documents, Divisions 1 & 0 of Specifications).

2. Develop with successful contractors their Schedule of Values.
3. Prepare and Review with Owner Project Status Reports
4. Set Final Construction Budgets
5. Buy Out Owner Purchase Items
6. Finalize Site Staging & Phasing plans
7. Review, Set-up and Implement Owner's Project Cost Tracking, Control and Reporting System (Budget, Commitments, Estimate-to-Complete, Projected Final Cost, Progress Payments To-Date)
8. Oversee the finalization of design, budgeting, bidding, and award of pending bid packages for ancillary services (such as material testing and inspection services). Coordinate the required activities of services provided by other in-house owner units (i.e. Commissioning, utility connections, telecommunications, etc. as may be applicable). Work with the District and its design professionals to attempt to ensure that bid packages are issued in a timely manner. Facilitate any special meetings to coordinate the timely participation by other owner service providing groups.

### **E. District Facility Operations, Bldg. and District Administration Coordination**

The Consultant shall assist the District to complete or monitor the following:

1. Assure coordination of building program activities and construction activities with Building Administrators.
2. Communicate project schedule, progress, status, and issues on a regular basis (not less than monthly and more often as required by the phase of the project) with the building administrator for each building and with Director of Facilities & Maintenance.
3. Assure that all appropriate district personnel are invited to attend the project Pre-Bid, Pre-Construction Coordination & Project Orientation Meetings and are informed of important actions or activities.
4. Assure that all project documentation is organized and available for the Director of Facilities & Maintenance throughout the course of the project.
5. Report on project progress and issues to District Administration and the Board of Education as required throughout the course of the project.
6. Assure that the District's Health & Safety and other applicable Policies & Procedures are provided to and reviewed by the Contractors and Subcontractors (made a part of their contract) and that violations will be identified, documented and corrective actions taken.
7. Assure District regularly reviews the project's progress and status with its Health & Safety Committee as required by Commissioner's Regulation 155.5.
8. Work with District Administration & Staff to provide information and/or make presentations on building project to community or other interested groups as required.

## **3. BID, AWARD & CONSTRUCTION PHASE SERVICES**

### **A. Construction Contract – Bid & Award Monitoring**

The Consultant shall assist the District to complete or monitor the following:

1. Assure Construction Contract Bidding is legally noticed and advertised in accordance with District bidding policies and procedures
2. Attend or conduct as required the project Pre-Bid Meetings
3. Review Construction Bid Packages (Site, Building, etc.) prepared by the Design Professionals
4. Issue construction documents (Bid Packages) for Bid and Receive & Open Bids submitted to the District
5. Evaluate Bids (with the assistance of the design professionals)
6. Evaluate, Recommend the Selection & Acceptance Contractor Bid Alternates
7. Make recommendations of the Successful Bidders & Finalize the Award of Contracts

### **B. Construction Monitoring**

The Consultant shall assist the District to complete or monitor the following:

1. Attend or conduct as required the project Pre-Bid, Pre-Construction Coordination & Project Orientation Meeting
2. Monitor Contractor Mobilization
3. Coordination of Project Team (Architects, Engineers, Prime Contractors, Testing & Inspection, etc.)
4. Attend regular Project Team Progress Meetings and assure that the architect is issuing formal "action item" type meeting minutes identifying actions required by responsible individuals and associated timing
5. Facilitate, conduct and document regular Owner Project Team Coordination & Progress Meetings
6. Facilitate, conduct and document any Special/Topic related Meeting as may be necessary from time to time to focus on the resolution or coordination of special issues.
7. Attend project coordination meetings held at the site to monitor progress, identify issues and provide Owner input and/or direction as appropriate.
8. Monitor Contractor Buy-out
9. Progress Monitoring, Quality Control Monitoring, Testing & Inspection Consultant Monitoring & Supervision
10. Establish, Track & Monitor Cash Flows
11. Evaluate Contractor Change Order Requests, make recommendations to the Owner and complete final Change Order Negotiations with the Contractor. Meetings as necessary with the design professionals and/or the contractor(s) to review the reasons, justifications, and supporting data relating to change requests. When appropriate, establishing equitable solutions to cost issues. Assure appropriate filing of SED documentation.
12. Provide routine updates of the total project's budget and schedule; update project's estimate to complete and projected final cost and completion schedule; clarify variances; develop and recommend variance mitigation and management strategies; assess and recommend the periodic utilization of the Owner's project contingency as necessary using the Owner's existing contingency utilization criteria; work with owner personnel to identify funding sources applicable to scope changes.
13. Contract Administration: Review and monitor contractor and vendor compliance with the applicable portions of the Owner's established policies, procedures and requirements relating to: Bonds, Insurance, Payment Affidavits, Sworn Statements, and Affirmative Action (Target Group Business & EEO) with responsible owner personnel. Work with contractors and vendors to improve their compliance in any deficient areas as they may become evident.
14. Monitor and make recommendations to the Owner relative to critical project correspondence issues by:
  - a.) reviewing correspondence sent to the Owner and copied to the consultant from the design professional, general contractor and others and providing or recommending the Owner response as determined appropriate.
  - b.) identifying issues requiring documentation to protect the Owner's and providing or recommending such documentation.
  - c.) monitoring the resolution of any identified unresolved issues. Respond in writing when appropriate on behalf of the District to all critical correspondence.
15. Progress Payment Administration including the review and recommendation for payment of each contractor application for payment as well as the monitoring of invoice payment for compliance with contract requirements.
16. Schedule Monitoring & Management including the interface of owner project-related activities with the Prime Contractors and Contractors' Construction Schedule.
17. Administer or provide necessary data to the Owner for its existing Project Cost Tracking, Projection and Reporting Systems.
18. Prepare and Review with Owner Monthly Project Status Reports. Reports to include among other things:
  - a.) Comparisons of project budget with current commitments, expenditures, and estimated costs to complete the project (Projected Final Cost).
  - b.) Monitoring and reporting of project changes utilizing a change management system which tracks the scope, cost and reason for the changes. This report shall be the basis of evidencing required written recommendations relating to consultant's services on a monthly basis.
19. Coordinate with and represent the Owner with governing authorities (SED, Local Building, Planning, and Fire & Health Inspection Officials) during the construction of the project through substantial completion. Develop understanding of the Owner's structure relating to these governmental authorities and identifying actions required and facilitating resolution by the project team.

20. Coordinate work progress, status and issues with Building Maintenance. Schedule all required utility shut-downs with Supt. of Buildings & Grounds and the Prime contractors.
21. Develop Construction Deficiency and Punch lists
22. Obtain Building Certificates of Occupancy - Temporary & Permanent

### **B. Construction & Contract Administration**

The Consultant shall assist the District to complete or monitor the following:

1. Owner Review & Monitoring of Construction Documents - Addenda & Bulletins
2. Owner Review & Monitoring of Shop Drawing & Submittal Review
3. Owner Review & Monitoring of Request for Clarification Review
4. Owner Review & Monitoring of Field Modifications
5. Owner Review & Monitoring of Alternate/Value Engineering Review
6. Owner Review & Monitoring of Compliance with Contract Provisions and Requirements

## **4. SYSTEMS START-UP BUILDING ACCEPTANCE & CONSTRUCTION CONTRACT CLOSE-OUT**

### **A. System start-up & Building Acceptance**

The Consultant shall assist the District to complete or monitor the following:

1. Coordinate with and assist the District with selecting and coordinating designated Building Systems Commissioning Agent, including scheduling inspections, acceptance testing and demonstrations.
2. Review, Organize, Catalog and Turn-over of the project Shop Drawings, Submittals, Record Documents, Operations & Maintenance Manual Sets for District Facility Management and Operations.
3. Coordinate & Schedule Training of Building Management & Maintenance Staff as required.

### **B. Construction Contract Close-out & Warranty Administration**

The Consultant shall assist the District to complete or monitor the following:

1. In conjunction with the project Architect and the Prime contractors, determine substantial and final completion
2. Administer & monitor Punch list Completion
3. Negotiate Final Change Orders
4. Make Final Payments & Collect all Final Waivers & Releases of Lien Rights
5. Close-out/Demobilize Construction Field Offices





# Statement of Qualifications

## Owner's Representative Services

Saratoga  
Project Management, Inc.  
Program & Construction Management Services

**2 Gilbert Road  
Saratoga Springs NY 12866  
518-462-0555  
Bill McMordie  
February 7, 2014**

## **TABLE of CONTENTS**

### **Section 1 : Contact Information, Organizational Structure & Project Team**

Section 2 : Approach

Section 3 : Public School District Clients

Section 4 : Scope of Services

## **Section 1:      Contact Information**

Office:

**Saratoga Project Management, Inc.**

2 Gilbert Road  
Saratoga Springs, NY 12866  
Phone (518) 462-0555  
Fax (518) 462-0552

Bill McMordie  
Cell: (518) 857-3201  
E-mail: [bmcmordie@armlindamon.com](mailto:bmcmordie@armlindamon.com)

**Gordon Creek Elementary School**  
**Ballston Spa , NY**



## Section 1: Organizational Structure

Saratoga Project Management, Inc. is a New York State sub-chapter S-Corporation with its main office in Saratoga Springs, NY.

### *Corporate History:*

Armlin Damon & Associates was formed in 2002 to focus almost exclusively on the planning and management of K-12 educational facilities development across New York State. In 2007, Tony Armlin and Terry Damon were joined by Bill McMordie, as the newest and third principal of the firm, and created Armlin Damon & McMordie, Inc. In January 2013, we formed Saratoga Project Management, Inc., changing our name to parallel the services that we provide and relocated our corporate office from Albany to Saratoga Springs. The principals of the firm, Bill McMordie, Tony Armlin and Terry Damon, remain the same, as does the high level of service provided to each of our clients.

Saratoga Project Management is a small business. Our firm is small by design and was developed with two guiding principles. First, an owner of the firm is personally involved as the "lead" on every project. Second, our team members become a seamless extension of our client's staff.

SPM offers a tailored approach to Owner's Representative/Project Management services for facilities/construction projects. Each project requires a specific set of services to deliver an efficient and successful outcome. Together with our client, our project responsibilities are developed to eliminate any overlap of service between consultants. Each client selects only what is the most efficient scope of service for that particular project.

SPM's tailored approach has provided successful project management services on over \$600M in projects over the past twelve years. These projects have been completed in several school districts across the region: City School District of Albany, Newburgh Enlarged School District, Averill Park Central School District, Utica City School District and Catskill Central School District. We are currently working with our clients in Ballston Spa Central School District and Averill Park Central School District on two district wide facilities improvement projects.



## **Section 1: Saratoga Project Management Team**

Our project team will be led by Bill McMordie, firm principal, with the support and assistance, as needed, of the following company personnel:

- Tony Armlin – Principal
- Terry Damon – Principal
- Colleen Armlin – Director of Project Administration
- Jerri Wassenaar – Sr. Project Administrator/Project Accountant
- Will Corrigan – Senior Project Manager

Resumes for all of the above staff are included on the following pages.



**Montessori Magnet School**

**Stephen & Harriet Myers Middle School**





## Bill McMordie

Principal

### Education

Bachelor of Science – Building Construction & Management  
*State University of New York- Syracuse*

### Employment History & Project Experience

#### **Saratoga Project Management, Inc.**

##### **Principal:**

- ❑ **Ballston Spa Central School District**  
Ballston Spa, NY                      \$58.2M Facilities Project
- ❑ **Averill Park Central School District**  
Averill Park, NY                      \$12.9M Facilities Project

#### **Armlin Damon & McMordie, Inc.**

##### **Principal:**

- ❑ **Utica City School District**  
Utica, NY                      \$187.6. M Facilities Project
- ❑ **City School District of Albany**  
Albany, NY                      \$204.24M Facilities Project
- ❑ **Averill Park Central School District**  
Averill Park, NY                      \$13.1M Facilities Project

#### **The Pike Company**

##### **Vice President**

- ❑ **City School District of Albany**  
Albany, NY                      \$204.24M Facilities Project
- ❑ **Lansingburgh Central School District**  
Lansingburgh, NY                      \$11.5M Facilities Project
- ❑ **Schuylerville Central School District**  
Schuylerville, NY                      \$29.8M Facilities Project
- ❑ **Potsdam Central School District**  
Potsdam, NY                      \$21.8M Facilities Project
- ❑ **Averill Park Central School District**  
Averill Park, NY                      \$19.5M Facilities Project
- ❑ **Hadley-Luzerne Central School District**  
Hadley & Luzerne, NY                      \$13.8M Facilities Project

### *Profile*

With 29 years experience in the construction industry, Bill has focused his career on planning, project management, negotiations and contract language for complex institutional and commercial construction projects using the key tools for a project's success - planning, execution and flexibility. Bill brings unparalleled insight into the business administration of development and construction projects.



## Tony Armlin

Principal

### Education

Masters of Public Administration  
*State University of NY– Rockefeller College of Public Affairs & Policy*

Bachelor of Science  
*State University of NY - Plattsburgh*

### Employment History & Project Experience

#### **Saratoga Project Management, Inc.**

##### ***Principal:***

- ❑ **Ballston Spa Central School District**  
Ballston Spa, NY                      \$58.2M Facilities Project
- ❑ **Averill Park Central School District**  
Averill Park, NY                      \$12.9M Facilities Project

#### **AD Planning & Management, Inc.**

##### ***Principal***

- ❑ **Utica City School District**  
Utica, NY                      \$187.6 M Facilities Project

#### **Armlin Damon & McMordie, Inc.**

##### ***Principal***

- ❑ **City School District of Albany**  
Albany, NY                      \$204.24M Facilities Project
- ❑ **Newburgh Enlarged Central School District**  
Newburgh, NY                      \$50M & \$76.5M Facilities Projects
- ❑ **Averill Park Central School District**  
Averill Park, NY                      \$19.5 & \$13.1M Facilities Project

#### **Armlin North & Associates, LLC**

##### ***Principal***

- ❑ **University of Minnesota**  
Minneapolis, MN                      \$403M New Buildings & Renovations
- ❑ **Minnesota State Colleges & Universities (MnSCU)**  
*of Project Management*
- ❑ **Mall of America Phase I**  
Bloomington, MN                      \$650M Mixed –Use Retail Project

### ***Profile***

With 29 years of experience in the Construction Industry, Tony's primary skills and focus have centered on Educational Planning, Project Planning, Management and Oversight. Specializing in Educational Projects, his experience in both K-12 and Higher Education give him a unique perspective in complex, multi-phase, multi-project programs.



## Terry Damon

Principal

### Education

Bachelor of Science - Business Administration  
*State University of New York*

### Employment History & Project Experience

#### **Saratoga Project Management, Inc.**

*Principal:*

- ❑ **Ballston Spa Central School District**  
Ballston Spa, NY                      \$58.2M Facilities Project
- ❑ **Averill Park Central School District**  
Averill Park, NY                      \$12.9M Facilities Project

#### **AD Planning & Management, Inc.**

*Principal*

- ❑ **Utica City School District**  
Utica, NY                      \$187.6M Facilities Project

#### **Armlin Damon & McMordie, Inc.**

*Principal*

- ❑ **City School District of Albany**  
Albany, NY                      \$204.24M Facilities Project
- ❑ **Newburgh Enlarged Central School District**  
Newburgh, NY                      \$50 & \$76.5M Facilities Projects
- ❑ **Cazenovia Central School District**  
Cazenovia, NY                      \$4.3M Facilities Projects
- ❑ **Catskill Central School District**  
Catskill, NY                      \$16.175 & \$16.175M Facilities Projects

#### **TC Damon & Associates**

*Principal*

- ❑ **Appledore Engineering**  
Portsmouth, NH                      Multiple Retail Centers across New England
- ❑ **Charter Realty**  
Greenwich, CT                      Multiple Retail & Entertainment Centers

#### **PMK Group**

*Principal of Construction Service Division*

### *Profile*

With 39 years of experience in the construction industry exclusively as a project manager, owner's representative and consultant, Terry has extensive insight in project planning, the right-to-build process, and construction contract administration. Terry's hands-on and real world experiences has given him the ability to easily define critical project issues and quickly develop strategies for success.



## Colleen Armlin

Director of Project Administration

### Education

Masters of Science - Education  
*The College of Saint Rose*

Bachelor of Science  
*State University of NY -Plattsburgh*

### Employment History & Project Experience

#### **Saratoga Project Management, Inc.**

##### ***Director of Project Administration:***

- ❑ **Ballston Spa Central School District**  
Ballston Spa, NY                      \$58.2M Facilities Project
- ❑ **Averill Park Central School District**  
Averill Park, NY                      \$12.9M Facilities Project

#### **AD Planning & Management, Inc.**

##### ***Director of Project Administration:***

- ❑ **Utica City School District**  
Utica, NY                      \$187.6M Facilities Project

#### **Armlin Damon & McMordie, Inc.**

##### ***Director of Project Administration:***

- ❑ **City School District of Albany**  
Albany, NY                      \$204.24M Facilities Project
- ❑ **Averill Park Central School District**  
Averill Park, NY                      \$19.5 & \$13.1M Facilities Projects
- ❑ **Newburgh Enlarged Central School District**  
Newburgh, NY                      \$50 & \$76.5M Facilities Projects

#### **Guilderland Central School District**

***Elementary Special Education Teaching Assistant and Gifted & Talented Teaching Assistant***

#### **Armlin North & Associates, LLC**

##### ***Project Administrator & Accountant:***

- ❑ **Science Museum of Minnesota**  
St. Paul, MN                      \$100M New Facility Project

### *Profile*

With 17 years experience in project administration, Colleen has developed a comprehensive knowledge of project cost tracking and reporting systems. She has overseen the project accounting and administration for several school districts. Colleen has been the Director of Project Administration for 7 years overseeing and coordinating the project administering of all accounting staff.





## Jerri Wassenaar

Sr. Project Administrator/Project Accountant

### Education

Bachelor's of Science - Accounting  
*The Sage Colleges*

### Employment History & Project Experience

#### **Saratoga Project Management, Inc.**

**Sr. Project Administrator / Project Accountant:** Responsible for all aspects of cost tracking, pay application & invoice processing, tracking & payment, change order processing and tracking; final cost report preparation.

- ❑ **Ballston Spa Central School District**  
Ballston Spa, NY \$58.2M Facilities Project
- ❑ **Averill Park Central School District**  
Averill Park, NY \$12.9M Facilities Project

#### **Armlin Damon & McMordie, Inc.**

##### **Sr. Project Administrator / Project Accountant:**

Lead Project Administrator responsible for all aspects of cost tracking, pay application & invoice processing, tracking & payment, change order processing and tracking; final cost report preparation

- ❑ **Newburgh Enlarged Central School District**  
Newburgh, NY \$50 & \$76.5M Facilities Projects
- ❑ **Catskill Central School District**  
Catskill, NY \$16.175 & \$16.175M Facilities Projects

#### **City School District of Albany**

##### **District Treasurer & Capital Projects Accountant:**

Responsible processing invoices & payments for the Capital Project as well as all project financial accounting – General Ledger & FM System. Printing all checks for the district, make bank deposits and reconciling bank statements on various accounts. Create monthly Treasurer's reports for the BOE. Also, review and oversee accounts ( General Fund, T&A, and Federal Funds) daily activity reports. Work closely with all staff in Business office to include Assistance Superintendent of Finance, Business Manager, Budget Director, Purchasing Department and Grants Department. Coordinate activities of the External and Internal Auditors regarding Capital Project accounts and records.

#### **Glenmont Job Corps**

**Accountant :** Process internal accounts payables and process staff and student payroll. Reconcile bank statements, make daily deposits and correspond with banks as needed. Maintain records for payroll, accounts payable and deposit transactions and student accounts.

### Profile

With 12 years experience in accounting and administration, Jerri is a valuable asset to the company. Jerri's past experience as a school district Treasurer and Project Accountant for Albany City Schools \$204M Facilities Plan gives her invaluable understanding of all facets of school district Project Accounting. For the past several years, Jerri has overseen the project accounting and administration for Newburgh ECSD and Catskill CSD Facilities projects. Her attention to detail and knowledge of school financial systems has made her a indispensable member of the team.



## Will Corrigan

Project Director/Senior Project Manager

### Education

Bachelor of Arts – Environmental Science & Planning  
*State University of New York- Plattsburgh*

### Employment History & Project Experience

#### **Saratoga Project Management, Inc.**

**Senior Project Manager** – *Owner's Representative for Multi-building Renovation project*

- ❑ **Ballston Spa Central School District**  
Ballston Spa, NY \$58.2M Facilities Project
- ❑ **Averill Park Central School District**  
Averill Park, NY \$12.9M Facilities Project

#### **Armlin Damon & McMordie, Inc.**

**Senior Project Manager** – *Owner's Representative for Multi-building Renovation project*

- ❑ **Averill Park Central School District**  
Averill Park, NY \$13.1M Facilities Project

#### **The Pike Company**

**Project Director/ Senior Project Manager :**

- ❑ **City School District of Albany –**  
Albany, NY \$204.24M Facilities Project
- ❑ **Newburgh Enlarged Central School District**  
Newburgh, NY \$76.5M Facilities Projects
- ❑ **City of Hartford, Pathways to Technology School**  
Hartford, CT \$24M Facilities Project
- ❑ **Army Aviation support Facilities & Readiness Center**  
Burlington, VT \$34M General Construction Project
- ❑ **Averill Park Central School District**  
Averill Park, NY \$19.5M Facilities Project

### **Profile**

Will has over 27 years experience in the field of construction, including estimating, project management and field supervision. He brings an outstanding ability to communicate and interface with clients, stakeholders, architects, engineers, consultants and contractors.

### **Training**

30 Hour OSHA Trained  
AGC/GBC Future Leaders Program

### **Relevant Experience**

Will has over 14 years of experience of project cost estimating for public and private sector work . Experience in performing concept estimates, Lump Sum GC bids, CM at Risk with GMP and CM Agency Projects. Extensive value engineering, cost reconciliation and constructability experience for multi-million dollar projects.

## **TABLE of CONTENTS**

Section 1 : Contact Information, Organizational Structure &  
Project Team

**Section 2 : Approach**

Section 3 : Public School District Clients

Section 4 : Scope of Services



## Section 2: Project Approach

SPM's objective is to provide each of our clients with the service and support which meets the specific needs of each of their projects. We have found that each client is unique and each project different. Our approach is to define these unique attributes, focus on them, and apply the most effective project management methods and techniques in order to meet or exceed our client's objectives for the successful completion of the project. SPM goes beyond the simple advisement to its clients and truly acts as the owner's partner and advocate.

SPM defines successful projects as those where the owner, design professionals and contractors meet or exceed their goals. We believe in fair, open and honest management, while making sure all groups understand that performance means successfully and satisfactorily completing and fulfilling all of their contractual responsibilities to the owner.

Our corporate business development is to remain a relatively small, tight-knit professional management firm. We strategically select the projects and clients that we seek to do business with and have been very fortunate to have developed long-standing relationships with all that we have worked with and for. A well-organized project, and a project team with a commitment to the project's success, is fundamental to delivering a successful project.

We have a philosophy about team-building that starts with a Project First Philosophy. To us, that means that outside of family concerns, the individuals assigned to the project team commit to each other that their main goal for the duration of the project is the successful completion of the project. Team members must set aside personal or corporate motivations, as these types of events detract the project's success. Our commitment to the Project First Philosophy is personified by the fact that SPM places one of the firm's Principals as the lead and main contact on each one of its projects.

Over the past twelve years we have completed, or are in the process of completing, approximately \$659,890,000 in K-12 facility project work. We have developed what we consider to be a highly effective and efficient system of management and oversight of the K-12 facility project process and have come up with some "best practices" approach. Items such as cost containment, schedule, and change management are critical to the success of facility projects. We have found that the key to success is a proactive and on-going process that keeps the team informed, focused, on task and constantly challenges outcomes for improvement.

- Cost Containment – For all of our projects as Owner's Representative for K-12 clients we have performed cost accounting aspects, are informed of SED requirements and have produced multiple SED final cost reports for districts. We truly understand the intimate details of the cost side of the project and its important roles in the project's success.

## **Section 2: Project Approach**

- **Schedule** – Completing projects in the K-12 environment is challenging due to time restrictions and occupied conditions. We have performed over seventy (70) major K-12 projects over the past years and have successfully maintained schedule on each one of the projects. Our approach to maintaining schedule is up-front buy-in and development with all team members and consistent follow-up as the project progresses.
- **Change Management** – Our approach to change management begins with being proactive before the start of the project. Helping team members understand that change is inevitable during the project, how to explain changes as they develop during the project and the best path to address those changes during the project. Over the years we have developed a cost tracking system that simplifies the understanding of cost allocations categories for all changes and provides the owner with a snapshot of all changes on re-occurring basis. As requested, a summarized sample of past project change orders are shown below.

In summary, SPM believes in fair, open and honest management. We have found that each client is unique and each project different. Our approach is to define these unique attributes, focus on them, and apply the most effective project management methods and techniques in order to meet or exceed our client's objectives for the successful completion of the project.



**Philip J. Schuyler Achievement Elementary School**  
**Albany, NY**

## **TABLE of CONTENTS**

Section 1 : Contact Information, Organizational Structure &  
Project Team

Section 2 : Approach

**Section 3 : Public School District Clients**

Section 4 : Scope of Services

## Section 3: Public School District Clients

Saratoga Project Management (formally ADM) has had the pleasure of working with the following New York State School Districts since 2002:

- 1. Ballston Spa Central School District, *Dr. Joe Dragone, Superintendent of Schools***  
Since 2009, SPM has served as the Ballston Spa Central School District's Owner's Representative assisting with the completion of the district's initial \$49.3 million facilities improvement project which was passed by the voters in October 2010. In December 2012 the district voters successfully passed a second referendum for \$8.9 million. The project is scheduled for completion in December 2016.
- 2. Averill Park Central School District, *Dr. James Hoffman, Superintendent of Schools***  
Since 2003, ADM has served as the Averill Park Central School District's educational and facilities planning and project management consultant assisting with the completion of its \$19.5 million facilities improvement project; the planning, management and completion of a \$13.1 million facilities improvement project and the facilitation of its Long-Range Strategic Plan. SPM is currently underway on a \$12.9 million facilities improvement project.
- 3. City School District of Albany, *Dr. Eva Joseph, former Superintendent of Schools***  
Since 2002, ADM has provided educational and facilities planning and project management services for the City School District of Albany related to the planning and implementation of its 8-year, \$204.2 million district-wide facilities improvement plan. This include comprehensive reviews of enrollment, district finances, district facilities, educational program, community use and integration, building and grade reconfiguration, state aid, property evaluation and acquisition, neighborhood and community involvement, and much more.
- 4. Utica City School District, *Mr. Bruce Karam, Superintendent of Schools***  
In Jan. 2009, the Utica CSD engaged ADM to serve as the planners and program managers for their \$187.6 million district-wide facilities improvement project.
- 5. Newburgh Enlarged City SD, *Mr. Ralph Pizzo, former Superintendent of Schools***  
Since 2004, ADM has provided educational and facilities planning and project management services for the Newburgh Enlarged City School District related to the planning and implementation of its 8-year, \$126.5 million district-wide facilities improvement plan.
- 6. Catskill Central School District, *Dr. Kathleen Farrell, Superintendent of Schools***  
Since 2004, ADM has served as the Catskill Central School District's educational and facilities planning and project management consultant assisting with two improvement projects each approved by voter referendum at \$16.7 million; this include planning of grade reconfiguration; long-range facilities utilization, athletic facilities, and community use.

**Owner's Representation, Project Planning & Management Services for Owner's in K-12 Education**

**K-12 Education Project Experience**

Client & Category						
A. K-12 Education Projects						Total
	Type of Work	Budget	Status	Yr. of Completion		
1. <u>City School District of Albany</u> -- 3 Referendum (2001 - \$176.47 M; 2003 - 8.77 M; 2007 - \$19 M)						\$204,240,000
1	Myers Middle School	New Construction & Athletic Facilities	\$36,720,000	Completed	2003	
2	Hackett Middle School	Renovation	\$34,500,000	Completed	2008	
3	Thomas O'Brien Academy of Science & Technology ES	Renovation	\$9,905,000	Completed	2009	
4	Philip J. Schuyler Achievement Academy ES	Renovation & Additions	\$9,990,000	Completed	2004	
5	Sheridan Preparatory Academy ES	New Construction	\$11,945,000	Completed	2004	
6	Montessori ES	New Construction	\$8,930,000	Completed	2005	
7	North Albany Academy ES	Renovation & Additions	\$10,475,000	Completed	2005	
8	Eagle Point ES	Renovation & Additions	\$10,740,000	Completed	2005	
9	Deleware Community ES	New Construction	\$11,600,000	Completed	2007	
10	Pine Hills ES	New Construction	\$11,100,000	Completed	2006	
11	Arbor Hill	Renovation	\$14,530,000	Completed	2011	
12	Giffen ES	Renovation	\$14,690,000	Completed	2009	
13	Albany High School	Athletic Fields	\$550,000	Completed	2003	
14	School 19 ES	Renovation	\$14,555,000	Completed	2009	
15	Harriett Gibbons HS	Renovation & Lease/Purchase	\$4,010,000	Completed	2002	
2. <u>Utica City School District</u> -- 1 Referendum (2008 - \$187.6 M)						\$202,600,000
1	Albany Elementary School	Renovation; Additions & Sitework	\$10,000,000	Completed	2012	
2	Conkling Elementary School	Renovation; & Sitework	\$11,600,000	Completed	2012	
3	Jefferson Elementary School	Renovation; Additions & Sitework	\$10,000,000	Completed	2012	
4	Herkimer Elementrary School	Renovation; Additions & Sitework	\$10,000,000	Completed	2012	
5	Hughes Elementary School	Renovation	\$10,000,000	Underway	2015	
6	M.L. King Elementary School	Renovation & Addition	\$7,000,000	Completed	2014	
7	Kernan Elementary School	Renovation & Additions	\$25,000,000	Underway	2015	2018
8	Watson Williams Elementary School	Renovation	\$8,000,000	Underway	2015	
9	Jones Elementary School	Renovation	\$6,000,000	Underway	2015	
10	Columbus Elementary School	Renovation	\$10,000,000	Underway	2015	
11	J.J. Kennedy Middle School	Renovation	\$20,000,000	Completed	2014	
12	Donovan Middle School	Renovation	\$20,000,000	Underway	2015	
13	Proctor High School	Renovation; Additions & Athletic Fields	\$55,000,000	Underway	2018	
3. <u>Newburgh Enlarged City School District</u> -- 2 Referendum (2005 - \$50 M & 2007 - \$76.5 M)						\$126,500,000
1	Newburgh Free Academy HS	Renovation; Additions & Athletic Fields	\$23,670,000	Completed	2007	2014
2	North HS	Renovation; Additions & Athletic Fields	\$20,370,000	Completed	2007	2014
3	South JHS	Renovation	\$11,790,000	Completed	2007	2012
4	Herritage JHS	Renovation	\$3,020,000	Completed	2007	2012
5	Gidney Avenue Memorial ES	Renovation	\$13,800,000	Completed	2007	2014
6	Horizon on the Hudson ES	Renovation	\$4,860,000	Completed	2007	2014
7	New Windsor ES	Renovation & Additions	\$10,700,000	Completed	2007	2011
8	Balmville ES	Renovation & Additions	\$9,570,000	Completed	2007	2011
9	Fostertown ES	Renovation	\$2,380,000	Completed	2007	2014
10	Meadow Hill ES	Renovation & Athletic Fields	\$9,590,000	Completed	2007	2013
11	Temple Hill ES	Renovation & Athletic Fields	\$8,860,000	Completed	2007	2013
12	Gardnertown ES	Renovation	\$1,800,000	Completed	2007	2014
13	Vails Gate ES	Renovation	\$2,440,000	Completed	2007	2014
14	Washington Street Pre-K Ctr.	Renovation	\$420,000	Completed	2010	
15	West Street ES	Renovation	\$2,670,000	Completed	2009	
16	Chestnut Street	Renovation	\$560,000	Completed	2007	
4. <u>Ballston Spa Central School District</u> -- 2 Referendum (2010 - \$49.3 M & 2012- \$8.9M)						\$58,200,000
1	Malta Ave. Elemenrary School	Renovation	\$11,800,000	Completed	2014	
2	Gordon Creek Elementary School	New Construction	\$26,500,000	Completed	2013	
3	Milton Terrace North Elementary School	Renovation & Sitework	\$6,000,000	Underway	2015	
4	Middle School	Renovation	\$5,000,000	Completed	2015	
5	Wood Road Elementary School	Renovation	\$8,100,000	Underway	2015	
6	High School	Athletics	\$800,000	Completed	2014	
5. <u>Averill Park Central School District</u> -- 2 Referendum (2001 - \$19.55 M & 2007 - \$13.1 M)						\$45,550,000
1	Averill Park HS	Renovation; Additions & Athletic Fields	\$12,108,892	Underway	2005	2009 2015
2	Algonquin MS	Renovation; Additions & Athletic Fields	\$13,931,774	Underway	2004	2009 2015
3	West Sand Lake ES	Renovation	\$548,000	Underway	2003	2009 2015
4	Sand Lake ES	Renovation & Athletic Fields	\$1,827,000	Underway	2003	2008 2015
5	Poestenkill ES	Renovation	\$1,321,249	Underway	2003	2009 2015
6	Miller Hill ES	Renovation	\$521,512	Underway	2003	2008 2015
7	George Washington ES	Renovation	\$915,294	Underway	2003	2009 2015
8	Transportation Center	Renovation	\$20,000	Underway		2015
6. <u>Catskill Central School District</u> -- 2 Referendum (2005 -- \$16.75 M & 2007 - \$16.75 M)						\$33,500,000
1	Catskill MS	Renovation		Completed	2007	2010
2	Catskill HS	Renovation & Additions		Completed	2007	2012
7. <u>Cazenovia Central School District</u> -- 1 Referendum (2002 -- \$4.8 M)						\$4,300,000
1	Cazenovia HS	Renovation, Additions, Athletics	\$2,550,000	Completed	2004	
2	Cazenovia MS	Renovation	\$260,000	Completed	2004	
3	Burton Street ES	Renovation	\$1,490,000	Completed	2004	
Total ALL K-12 EDUCATION Projects:						\$674,890,000



# Ballston Spa Central School District

## Project Team

### Owner:

Ballston Spa Central School  
District

Joseph P. Dragone, Ph.D  
Superintendent of Schools

### Owner's Representative:

Saratoga Project  
Management, Inc.

### Architects:

CS Arch Architecture

### Consulting Team:

Girvin & Ferlazzo  
Fiscal Advisors  
The LA Group  
Lewis Engineering  
Engineered Solutions  
Dente Engineering  
PSI

### Contact Info.:

Joseph P. Dragone, Ph.D  
Superintendent of Schools

Phone: (518) 884-7195

## Project Fact Sheet



**Description/Program & Project Phasing Timeline:** Located in Ballston Spa, New York, the Ballston Spa Central School District serves about 4,400 children. The community is thirty miles North of Albany and is a suburban school district with rural traditions. The voters have passed two series of Bond Referendum votes. The first referendum of \$49.3M set a focus on eliminating open classroom plans, which included construction of a new 81,500 SF state of the art elementary school and renovation improvements to two (2) elementary schools and one Middle School. The second referendum of \$8.9M focused on completing the elimination of open classrooms to one of its elementary school buildings coupled with athletic improvements to its High School facility. The district has one (1) High School, one (1) Middle School, four (4) Elementary School Buildings and one (1) Transportation Center.

### Timeline:

#### Start Date

#### Completion Date

#### Planning

June 2009

September 2010

#### \$49.3M Referendum

October 2010

December 2016

#### \$8.9M Referendum

December 2012

December 2016

### Cost:

Gordon Creek Elementary School	\$26,500,000
Malta Avenue Elementary School	\$11,800,000
Milton Terrace North Elementary School	\$ 6,000,000
Middle School	\$ 5,000,000
Wood Road Elementary School	\$ 8,100,000
High School	\$ 800,000
<b>Current Total Project Cost:</b>	<b>\$58,200,000</b>

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# Averill Park Central Schools

## Project Team

### Owner:

Averill Park Central  
School District  
Averill Park, New York

Dr. James D. Hoffman,  
Superintendent of Schools

### Owner's Representative:

Saratoga Project  
Management, Inc.

### Architects:

CS Arch Architecture  
Rhinebeck Architecture &  
Planning

### Consulting Team:

Alpine Environmental  
Girvin & Ferlazzo  
Open Systems Technology  
QCQA Labs  
Amsure  
Excel Engineering  
Engineering Solutions

### Contact Info.:

Dr. James D. Hoffman,  
Superintendent of Schools

Phone: (518) 674-7055

Mr. Michael Ouimet  
Asst. Sup't. for Business,

Phone: (518) 674-7085

## Project Fact Sheet



**Description/Program:** Located in Averill Park, New York, the Averill Park Central School District serves about 3,300 children. The community is ten miles East of Albany and is a suburban school district with rural traditions. The voters have passed three series of Bond Referendum votes and each vote has encompassed work in a district-wide fashion in all seven (7) of the district's buildings. The district has one (1) High School, one (1) Middle School, five (5) Elementary School Buildings and one (1) Transportation Center. The projects have targeted primarily aged building infrastructure, ADA code compliance, small additions, significant athletic field improvements and technology infrastructure upgrades.

<b>Timeline:</b>	<b>Start Date</b>	<b>Completion Date</b>
<b>\$19.55M Referendum</b>	June 2001	September 2004
<b>Long Range Planning</b>	September 2007	September 2008
<b>\$13.1M Referendum</b>	February 2007	September 2012
<b>Long Range Planning</b>	September 2010	October 2011
<b>\$12.9M Referendum</b>	April 2013	December 2015

### Cost Update New Project:

Averill Park High School:	\$19,432,300
Algonquin Middle School:	\$14,329,800
Sand Lake /Miller Hill	\$ 4,248,150
West Sand Lake Elementary:	\$ 2,904,000
George Washington Elementary:	\$ 1,993,250
Poestenkill Elementary:	\$ 2,118,000
Transportation Center	\$ 525,000
<b>Total Project Cost:</b>	<b>\$45,550,500</b>

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## Project Team

### Owner:

City School District of Albany, New York

Dr. Eva C. Joseph -  
Former Superintendent  
of Schools

### Owner's Representative:

Saratoga Project  
Management, Inc.

### Architects:

Cannon Design

Collins+Scoville  
Architects

Envision Architects

### Construction Manager:

Pike/Heery-Joint Venture

### Consulting Team:

Clough Harbour & Assoc.  
Girvin & Ferlazzo  
Fiscal Advisors  
Stanton & Leggett  
Open Systems Technology  
Construction Technologies  
The Grier Partnership

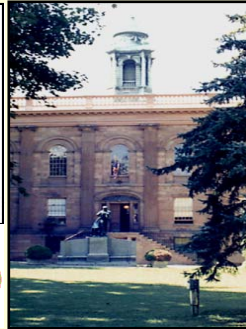
### Contact Info.:

Dr. Eva C. Joseph -  
Former Superintendent of  
Schools

Phone: (518) 438-7895

# City School District of Albany

## Project Fact Sheet



**Description/Program & Project Phasing Timeline:** The Albany City School District has a student population of approximately 10,000 students with a City population of 100,000. District-wide facilities improvements affecting 14 school buildings were approved by District voters on December 11, 2001 with a revised total investment of \$204.240 million in renovation, expansion, new construction and reconstruction for all school facilities with the exception of the district's High School which is to be considered in a separate voter referendum. District-wide improvements are being designed and constructed over a nine (9) year period between 2002 and 2010. Planning for renovation and expansion of the 2,600 student Albany High School complex and calls for an additional \$100 million in improvements and reconstruction investment. The initial phases of the project (2002 – 2010) include:

**Phase A – 2004:** *Harriett Gibbons Alt. Learning Ctr.* – Gr. 9-12, 200 Student – Bldg. Conversion/Renovation  
*Philip Schuyler Achievement Academy* – Gr. K-5, 450 Student – 53,600 sf New Const/Renovation  
*Sheridan Preparatory Academy* – Gr. K-5 450, Students – 53,200 sf - New Construction

**Phase B – 2005:** *Kelton Middle School* – Gr. 6-8, 650 Student – 134,000 sf/18 Acre - New Construction  
*Montessori Magnet School* – Gr. Pre-k-5, 300 Students – 45,000 sf – New Construction  
*School 20* – Gr. K-8 450 Student – 75,700 sf – Major Renovation & Addition  
*School 27* – Gr. K-5 300 Student – 69,600 sf – Renovation & Major Addition

**Phase C – 2006:** *Hackett Middle School* – Gr. 6-8, 650 Student – Major Historic Renovation  
*School 18* – Gr. K-5 450 Student – 55,000 sf – New Construction/Reconstruction

**Phase D – 2008:** *School 16* – Gr. K-5 450 Student – 55,000 sf – New Construction/Reconstruction

**Phases E/F-'08-2010:** *Giffen Elem. School* – Gr. Pk-5, 450 Student – 132,000 sf - Renovation  
*TOAST Elementary School* – Gr. Pk-5, 450 Student – 86,000 sf Renovation  
*School 19* – Gr. Pk-5, 450 Student – 85,000 sf Renovation w/Addition  
*Arbor Hill Elementary School* – Gr. Pk-5 450 Student – 128,000 Renovation

### Cost:

Phase A	\$ 64,960,000
Phase B	\$ 30,334,000
Phase C	\$ 45,727,000
Phase D	\$ 12,228,000
Phase E/F	\$ 50,991,000
<b>Total Project Cost:</b>	<b>\$ 204,240,000</b>

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# The Utica City School District

## Project Team

### Owner:

Utica City School District  
Mr. Bruce Karam  
Superintendent of Schools

### Owner's Representative:

AD Planning & Management

### Architects:

Stieglitz Snyder  
Architecture

### Construction Manager:

The Pike Company

### Consulting Team:

Fiscal Advisors  
Eisenbach & Ruhnke  
Atlantic Testing Labs  
CME Associates, Inc.

### Contact Info.:

Mr. Bruce Karam  
Superintendent of Schools

Phone: (315) 792-2210

## Project Fact Sheet



**Description/Program & Project Phasing Timeline:** The Utica City School District is located in Utica, NY and includes 13 schools that serve about 9,500 students in grades Kindergarten through 12th grade. A District-wide facilities improvements referendum for \$187.6 million was approved by the voters on September 29 2008, which encompasses the original 12 school buildings -- renovations, expansions-- and establishes an additional Elementary School. The District-wide improvements are being designed and constructed over a six (6) year period between 2009 and 2015. ADPM has led the District's development of this multi-phase Comprehensive Educational & Facilities Master Plan.

#### A. Elementary Schools: (K-6)

Albany Elementary – Gr. K-5 Addition/Renovation  
Christopher Columbus Elementary— Gr. K-5 Renovation  
General Herkimer Elementary.— Gr. K-5 Renovation  
Hugh R. Jones Elementary— Gr. K-5 Renovation  
John F. Hughes Elementary – Gr. K-5 Renovation  
Rosco Conkling Elementary – Conversion to Gr. K-5  
Thomas Jefferson – Gr. K-5 Renovation  
Kernan – Gr. K-5 Renovation  
ML King – Gr. K-5 Renovation  
Watson Williams – Gr. K-5 Renovation

#### B. Middle Level Schools: (Converting to 7-8)

JF Kennedy Middle School – Gr. 6-8 Renovation  
Donovan Middle School – Gr. 6-8 Renovation

#### C. High Schools: (Converting to 9-12)

Proctor High School - Gr. 9-12 Renovations & Additions

### Cost:

High School (1):	\$50,000,000
Middle Schools (2):	\$31,600,000
Elementary Schools (10):	\$86,400,000
District wide Technology:	\$19,600,000

**Current Total Project Cost: \$187,600,000**

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# The Newburgh Enlarged City School District

## Project Team

### Owner:

Enlarged City School District of Newburgh

Mr. Ralph Pizzo  
Superintendent of Schools

### Owner's Representative:

Saratoga Project Management, Inc.

### Architects:

Collins + Scoville Architects

Joseph J. Minuta Architects

Sammel Architecture

### Construction Manager:

BBL Construction Services—Phase I

Pike/Heery — Phase 2

### Consulting Team:

Clough Harbour & Assoc.  
Shaw & Perelson  
Fiscal Advisors  
NYSBA -Advisory Solutions

### Contact Info.:

Mr. Ralph Pizzo  
Superintendent of Schools

Phone: (845) 563-3501

## Project Fact Sheet



**Description/Program & Project Phasing Timeline:** The Newburgh Enlarged City School District serves approximately 13,000 students residing in the City of Newburgh, Town of Newburgh and the Town of New Windsor. District-wide facilities improvements affect 16 school buildings. ADM has lead the District's development of a multi-phase, multi-referendum Comprehensive Educational & Facilities Master Plan. The first phase of the project was a \$50M Referendum approved by District voters on 2/15/05. The second phase of the project is a \$76.5 M Referendum approved by District voters on 3/27/07. As of the end of 2007, the \$50 Million first phase was completed and the second phase, \$76.5 million was getting underway and is anticipated to complete in 2011. A third Phase is contemplated but not yet approved by the BOE for presentation to District voters.:

#### A. Elementary Schools: (PK, K-6 & Converting to several K-8s)

Gidney Ave – Gr. K-6 Renovation  
Washington St.—Pre-K Center  
West St.—K-4 Conversion/Renovation  
Balmville – Gr. K-6 Addition/ Renovation  
New Windsor – Gr. K-6 Addition/ Renovation  
Horizon on the Hudson – Gr. K-6 Renovation  
Vails Gate – Gr. K-6 Renovation  
Gardnertown – Gr. K-6 Renovation  
Fostertown – Gr. K-6 Renovation  
Meadow Hill – Gr. K-8 Conversion & Renovation  
Temple Hill –K-6 Renovation

#### B. Middle Level Schools: (Converting to 7-8)

South Junior High – Gr. 7-9 Renovation  
Heritage Junior High – Gr. 7-9 Renovation

#### C. High Schools: (Converting to 9-12)

Newburgh Free Academy - Gr. 9-12 Renovations & Additions  
North High – 9-12 Renovations & Additions

### Cost:

Phase 1 — Approved 2/15/05	\$ 50,000,000
Phase 2 — Approved 3/27/07	\$ 76,500,000
Phase 3 — To Be Determined	\$ TBD

**Current Total Project Cost: \$ 126,500,000**

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### Section 3: Public School District Clients

#### *Superintendents:*

Joseph P. Dragone, Ph.D.	Superintendent of Schools, Ballston Spa CSD \$58.2M District-Wide Facilities Improvement Projects Ballston Spa Central School District 70 Malta Avenue Ballston Spa, NY 12020 (518) 884-7195
James Hoffman, Ed.D.	Superintendent of Schools, Averill Park CSD \$45.5M District-Wide Facilities Improvement Projects Averill Park Central School District 146 Gettle Road, Station #1 Averill Park, NY 12018 (518) 674-7066
Dr. Kathleen P. Farrell	Superintendent of Schools, Catskill Central School District \$33.5M District-Wide Facilities Improvement Projects Catskill Central School District 343 West Main Street Catskill, New York 12414 (518) 943-4696
Dr. Roberto Padilla	Superintendent of Schools, Newburgh Enlarged City SD \$126.5M District-Wide Facilities Improvement Projects Newburgh Enlarged City School District 124 Grand Street Newburgh, New York 12550 (845) 563-3400
Mr. Bruce J. Karam	Utica City School District \$187.6M District-Wide Facilities Improvement Projects Utica City School District 106 Memorial Parkway Utica, New York 13501 (315) 7921-2210
Dr. Eva Joseph	Retired Superintendent, City School District of Albany \$204.24M District-Wide Facilities Improvement Projects Campus President- Retired Holy Names Academy 1073 New Scotland Road Albany, NY 12208 (518) 438-7895

### Section 3: Public School District Clients

#### *Business Officials:*

Mr. Brian Sirianni	Asst. Sup't. for Business, Ballston Spa CSD \$58.2M District-Wide Facilities Improvement Projects Ballston Spa Central School District 70 Malta Avenue Ballston Spa, NY 12020 (518) 884-7195
Mr. Michael Ouimet	Asst. Sup't. for Business, Averill Park CSD \$45.5M District-Wide Facilities Improvement Projects Averill Park Central School District 146 Gettle Road, Station #1 Averill Park, NY 12018 (518) 674-7085
Ms. Marianne Heslin	Asst. Sup't. for Business, Newburgh Enlarged City SD \$126.5M District-Wide Facilities Improvement Projects Newburgh Enlarged City School District 124 Grand Street Newburgh, New York 12550 (845) 563-3400
Mr. William F. Hogan	Asst. Sup't. for Business Affairs, City School District of Albany \$204.24M District-Wide Facilities Improvement Projects 1 Academy Park Albany, NY 12207 (518) 475-6020

## **TABLE of CONTENTS**

Section 1 : Contact Information, Organizational Structure &  
Project Team

Section 2 : Approach

Section 3 : Public School District Clients

**Section 4 : Scope of Services**

## Section 4: Scope of Services

Saratoga Project Management, Inc. works exclusively as Owner's Representatives and Project Managers in the planning, design, construction, turnover and occupancy phases of school facility improvement projects. All of our services are conducted working in collaboration with architects, engineers, various related consultants, construction managers, contractors, and vendors on behalf of and in conjunction with school district Boards of Education, Superintendents of School, and their staffs.

As Project Managers and Owner's Representatives our role is to provide the professional management and oversight of capital project activities on behalf of the school district as their agent – a function that is not the traditional purview of a school district but nonetheless is an essential part of the educational program's successful delivery. As professional managers with a sole focus on this service, we have developed a delivery approach that encourages district's to bring us into the school district organization and become a temporary but integral part of the district's administrative team. Our goal is to become an effective extension of the school district's administration with the sole goal of assisting the school district in planning and successfully completing capital projects that meet and exceed the district's expectations.

Over the past twelve years we have developed what we consider to be a very highly effective and efficient system of management and oversight of this process which has incorporated what we have culled through to determine truly effective and efficient "Best Practices".

Our goal is to provide our clients with this knowledge and insight and assist them with applying these important "lessons learned" concerning almost every aspect of the project planning and implementation process. We do not place ourselves in the position of telling any district that they must follow a specific path relating to a specific "best practice" but do offer our recommendations, a review of options and likely repercussions or outcomes of any given decision of this type of magnitude. Our experience in working has shown us where hidden challenges exist and where unforeseen opportunities existing at each phase of:

- Planning
- Design
- Construction
- Occupancy

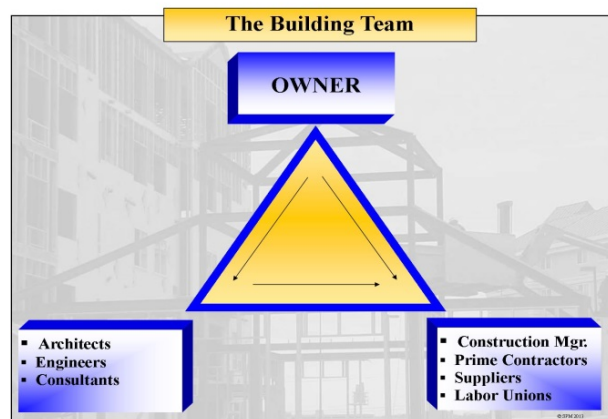
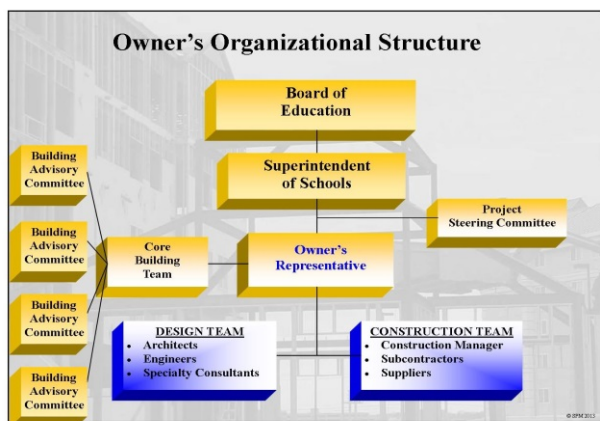
Perhaps most importantly, we have developed a very good understanding of the challenges of renovating, restoring and expanding existing and aged educational facilities – from truly historic structures, too over-crowded buildings, to buildings with serious asbestos and lead abatement issues, and so on.



## Section 4: Scope of Services

Understanding SED's requirements and preferences in these issues is also fundamental to being successful. Having worked on over 100 SED building projects over the past several years, we are very aware of their current position on many critical issues and how they have changed over the years. Being able to not only be aware of these "Best Practices" but also being able to have specific project experiences in developing and refining these and the ability to reference these experiences with SED and showing there past success is critical.

We believe our background and extensive level of experience will provide immeasurable benefit to our clients.



## **Project Management & Owner's Representation Scope of Services**

We have detailed below the services we feel are necessary to deliver a project of this type and size and have broken them down into the four (4) primary areas required for the project.

- 1. Project Planning Phase Services**
- 2. Pre-Construction & Design Management Phase Services**
- 3. Bid, Award & Construction Phase Services**
- 4. System Start-up, Building Acceptance & Construction Contract Close-out Phase Services**

### **1. PROJECT PLANNING PHASE SERVICES**

#### **A. Assessment of Pre-Referendum Project Plan**

The Consultant shall assist the District to complete or monitor the following:

1. Select and organize a project planning team – architects, financial planners, bond counsel, etc.
2. Review district's 5-yr. plan, AHERA reports, building condition surveys and Long Range Planning Priority List to develop a potential scope of work for each building.
3. Review State of New York State Education Department's rules, regulations and requirements concerning traditional Building Aid and new EXCEL building aid program and compare with potential scope of work to assess what qualifies.
4. Present overview of planning process to District Administration & Board of Education for review and approval.

#### **B. Project Scope, Cost Budget & Project Financing Plan**

The Consultant shall assist the District to complete or monitor the following:

1. Working with the Architect & Financial Advisors, evaluate and categorize initial potential scope of work with State Aid categories and assess potential cost investment for each scope item. Compile a conceptual estimate, building-by-building, and assess aid qualification per SED's rules and requirements.
2. Working with the Architect & Financial Advisors, to assess district's Building Aid Ratio, qualification of potential scope of work for Building Aid, and qualification for scope of work with EXCEL Aid – meeting all tests and criteria
3. Refine project scope to align with all aid tests and criteria
4. Assess Local Share tax impacts of proposed scope with all qualified aid streams
5. Develop conceptual project schedule and cashflow
6. Compile the above into a scope of work, conceptual budget, cashflow and overall project Financial Plan and present to District Administration and the BOE for review, discussion and action.

#### **C. Project Plan Preparation & Presentation**

The Consultant shall assist the District to complete or monitor the following:

1. Working with the District's Financial Advisors, the Architect and Bond Counsel review authorizing resolutions for issuance of Voter Referendum, Bond Resolutions, and all SEQR actions and related authorizing documents, verify project plan compliance.
2. Make presentations to the BOE to review the project plan – budgets, phasing, aidability, anticipated cashflows, planning logic and constraints, key objectives and milestones.



3. Make presentations to district staff, BOE, public/stakeholder workshops, community groups, etc. concerning project plan development.

## **2. PRE-CONSTRUCTION & DESIGN MANAGEMENT PHASE SERVICES**

### **A. Preconstruction**

The Consultant shall assist the District to complete or monitor the following:

1. Develop a Project Delivery System (Construction Packages)
2. Review Architect's Pre-Construction Cost Estimate and Develop Construction Schedule
3. Review Project Team/Assignments and District personnel
4. Establish Clearly Defined Owner's Project Organizational & Decision-Making Chart, including roles and responsibilities
5. Develop Bid Packaging of Project Scope and Bid Schedule

### **B. Development Cost Budget & Project Financing**

The Consultant shall assist the District to complete or monitor the following:

1. Review project cost information and develop initial Project Budgets based on Architect's Pre-Ref. Costs Estimates.
2. Review/Develop Anticipated Cash Flow Schedule for Construction Period
3. Preparation and presentation Project Cost, Schedule and Management Program to the Superintendent and Board of Education as required.
4. Provide regular updates of project budget and schedule status.

### **C. Design Management & Coordination**

The Consultant shall assist the District to complete or monitor the following:

1. Review scope of work, program and project criteria with the appropriate district personnel and identify and confirm that the district's criteria are being met.
2. Negotiate (with District's Construction Legal Counsel and the Superintendent of Schools) contracts with the Architect and other Design Professionals. Administer these contracts through their final completion including the negotiation and resolution of any changes which are required from the owner's perspective on its behalf and subject to its approval. Enforce contract provisions. Review and process requests for payment.
3. Lead the project team in regularly reviewing the client program requirements, project criteria and District Standards and seek consensus of all affected district user groups.
4. Review, evaluate and recommend to the District required scope or design changes that may be presented or become necessary in accordance with the District's established program requirements & standards and seeking consensus of affected User groups.
5. Attend project review meetings, monitor design professional progress and adherence to defined scope, standards and objectives.
6. Coordinate and manage Drawing Review, Constructability Review and Value Engineering Analysis Process
7. Assess the need for a project commissioning process.
8. Review & Confirm with Design Professionals that all SED Review & Approvals have been completed

### **D. Construction Contracting Process Management - Bid, Negotiation, Award**

The Consultant shall assist the District to complete or monitor the following:

1. Review (and modify or develop with District's Legal Counsel as necessary) forms of Construction Agreement and related Documents (Form of Contract, General Conditions, Supplementary Conditions, Bid Documents, Divisions 1 & 0 of Specifications).

2. Develop with successful contractors their Schedule of Values.
3. Prepare and Review with Owner Project Status Reports
4. Set Final Construction Budgets
5. Buy Out Owner Purchase Items
6. Finalize Site Staging & Phasing plans
7. Review, Set-up and Implement Owner's Project Cost Tracking, Control and Reporting System (Budget, Commitments, Estimate-to-Complete, Projected Final Cost, Progress Payments To-Date)
8. Oversee the finalization of design, budgeting, bidding, and award of pending bid packages for ancillary services (such as material testing and inspection services). Coordinate the required activities of services provided by other in-house owner units (i.e. Commissioning, utility connections, telecommunications, etc. as may be applicable). Work with the District and its design professionals to attempt to ensure that bid packages are issued in a timely manner. Facilitate any special meetings to coordinate the timely participation by other owner service providing groups.

#### **E. District Facility Operations, Bldg. and District Administration Coordination**

The Consultant shall assist the District to complete or monitor the following:

1. Assure coordination of building program activities and construction activities with Building Administrators.
2. Communicate project schedule, progress, status, and issues on a regular basis (not less than monthly and more often as required by the phase of the project) with the building administrator for each building and with Supt. of Buildings & Grounds for coordination of District Facilities Operations & Maintenance.
3. Assure that all appropriate district personnel are invited to attend the project Pre-Bid, Pre-Construction Coordination & Project Orientation Meetings and are informed of important actions or activities.
4. Assure that all project documentation is organized and available for the Supt. of Buildings & Grounds throughout the course of the project.
5. Report on project progress and issues to District Administration and the Board of Education as required throughout the course of the project.
6. Assure that the District's Health & Safety and other applicable Policies & Procedures are provided to and reviewed by the Contractors and Subcontractors (made a part of their contract) and that violations will be identified, documented and corrective actions taken.
7. Assure District regularly reviews the project's progress and status with its Health & Safety Committee as required by Commissioner's Regulation 155.5.
8. Work with District Administration & Staff to provide information and/or make presentations on building project to community or other interested groups as required.

### **3. BID, AWARD & CONSTRUCTION PHASE SERVICES**

#### **A. Construction Contract – Bid & Award Monitoring**

The Consultant shall assist the District to complete or monitor the following:

1. Assure Construction Contract Bidding is legally noticed and advertised in accordance with District bidding policies and procedures
2. Attend or conduct as required the project Pre-Bid Meetings
3. Review Construction Bid Packages (Site, Building, etc.) prepared by the Design Professionals
4. Issue construction documents (Bid Packages) for Bid and Receive & Open Bids submitted to the District
5. Evaluate Bids (with the assistance of the design professionals)
6. Evaluate, Recommend the Selection & Acceptance Contractor Bid Alternates
7. Make recommendations of the Successful Bidders & Finalize the Award of Contracts

#### **B. Construction Monitoring**

The Consultant shall assist the District to complete or monitor the following:

1. Attend or conduct as required the project Pre-Bid, Pre-Construction Coordination & Project Orientation Meeting
2. Monitor Contractor Mobilization
3. Coordination of Project Team (Architects, Engineers, Prime Contractors, Testing & Inspection, etc.)
4. Attend regular Project Team Progress Meetings and assure that the architect is issuing formal "action item" type meeting minutes identifying actions required by responsible individuals and associated timing
5. Facilitate, conduct and document regular Owner Project Team Coordination & Progress Meetings
6. Facilitate, conduct and document any Special/Topic related Meeting as may be necessary from time to time to focus on the resolution or coordination of special issues.
7. Attend project coordination meetings held at the site to monitor progress, identify issues and provide Owner input and/or direction as appropriate.
8. Monitor Contractor Buy-out
9. Progress Monitoring, Quality Control Monitoring, Testing & Inspection Consultant Monitoring & Supervision
10. Establish, Track & Monitor Cash flows
11. Evaluate Contractor Change Order Requests, make recommendations to the Owner and complete final Change Order Negotiations with the Contractor. Meetings as necessary with the design professionals and/or the contractor(s) to review the reasons, justifications, and supporting data relating to change requests. When appropriate, establishing equitable solutions to cost issues. Assure appropriate filing of SED documentation.
12. Provide routine updates of the total project's budget and schedule; update project's estimate to complete and projected final cost and completion schedule; clarify variances; develop and recommend variance mitigation and management strategies; assess and recommend the periodic utilization of the Owner's project contingency as necessary using the Owner's existing contingency utilization criteria; work with owner personnel to identify funding sources applicable to scope changes.
13. Contract Administration: Review and monitor contractor and vendor compliance with the applicable portions of the Owner's established policies, procedures and requirements relating to: Bonds, Insurance, Payment Affidavits, Sworn Statements, and Affirmative Action (Target Group Business & EEO) with responsible owner personnel. Work with contractors and vendors to improve their compliance in any deficient areas as they may become evident.
14. Monitor and make recommendations to the Owner relative to critical project correspondence issues by:  
a.) reviewing correspondence sent to the Owner and copied to the consultant from the design professional, general contractor and others and providing or recommending the Owner response as determined appropriate. b.) identifying issues requiring documentation to protect the Owner's and providing or recommending such documentation. c.) monitoring the resolution of any identified unresolved issues. Respond in writing when appropriate on behalf of the District to all critical correspondence.
15. Progress Payment Administration including the review and recommendation for payment of each contractor application for payment as well as the monitoring of invoice payment for compliance with contract requirements.
16. Schedule Monitoring & Management including the interface of owner project-related activities with the Prime Contractors and Contractors' Construction Schedule.
17. Administer or provide necessary data to the Owner for its existing Project Cost Tracking, Projection and Reporting Systems.
18. Prepare and Review with Owner Monthly Project Status Reports. Reports to include among other things:  
a.) Comparisons of project budget with current commitments, expenditures, and estimated costs to complete the project (Projected Final Cost). b.) Monitoring and reporting of project changes utilizing a change management system which tracks the scope, cost and reason for the changes. This report shall be the basis of evidencing required written recommendations relating to consultant's services on a monthly basis.
19. Coordinate with and represent the Owner with governing authorities (SED, Local Building, Planning, and Fire & Health Inspection Officials) during the construction of the project through substantial completion. Develop understanding of the Owner's structure relating to these governmental authorities and identifying actions required and facilitating resolution by the project team.

20. Coordinate work progress, status and issues with Building Maintenance. Schedule all required utility shut-downs with Supt. of Buildings & Grounds and the Prime contractors.
21. Develop Construction Deficiency and Punch lists
22. Obtain Building Certificates of Occupancy - Temporary & Permanent

**B. Construction & Contract Administration**

The Consultant shall assist the District to complete or monitor the following:

1. Owner Review & Monitoring of Construction Documents - Addenda & Bulletins
2. Owner Review & Monitoring of Shop Drawing & Submittal Review
3. Owner Review & Monitoring of Request for Clarification Review
4. Owner Review & Monitoring of Field Modifications
5. Owner Review & Monitoring of Alternate/Value Engineering Review
6. Owner Review & Monitoring of Compliance with Contract Provisions and Requirements

**4. SYSTEMS START-UP BUILDING ACCEPTANCE & CONSTRUCTION  
CONTRACT CLOSE-OUT**

**A. System start-up & Building Acceptance**

The Consultant shall assist the District to complete or monitor the following:

1. Coordinate with and assist the District with selecting and coordinating designated Building Systems Commissioning Agent, including scheduling inspections, acceptance testing and demonstrations.
2. Review, Organize, Catalog and Turn-over of the project Shop Drawings, Submittals, Record Documents, Operations & Maintenance Manual Sets for District Facility Management and Operations.
3. Coordinate & Schedule Training of Building Management & Maintenance Staff as required.

**B. Construction Contract Close-out & Warranty Administration**

The Consultant shall assist the District to complete or monitor the following:

1. In conjunction with the project Architect and the Prime contractors, determine substantial and final completion
2. Administer & monitor Punch list Completion
3. Negotiate Final Change Orders
4. Make Final Payments & Collect all Final Waivers & Releases of Lien Rights
5. Close-out/Demobilize Construction Field Offices