

**LEGAL NOTICE  
REQUEST FOR QUALIFICATIONS/PROPOSAL  
TOWN OF ELLINGTON  
OCTOBER 26, 2012**

**COMMISSIONING AUTHORITY FOR THE INDOOR AIR QUALITY AND M/E/P  
SYSTEM RENOVATIONS AT CRYSTAL LAKE ELEMENTARY SCHOOL**

Sealed proposals will be received by the Town of Ellington, acting through its Finance Officer to provide architectural and related consultant services. Proposals are to be marked **COMMISSIONING AUTHORITY FOR THE INDOOR AIR QUALITY AND M/E/P SYSTEM RENOVATIONS AT CRYSTAL LAKE ELEMENTARY SCHOOL** and delivered to the Finance Officer, Ellington Town Hall clearly marked, sealed and shall be directed to:

Nicholas J. DiCorleto, Jr., Finance Officer  
Town of Ellington  
55 Main Street  
Ellington, CT 06029

Proposals will be received until **3:00 P.M., THURSDAY, NOVEMBER 15, 2012**. Proposals will then be publicly opened, reviewed for compliance with proposal procedures as to copies, enclosures and attachments in the Meeting Hall of Town Hall.

The complete Request for Qualifications/Proposal may be obtained at the office of the Finance Officer, 55 Main Street, Ellington, Connecticut during normal business hours, or on the Ellington Town web site [www.ellington-ct.gov](http://www.ellington-ct.gov).

No proposal may be withdrawn for a period of ninety (90) days after opening of the proposals without approval and written consent of the Town of Ellington.

The Town of Ellington reserves the right to reject any or all proposals, to waive any informalities, omissions, excess verbiage or technical defects in the responses and the Town need not necessarily award the contract to the proposer offering the lowest price if, in the opinion of the Town, it would be in the best interest of the Town of Ellington to accept another proposal.

TOWN OF ELLINGTON

By   
Nicholas J. DiCorleto, Jr.  
Finance Officer

# Town of Ellington



## Request For Qualifications/Proposals (RFQ/RFP) for a Commissioning Authority for the Indoor Air Quality (IAQ) and M/E/P System Renovations At Crystal Lake Elementary School

All submittals must be made in accordance with the specifications supplied by:

Finance Officer  
Town of Ellington  
55 Main Street  
Ellington, Connecticut 06029

Submittals will be received in the Finance Office until **November 15, 2012, 3:00 PM Eastern Time**

Nicholas J. DiCorleto, Jr.  
Finance Officer  
Town of Ellington  
55 Main Street  
Ellington, CT 06029

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**REQUEST FOR PROPOSALS  
TOWN OF ELLINGTON, CONNECTICUT**

**Crystal Lake Elementary School IAQ and M/E/P Improvements  
Commissioning Authority**

**I. PROJECT SPECIFICATIONS**

**1. Introduction**

The Town of Ellington is seeking qualifications and cost proposals for Commissioning Authority construction management services during the construction of the indoor air quality and M/E/P system improvements at Crystal Lake Elementary School. The project will also entail site work drainage improvements, exterior courtyard renovations, ceiling tile and lighting replacement along with other associated work related to the M/E/P improvement work. The scope of the construction work is further outlined in the forms and attachments under the Table of Contents. The general intent of this request for qualifications/ proposals is to select a firm that can provide the services necessary for properly Commissioning a public school in accordance with the USGBC® requirements under Fundamental Commissioning for Schools. The selected firm shall apply Leadership in Energy and Environmental Design (LEED®) standards and State of Connecticut High Performance Building Guidelines Including but not limited to the LEED® for Schools (New Construction and Major Renovations) November, 2007 (or latest applicable document) as it applies to fundamental Commissioning. The Town has retained an Architecture and Engineering Design consulting firm as part of this project. Although the Town is seeking a Commissioning Authority and the design plans will incorporate LEED® strategies wherever possible, certification is NOT being pursued. An Energy Modeler is not anticipated for this project and thus should not be included in the Commissioning scope of work.

The total construction estimate, excluding all soft costs, contingencies, furniture fixtures and equipment and bonding fees is approximately \$14,242,500.

The Town of Ellington requests proposals for Commissioning Authority Services for the above project located at 284 Sandy Beach Road in Ellington, CT. Only proposals from experienced and reputable firms will be considered. Request for Proposal documents are available at the office of the Finance Officer, Town of Ellington, 55 Main Street, Ellington, CT, Telephone (860) 870-3115, Monday through Friday or by accessing the Town's website at <http://ellington-ct.gov>. Sealed proposals must be submitted to the Finance Officer no later than **3:00 p.m. (Prevailing Time) on Tuesday, November 15, 2012**. The Town of Ellington reserves the right to reject any and all proposals in whole or in part, or to waive technical defects, irregularities and omissions, if it's in the best interests of the Town.

Nicholas J. DiCorleto, Jr.  
Finance Officer  
Town of Ellington  
55 Main Street  
Ellington, CT 06029

## **2. Commissioning Authority Scope of Work**

The Town is interested in securing the services of a Commissioning Authority for this project to work directly for the Owner.

The Commissioning Authority's scope of services shall generally follow the items outlined here in this RFQ/RFP, and the Town will utilize the attached two page consulting agreement, subject to Corporation Counsel's review and approval for this contract.

To allow a base line comparison, the respondent shall provide (but not limited to) the following services, as a minimum:

- Include commissioning requirements in the design development and construction document phases
- Develop and utilize a commissioning plan
- Verify installation, functional performance, training and documentation
- Complete a commissioning report.
- Include the printing costs for all interim reports, final reports, travel, lodging, meals, telecommunication, CAD drafting, testing equipment and other customary costs in the fixed fees. 12 copies of all interim and final reports will be required as part of the fixed fees. Please identify any fee exclusions on a separate page with Form 1.

### **Understanding the Commissioning Process**

Fundamental Commissioning requires the designer to incorporate standards and strategies into the design process at a very early stage because there are so many important stages from site selection, conceptual planning, permitting and construction documents that are Commissioning dependent.

Verify that the building's energy-related systems are installed, calibrated and perform according to the Owner's Project Requirements, Basis of Design and Construction Documents.

### **Benefits of Commissioning**

Benefits of commissioning include reduced energy use, lower operating costs, reduced contractor callbacks, better building documentation, improved occupant productivity and verification that the systems perform in accordance with the owner's project requirements.

### **Requirements**

The following commissioning process activities shall be completed by the commissioning team, in accordance with this LEED® for Schools Reference Guide:

- 1) Designate an individual as the Commissioning Authority (CxA) to lead, review and oversee the completion of the commissioning process activities.
  - a) The Commissioning Authority shall have documented commissioning authority experience in at least two building projects.
  - b) The individual serving as the Commissioning Authority shall be independent of the project's design and construction management, and may not be employees of the firms providing those services. The Commissioning Authority may be a qualified employee or consultant of the Owner.
  - c) The Commissioning Authority shall report results, findings and recommendations directly to the Owner.
- 2) Develop and incorporate commissioning requirements into the construction documents.
- 3) Develop and implement a commissioning plan.

- 4) Verify the installation and performance of the systems to be commissioned. Re-verify systems that are identified during the process to be recalibrated or reconfigured by the Commissioning firm.
- 5) Complete a thorough and final commissioning report with an executive summary.

### **Commissioned Systems**

Commissioning process activities shall be completed for the following energy-related systems, at a minimum:

- 2.1 Heating, ventilating, air-conditioning and refrigeration (HVAC&R) systems (mechanical and passive) and associated controls and power systems
- 2.2 Lighting and day lighting controls
- 2.3 Plumbing systems, water heating and fixture performance.

### **Potential Technologies & Strategies**

The process of commissioning a school involves a detailed review of building systems during construction to confirm that they are functioning properly. This ensures that benefits of energy savings and high indoor environmental quality are actually realized during building operations as intended. Commissioning provides a level of quality control that has been shown to reduce the need for contractor callbacks. In order to meet this prerequisite, owners are required to use qualified individuals to lead the commissioning process. Qualified individuals are identified as those who possess a high level of experience in the following areas:

- 2.5 Energy systems design, installation and operation
- 2.6 Commissioning planning and process management
- 2.7 Hands-on field experience with energy systems performance, interaction, start-up, balancing, testing, troubleshooting, operation and maintenance procedures
- 2.8 Energy systems automation control knowledge: Owners are encouraged to consider including water-using systems, building envelope systems and other systems in the scope of the commissioning plan, as appropriate. The building envelope is an important component of a school facility which impacts energy consumption, occupant comfort and indoor air quality. Building envelope commissioning, while not required by LEED® and State of Connecticut High Performance Building Standards can result in significant financial savings and reduced risk of poor indoor air quality.

This LEED® for Schools Reference Guide provides guidance on the rigor expected for this prerequisite for the following:

- 2.9 Owner's Project Requirements
- 2.10 Basis of Design
- 2.11 Commissioning Plan
- 2.12 Commissioning Specification
- 2.13 Performance Verification Documentation
- 2.14 Commissioning Report
  - 2.14.1 Ensure accurate as-built drawings and contract document revisions are maintained and distributed to all members of the Commissioning Team.
  - 2.14.2 Redevelop documentation and training programs for all building and operators and occupants.
  - 2.14.3 Retain Commissioning Documents as part of the permanent building records.

Commissioning is the process of ensuring that all building systems are installed and perform interactively according to the design intent. The installation is adequately documented and that the Operators are adequately trained. It serves as a tool to minimize post occupancy operational problems. It establishes testing and

communication protocols in an effort to advance to the building systems from installation to full dynamic operation and optimization. Building system problems can often be identified, documented and corrected through this process which can have a positive affect on energy bills and occupant comfort (Manke, Hittle et al. 1996) Fundamental Commissioning Tasks will include:

2.14.4 Act as the Owner's Commissioning Authority for Systems Commissioning during all phases of Construction.

2.14.5 Develop a design intent and basis of design documentation, which will provide the framework and guidance for the design of the Commissioning Systems. By introducing standards and strategies early in the process, implementation of selected measures and target requirements can be easily adopted into the Construction documents. The Owner shall provide a list of requirements including HVAC, Lighting, indoor environment, energy efficiency, siting and environmental responsiveness of the facility. Any important criteria, ideas, or objectives shall be documented by the owner along with building specifics such as: occupancy, space, process requirements, and other owner specifics. The basis of design shall include applicable codes, policies and standards; load and climatic assumptions that influence design decisions. This should be a narrative documents updated with each phase of design.

2.14.6 Commissioning requirements will be included in the Construction Documents (Plans, Specifications) which will describe the commissioning documents such as: Pre Functional Test Plan; Functional Test Plan; Model Commissioning Manual; Test Performance; Commissioning of Systems in field; Final Commissioning Report.

2.14.7 Develop a Commissioning Plan; The Commissioning Plan outlines the Commissioning Process. It is part of the Contract Documents and stipulates Contractor responsibilities that are part of this project. It also indicates the details of the functional and pre-functional performance testing that is required in which the contractor shall participate.

2.14.8 Meet with the Ellington Public Schools Facilities Manager and staff (also hereinafter referred to as 'Owner'), the Contractors, General Contractor or Construction Manager and appropriate Sub-contractors to verify individual roles and responsibilities for completing the commissioning process as specified in the Commissioning plan(s)/specifications.

2.14.9 Participate with the Owner to integrate the Commissioning process into the contractor's schedule.

2.14.10 Verify that all specified contractor start-up and testing procedures have been completed and documented. Secure all specified start-up and testing documentation for inclusion in the final Commissioning Report.

2.14.11 Develop physical inspection checklists and inspect all related construction for completeness, workmanship and compliance to the design specifications. Document all issues and note the party responsible for resolution.

2.14.12 Develop, coordinate, witness, perform and document functional performance testing procedures. Verify functional performance of specified systems in all

operational modes and through every potential sequence of operation. Document all issues and note the party responsible for resolution.

2.14.13 Identify, document and track the status of all commissioning related issues through final resolution. Attend job site meetings to communicate the status of issues. Verify the appropriate resolution of outstanding issues.

2.14.14 Verify specified training has been provided to designated Town of Ellington personnel.

2.14.15 Verify specified operations and maintenance materials are complete and delivered to the Town of Ellington and school facility.

2.14.16 Document all Commissioning procedures and submit a final comprehensive report to the owner upon completion.

2.14.17 Commissioning Preparation and Organization:

2.14.17.1 Commissioning Meetings including Kick off Meeting

2.14.17.2 Develop Database for Tracking Issues / Concerns

2.14.17.3 Develop Commissioning Plan

2.14.18 Installation Inspection:

2.14.18.1 System Installation Inspection

2.14.18.2 Summary of High Priority Installation Concerns and Documentation

2.14.18.3 Re-inspect Systems after Correction

2.14.19 Performance Verification:

2.14.19.1 Review Major System Tests/Start-ups Documentation

2.14.19.2 Pre-Functional Testing

2.14.19.3 Develop Performance Testing Procedures

2.14.19.4 Performance Verification of Systems (includes One (1) Re-test)

2.14.19.5 Summary of High Priority Operational Concerns and Documentation

2.14.20 Corrective Action Support:

2.14.20.1 Develop Corrective Action Plan

2.14.20.2 Technical Support In Resolution of Operating Concerns

2.14.20.3 Corrective Action Validation

2.14.21 Maintenance Planning and Operations Training

2.14.21.1 Coordinate and Support Training

2.14.21.2 Review Operations and Maintenance Manuals

2.14.21.3 Track and Overview Contractor Training

2.14.22 HVAC Systems:

2.14.22.1 Air Handling Units

2.14.22.2 Primary / Secondary Chilled Water System

2.14.22.3 Air-Cooled Chiller

2.14.22.4 Fan Coil Units

2.14.22.5 Exhaust fans

2.14.22.6 Make-up Air Systems

2.14.22.7 Glycol Filling Systems

2.14.23 Electrical Systems:

2.14.23.1 Transformer

2.14.23.2 Power Quality

2.14.23.3 Lighting and Lighting Controls

2.14.24 Energy Management Control System:

2.14.24.1 EMS Workstation and Network

- 2.14.24.2 EMS Communication
- 2.14.24.3 EMS Sequence of Operation
- 2.14.24.4 Field Devices

#### 2.14.25 Plumbing Systems

- 2.14.25.1 Water Heater and Systems
- 2.14.25.2 Plumbing Fixtures

#### 2.14.26 Preventative Maintenance System Development:

- 2.14.26.1 Development of PM Tasks and Detailed Descriptions of Work

### 2.15 Other Scope of Work Requirements

- Comply with USGBC® for LEED® Commissioned buildings and State of Connecticut High Performance Building Standards as further outlined here in the project. Work with design firm during development of construction documents and review for compliance with Commissioning requirements.
- A minimum of bi-weekly meetings with the Owner, Architect and others, as appropriate, as well as night meetings as needed (typically once a month with the Permanent Building Committee (PBC)).
- Assistance in the review of Bids received for Commissioning components.
- Assistance in preparation of recommendations concerning bids.
- Provide input to General Contractor or Construction Manager in developing a detailed project schedule including Commissioning components.
- Provides services, attend meetings and complete all Commissioning requirements through both heating and cooling seasons.
- Provide services until all punchlist items related to any component outlined in the commissioning process are complete and accepted by owner.

### 2.16 Post-Construction Phase

As necessary to comply with the requirements outlined below and complete commissioning process in accordance with USGBC® Standards and State of Connecticut High Performance Building Standards and as further required in this RFQ/RFP.

## 3. Proposals

This Request for proposal requires that each section be addressed, and the Town reserves the right to reject responses that do not follow the format given.

- Executive Summary
- History
- Firm Organization:
- Approach to Project:
- Fee Proposal- Lump Sums broken into phases (based on Form 1) with hourly rates for additional work beyond construction schedule shown.
- Staffing Plan and Fee for Services. Provide a staffing plan for completion of the work. Indicate hourly rates of the staff, the estimated hours required completing the various phase tasks, and a total cost to the Town. Include all meetings, staff time, coordination, and all required project expenses in your total cost to the Town.

- Briefly describe the respondent, the approach to the project, the staffing available and envisioned for use on the project, and the capability of the respondent to operate to the given schedule while providing the services required. Give an overview of the history of the respondent with emphasis, upon recent public school projects of a similar nature but within the past 5 years. Include name of owner, architect, cost and completion date. Submission of these names shall constitute your permission for the PBC or other Town representatives to contact those individuals. Highlight significant projects, accomplishments, and awards, as well as alliances or partnerships with other contractors, professionals, and owner's particular discussion should be given on HVAC M/E/P and indoor air quality type projects completed by the firm within the last 5 years. Describe methods of cost control; show examples of conceptual estimates to actual bid results and final costs of projects completed within the last five years.
- Describe the Respondent's organization. Specify the personnel and equipment available for assignment to the projects. Specify the bonding capability and rating of the Respondent. Supply resumes of principal personnel as an appendix. Indicate contact person for the proposal phase, telephone and fax numbers. Describe, in whatever manner the Respondent deems appropriate, the Respondent's approach to the Project commencing with date of hire and ending with completion of punch list items and close out of paperwork. List software utilized for estimates and project management.
- Provide a list of contacts complete with phone and fax numbers for all projects listed (as required). State whether any projects of any kind resulted in a legal dispute and, if so, describe the dispute and the outcome of same. Submission of these names shall constitute your permission for the PBC or other Town representatives to contact those individuals.
- Provide claims loss letter from insurance company covering the past five years, and provide a summary of claims and lawsuits in the last five years, detailing the claimant, project, date of the claim and narrate the current disposition of the claim or lawsuit.
- Project Approach: Provide a summary of the company's commissioning process, from Design Development, thru Construction Documents, in the Construction Phase and in the Acceptance and Post Occupancy Phases.
- Additional Information. Provide any additional information about your firm or process which you believe may be useful and applicable for consideration.
- Exceptions. Provide detailed list and explanation of any and all exceptions being made in this proposal. The submittal shall have each of these sections clearly delineated.

The Respondent shall submit an original and ten (10) copies of the Proposal together with one (1) electronic copy on a CD or flash drive. A Certificate of Insurance, showing evidence of compliance with basic insurance requirements, will be required only at the time of negotiations.

### 3.1 Information

Technical and other questions should be directed to Mr. Kenneth J. Sgorbati, P.E., LEED, Principal Engineer, Silver Petrucelli & Associates, 3190 Whitney Avenue, Hamden, CT 06518, Phone 203-230-9007x222, E-mail [ksgorbati@silverpetrucelli.com](mailto:ksgorbati@silverpetrucelli.com).

#### 4. Basis of Award

Selection will be based upon the proposals submitted, qualifications, costs and interview process, if necessary. Respondents selected for interviews will be given no more than thirty (30) minutes in which to present their qualifications and proposal. At the interview each firm must elaborate on the project schedule and cost and confirm if the project can be completed within the specified budget with the Commissioning Authority's approach and fees. The Commissioning Authority firm must identify all key field and management personnel and make them available for questions during the interview. Respondents shall be asked to submit Fee Proposals along with additional materials deemed necessary. The Owner will give consideration to the following aspects of the Submittal and Presentation:

- Documented successful performance of firm on similar undertakings.
- Team Composition. Provide resumes of key individuals. Identify staff to be assigned and certify immediate availability for the requested Design Phase Project Management Services. Provide evidence of successful completion of comparable school Town projects. Indicate experience of the staff on similar projects
- The number of school or municipal HVAC M/E/P system projects Commissioned in the last 5 years (\$3,000,000 construction value or higher).
- Documented successful past performance of firm and project staff on similar undertakings (\$3,000,000 construction value or higher).
- Manpower planning.
- Extent of services offered.
- References and reputation.
- The Town reserves the right to accept any proposal or to reject any or all proposals and to waive informalities in proposals if deemed to be in the best interest of the Town.
- The Town of Ellington is not liable for any cost incurred by any respondent prior to the issuance of a contract and purchase order.

#### 5. Acknowledgement Form

**IMPORTANT INFORMATION:** Acknowledgement Form (Form 2) is located in this RFP package (at end) and shall be filled out and returned immediately.

#### 6. Site Considerations

Crystal Lake Elementary School, 284 Sandy Beach Road, Ellington, Connecticut 06029

#### 7. Bid Price

Lump Sum in phases listed in Form 1 (based on Construction Schedule shown) with hourly rates and unit prices for additional work beyond construction schedule shown.

#### 8. Project Schedule

The following is the proposed schedule for the selection process and work program and is subject to change based on unforeseen conditions and requirements of the Town:

Advertise RFP	October 26, 2012
<b>Request for Proposals Due</b>	<b>November 15, 2012</b>
PBC Interviews (if any)	week of December 3, 2012
Contract Award to Commissioning Authority	December 20, 2012
Construction Work (includes punchlist, Commissioning, startup both seasons, closeout)	January, 2013 – February, 2016

## **II. SUBMISSION REQUIREMENTS**

### **1. Submission Due Date**

Qualifications and Proposals will be accepted at the Town of Ellington, Office of the Finance Officer, 55 Main Street, Ellington, Connecticut, 06029 until **November 15, 2012 3:00 PM Prevailing Time**. Proposals received after that time will not be considered. Bids will be publicly read at time of bid opening and will be reviewed by staff and the Permanent Building Committee at a later date. Submittals may be withdrawn 90 days after opening if no award has been made.

- 2. Pre-Bid Meeting - None Required.** However, interested respondents can tour the existing facility by contacting Peter R. Williams, Owner's Agent, at (860)870-3124 or [pwilliams@ellington-ct.gov](mailto:pwilliams@ellington-ct.gov).

### **3. Vendor Information**

#### **A. Vendor Overview**

Please provide the following:

- The name and location of your company, including the office location that will be serving the Town.
- A brief general description of your business.
- The number of years your company has been in business.
- Is your company a subsidiary of another corporation? If so, what is the name of the parent company?
- The number of personnel employed by your company (please include the number of staff dedicated to provide requested services).
- The primary line of business of your firm.
- Current commissioning workload of the firm and identifying the company resources and staff that are assigned to the current commissioning workload, dates, etc.

#### **B. Client Base**

Provide specific reference information for three clients you have served, relevant to the work proposed, to include:

- Client name and location
- Starting date of service
- Contact name, title and telephone number

### **4. Addenda to this RFP**

If it becomes necessary to revise any part of this request or if additional data is necessary to enable interpretation of provisions of this document, revisions or addenda will be provided to all prospective firms who have completed and filed Form #2 with the Finance Officer. Such revisions or addenda will additionally be posted on the following website: <http://ellington-ct.gov/Plugs/RFP.aspx> Form #2 includes an acknowledgement page that shall be returned to the Finance Officer upon receipt, to ensure proper notification of changes to the published documents. The Town of Ellington does not assume responsibility for any vendor that does not receive revisions or addenda, where the vendor has not returned this form.

No inquiry received with five (5) days of the date fixed for opening the RFQ/P's will be given consideration or a response. Every interpretation made to a bidder will be in the form of an addendum to the specifications.

Questions regarding this document and bidding procedures should be referred to Nicholas J. DiCorleto, Jr., Finance Officer at (860) 870-3115 or at ndicorleto@ellington-ct.gov.

The right is reserved to reject any and all bids, in whole or in part, to award any part or parts, or total bid, and to waive any informality or defects, if it is deemed in the best interest of the Town. If it becomes necessary to revise any part of this RFP or these Specifications or otherwise provide additional information, an addendum will be issued by the Town to all prospective Bidders who have received copies of the RFP and have returned the acknowledgment page or attended the pre-bid meeting (if required).

### **5. Qualifications Criteria**

A firm submitting qualifications shall be considered as qualified for this project, provided that the firm has provided sufficient supporting documentation. The Town of Ellington shall be the sole judge in determining the sufficiency of said supporting documentation.

## **III. CONTRACT CONSIDERATIONS**

### **1. General Considerations**

The sections listed below are informational only; firms submitting qualifications are hereby advised that any firm awarded a contract shall be subject to these conditions. Qualification packages are not required to contain any documents described within this section (e.g. certificates of insurance are required solely at the time of contract execution with a contracted firm).

### **2. Equal Opportunity – Affirmative Action**

The successful firm shall comply in all aspects with the Equal Employment Opportunity Act. A firm with 15 or more employees shall be required to have an Affirmative Action Plan which declares that the firm does not discriminate on the basis of race, color, religion, sex, national origin or age, and which specifies goals and target dates to assure the implementation of equal employment. A firm with fewer than 15 employees shall be required to have a written equal opportunity policy statement declaring that it does not discriminate on the basis of race, color, religion, sex, national origin or age. Findings of noncompliance with applicable State and Federal equal opportunity laws and regulations could be sufficient reason for revocation or cancellation of this contract.

### **3. Indemnification**

The awarded firm shall agree to indemnify, defend, and save harmless the Town of Ellington, as well as its officers, agents and employees from any and all claims and losses to the extent caused by the negligent act, error or omission of the awarded firm resulting from the performance of this contract. The Town, as a sovereign government, cannot indemnify businesses or individuals.

### **4. Insurance**

Prior to the execution of any contract, the Town of Ellington requires that any awarded contractor providing materials, equipment or services to the Town, must provide to the Town a certificate of insurance (Acord or other approved format) naming the Town of Ellington and the Ellington Board of Education as additional insured, for the following:

(Minimum Limits)

General Liability	Each Occurrence	\$1,000,000
	General Aggregate	\$2,000,000
	Products/Completed Operations Aggregate	\$2,000,000
Auto Liability	Combined Single Limit	\$1,000,000
	Each Accident	\$1,000,000
Professional Liability	Each Claim or Each Occurrence	\$1,000,000
	Aggregate	\$3,000,000
Umbrella (Excess Liability)	Each Occurrence	\$5,000,000
	Aggregate	\$5,000,000

Any subcontractor to a contracted firm shall be likewise covered, and shall furnish certificates of coverage acceptable to the Town before starting work.

## **5. Termination**

Please note that any contract executed by the Town of Ellington, may be terminated by the Town upon (30) days written notice, in the event that the Town determines that termination is in its best interest. In the event of termination, the Contractor shall be compensated for all work properly performed in accordance with the approved fee schedule submitted after award.

### **A. Termination For Convenience**

In the event that the contract is terminated or canceled upon request and for the convenience of the Town, without the required thirty (30) Days' advance written notice, then the Town shall negotiate reasonable termination costs, if applicable.

### **B. Termination For Cause**

Termination by the Town for cause, default or negligence on the part of the Contractor shall be excluded from the foregoing provision; termination costs, if any, shall not apply. The thirty (30) days' advance notice requirement is waived in the event of termination for cause.

## **6. Non-Appropriation of Funds**

Please note that any contract executed by the Town of Ellington, Permanent Building Committee or the Board of Education is subject to the appropriation of funds on an annual basis.

## **7. Contract Governed by Connecticut Law**

Please note that any contract executed by the Town of Ellington shall be governed by and construed in accordance with the laws of the State of Connecticut and the ordinances of the Town of Ellington.

Further, any such contract, and any other documents associated therewith, shall be in compliance and conformance with all applicable provisions of the General Statutes of the State of Connecticut, and the rules and regulations pertaining thereto, as the same may be amended from time to time, including, but not limited to, all provisions pertaining to Public School Building Projects.

## **IV. Conditions of Bid and Selection**

1. This Request for Qualifications/Proposal by the Town and these Specifications are intended to provide interested parties with uniform information concerning the requirements for submitting bids. In responding to this RFP, the bid requirements and content format indicated herein must be adhered to. Failure to respond to all information requested may result in disqualification of the bid.
2. The bid price shall include all items and services typical of this type of project. The Town standard consultant agreement form will be used. In the event that a prospective design firm takes exception to any provisions to this RFP, said firm shall submit a second bid price with enumerated and identified conditions.
3. The submission of a bid will be construed to mean that a Bidder is fully informed as to the extent and character of the Town's requirements, and the Bidder represents that it is willing and able to furnish the services requested in a satisfactory manner in complete compliance with the specifications. Once submitted, all bids become property of the Town. Bids must be firm and may not be withdrawn for ninety (90) days, or until the Town awards the contract for design services, whichever comes first. The Town shall not be liable for any costs incurred by Bidders in preparing or submitting bids.
4. The Town reserves the right to reject any bid, in whole or in part, and to waive technical defects, qualification, irregularities and omissions, if, in its sole judgment, the best interest of the Town will be served by doing so. Each bid received within the required time frame will be evaluated individually by the Town. Each evaluation will be made using consistent judgments concerning the qualifications of each bidder and the responsiveness of each bid.
5. In the event that the selected Bidder fails to execute a contract within (30) days after notification of award by the Town, the Town may cancel its selection without penalty and reconsider other bids or solicit new bids. The Town of Ellington, in its sole discretion, may extend this period for a short time if negotiations are proceeding in good faith.
6. Town shall consider the successful Bidder to be the sole point of contact with regard to Commissioning services, including payment to and performance of service by the design firm, its agents and employees. The successful Bidder shall not be allowed to assign the contract or delegate any responsibilities or duties to any third party without prior written consent of the Town.
7. If warranted by the PBC, firms selected for interview will be provided with the interview panel; the selected firms will be required to submit affidavits relating to their relationship(s) with members of the panel. The names of interview committee members will be released solely for the purpose of preparation of affidavits; the selected firms shall not directly contact the panel members prior to or immediately following the interview process.
8. Non-collusion Representation: In submitting a bid, the Bidder shall declare that its bid is made without any connection with any persons making another bid for the same contract; that the bid/proposal is in all respects fair and without collusion, fraud or mental reservation; that no official of the Town, or any person in the employ of the Town is directly or indirectly interested in said bid or in the supplies or work to which it relates, or in any portion of the profits thereof.
9. Conflict of Interest Disclosure Required: No purchase shall be made from nor shall services (other than services as an officer, agent, or employee of the Town) be secured from any officer or employee of the Town, or from any partnership or corporation in which such officer or employee is a partner, or officer, or holds a substantial interest, unless such relationship and the fact that such purchase is contemplated shall be known in writing to the agency making such purchase, and notice thereof posted for at least five (5) days before such purchase be made in the office of the agency making such purchase and in the public place in the Ellington Town Hall.

## **V. Award Considerations**

The Town may reject any or all proposals or submittals for such reason as it may deem proper. In acceptance of proposals or submittals, the Town will be guided by consideration of the interests of the Town. The Town also reserves the right to negotiate further with one or more of the firms as to any features of their proposals or submittals and to accept modifications of the work and price when such action will be in the Best Interest of the Town. The Award will be made pursuant to Connecticut law from a pool of not more than the four (4) most responsible qualified bidders after a public selection process and will be made to the most responsible qualified bidder, taking into consideration all criteria included within this request for proposals. The cost portion of the evaluation will be based upon a proposal fees submitted and will also be used as part of the criteria for selection.

# Request For Qualifications/Proposals (RFQ/RFP) for Commissioning Authority for the Indoor Air Quality (IAQ) and M/E/P System Renovations at Crystal Lake Elementary School

**Due Date: November 15, 2012, 3:00PM Prevailing Time**

Finance Officer  
Town of Ellington  
55 Main Street  
Ellington, CT. 06029

In accordance with the Town's requirements, fees should be based on the tasks outlined in request for qualifications/proposals, and the information provided by the drawings, cost estimate and schedule as of the schematic design phase. The undersigned agrees to provide services as defined herein.

Because plans are in schematic design phase, please present your fees as noted below, which may be used as a basis to negotiate a firm price that will prevail for the full project.

	<u>Fee</u>	<u>Hours</u>
Schematic Design Phase		
• Design Development: Review Documents and Prepare Report	\$ _____	_____
• Construction Document Phase	\$ _____	_____
• Construction Administration	\$ _____	_____
• Final Completion, Report and Punchlists:	\$ _____	_____

- Percentage markup and estimated reimbursable expenses for each phase. \_\_\_\_\_ %
- List and estimate on another sheet any other miscellaneous costs for each phase.
- Please include your hourly rates per discipline and title on another sheet.

The undersigned, who is legally authorized to sign bid documents on behalf of the firm is familiar with the conditions surrounding this Request for Qualifications/Proposals, is aware that the Town reserves the right to reject any and all proposals, and is making submission without collusion with any other person, individual or corporate.

*Form 1 (Page 2)*

---

**Signature**

---

**Company Name**

---

**Printed Name**

---

**Signature**

---

**Address**

---

**Title**

---

**Town**

**State**

**Zip**

---

**Date**

---

**Federal ID #**

---

**Telephone Number**

---

**Email address**

---

**Fax Number**

**RETURN THIS FORM IMMEDIATELY!**

Acknowledgment: Receipt of RFP Documents

**Commissioning Authority for the Indoor Air Quality (IAQ) and  
M/E/P System Renovations at Crystal Lake Elementary School**

Please take a moment to acknowledge receipt of the attached documents. Your compliance with this request will help us to maintain proper follow-up procedures while ensuring that all recipients have the opportunity to submit qualifications.

Date issued:

Date documents received

\_\_\_\_/\_\_\_\_/\_\_\_\_

Do you plan to submit a response?

Yes \_\_\_\_\_ No \_\_\_\_\_

Print or type the following information:

Company name: \_\_\_\_\_

Address: \_\_\_\_\_

Town or Town: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Received by: \_\_\_\_\_

**Note: Faxed acknowledgments are requested! FAX (860)870-3158  
A cover sheet is NOT necessary.  
IMPORTANT: DO NOT FAX QUALIFICATIONS.  
QUALIFICATIONS MUST BE SUBMITTED IN SEALED PACKAGE(S)**

**TOWN OF ELLINGTON  
(RFQ/RFP) for  
Commissioning Authority for the  
Indoor Air Quality (IAQ) and M/E/P System Renovations**

**PERMANENT BUILDING COMMITTEE  
55 Main Street  
ELLINGTON, CONNECTICUT 06029**

**Proposal Check List**

This form need not be returned with your submittal. It is suggested that you review and check off each action as you complete it.

- 1. The proposal has been signed by a duly authorized representative of the company.
  - 2. Fee schedule you have offered has been reviewed and verified.
  - 3. Any technical or descriptive literature, drawings or proposal samples that are required have been included with the submittal.
  - 4. Any addenda to this document have been acknowledged and included.
  - 5. The envelope has been addressed to: Finance Officer  
Town of Ellington  
55 Main Street  
Ellington, CT 06029
- Re: RFP Crystal Lake Elementary School IAQ and  
M/E/P Renovations Commissioning Authority Services
- 6. The envelope has been clearly marked with the proposal number and opening date.
  - 7. Make sure the original is clearly marked.
  - 8. The proposal is mailed or hand-delivered in time to be received no later than the designated opening date and time. Late responses are **NOT** accepted under any circumstances. Faxed responses are not accepted. Please allow enough time if mailing your submittal.



STATE OF CONNECTICUT – COUNTY OF TOLLAND  
INCORPORATED 1786

# TOWN OF ELLINGTON

55 MAIN STREET – PO BOX 187  
ELLINGTON, CONNECTICUT 06029-0187  
TEL 870-3100 FAX 870-3102  
[www.ellington-ct.gov](http://www.ellington-ct.gov)

MAURICE W. BLANCHETTE  
First Selectman

JAMES M. PRICHARD  
Deputy First Selectman

LAURIE E. BURSTEIN  
A. LEO MILLER, JR.  
LORI L. SPIELMAN  
RONALD F. STOMBERG  
JOHN W. TURNER

SPECIAL MEETING  
BOARD OF SELECTMEN  
Monday, November 28, 2011  
Town Hall - Meeting Hall

## Minutes

SELECTMEN PRESENT: Maurice Blanchette, A. Leo Miller, James Prichard, Ronald Stomberg and John Turner

SELECTMEN ABSENT: Laurie Burstein, Lori Spielman

OTHERS PRESENT: Nicholas DiCorleto, Director of Finance; Don Davis, Director of Emergency Management; Stephen Cullinan, Superintendent, Ellington Public Schools; Anthony T. Littizzio, BOE Director of Business Services; Board of Finance Members: John Rachek, Michael D. Varney, Richard J. Cleary, Jr. and Barry Pinto; Board of Education Members: Daniel C. Keune, Chair, Gary J. Blanchette, Ann Marie Hayes, Kristen Picard-Wambolt, James M. Stoughton, Howard Friedman, Tracey Kiff-Judson and Michael Young; Arlo Hoffman, Planning & Zoning Chair; Permanent Building Committee Members: Peter W. Welti, Chair, Thomas Adams, Gary T. Feldman, Sr., David Stavens and Jeffrey Gerber; Hugh Pearson, Moser Pilon Nelson Architects; Erin Quinlan, Patch.com

### 1. CALL TO ORDER

First Selectman Blanchette called the Special Meeting of the Board of Selectmen (BOS) to order at 7:32 p.m.

### 2. CITIZENS' FORUM: No one came forward.

### 3. BOE FACILITIES COMMITTEE:

- Review Plans for Expansion/Renovation of Crystal Lake School and Alterations/Re-tasking of Windermere School

Mr. Blanchette welcomed members of the Board of Finance, Board of Education, Permanent Building Committee, School Administration, other invited guests and members of the public. He introduced Stephen Cullinan, Superintendent of Ellington Public Schools, who will present an overview of the plans for the

renovation and expansion of Crystal Lake Elementary School and alterations and renovations for re-tasking Windermere Intermediate/Elementary School.

Mr. Cullinan said that the concept of renovating the Crystal Lake School has been talked about since the early 1990s. Formally, in 2004, there was a study committee for facilities, headed by Mr. Blanchette, including Mr. Miller as well as other members who now serve on the Board of Education. In 2004-2005, the Facilities Committee made a presentation to the BOS and the BOF. In 2006, there were several conceptual drawings that were done by Moser Pilon Nelson Architects with regard to options for Crystal Lake School, the Windermere School, the High School and the Middle School. In 2008, the economy was not in good shape, and the BOE decided that it was not a good time to present the proposals. In 2010, the BOE reformed its Ad Hoc Facilities Committee. The Town's purchase of 59 South Road makes it possible to present this proposal. Mr. Cullinan said it would be difficult to guess what position the Town would be in now had this property not been acquired.

Mr. Cullinan said that as they went forward with the process there were several options on the table. One was a very large expansion to the Middle School, adding 18 classrooms and putting grades 6, 7 & 8 there. On paper, it could be built, but in reality, it was not going to work. Mr. Cullinan said that he was glad that Mr. Varney, Fire Chief, was on the Committee at the time, as he pointed out that an emergency vehicle would not have been able to get to the back of the school, which pulled that option off the table. He said that anyone who has pulled in and out of the driveway at Crystal Lake School knows that it is not a good situation and a new entrance and exit, from a safety standpoint, needs to be done. There are a number of other inefficiencies in the school as well.

Mr. Cullinan said that from an enrollment point of view, the Ellington Public Schools have been growing. Each annual presentation to the BOF at budget time shows that the schools have grown by 20% in the last decade and are projected to grow approximately 20% in the next decade.

Mr. Cullinan introduced Mr. Hugh Pearson, Moser Pilon Nelson Architect, wjp presented a detailed PowerPoint presentation [attached]. He reviewed the proposed expansion and renovation of Crystal Lake School, as well as the proposed renovations to Windermere School. He provided a breakdown of anticipated costs, expected enrollment numbers, as well as the State of Connecticut reimbursement expected for each project, and the total projected cost to the Town. He reviewed the highlights of each area, as noted on the attached presentation.

Mr. Pearson noted one of the major concepts is that the State has put into law the need for building systems based on conventional/high performance equipment. In doing the renovation, it focuses on energy consumption, so instead of meeting established code, the project will exceed code by 21%. Therefore, the Town does a modeling process in terms of how the existing building would work as renovated under current code, and then designs into it factors of improved efficiency of mechanical systems in order to exceed code by 21%, in terms of energy use. One of the considerations is installing geo-thermal HVAC systems. The initial cost may not support full geo-thermal, but there may

be a hybrid approach that may be appropriate. The project will be full code compliant and full ADA compliant. Mr. Pearson also reviewed the acoustic standards that must be adhered to so that every student has an equal opportunity to hear in the classroom.

Mr. Pearson reviewed the process and time-line for building the Crystal Lake School expansion and completing the renovations, as outlined in the presentation. He said that the project will be sequenced for minimal disturbance. He said it will be approximately a 2-year time-frame of sequencing construction, with the completion anticipated to be the beginning of the school year in 2015. The schedule will be built into the contract documents and that has to be carefully managed during the process.

Mr. DiCorleto asked if the Crystal Lake School, after expansion, will be able to accommodate just the projected 337 students, or could it handle additional students. Mr. Cullinan responded that 337 students is what the expected enrollment is, but it will handle more students.

Mr. Turner asked if the cost estimates include furnishings, technology and an emergency generator for the building. Mr. Pearson said that it does.

Mr. Adams asked if when the Committee went through the process, did they look at past projects to determine if there are any lessons that could be learned going forward and Mr. Pearson said that you always learn from past projects. He said that the intent is to have open communication between the Building Committee and the Superintendent's Office. Mr. Cullinan added that during the development process, members of the Committee and members of the BOE have been involved.

Mr. Gary Blanchette asked if there are better companies out there for construction than the one that has been used. Mr. Pearson said that more and more projects are utilizing construction management, in terms of the advisor version as opposed to the construction manager at-risk version. He said that the impression at this point is more that considering general construction, if you get the right company, based on the size of the project and the money involved, a good general contractor might be a better approach, but sometimes when you get into a complicated job when you are renovating an occupied building, construction management can have advantages, too.

Mr. Rick Cleary asked what kinds of contingency numbers have been put on the project. Mr. Pearson said that there will be some design contingency, construction contingency and there is some cost escalation built in.

Mr. Kuene said that as a point of interest, one that the Facilities Committee addressed that hasn't come up yet tonight, is the availability of adequate fire safety vehicles. He said that the Crystal Lake Fire Department has a relationship with two area fire departments that have adequate equipment, so they will not be requesting a new truck. The Fire Department did make a request for installation of a pipe at a nominal cost that would be done during construction which would make it beneficial in dealing with a fire situation.

Mr. DiCorleto asked if the Crystal Lake School gym will have showers, in the event the building needs to be used as a shelter. Mr. Pearson said that there will be showers.

Mr. Cleary asked if the proposal to change the Center School to K through 6, and move the Pre-K out, will be done with no renovations and at no cost. Mr. Cullinan said that there may be some slight renovation costs that would come under the operating budget, such as furnishings, if one of the classrooms is redesigned to accommodate a science classroom.

Mr. DiCorleto asked if, with grades 5 and 6 moving to the Center School, there will be a need for new athletic fields. Mr. Cullinan responded that there is no space for athletic fields, so the present space will remain as is.

Mr. Miller said he mentioned some time ago his concerns with a safety issue regarding detention ponds. Mr. Pearson said he understood Mr. Miller's concerns.

Mr. Cleary asked if additional staff will be required in this proposal. Mr. Cullinan said that there will be a need for two teachers; one for grade 5 and one for grade 6. This adds a cost of two teaching positions with benefits. He said that, unrelated to the project, several years ago Ellington cut 1.6 physical education positions and 1 art position. He said that at some point, regardless of the project and enrollment, there will be a need for an additional art teacher.

Mr. Welti asked if, as the public meetings start, consideration has been given to potential questions such as the fact that fifteen years ago, Ellington had three K through 6 schools and now is proposing to go back to that model. Mr. Cullinan said that the number one issue is space. The most cost-effective manner to take care of the enrollment of this district over the next decade is this plan, which offers the most sound educational program.

Mr. Cullinan asked anyone who may think of additional questions after the meeting to call or email him. He noted that if there are approvals to move forward with referendum, there will be a number of public forums in the community to address questions.

Mr. Blanchette thanked all for attending.

4. ADJOURNMENT:

MOVED (STOMBERG), SECONDED (MILLER) AND PASSED UNANIMOUSLY, BY THOSE PRESENT, TO ADJOURN THE MEETING OF THE BOS AT 8:36 P.M.

Submitted by

  
LouAnn Cannella

Approved by

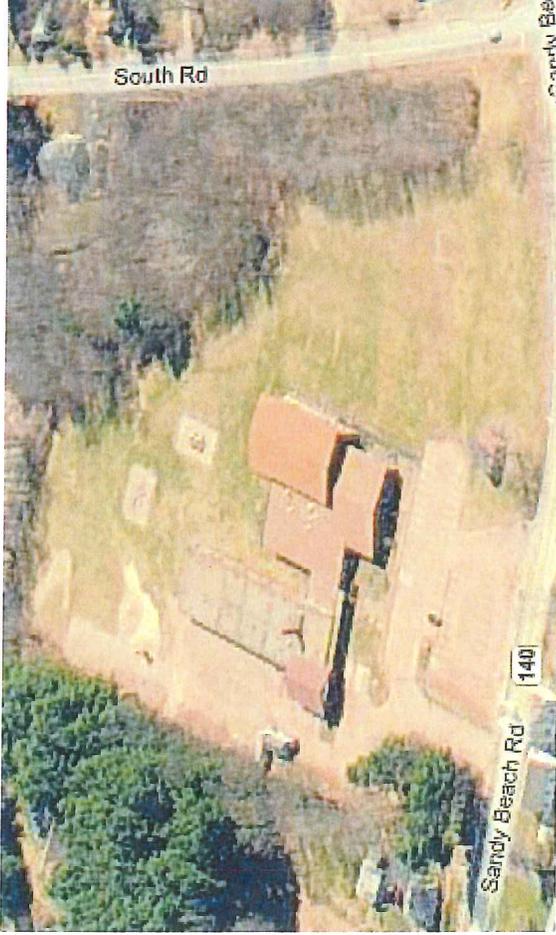
  
Maurice Blanchette

Presentation to  
**Town of Ellington**  
**Board of Education**

SCHOOLS STUDY  
TASK B

November 10, 2011

MOSER  
PILON  
NELSON  
ARCHITECTS



**Crystal Lake Elementary School**



**Windermere Intermediate / Elementary School**

# Crystal Lake School

- Currently a neighborhood K-4 grade school
- Proposed change to a neighborhood K-6 school
- Acquisition (Site 59 South Road)

Estimated K-6 enrollment: 337 students

Square footage:  
 Existing = 29,600 SF  
 Proposed = 18,350 SF  
 Total = 47,950 SF

Maximum State reimbursement potential for application year 2012: 58.12%

Reimbursement projection per space standards: 54.38%

Partial and ineligible costs est.: 4%

Net reimbursement from State of Connecticut: 50.38%

ELLINGTON  
 CRYSTAL LAKE  
 (MAX REIMB. RATE = 58.12%)

### SPACE STANDARDS WORKSHEET

This worksheet should be completed and submitted with the application for any N (new), E (extension), A (alteration), or RENO (renovation) project, or combination of such types of project.

### State Standard Space Specifications

Projected Enrollment	Pre-K and K	1	2	3	4	5	6	7	8	9	10	11	12
0 - 350	124	124	124	124	156	156	180	180	180	194	194	194	194
351 - 750	120	120	120	120	152	152	176	176	176	190	190	190	190
751 - 1500	116	116	116	116	148	148	170	170	170	184	184	184	184
Over 1500	112	112	112	112	142	142	164	164	164	178	178	178	178

- Under the column headed "Projected Enrollment", find the range within which your school's highest projected 8 year enrollment falls.
- Using the figures on that line, complete the grid below for only those grades housed within the school.

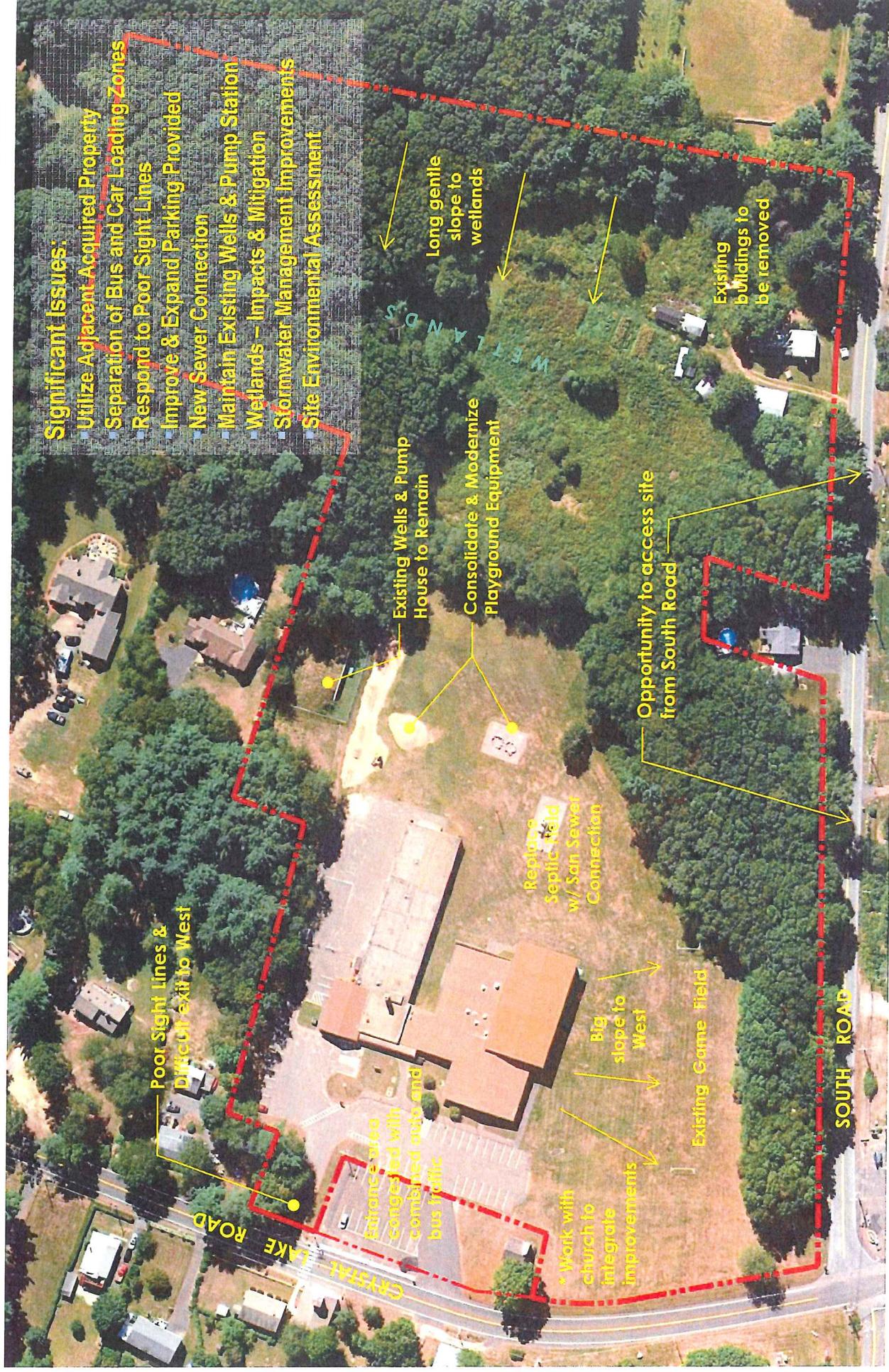
Grade	6	7	8	9	10	11	12
Pre-K	-	-	-	-	-	-	-
K	124	-	-	-	-	-	-
1	124	-	-	-	-	-	-
2	124	-	-	-	-	-	-
3	124	-	-	-	-	-	-
4	124	-	-	-	-	-	-
5	156	-	-	-	-	-	-
(a) Total (grades Pre-K through 12)	512	7	-	-	-	-	-
(b) Number of grades housed	7	-	-	-	-	-	-
(c) Average [(a)/(b)]	73.14	-	-	-	-	-	-
(d) Highest Projected 8-year Enrollment	337	-	-	-	-	-	-
(e) Maximum Square Footage [(c) x (d)]	14,169	-	-	-	-	-	-

- Total square footage at completion of project:
  - Existing area constructed pre-1950: 29,600
  - Multiply "a." by 80%: 23,680
  - Area (at completion of project) constructed 1950 or later: 47,950
  - Square footage for space standards computation (b+c): 47,950

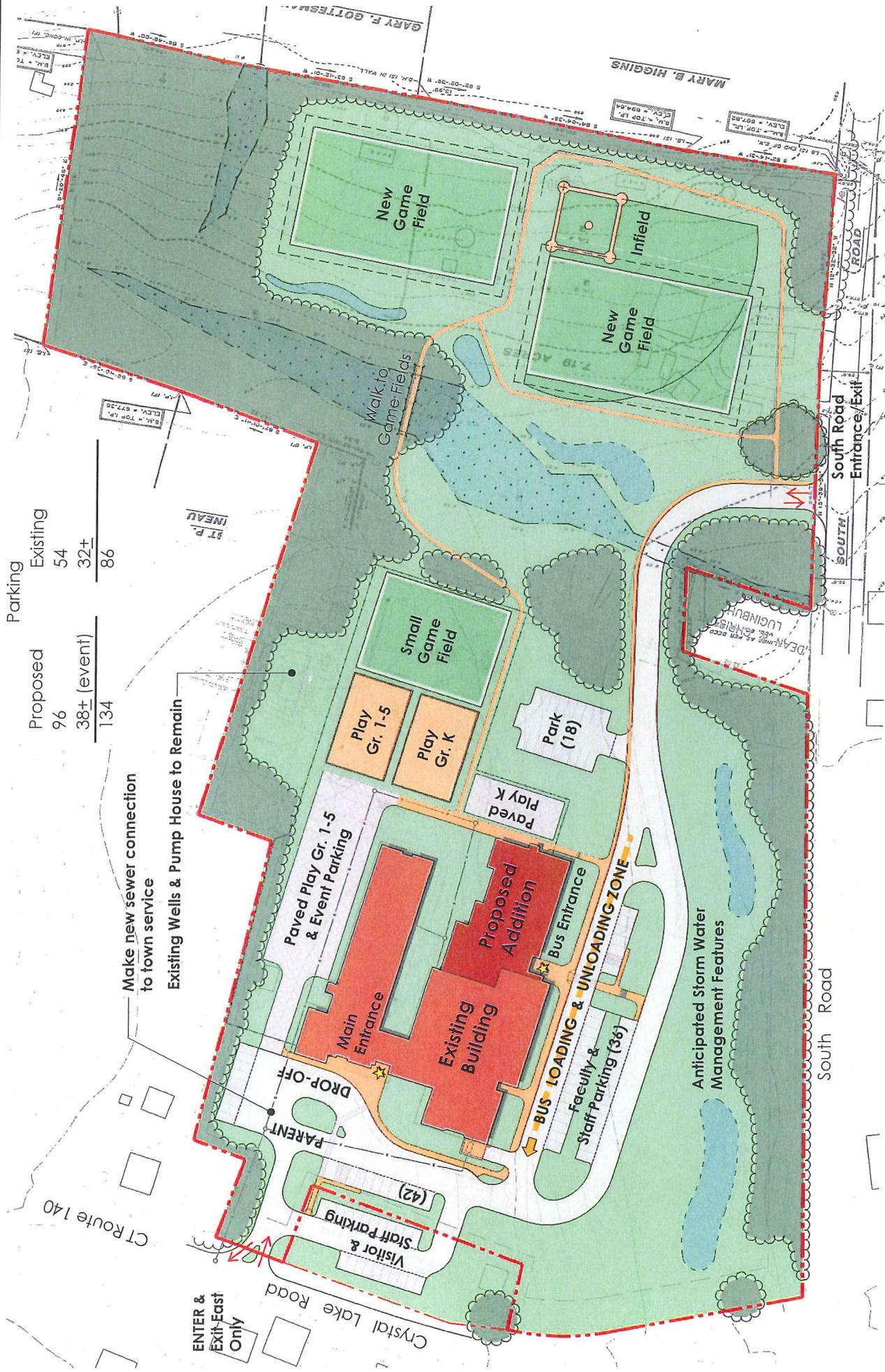
If line 2(e) is greater than line 3(d) there is no grant reduction.  
 If line 3(d) is greater than line 2(e), divide line 2(e) by line 3(d).  
 23,680 / 47,950 = 49.38%  
 \* This factor will be used to reduce total eligible costs because of space in excess of the maximum eligible for reimbursement.  
 If a project exceeds the standards solely as the result of extraordinary programmatic requirements, the superintendent may submit a request to the Commissioner for a waiver. A detailed list of space allocations for all extraordinary programs with explanations must be included with the request.

( NET REIMBURSEMENT = 54.38% )

# Crystal Lake School Ex. Site Conditions



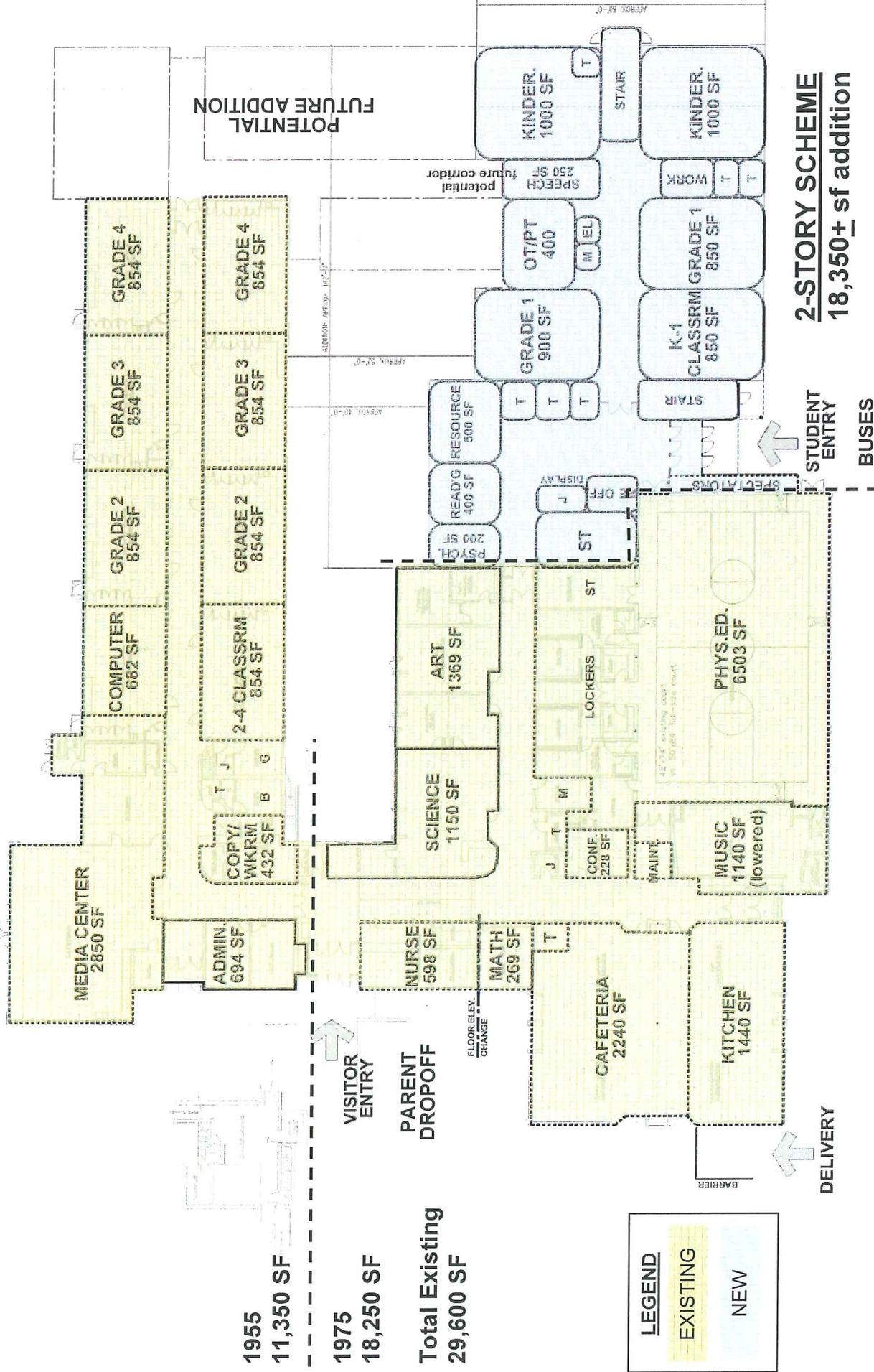
# Crystal Lake School Site Plan



Parking	
Proposed	Existing
96	54
38+ (event)	32+
134	86

Make new sewer connection to town service  
Existing Wells & Pump House to Remain

# Crystal Lake School Programmatic Plan



1955  
11,350 SF

1975  
18,250 SF

Total Existing  
29,600 SF

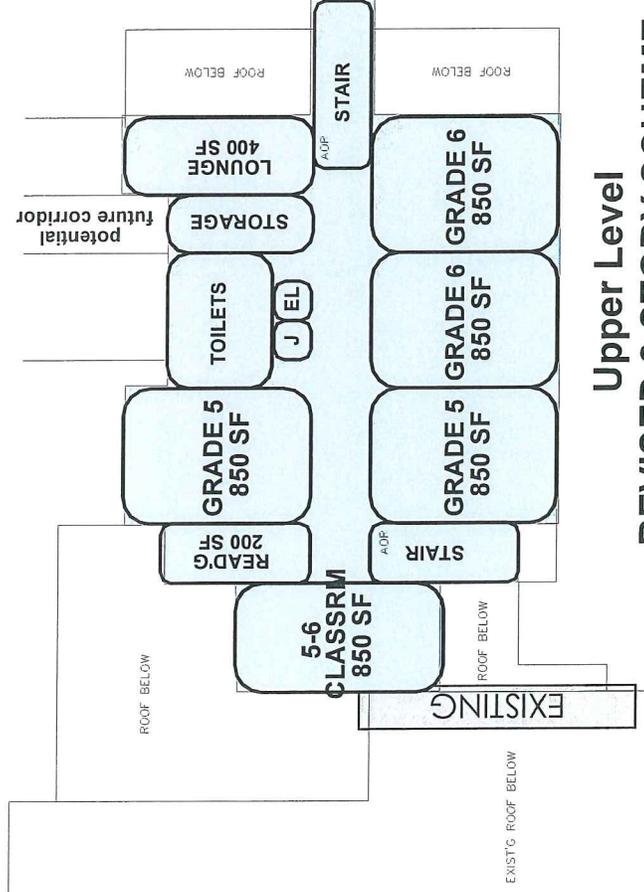
**LEGEND**

EXISTING

NEW

**2-STORY SCHEME**  
18,350+ sf addition

# Crystal Lake School



**Upper Level  
REVISED 2-STORY SCHEME**

## Scope

- Full “renovation;” like new
- Building envelope, systems
- High performance (comparable to LEED Silver)
- Consider geo-thermal/conventional HVAC
- Code compliance
- ADA
- Hazmat
- Acoustic standards
- Core facilities for K-6 (media center, gym, cafeteria)





# Windermere Reimbursement / Program

## Programmatic Alterations

### Scope

- Currently a neighborhood K-4 school with District 5 & 6 Grades; enrollment 800+
- Proposed change to a neighborhood K-6, with districtwide PK
- Enrollment to match square footage = 660 students
- Square footage = 84,519
- Suggested alterations = 10,000+ SF
- Alteration scope
  - Limited systems, modifications, capital improvements
  - No additions, no site work, Pre-K playscape?
  - Computer labs (2)
  - Grades 5-6 core renovations
  - Support rooms
  - Administration, guidance
  - Staff areas

**ELLINGTON WINDERMERE** (KAY REIMB RATE = 58.12%)

**SPACE STANDARDS WORKSHEET**

This worksheet should be completed and submitted with the application for any N (new), E (extension), A (alteration), or RENO (renovation) project, or combination of such types of project.

Projected Enrollment	State Standard Space Specifications												
	Pre-K	1	2	3	4	5	6	7	8	9	10	11	12
0 - 350	124	124	124	124	124	155	155	180	180	180	194	194	194
351 - 750	120	120	120	120	120	152	152	176	176	176	190	190	180
751 - 1500	116	116	116	116	116	148	148	170	170	170	184	184	184
Over 1500	112	112	112	112	112	142	142	164	164	164	178	178	178

1. Under the column headed "Projected Enrollment", find the range within which your school's highest projected 8-year enrollment falls.

2. Using the figures on that line, complete the grid below for only those grades housed within the school.

Pre-K	120	6
K	120	7
1	120	8
2	120	9
3	120	10
4	120	11
5	152	12

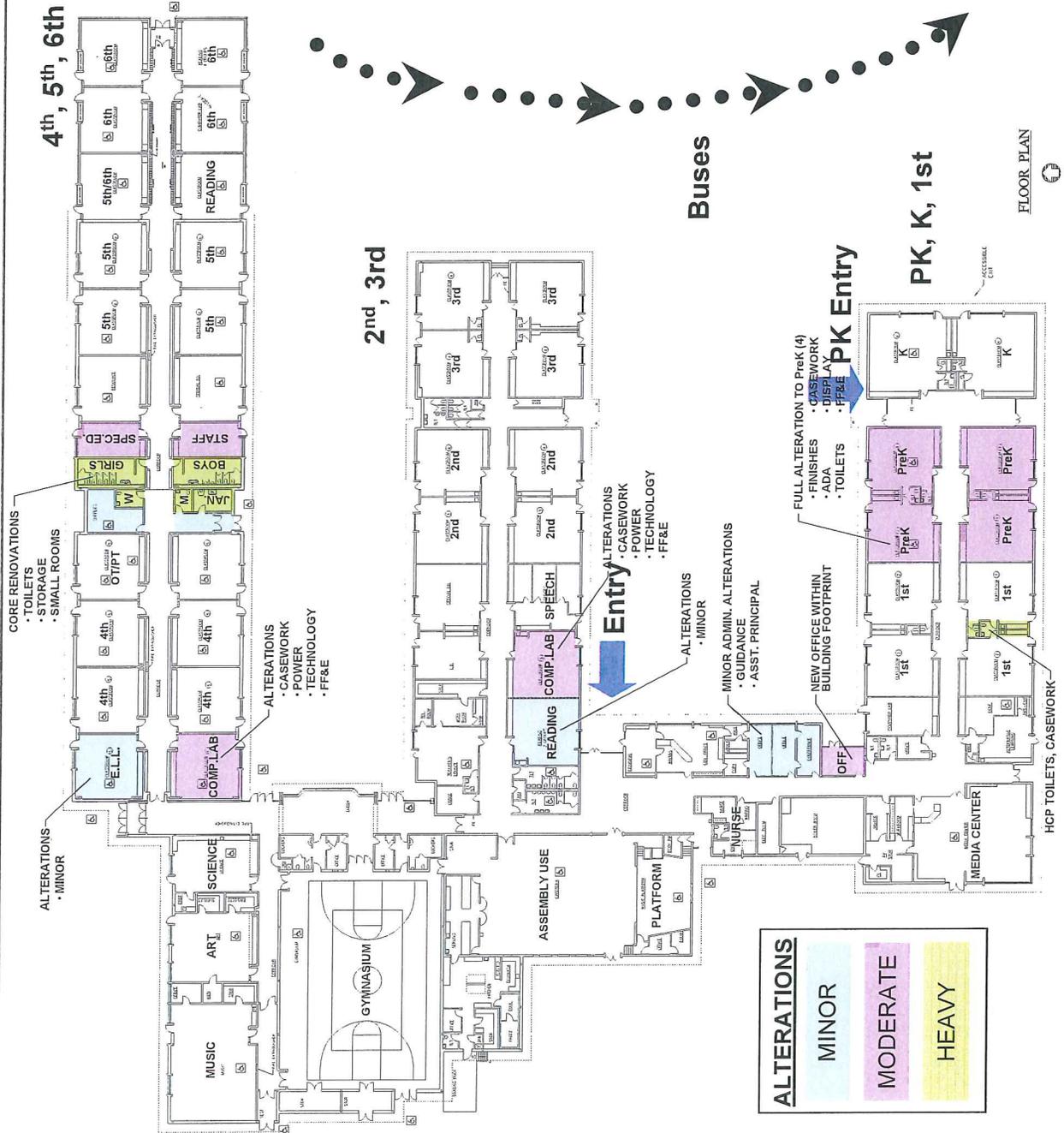
(a) Total (grades Pre-K through 12) 1024  
 (b) Number of grades housed 8  
 (c) Average [(a)/(b)] 128  
 (d) Highest Projected 8-year Enrollment 800  
 (e) Maximum Square Footage [(c) x (d)] 84519

3. Total square footage at completion of project:  
 a. Existing area constructed pre-1950. 84519  
 b. Multiply "a." by 80% 67615  
 c. Area (at completion of project) constructed 1950 or later. 84519  
 d. Square footage for state standards computation (b+c). 84519

If line 2(e) is greater than line 3(d) there is no grant reduction.  
 If line 3(d) is greater than line 2(e), divide line 2(e) by line 3(d). 99.95%

\* This factor will be used to reduce total eligible costs because of space in excess of the maximum eligible for reimbursement.  
 If a project exceeds the standards solely as the result of extraordinary programmatic requirements, the school superintendent may submit a request to the Commissioner for a waiver. A detailed list of space allocations for all extraordinary programs with explanations must be included with the request. **ESTIMATED:** (NET REIMB. RATE = 58.09%)  
 \* Ineligible scope will impact cost reimbursement.

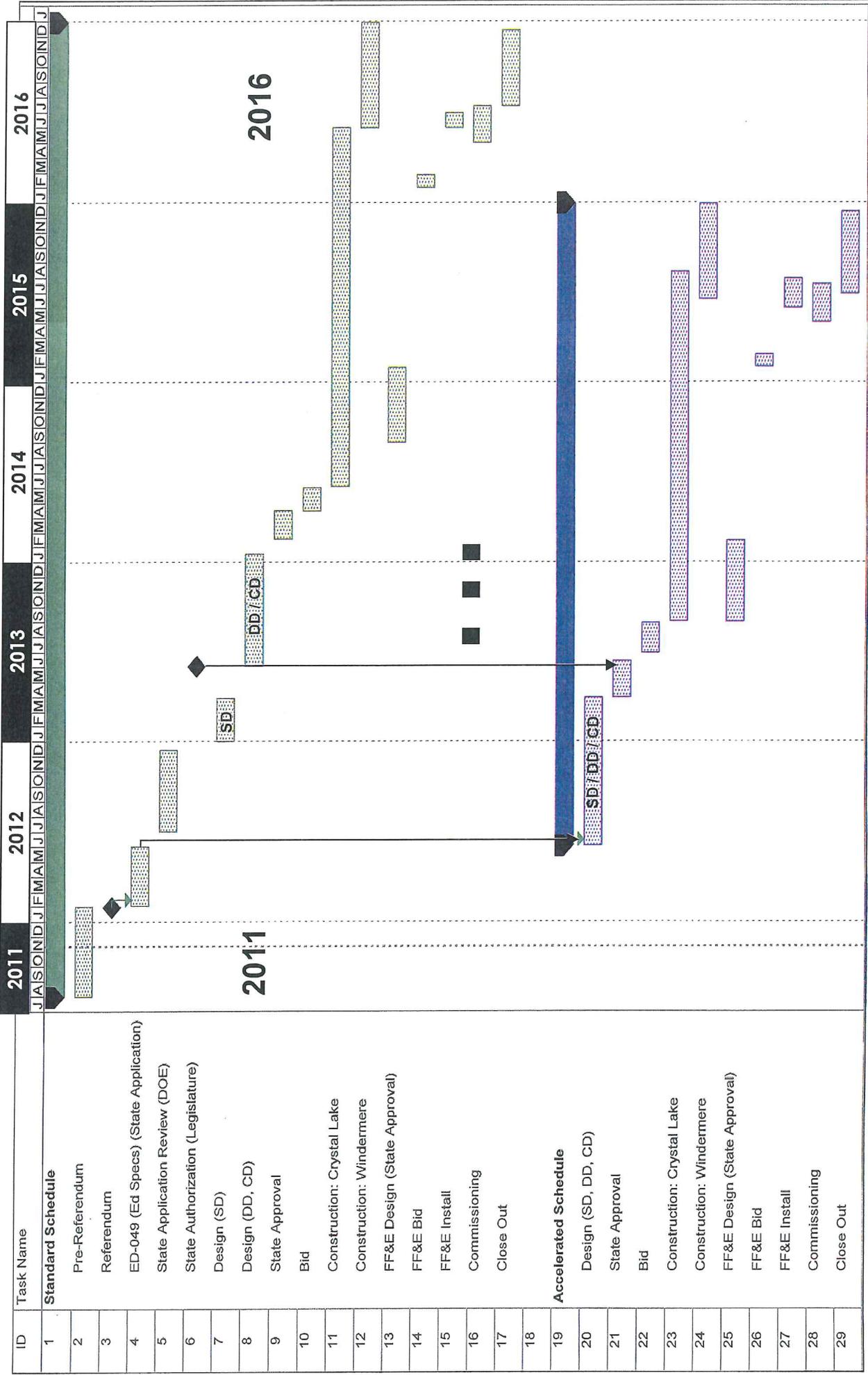
# Windermere School



## Construction Schedule

- Work over summer(s)
- Work after Crystal Lake

# Conceptual Schedule



# Estimated Project Cost Summary

Crystal Lake	Windermere	Combined Totals
Bldg Envelope renovate new	Bldg Envelope renovate new	
\$ 1,770,800	\$ -	
\$ 1,659,300	\$ -	
Bldg Infrastructure renovate new	Bldg Infrastructure renovate new	
\$ 1,264,000	\$ 64,697	
\$ 629,600	\$ -	
Site	Site(PK playscape)	
\$ 3,398,000	\$ 214,000	
Renovations	Renovations	
\$ 3,792,800	\$ 1,747,618	
Additions	Additions	
\$ 1,728,000	\$ -	
Total Const	Total Const	\$ 16,268,815
FF&E & Technology	FF&E	\$ 1,100,000
\$ 1,000,000	\$ 100,000	
Soft Costs 20%	Soft Costs 20%	\$ 3,253,763
\$ 2,848,500	\$ 405,263	
<b>Total Project</b>	<b>Total Project</b>	<b>\$ 20,622,578</b>
Est Reimb. Bldgs	Est Reimb.	\$ 10,380,035
\$ 9,114,246	\$ 1,265,789	
Est Reimb. Site Acquisition		\$ 162,486
\$ 162,486		
<b>Total Town Cost</b>	<b>Total Town Cost</b>	<b>\$ 10,080,057</b>
\$ 8,814,268	\$ 1,265,789	

Site Acquisition-Estimated	
7.19 acres	\$ 340,000
Est.Reimb. @ 47.79%	\$ 162,486
Total Town Cost	\$ 177,514

## Crystal Lake Notes:

- Building systems are based on conventional/high performance equipment.
- Geo-Thermal (Hybrid scenario) may add up to \$1m. Detailed site/soils analysis/engineering are required to further define scope and budget.

## Site Acquisition Notes:

- Costs are not included in project costs as it was a previous acquisition, however estimated reimbursement costs are included here.
- Existing site =9.07 acres.
- Added site = 7.19 acres.
- Total site = 16.26 acres; Allowable acres for reimb. = 13.37 acres
- Est. acquisition reimbursement = 47.79%

The Board of Education is hopeful that its request for the Elementary School Expansion and Realignment project be reviewed and approved by the Board of Finance on January 3, 2012 and the Board of Selectmen on January 9, 2012. These approvals should lead to a Town Meeting on January 31, 2012 with a referendum for consideration of the proposed project by the citizens of Ellington tentatively scheduled for February 14, 2012.

For additional information, visit the Board of Education Web Site at <http://www.ellingtonpublicschools.org/>



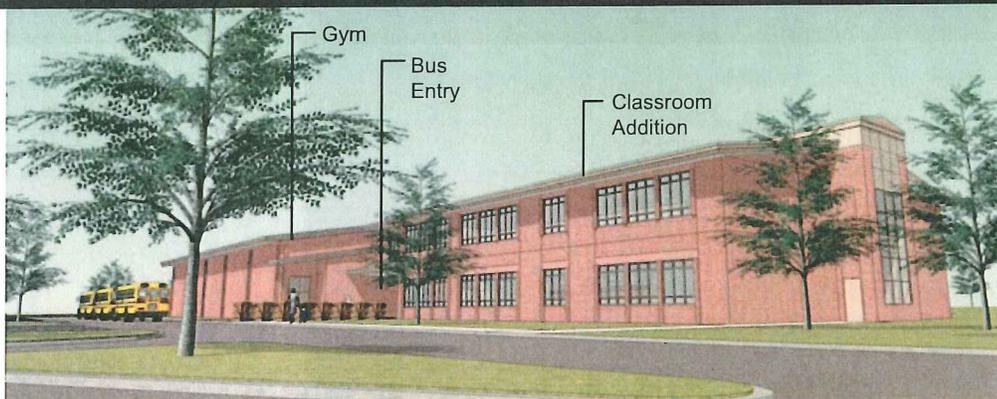
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## Elementary School Expansion and Realignment

**Crystal Lake School**  
Ground View from  
Bus Loop



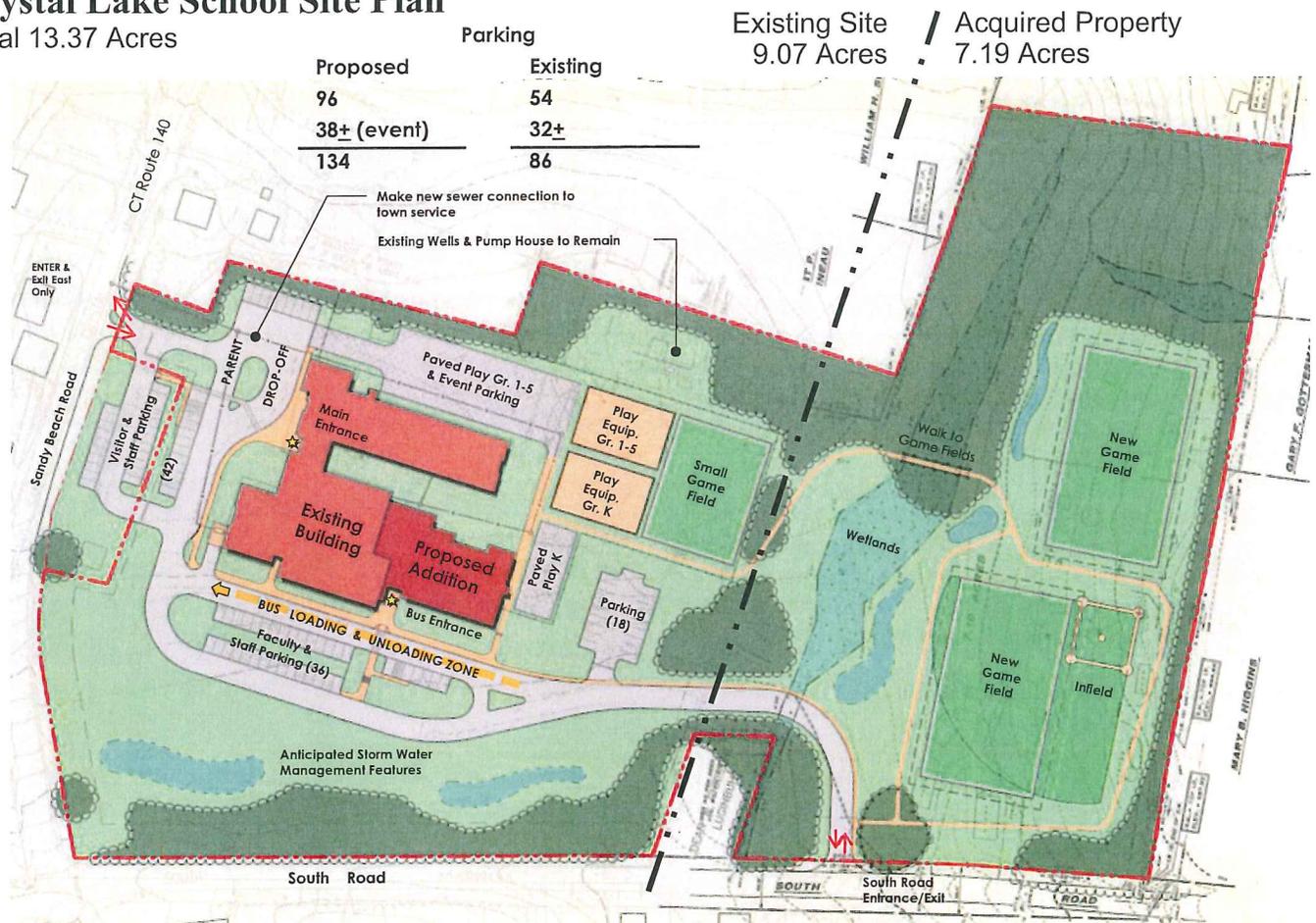
**Crystal Lake School**  
Aerial View from South Road

# Background/History of Elementary School Expansion and Realignment Project

- Early 1990's** Discussions begin regarding the need to renovate Crystal Lake School.
- 2001** Renovation of Crystal Lake School was considered for inclusion but then eliminated from the 2001 project which renovated and expanded Center School and Ellington High School.
- 2003-2005** The Board of Education created a School Facilities Study Committee that met throughout 2004 and presented a formal report in March 2005.
- 2006** The Town of Ellington authorized obtaining costs estimates and conceptual drawings for projects at Crystal Lake School and Ellington Middle School
- 2007** The Board of Education contracted with the New England School Development Council (NESDEC) to complete a Long-Range School Facilities Planning document; report presented in April 2008.
- 2008** The Board of Education created an Ad Hoc Facilities Committee, which continued working on this process throughout 2009 and 2010 and expanded its membership to include a representative of the Board of Finance, the Board of Selectmen and the Crystal Lake PTO.
- 2010** The Ad Hoc Facilities Committee requested a more detailed analysis of proposed projects at both Ellington Middle School and Crystal Lake School. The report presented in August 2010 also reviewed the impact of the addition of the property at 59 South Road upon a project at Crystal Lake School.
- August 2011** Mr. Hugh Pearson of Moser Pilon Nelson, Architects, presented a conceptual drawing of a renovation and expansion project at Crystal Lake School with some alterations to Windermere School to accommodate the district special education pre-school program.
- November 2011** The Board of Education approved the recommendations of the Ad Hoc Facilities Committee and presented the proposed project at a meeting of the Board of Selectmen on November 28, 2011. Members of the Board of Finance and the Permanent Building Committee were also in attendance.

## Crystal Lake School Site Plan

Total 13.37 Acres



## Project Description

### Crystal Lake School

Crystal Lake School will be expanded and fully renovated as part of the reconfiguration from a K-4 to a K-6 school. The proposed addition of 18,350 sf will provide for a facility totaling 47,950 sf. The addition will consist of classrooms and student support areas with a primary entrance/exit for buses, separate from the entrance for parent drop off and visitors. The existing portions of the school will receive alterations to support the K-6 educational program, including a larger cafeteria, new kitchen, and larger media center. The renovations will include the replacement of all systems (mechanical, electrical, etc.), increased thermal performance of the building envelope, full code and accessibility compliance, and compliance with the State's High Performance regulations for energy efficiency and sustainability. The site, recently expanded to 16 acres with the acquisition of the adjacent parcel to the south will provide increased parking, improved on site traffic flow with separation of buses, and cars, sewer connection to Route 140, new playfields and play equipment.

### Windermere School

Windermere will undergo limited programmatic alterations within the building footprint to support the change from K-4 with district wide grades 5 & 6 to a K-6 with full district Pre-K. Spaces will be converted to Pre-K, computer labs, administration, misc. student support, and toilet rooms. A new Pre-K play area will be created on the site. No other site work, nor expansion of the building will occur.

## Question and Answers

### Will the project accommodate Ellington students for the foreseeable future?

Enrollment and capacity studies indicate that our schools should support our projected student population through the year 2021. Members of the Board of Education, as well as members of other town boards and the community, have been engaged in analyzing enrollment and facility needs for the school district for a number of years. The proposed building project is designed to meet the projected enrollment demands in a cost-effective manner.

### What would occur if this project is not completed?

If additional classroom space is not constructed, the district would be required to phase in the use of portable classrooms as enrollment dictates. Portable classrooms are not cost effective and experience has shown significant problems related to their use. The town would also need to begin the expensive process of addressing age related issues and programmatic deficiencies within the buildings with the understanding that these upgrades would likely not meet the long term needs for the buildings.

### What will the impact on the elementary schools be?

Under the proposed configuration, each of the three elementary schools will serve students in grades K-6 and will operate on a common schedule. Additionally, the preschool program currently housed at Center School will be relocated to Windermere.

### Why did the Board of Education recommend a two-story addition to Crystal Lake School?

A two-story addition would preserve some land for a future expansion if needed, while a single story addition would exhaust the available footprint and eliminate any flexibility for future expansion on the property.

### Why does the Board of Education recommend that this project be done now?

Enrollment across the Ellington Public Schools increased twenty percent over the last decade and is projected to increase by another twenty percent over the upcoming decade. Quite simply, if we do not act now, we will not have sufficient space for the elementary school population. The growth in student enrollment has already led to significant overcrowding at Windermere School. There are currently 853 students in the school and enrollment continues to grow. Intermediate students have limited access to technology as the computer lab was eliminated to make room for a ninth grade five classroom.

The safety issues created by the current entrance/exit to Crystal Lake School continue to be of significant concern. At Crystal Lake School, the core facilities and systems are aging. The gymnasium floor is cracking, the kitchen has deteriorating asbestos floor tiles, and the heating system is antiquated and inefficient. Art instruction takes place in the cafeteria and cannot be scheduled during lunch periods. Music instruction takes place on the stage in the gym and cannot be scheduled while physical education classes are being held.

### Are there any additional benefits to the community as a result of this project?

The project includes the construction of two new game/regulation-sized soccer fields which will be available for use by the Recreation Department. Improvements to the core facility will provide town organizations with needed meeting space. In addition, Crystal Lake School will have improved facilities, such as showers and cot storage, which will allow it to be used as an emergency shelter.

### Will technology be addressed?

Technology is essential to effective instruction in the 21st century. The project plan includes technology upgrades in classrooms at Crystal Lake, which can include interactive "Smart" boards, enhanced audio-visual systems, wireless computer capabilities, local and school wide communications, and enhanced internal and external building security. At the current time, Windermere School has a single computer lab for 850 students, severely limiting hands-on access to technology for students. The reduction in enrollment at Windermere will allow a room that is currently a general education classroom to be used as a computer lab.

### Will the renovated facilities require additional staffing?

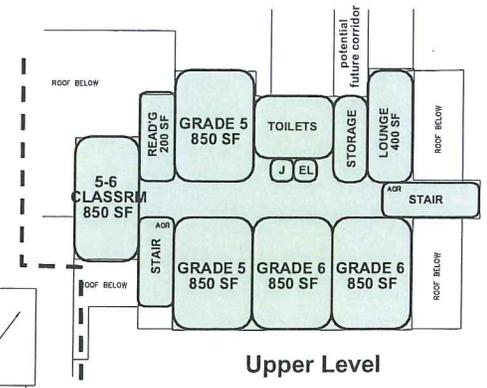
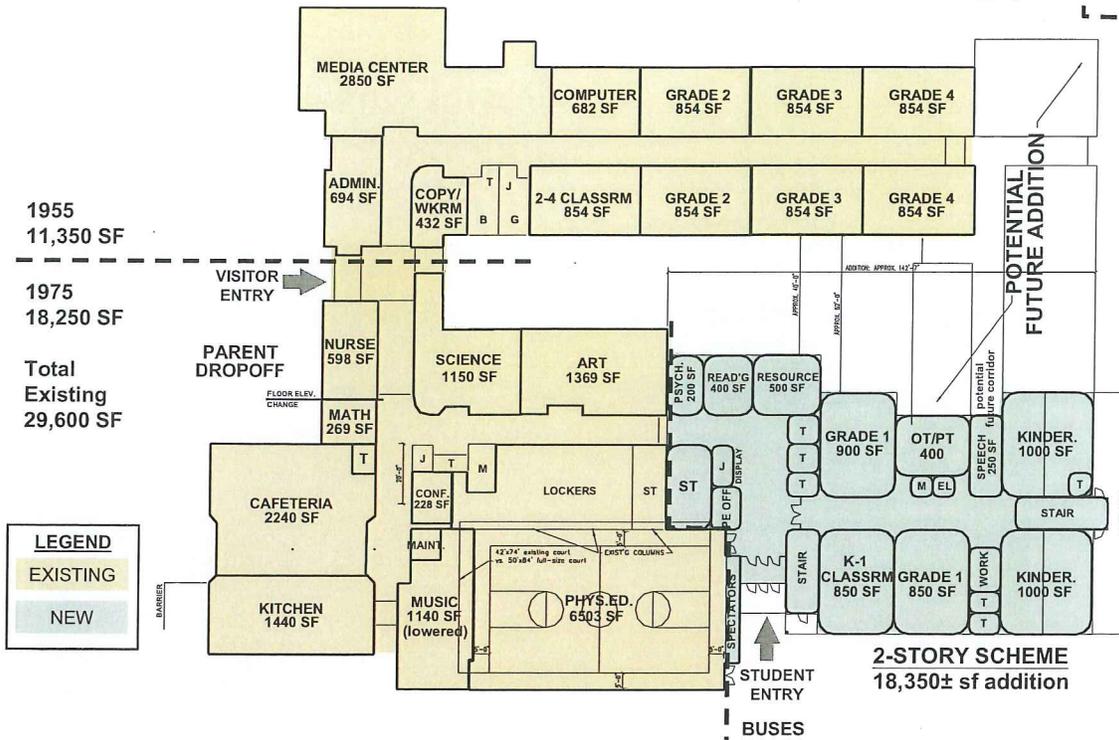
Reconfiguring the elementary schools into three K-6 schools will require two additional teachers, one at grade five and one at grade six. Other staff members may need to be reassigned to reflect the change in configuration. Any additional staffing will be the result of continued growth in enrollment.

### How will the project address energy efficiency and concerns regarding green technology?

New State of CT regulations known as "High Performance," comparable to LEED (Leadership in Energy and Environmental Design); "green" technology is a part of any significant renovation or new construction. The focus is on long term efficiency of the building's envelope (roof, walls, windows, doors), fuel consumption, improved interior environment for air quality, acoustical control, use of natural daylight with reduced/improved quality of artificial light. In addition recycling of materials both during construction and after occupancy will help to teach proper stewardship of our built environment and the efficient use of limited resources.

# Crystal Lake School Building Plan

Total Proposed Square Footage = 47,950



- Full “renovation” like new: Building envelope, systems
- High performance (comparable to LEED Silver)
- Consider geo-thermal/other newer technologies
- Code compliance/ ADA/ Hazardous material removal
- Acoustic standards

## Construction Sequencing Plan

Year	Year 2013				Year 2014												Year 2015												
	Month	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9			
<b>Crystal Lake School</b>																													
Sequence 1					New Addition												*	K-4 occupancy											
Sequence 2																		Summer plus: Roof, Abatement, Systems											
Sequence 3																		Summer plus: 1977 Kitchen/Café/Cym											
Sequence 4																		1955 Wing										*	
Close out																		As-builts, punch list, State Audit											
<b>Windermere School</b>																													
Alterations																													

## Cost Estimate

Crystal Lake	Windermere	Combined Totals
<b>Bldg Envelope</b>		
renovate	\$ 1,770,800	\$ -
new	\$ 1,659,300	\$ -
<b>Bldg Infrastructure</b>		
renovate	\$ 1,264,000	\$ 64,697
new	\$ 629,600	\$ -
Site	\$ 3,398,000	\$ 214,000
Renovations	\$ 3,792,800	\$ 1,747,618
Additions	\$ 1,728,000	\$ -
<b>Total Const</b>	\$ 14,242,500	\$ 2,026,315
FF&E & Technology	\$ 1,000,000	\$ 100,000
Soft Costs 20%	\$ 2,848,500	\$ 405,263
<b>Total Project</b>	\$ 18,091,000	\$ 2,531,578
Est Reimb. Bldgs	\$ 9,114,246	\$ 1,265,789
Est Reimb. Site Acquisition	\$ 162,486	\$ 162,486
<b>Total Town Cost</b>	\$ 8,814,268	\$ 1,265,789

### Construction

- Construction while occupied
- Schedule incorporated into construction documents
- Separations of students / construction
- Coordinate with officials for egress and safety
- Limited programs “on a cart”?

### Probable Costs Info

- Total Project \$20.6 million
- Town Cost \$10.1 million
- State reimbursement = 50.4%
- State reimbursement for land acquisition = 47.8%
- Contingencies added for design, construction, escalation

# Estimated Project Cost Summary

- Crystal Lake Notes:**
- Building systems are based on conventional/high performance equipment.
  - Geo-Thermal (Hybrid scenario) may add up to \$1m. Detailed site/soils analysis/engineering are required to further define scope and budget.

**Site Acquisition Notes:**

- Costs are not included in project costs as it was a previous acquisition. Estimated reimbursement is \$162,486.
- Existing site = 9.07 acres.
- Added site = 7.19 acres.
- Total site = 16.26 acres; Allowable acres for reimb. = 13.37 acres
- Est. acquisition reimbursement = 47.79%

Crystal Lake	Windermere	Combined Totals
Bldg Envelope renovate	Bldg Envelope renovate	
\$ 1,770,800	\$ -	
Bldg Infrastructure renovate	Bldg Infrastructure renovate	
\$ 1,659,300	\$ 64,697	
Bldg Infrastructure new	Bldg Infrastructure new	
\$ 1,264,000	\$ -	
Bldg Infrastructure new	Bldg Infrastructure new	
\$ 629,600	\$ 214,000	
Site	Site(PK playscape)	
\$ 3,398,000	\$ -	
Renovations	Renovations	
\$ 3,792,800	\$ 1,747,618	
Additions	Additions	
\$ 1,728,000	\$ -	
Total Const	Total Const	
\$ 14,242,500	\$ 2,026,315	\$ 16,268,815
FF&E & Technology	FF&E	
\$ 1,000,000	\$ 100,000	\$ 1,100,000
Soft Costs 20%	Soft Costs 20%	
\$ 2,848,500	\$ 405,263	\$ 3,253,763
Bonds/Legal/Finance	Bonds/Legal/Fin.	
\$ 366,497	\$ 50,925	\$ 417,422
<b>Total Project</b>	<b>Total Project</b>	<b>Total Project</b>
<b>\$ 18,457,497</b>	<b>\$ 2,582,503</b>	<b>\$ 21,040,000</b>
Est Reimb. Bldgs	Est Reimb.	
\$ 9,298,887	\$ 1,291,252	\$ 10,590,139
<b>Total Town Cost</b>	<b>Total Town Cost</b>	<b>Total Town Cost</b>
<b>\$ 9,158,610</b>	<b>\$ 1,291,251</b>	<b>\$ 10,449,861</b>

Site Acquisition-Estimated	
7.19 acres	\$ 340,000
Est.Reimb. @ 47.79%	\$ 162,486
Total Town Cost	\$ 177,514

Total Project of \$21,040,000 was approved at Referendum-February 14, 2012