

Belmont Public Library Building Committee Meeting

Meeting Minutes Thursday 4/9/24 at 5:00 PM
Zoom Meeting

Building Committee Members

Attending:

- Clair Colburn
- Kathy Keohane
- Sally Martin
- Christina Marsh
- Marcie Schorr Hirsch
- Marty Bitner
- Stephen Sala
- Bob McLaughlin

CHA – Owner’s Project Manager

- David Hurley
- Tom Gatzunis
- Jake Zelikman

Oudens-Ello -- Design Team

- Noel Murphy - Oudens Ello
- John Branagan-Dee - Oudens Ello

Others:

- Peter Struzziero (Library Director)
- Lauren Pfendner (Assistant Library Director)

Others:

- (Public) Larry Link, Mary Stearns, Corinne McCue

1. **Welcome the public-** Clair Colburn welcomed the public and called the meeting to order.
2. **Budget update-** The Committee went through the cost reconciled sheet showing the estimates and the low bid numbers received by G&R. It was also noted by Clair that the contingency is 4.4% of the GC Contract value. Kathy Keohane stated that the budget is tight with 4.4% contingency. Clair also mentioned that all projects are being affected by new energy codes, new plumbing codes, and new storm water regulations. It was also noted that the book sorter and IT have been shifted into the FFE budget to protect the contingency.

After discussing the budget globally, the Committee discussed each trade line on the cost reconciliation sheet:
 Elevator- No filled sub bids received so General Contractor carried cost.
 Masonry- Came above the estimates. It was noted that this may be due to the filled sub bid market and that we have 2 different brick types so the labor to make them align may have been higher.

Glass- Influxes in pricing have occurred, specifically during the pandemic. Some of the glazing scope is carried in the general contractor bid.

Roofing- Noel Murphy indicated there is a lot of variability in the Filled sub bid market, Roofing did come in above both estimates.

Tile and Paint- Steve Sala shared his concern about trades such as Tile and Paint that come in low. Tom Gatzunis respond that these are the final bid numbers and are beholden to the bid documents.

Alternates- Clair Colburn stated that it would not be financially responsible for the Committee to take any add alternates since items like the book sorter had to be shifted out of the project costs Clair also stated that if money becomes available the project has the ability to include Add Alternate #1, ADA portion of the walking path as there is a lot of interest and final grading occurs at the end of the project.

G&R: Both CHA and OE have had good experiences with G&R on separate projects. Kathy Keohane noted that G&R also finished a successful similar project at the Medford Library.

Award of General Contractor- A motion to award G&R Construction as the general contractor in the amount of \$30,387,000 was made by Bob McLaughlin. This was seconded by Kathy Keohane. All voted yes via a roll call vote.

3. Meeting minutes- A motion to approve the meeting minutes from 3.12.24 was made by Bob McLaughlin and seconded by Kathy Keohane.

4. Invoices-

Oudens-ello- A Motion to approve an Oudens-ello invoice in the amount of \$51,762.30 was made by Sally Martin. The motion was seconded by Bob McLaughlin. The motion carried unanimously except for Christina Marsh as she dropped the call due to technical difficulties.

American Environmental- A motion to approve American Environmental req #2 in the amount of \$406,310.73 was made by Sally Martin and seconded by Bob McLaughlin. The motion carried unanimously except for Christina Marsh as she dropped the call due to technical difficulties.

CHA- A CHA invoice in amount of \$14,000 was made by Sally Martin and seconded by Bob McLaughlin. The motion carried unanimously except for Christina Marsh as she dropped the call due to technical difficulties.

Cabot Risk- A motion to approve builders risk insurance in the amount of \$45,137 was made by Sally Martin and seconded by Bob McLaughlin. The motion carried unanimously except for Christina Marsh as she dropped the call due to technical difficulties.

5. Schedule Update- Demolition will be completed by the end of the month. The completion date is scheduled for Fall of 2025. Once we receive the construction schedule from the Contractor, we will have an exact date. It was also noted that we will need Conservation Commission approval prior to using the Golden Bowl.

6. **Design update** - Noel indicated that there are no big design updates. FFE Working group is continuing to meet and refine the design.
7. **New Business** - Peter Struzziero mentioned that we should have a groundbreaking ceremony. All agreed.
8. **Public Comment** - No Comments
9. **Adjourn** - A motion to adjourn was made by Bob McLaughlin and seconded by Kathy Keohane. The motion carried unanimously.

Total Project Budget

Library Building Project Budget Update

	Dec-23	Apr-24	Difference	
Administration				
Owner's Project Manager	\$962,540	\$962,540	\$0	
Advertising & Professional Services	\$15,000	\$15,000	\$0	
Owner's Insurance (Builder's Risk)	\$84,000	\$45,137	-\$38,863	Moving balance to construction contingency
Administration Subtotal	\$1,061,540	\$1,022,677	-\$38,863	
Architecture and Engineering				
Basic Services	\$2,980,590	\$2,980,590	\$0	
Reimbursables	\$75,000	\$75,000	\$0	
Additional Services (1-5)	\$74,525	\$74,525	\$0	
Testing & Commissioning	\$87,105	\$87,105	\$0	
Architectural/Engineering Subtotal	\$3,217,220	\$3,217,220	\$0	
Furnishings and Equipment				
Steel Shelving & Metal End Panels	\$450,000	\$450,000	\$0	
IT	\$210,000	\$210,000	\$0	
Other FF&E	\$1,250,000	\$1,330,000	\$80,000	Moved some equipment from construction to FF&E
FF&E Subtotal	\$1,910,000	\$1,990,000	\$80,000	
Construction Costs				
Building Construction	\$30,800,000	\$31,260,711	\$460,711	Total contingency now consolidated here: 4.5% of GC Contract cost 3.5% of project costs
Construction Contingency	\$1,555,000	\$1,367,199	-\$187,801	
Total Construction Cost	\$32,355,000	\$32,627,910	\$272,910	
Miscellaneous Project Costs				
Moving Expenses/Storage	\$210,000	\$210,000	\$0	
Temporary Quarters	\$200,000	\$100,000	-\$100,000	
Utility Backcharges	\$150,000	\$150,000	\$0	
Other Project Costs	\$170,000	\$170,000	\$0	
Testing & Commissioning (funds moved to A&E)	\$0	\$0	\$0	
Misc. Project Costs Subtotal	\$730,000	\$630,000	-\$100,000	
			\$0	
Owner's Project Contingency 0.5%	\$214,047	\$0	-\$214,047	Added to construction contingency
Total Project Budget	\$39,487,807	\$39,487,807		



General and Sub Contractor Qualification and Approvals

CHA has performed our diligence to review and evaluate the general and sub-contractor proposals for accuracy and to ensure they have submitted a responsible bid, including all necessary documentation per the attached M.G.L. c.149 procurement chart.

- Prequalification & reference calls
- DCAMM certification review
- FSB & GC bid form review
- Bid Deposits – 5% value of total bid or sub-bid
- Payment/Performance Bond – 100%
- Prevailing Wage

M.G.L. c. 149 – Building Construction Contracts

Estimated Contract Amount	Under \$10,000	\$10,000 to \$50,000	Over \$50,000 to \$150,000	Over \$150,000	Over \$10,000,000
Procurement Procedure	Sound business practices (as defined in M.G.L. c. 30B, § 2). ¹	Use a written scope-of-work statement to solicit written responses from no fewer than 3 persons who customarily perform such work.	Sealed bids (using M.G.L. c. 30, § 39M).	Sealed bids (using M.G.L. c. 149, §§ 44A – 44J).	Solicit statements of qualifications prior to soliciting sealed bids (using M.G.L. c. 149, §§ 44A – 44J).
Notice/Advertising Requirements	None.	Post a notice at least two weeks before responses are due on 1) your jurisdiction’s website; 2) COMMBUYS; 3) in the <i>Central Register</i> ; and 4) in a conspicuous place near your office. ²	Post a notice 1) in your jurisdiction’s office for at least one week before bids are due; and, at least two weeks before bids are due, publish 2) in the <i>Central Register</i> ; 3) in a newspaper; and 4) on COMMBUYS. ³	Post a notice 1) in your jurisdiction’s office for at least one week before bids are due; and, at least two weeks before bids are due, publish 2) in the <i>Central Register</i> ; 3) in a newspaper; and 4) on COMMBUYS. ⁴	Advertise the request for qualifications at least two weeks before responses are due (1) in a newspaper; (2) in the <i>Central Register</i> ; and (3) on COMMBUYS. ⁵
DCAMM Certification	No.	No.	No.	Yes. General bidders if more than \$150,000 and filed sub-bidders if more than \$25,000.	Yes. General bidders if more than \$150,000 and filed sub-bidders if more than \$25,000.
OSHA Training	No.	Yes.	Yes.	Yes.	Yes.
Prequalification	No.	No.	No.	Optional. ⁶	Yes.
Filed Sub-bids	No.	No.	No.	Yes, if more than \$25,000.	Yes, if more than \$25,000.
Bid Deposit	No.	No.	5% of the value of the total bid.	5% of the value of the total bid or sub-bid.	5% of the value of the total bid or sub-bid.
Payment Bond	No.	50% payment bond if contract is >\$25,000. ⁷	50% payment bond.	100% payment bond.	100% payment bond.
Performance Bond	No.	No.	No.	100% performance bond.	100% performance bond.
Prevailing Wage	Yes.	Yes.	Yes.	Yes.	Yes.
Contractor Evaluation	No.	No.	No.	Yes.	Yes.
OSD or Blanket Contract Option	Yes.	Yes.	No.	No.	No.

¹ M.G.L. c. 149, § 44A(2)(A), as amended by Chapter 218 of the Acts of 2016, M.G.L. c. 30B, § 2, defines sound business practices as “ensuring the receipt of favorable prices by periodically soliciting price lists or quotes.”

² M.G.L. c. 149, § 44A(2)(B), as amended by Chapter 218 of the Acts of 2016.

³ M.G.L. c. 149, § 44J, as amended by Chapter 218 of the Acts of 2016.

⁴ M.G.L. c. 149, § 44J, as amended by Chapter 218 of the Acts of 2016.

⁵ The advertising procedures listed pertain only to the request for qualifications. Within 14 days of the completion of the prequalification process, you are required to post a notice in your jurisdiction and on COMMBUYS listing those general contractors and subcontractors that have been prequalified. A copy of the notice must be sent via first class mail, postage pre-paid, to all prequalified general and subcontractors along with an invitation to bid. The invitation to bid must have a deadline of at least two weeks. Although you may only consider bids from those general and subcontractors who have been prequalified, the advertising requirements for building construction contracts over \$150,000 apply.

⁶ If you decide to use the optional prequalification process for projects over \$100,000, follow the procedures listed in the “Over \$10,000,000” column. (Note: The prequalification threshold was not raised in 2016.)

⁷ M.G.L. c. 149, § 29.



BELMONT PUBLIC LIBRARY - ESTIMATE RECONCILIATION

3/29/2024

	<u>CHA Estimate</u>	<u>OE Estimate</u>	<u>G&R Bid</u>	<u>Comments</u>
GC Bid	\$ 17,109,757.00	\$ 17,607,476.00	\$ 18,860,297.00	GC Bid is carrying elevator
Masonry	\$ 396,108.00	\$ 528,971.00	\$ 878,000.00	Increased amount assumed due to premium for 2 types of brick with different installation methods.
Miscellaneous and Ornamental Metals	\$ 431,996.00	\$ 508,730.00	\$ 668,068.00	
Waterproofing/Dampproofing/Caulking	\$ 220,454.00	\$ 254,957.00	\$ 322,007.00	
Roofing and Flashing	\$ 757,612.00	\$ 783,252.00	\$ 932,300.00	
Glass and Glazing	\$ 2,467,743.00	\$ 2,373,530.00	\$ 806,405.00	Interior glazing and railings; curtain wall and exterior entrances carried in the GC bid
Tile	\$ 256,215.00	\$ 251,500.00	\$ 292,770.00	
Acoustical Tile	\$ 918,274.00	\$ 788,819.00	\$ 973,700.00	
Resilient Flooring	\$ 104,892.00	\$ 122,143.00	\$ 65,798.00	
Painting	\$ 130,597.00	\$ 172,029.00	\$ 77,240.00	Painting FSB was considerably lower than other bids
Elevator	GC	GC	GC	2 RFQs were published for FSB Elevators, no responses. Carried in GC Bid
Fire Protection Sprinkler	\$ 411,727.00	\$ 407,200.00	\$ 447,215.00	
Plumbing	\$ 715,766.00	\$ 710,335.00	\$ 691,200.00	
HVAC	\$ 3,050,431.00	\$ 2,972,621.00	\$ 2,427,000.00	
Electrical	\$ 3,158,431.00	\$ 3,430,752.00	\$ 2,945,000.00	
<u>Totals</u>	<u>\$ 30,130,003.00</u>	<u>\$ 30,912,315.00</u>	<u>\$ 30,387,000.00</u>	



April 5, 2024

Belmont Public Library
336 Concord Ave
Belmont, MA 02478

Owner's Project Manager Monthly Update

- **Demolition and Abatement:**
 - Received DEP inspection clearance for NTWP exterior abatement
 - Entire structure has been demolished
 - AEI working through removal of the ground level slab
 - Site grading to proceed upon completion of slab removal

- **Construction Bids and Budget:**
 - GC Bid deadline had been extended by one week from 3/20 to 3/27 deadline
 - The project received 2 General Contractor Bids
 - G&R Construction was the low bid at \$30,387,000
 - WES Corporation was the second bid at \$33,385,980
 - CHA has reviewed G&R's bid package and confirmed they have provided all necessary documentation per MGL c.149 requirements
 - CHA, Oudens Ello and Library working group teams met to review the bid amount and the overall budget and have confirmed that we have sufficient funds to proceed with G&R as the low, responsible bid

- **Invoices & Proposals:**
 - American Environmental, Inc. – Application for Payment #2
 - Oudens Ello invoice #2301-14
 - CHA Invoice #38441-11

- **Upcoming Meetings & Activities:**
 - Library Building Committee Meeting – Tuesday 5/14, 5:00-6:00pm
 - Furniture Working Group – Friday 4/19, 10:00 – 11:30am
 - Belmont Media Center MOA Review – Wednesday 4/10, 12:00 – 1:00pm
 - Belmont Historical Society MOA Review - TBD



Oudens Ello Architecture

April 5, 2024

Town of Belmont
455 Concord Avenue
Belmont, MA 02478

Belmont Public Library, Belmont MA
PO Number: 2300579
OEA Project Number: 2301

INVOICE #: 2301-14

For services rendered through March 31, 2024

BASIC DESIGN SERVICES

Table with 6 columns: Firm, Discipline, Phase, % of Phase Completed, Previously Billed Phase Total, Amount due this Invoice. Includes Core Design Team and Specialty Consultants.

ADDITIONAL SERVICES

Table with 6 columns: Firm, Discipline, Phase, % of Phase Completed, Previously Billed, Amount due. Lists various additional services.

REIMBURSABLE EXPENSES (receipts attached)

Table with 5 columns: Task/Expense, Firm, Qty., Rate/Unit, Total. Lists reimbursable expenses like prints.

Total Amount Due This Invoice

\$51,762.30

Payment due within 30 days of receipt of invoice
Please make checks payable to Oudens Ello Architecture, LLC

DESIGN TEAM FEE SUMMARY

<i>Phase</i>	<i>Contract Fee</i>	<i>% of Work Completed</i>	<i>Fee Earned to Date</i>	<i>Remaining Fee</i>
Schematic Design	\$200,000	100.0%	\$200,000.00	\$0.00
Design Development	\$1,385,614	99.1%	\$1,372,852.00	\$12,761.60
Construction Documents	\$1,657,242	95.1%	\$1,575,450.70	\$81,791.70
Bid	\$63,260	90.9%	\$57,488.00	\$5,772.00
Construction Administration	\$862,224	1.4%	\$12,000.00	\$850,224.00
Reimbursables (NTE)	\$75,000	7.8%	\$5,818.31	\$69,181.69
Additional Services	\$74,525	45.5%	\$33,924.00	\$2,706.00

Invoice

STIMSON
71 Gates Rd
Princeton, MA 01541

March 28, 2024
Invoice No: 0023426

Oudens Ello Architecture
46 Waltham Street
Boston, MA 02118

Project BELM-1848 Belmont Public Library
Permitting 100%
CD 2.5% additional

Professional Services from January 01, 2024 to January 31, 2024

Billing Phase	Fee	Percent Complete	Earned	
Remobilization	10,000.00	100.00	10,000.00	
Design Development	45,000.00	100.00	45,000.00	
Construction Documents	73,200.00	97.50	71,370.00	
Bidding	1,500.00	0.00	0.00	
Permitting	9,000.00	100.00	9,000.00	
Construction Administration	53,700.00	0.00	0.00	
Total Fee	192,400.00		135,370.00	
			Previous Fee Billing	124,540.00
			Current Fee Billing	10,830.00
	Total Fee			10,830.00
		Total this Invoice		\$10,830.00

Billings to date	Current	Prior	Total	AR Balance
Fee	10,830.00	124,540.00	135,370.00	
Labor	0.00	30,303.75	30,303.75	
Expense	0.00	920.76	920.76	
Add-on	0.00	-303.75	-303.75	
Total	10,830.00	155,460.76	166,290.76	10,830.00



The Green Engineer, Inc.

23 Bradford Street
Concord, MA 01742
Tel: 978-369-8978
finance@greenengineer.com
www.greenengineer.com

INVOICE

BILL TO

Conrad Ello
Oudens Ello Architecture
46 Waltham Street, Ste 210
Boston, MA 02118

19-786.1 | Belmont Library_DD-CD

INVOICE NUMBER	INVOICE DATE	BILLING THROUGH	OUR PROJECT NO.	AMOUNT DUE THIS INVOICE
12248	March 15, 2024	March 9, 2024	19-786.1	\$2,500.00

	Fee Summary		Previously Invoiced		Current Invoice	
	Total Budget	Remaining Fee Remaining	% Billed	\$ Billed	% Billed	\$ Billed
Item 1 - General Sustainability Consulting	\$25,000.00	\$1,250.00	85.00 %	\$21,250.00	10.00 %	\$2,500.00
Item 2 - Energy Modeling Services	\$22,500.00	\$1,125.00	95.00 %	\$21,375.00	-	\$0.00
Budget Total	\$47,500.00	\$2,375.00		\$42,625.00		\$2,500.00

AMOUNT DUE THIS INVOICE	\$2,500.00
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APPLICATION FOR PAYMENT

AEI FORM-G702

PAGE 1 OF 2 PAGES

TO: Town of Belmont FROM: American Environmental APPLICATION NO: 2
 455 Concord Ave 18 Canal Street APPLICATION DATE: 3/30/2024
 Belmont, MA 02478 Holyoke, MA 01040 PERIOD TO: 3/30/2024
 Attn: David Hurley, CHA-OPM 413-322-7190 CONTRACT DATE: 12/27/23

PROJECT: Belmont Public Library AEI JOB NO: M24-001
 336 Concord Avenue, Belmont, MA
 Asbestos Abatement and Building Demolition

CONTRACTOR'S APPLICATION FOR PAYMENT

Application is made for payment, as shown below, in connection with the Contract. Continuation Sheet, AIA Document G703, is attached.

1. ORIGINAL CONTRACT SUM	\$	873,711.00
2. Net change by Change Orders	\$	0.00
3. CONTRACT SUM TO DATE (Line 1 ± 2)	\$	873,711.00
4. TOTAL COMPLETED & STORED TO DATE (Column G on G703)	\$	730,495.50
5. RETAINAGE:		
a. 5 % of Completed Work (Column D + E on G703)	\$	36,524.78
b. 0 % of Stored Material (Column F on G703)	\$	0.00
Total Retainage (Lines 5a + 5b or Total in Column I of G703)	\$	36,524.78
6. TOTAL EARNED LESS RETAINAGE (Line 4 Less Line 5 Total)	\$	693,970.73
7. LESS PREVIOUS CERTIFICATES FOR PAYMENT (Line 6 from prior Certificate)	\$	287,660.00
8. CURRENT PAYMENT DUE	\$	406,310.73
9. BALANCE TO FINISH, INCLUDING RETAINAGE (Line 3 less Line 6)		179,740.28

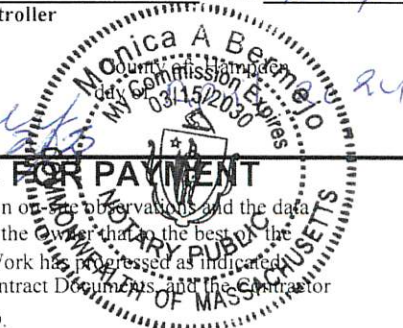
CHANGE ORDER SUMMARY	ADDITIONS	DEDUCTIONS
Total changes approved previously by Owner	\$0.00	\$0.00
Total approved this Month	\$0.00	\$0.00
TOTALS	\$0.00	\$0.00
NET CHANGES by Change Order	\$0.00	

The undersigned Contractor certifies that to the best of the Contractor's knowledge, information and belief the Work covered by this Application for Payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments received from the Owner, and that current payment shown herein is now due.

CONTRACTOR: American Environmental, Inc.

By: Steven R. Morissette Date: 4/8/2024
 Steven R. Morissette, Controller

State of: Massachusetts
 Subscribed and sworn to before me this
 Notary Public:
 My Commission expires:



ARCHITECT'S CERTIFICATE FOR PAYMENT

In accordance with the Contract Documents, based on the observations and the data comprising the application, the Architect certifies to the Owner that to the best of the Architect's knowledge, information and belief the Work has progressed as indicated the quality of the Work is in accordance with the Contract Documents, and the Contractor is entitled to payment of the AMOUNT CERTIFIED.

AMOUNT CERTIFIED \$ 406,310.73

(Attach explanation if amount certified differs from the amount applied. Initial all figures on this Application and on the Continuation Sheet that are changed to conform with the amount certified.)
 ARCHITECT:

By: David Hurley Date: 4/8/24

This Certificate is not negotiable. The AMOUNT CERTIFIED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner or Contractor under this Contract.

Schedule of Values

FROM: American Environmental
 18 Canal Street
 Holyoke, MA 01040
 413-322-7190

APPLICATION NO: 2
 APPLICATION DATE: 3/30/2024
 PERIOD TO: 3/30/2024
 AEI JOB NO: M24-001

A ITEM NO.	B DESCRIPTION OF WORK	C SCHEDULED VALUE	D WORK COMPLETED		F MATERIALS PRESENTLY STORED (NOT IN D OR E)	G		H BALANCE TO FINISH (C - G)	I RETAINAGE 5%
			FROM PREVIOUS APPLICATION (D + E)	THIS PERIOD		TOTAL COMPLETED AND STORED TO DATE (D+E+F)	% (G ÷ C)		
1	P&P Bonds	\$8,800.00	\$8,800.00	\$0.00	\$0.00	\$8,800.00	100%	\$0.00	\$440.00
2	Submittals	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$5,000.00	100%	\$0.00	\$250.00
3	Abatement Mobilization and Demobilization	\$10,000.00	\$10,000.00	\$0.00	\$0.00	\$10,000.00	100%	\$0.00	\$500.00
4	Demolition Mobilization and Demobilization	\$15,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	\$15,000.00	\$0.00
5	General Conditions-Fencing/Cut/Caps/Erosion Control	\$35,000.00	\$35,000.00	\$0.00	\$0.00	\$35,000.00	100%	\$0.00	\$1,750.00
6	Safety	\$10,000.00	\$5,000.00	\$2,500.00	\$0.00	\$7,500.00	75%	\$2,500.00	\$375.00
7	Supervision and Project Management	\$48,000.00	\$24,000.00	\$12,000.00	\$0.00	\$36,000.00	75%	\$12,000.00	\$1,800.00
8	Salvage Throughout	\$30,000.00	\$0.00	\$30,000.00	\$0.00	\$30,000.00	100%	\$0.00	\$1,500.00
9	Close-out	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	\$5,000.00	\$0.00
	<u>Asbestos Abatement</u>								
10	Interior-3rd Floor	\$40,000.00	\$40,000.00	\$0.00	\$0.00	\$40,000.00	100%	\$0.00	\$2,000.00
11	Interior-2nd Floor	\$50,000.00	\$50,000.00	\$0.00	\$0.00	\$50,000.00	100%	\$0.00	\$2,500.00
12	Interior-1st Floor	\$50,000.00	\$50,000.00	\$0.00	\$0.00	\$50,000.00	100%	\$0.00	\$2,500.00
13	Interior-Crawlspace	\$45,000.00	\$45,000.00	\$0.00	\$0.00	\$45,000.00	100%	\$0.00	\$2,250.00
14	Exterior	\$10,000.00	\$10,000.00	\$0.00	\$0.00	\$10,000.00	100%	\$0.00	\$500.00
15	Transite Pipe	\$15,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	\$15,000.00	\$0.00
16	Regulated Hazardous Materials	\$20,000.00	\$20,000.00	\$0.00	\$0.00	\$20,000.00	100%	\$0.00	\$1,000.00
	<u>Demolition and Site Work</u>								
17	Building Above Grade	\$100,000.00	\$0.00	\$100,000.00	\$0.00	\$100,000.00	100%	\$0.00	\$5,000.00
18	NTWP-Bulk Loading	\$283,500.00	\$0.00	\$283,195.50	\$0.00	\$283,195.50	99%	\$304.50	\$14,159.78
19	Foundations and Footings	\$60,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	\$60,000.00	\$0.00
20	Back Fill and Final Grading Throughout Site	\$33,411.00	\$0.00	\$0.00	\$0.00	\$0.00	0%	\$33,411.00	\$0.00
	TOTAL ORIGINAL CONTRACT	\$873,711.00	\$302,800.00	\$427,695.50	\$0.00	\$730,495.50		\$143,215.50	\$36,524.78
	CHANGE ORDERS								
	TOTAL CHANGE ORDERS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00
	TOTAL REVISED CONTRACT VALUE	\$873,711.00	\$302,800.00	\$427,695.50	\$0.00	\$730,495.50		\$143,215.50	\$36,524.78



Clair Colburn
 Town of Belmont, MA
 336 Concord Ave.
 Belmont, MA 02478

April 4, 2024
 Project No: 038841.000
 Invoice No: 38841-11

Project 038841.000 Belmont Public Library

Belmont P.O. # 02300822

Professional Services from February 24, 2024 through March 29, 2024

Description	Contract Amount	Percent Complete	Total Fee Earned	Previous Amount	Current Fee Amount
Design Development	93,900.00	100.00	93,900.00	93,900.00	0.00
Construction Documents	72,500.00	100.00	72,500.00	72,500.00	0.00
Prequal and Bidding	66,140.00	78.6211	52,000.00	38,000.00	14,000.00
Construction and Closeout	693,700.00	0.00	0.00	0.00	0.00
Cost Estimating	36,300.00	100.00	36,300.00	36,300.00	0.00
Total Fee	962,540.00		254,700.00	240,700.00	14,000.00
					14,000.00
			Total Due This Invoice:		\$14,000.00

PAYMENT IS DUE WITHIN 30 DAYS OF INVOICE DATE

Bank Name: Citizens Bank NA - Account Name: CHA Consulting, Inc. | Account #: 4011254230 - ABA #: 021313103
 Supporting remittance information should be sent via email to remittances@chasolutions.com

PO BOX 845746 | Boston, MA 02284-5746 | Worksource - 845746 | T: (518) 453-4500 | F: (518) 458-1735
 CHASOLUTIONS.COM



Cabot Risk
Strategies, LLC

Town of Belmont



Connor Powers

Account Executive

April 5, 2024

Insurance Proposal



Risk Strategies LLC

Insurance Solutions

- Property and Liability
- Worker's Compensation
- Professional Liability: including D+O
- Umbrella
- Commercial Auto
- Misc. Coverages: EPLI, Crime, Abuse & Molest.

Advantages of Partnering with Cabot Risk Strategies

- Customized Risk Management Services
- Flexible Service Model
- TPA Services
- Property and Liability Claim Management
- Medical Case Management
- Data and Technology Management
- Integrated Loss Control and Workplace Safety Services
- Brokerage Services: Partnered with Renaissance Alliance Group

Claim Management & Risk Control Service Capabilities

- Carrier Claim Service Oversight
- Claims Advocacy & Reviews
- Claim Audits & Training: Extensive Safety Video Library
- Carrier Risk Control Service Oversight Program Services
- Risk Control Program Assessments & Property Valuations – Independent of Carriers

Reasons to Partner with Cabot Risk Strategies

- Recognition of Fiduciary Responsibility
- Strong Communications & Creative Solutions
- Risk Control & Claims Management (TPA Services)

Cabot Risk Strategies LLC

Customized Risk Management Services

Cabot Risk Strategies serves thousands of individuals and families and hundreds of public entities, non-profits, health care and real estate businesses. Each year we manage over 4500 claims through our TPA Services. Our client base continues to expand, both within the region and within the industries we serve. We recognize that every client is different, with varying degrees of risk appetite and service specifications. That's why we work with a flexible service model. At Cabot, we provide customized risk management services to meet the unique needs of our clients. This approach offers clients a complete 360° of protection.



Brokerage Services

Each client presents a specialized set of risks and exposures requiring a specialized solution. Whether for business and commercial risk or personal and family, we provide the right solution at the right price. To complement the management of retained risk, Cabot offers a full-service brokerage portfolio to deliver insured, guaranteed cost insurance products. Our goal is to help our clients establish a balanced mix of insured and self-insured products and services that will achieve the most desired, cost-effective program.

Our Team

Our employees are dedicated professionals, and experts at what they do. They're client-focused individuals who enjoy resolving issues and developing innovative solutions. Cabot Risk Strategies is an independent, regional TPA with a New England focus. You'll find that makes us a little different. Our people are down-to-earth, always willing to share their expertise and take the time to get things right. Doing business with Cabot Risk Strategies means doing business with real people. And in these times of consolidations and constant change, that can make all the difference in the world.

Carriers

We work directly with over one hundred insurers. Among these are an elite group of superlative companies we have designated as our core insurer partners. We have chosen them for their:

- Strong service ethic and excellence
- Commitment to improving our clients' loss ratios
- Shared values of integrity, honesty, and business principles
- Innovation, flexibility, and ability to "think out of the box"
- Willingness to work as team members and partners
- Commitment to the local independent agency and the local community

AM Best Rating

A++ and A+ (Superior)

Assigned to companies which have, on balance, superior balance sheet strength, operating performance and business profile when compared to the standards established by the A.M. Best Company. These companies, in A.M. Best's opinion, have a very strong ability to meet their ongoing obligations to policyholders.

A and A- (Excellent)

Assigned to companies which have, on balance, excellent balance sheet strength, operating performance and business profile when compared to the standards established by the A.M. Best Company. These companies, in A.M. Best's opinion, have a strong ability to meet their ongoing obligations to policyholders.

Financial Size Categories (FSC)

Assigned to all companies by A.M. Best, the FSC reflects company size based on capital, surplus and conditional reserve funds in millions of U.S. dollars using the scale below. The FSC is designed to provide the subscriber with a convenient indicator of the size of a company in terms of its statutory surplus and related accounts. Many insurance buyers only want to consider buying insurance coverage from companies that they believe have sufficient financial capacity to provide the necessary policy limits to insure their risks. Although companies utilize reinsurance to reduce their net retention on the policy limits they underwrite, many buyers still feel more comfortable buying from companies perceived to have greater financial capacity.

FSC I	less	than	1
FSC II	1	to	2
FSC III	2	to	5
FSC IV	5	to	10
FSC V	10	to	25
FSC VI	25	to	50
FSC VII	50	to	100
FSC VIII	100	to	250
FSC IX	250	to	500
FSC X	500	to	750
FSC XI	750	to	1,000
FSC XII	1,000	to	1,250
FSC XIII	1,250	to	1,500
FSC XIV	1,500	to	2,000
FSC XV	greater	than	2,000

BUILDERS RISK

Named Insured: Town of Belmont

Insurance Company: Hanover Insurance Company AM Best Rating: A (XV)

Policy Number: TBD

Policy Period: April 22, 2024 – September 01, 2025

Description: Construction of new Town Library

Covered Location[s]: 336 Concord Ave, Belmont, MA 02478

Premium: **\$45,137, including Terrorism**
\$ 2,500 Minimum Earned Premium

Property

	<u>Limit</u>	<u>Coverage</u>
Limits & Coverages:	\$ 41,534,605	Jobsite Limit, Subject to
	\$ 37,332,950	New Construction
	\$ 4,201,655	Soft Costs
	Included	Equipment Breakdown/Boiler & Machinery
	Included	Testing
	\$ 5,000,000	Flood, Annual Aggregate
	\$ 5,000,000	Earthquake, Annual Aggregate
	\$ 1,000,000	Off-Site Storage Locations
	\$ 1,000,000	Transit
	Included	Ordinance or Law – Undamaged Portion
	\$ 1,000,000	- Demolition and Increased Cost of Construction
	25%/\$250,000	Debris Removal/Additional Limit
	\$ 100,000	Fungus Coverage
	\$ 100,000	Pollutant Cleanup and Removal
	\$ 50,000	Trees, Shrubs and Plants
	\$ 100,000	Expediting Costs
	\$ 100,000	Expense to Re-Erect Scaffolding, Fences and Signs
	\$ 100,000	Valuable Papers and Records

Builders Risk continued:

	\$ 100,000	Sewer Back-Up
	10%	Insufficiency of Limits (Up to \$1M Max Limit)
	\$ 50,000	Contract Penalty
Deductibles:	\$ 10,000	Combined, except
	\$ 25,000	Water Damage Deductible
	\$ 25,000	Earthquake
	\$ 25,000	Flood
Terms & Conditions:	Permission to Occupy is granted Replacement Cost as per coverage form No coinsurance Quote valid 30 days \$447 Terrorism charge included	

- Subjectivities:**
1. Confirmation of General Contractor PRIOR to Binding
 2. Receipt and Review of Final Approved Budget and Timeline
 3. Favorable Loss Control Inspection and Compliance with any Recommendations
 4. Signed ACORD application

In order to bind coverage, we will need full payment made payable to and sent to Cabot Risk Strategies LLC.

COVERAGE WILL BE MADE EFFECTIVE UPON RECEIPT OF PAYMENT

ACCEPTED BY: _____

DATE: _____

This is a coverage summary, not a legal contract. This summary is provided to assist in your understanding of your insurance program. Please refer to the actual policies for specific terms, conditions, limitations and exclusions that will govern in the event of a loss. Specimen copies of all policies are available for review prior to the binding of coverage.

In evaluating your exposure to loss, we have been dependent upon information provided by you. If there are other areas that need to be evaluated prior to binding coverage, please bring these areas to our attention. Should any of your exposures change after coverage is bound, such as your beginning new operation, hiring employees in new states, buying additional property, etc., please let us know so proper coverage(s) can be discussed.

Higher limits may be available. Please contact us if you would like a quote for

Information Concerning Our Compensation: Unless otherwise specifically negotiated and agreed to with our client, our professional compensation is customarily based on commission calculated as a percentage of the premium collected by the insurer and are paid to us by the insurer. We may also receive from insurers and insurance intermediaries' additional compensation (monetary and non-monetary), which is contingent on volume, profitability or other factors pursuant to agreements we may have with them relating to all or part of the business we place with those insurers or through those intermediaries. Such agreements may be in effect with one or more of the insurers with whom your insurance is placed, or with the insurance intermediary we use to place your insurance. In addition to commissions, we may charge fees to you provided however, such fees will always be identified separately and in agreement with you. We will be pleased to discuss with you further details of any contingent compensation agreements pertinent to your placement upon your request.



Risk Strategies LLC

15 Cabot Road
Woburn, MA 01801
Tel: 800.222.5963
Fax: 781.376.9907

PREMIUM NOTIFICATION

DATE: April 5, 2024

BILL TO: Town of Belmont

INSURED: Town of Belmont

POLICY INFORMATION:

Policy# TBD

Policy Description New Town Library Project Builders Risk

Policy Term: April 22, 2024 – September 1, 2025

COVERED LOCATION(S):

1. 336 Concord Avenue, Belmont, MA 02478

PREMIUM DUE:

<u>COVERAGE</u>	<u>AMOUNT</u>
Builders Risk, including Terrorism	\$ 45,137
TOTAL	\$ 45,137

Please make check payable to: Cabot Risk Strategies LLC
Mailing address: 15 Cabot Road
Woburn, MA 01801

COVERAGE WILL BE MADE EFFECTIVE UPON RECEIPT OF PAYMENT

IMPORTANT - CLAIMS REPORTING INFORMATION

Reporting incidents and claims timely is very important as delays in reporting could compromise coverage. In the event you have an incident or claim to report, we have a full-service Claims Department to assist you.

Please include the following information when reporting incidents and claims:

- Named Insured
- Policy Number
- Date of Incident
- Time of incident
- Location of incident
- Full Description of the incident, damages, injuries
- Claimant or potential Claimant name(s)
- Witnesses to the incident
- Contact name, phone number, email address

Automobile related claims:

- Description of Vehicle(s) involved
- Driver name, contact and Insurance information for all drivers involved

Please direct notices of incidents or claims to any of the following:

- Email report to claims@cabotrisk.com
- Fax report to (781) 376-9907
- Call (800) 222-5963
- Call or email your Account Manager

OCCURRENCE VS. CLAIMS MADE LIABILITY COVERAGE

Liability Policies can be on an Occurrence Basis or a Claims Made Basis. It is important to know what basis your policy(ies) is/are as there is a difference in timing of reporting claims. Please review your policy and contact us if you have any questions.

Occurrence based policies cover incidents that happen during your policy period, regardless of when you file a claim.

Claims Made based policies cover incidents that happen during your policy period (or after the retroactive date) and are also reported *during the policy period* or during the extended reporting period. It is very important to report a claim immediately if your policy is Claims Made.



Risk Strategies LLC

360° Advisory

Employers invest considerable resources in employee benefits programs that attract and retain quality employees. Offering a competitive employee benefits program remains an essential measure taken to secure top talent.

More than ever, small and large employers alike find themselves faced with the challenge of managing unsustainable rising healthcare costs, a diverse workforce with diverse benefits needs, ever-changing federal and state regulations and a complex marketplace. Consequently, developing a comprehensive and effective benefits strategy has never been more imperative.

At Cabot Risk Strategies, our experienced benefits professionals work closely with you to develop a long-term benefits strategy that meets your unique needs and objectives. Regardless of your size or industry, we partner with you to advance solutions that deliver value to you and your employees.

Cabot Risk Strategies is a leading employee benefits practice providing best-in-class employee benefits solutions and services. 360° Advisory is a broad and comprehensive service model we commit to each of our valued clients.

As your entrusted benefits partner, we take a thorough results-driven approach to assessing your needs, implementing a long-term benefits and communication strategy, auditing regulatory compliance, managing risk, supporting human resource initiatives and monitoring the success of your program.



Risk Strategies LLC

360° Advisory

At Cabot Risk Strategies, we provide expertise in the following areas of group benefits advisory:

Group Coverages and Programs

- Group Medical
- Consumer Driven Healthcare (HRA and HSA's)
- Group Dental and Vision
- Group Life and Disability
- Voluntary Benefits
- Identity Theft Protection

Strategic Benefits Advisory and Procurement

- Strategic Multi-year Benefits Planning and Program Development
- Transparent RFP Process
- Premium Analysis and Negotiations
- Self-Insured Plan Development and Program Management
- Ongoing Strategic and Analytical Support
- Benchmarking

Benefit Plan Implementation and Administration

- Section 125 Flexible Benefit Administration
- Open Enrollment Project Management
- Monthly Claims Tracking, Review and Reporting
- Summary Plan Descriptions (SPD's)
- Regulatory Compliance Support (ERISA, COBRA, HIPAA, FMLA etc.)
- 5500 Filing Services
- Vendor Intermediary Services (Administrative, Claims and Service Issues)

Employee Communications

- Web-based Communications and Open Enrollment
- Employer Site Open Enrollment Meetings
- Employee Benefit Statements
- Employee Benefit Surveys