



Plan and Cost Review Report



Rockville Community
444 E Main Street
Rocky Point, South Carolina

Prepared For:
Risk Mitigation
347 W 36th Street
New York, NY 10018

Job No. 2023-B111
Issue Date: June 21, 2023

June 7, 2023

Mr. Joseph Smith
Risk Mitigation Inc.
1034 W Jericho Turnpike
Smithtown, NY 11787

Project Name: Rockville Community

Project Addresses: 444 E Main Street
Rocky Point, South Carolina

Proposed Scope: New construction of an assisted-living facility

Dear Mr. Smith:

Enclosed find our **Plan and Cost Review Report** for the above referenced project. This Report is in accordance with **Risk Mitigation Inc.'s** Plan and Cost Review instructions and our April 4, 2023 executed fee proposal.

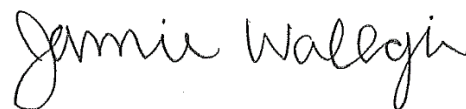
If you should have any questions or comments, please do not hesitate to contact this office.

Sincerely yours,

KOW Building Consultants



Kenneth F. Wille, P.E., LEED AP, C.E.M.
Enclosures



Jamie Walegir Potucek, P.E., LEED AP

JW:jw
pr::wc
ft:ld

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PROJECT DOCUMENTATION

PROJECT CONTACT INFORMATION

Owner / Developer:	Rockville Community Inc.
Architect:	Awesome Architects 928 Fulton Street Commack, NY Contact: Kevin Johnson
Structural Consultant:	Hold Up Industries 111 E 4 th Street Smithtown, NY
MEP Engineer:	
General Contractor:	Build Up Contractors 347 W Jericho Turnpike Smithtown, NY 11787
Geotechnical Consultant:	Rock Finders 5332 Crumb Court, Suite 2 301-668-4303
Environmental Consultants:	
Surveyor:	

PROJECT DOCUMENTATION, Continued

DOCUMENTS RECEIVED

Item	Date Received	Comment(s)
Complete Set of Approved Plans	5.31.19	
Architectural Specifications	5.31.19	
Direct Construction Cost Breakdown Including a Detailed Line Item Breakdown	5.31.19	
Architectural Survey	5.31.19	
Construction Schedule	5.31.19	
Architectural Contract	5.31.19	
General Contract	5.31.19	
Geotechnical Report	5.31.19	
Environmental Report	5.31.19	
Utility Letters	5.31.19	
Architectural Certification Letter	5.31.19	

DOCUMENTS NOT RECEIVED

Item	Comment(s)
Permits	

PROJECT OVERVIEW

General Description of Project

This report details the site development and new construction of a six-story Assisted Living and Memory Care building located at 444 E Main Street in Rocky Point, South Carolina. The building, when complete, will provide 146 units with 164 beds. 116 of the units will be for assisted living and 30 of the units will be for memory care. Parking will be provided at the cellar level and on-site.

The building will be supported by a conventional shallow concrete foundation system with post tension concrete floors. The exterior façade will consist of a mix of brick, stone veneer and fiber cement panels, with TPO roofing. Three (3) elevators will service the building.

This report is based upon project information provided by the Owner/Developer.

PROJECT OVERVIEW, Continued

Executive Summary

Plans and Contract Documents

- Plans provided for our review are listed as CD GMP and Permit Set and dated December 14, 2018 and are signed and sealed by the Architect.
- Specifications were provided to our office.
- It is not known if a site plan approval has been granted by the Town.
- It is not known if any permits have been obtained.
- A survey has been provided to our office. The survey is not signed or sealed nor certified to the Bank.
- A signed and sealed letter has been provided by the Architect indicating that the plans conform to and comply with all applicable codes.

Trade Comments

- Plans and specifications are well detailed for construction.

Geotechnical Investigation

- Geotechnical Report was provided for our review.
- Twenty-one (25) soil test borings drilled to depths between approximately 8 and 39 feet.
- Subsurface conditions encountered generally consisted of fill materials extending to depths of 2.5 to 5.5 feet below existing grade. Natural soils were encountered below the surface cover and fill materials with the natural soils extending to depths of 25 feet. The natural soils were classified as clays (CL), silts (ML), sands (SM, SP-SM), and gravels (GP).
- Decomposed/Weathered rock was encountered at some borings. The decomposed/weathered rock was encountered at depths ranging from approximately 18.5 to 28.5 feet below existing grades. Based on a lowest finished floor level, materials requiring rock removal were generally encountered below the range of anticipated excavation levels for the proposed building; however, some rock excavation could be necessary in deeper utility excavations.
- A soil bearing capacity of 7,000 psf is recommended.

PROJECT OVERVIEW, Continued

Executive Summary, Continued

Geotechnical Investigation, continued

- The planned assisted living facility can be supported by conventional shallow foundations consisting of individual column footings and continuous wall footings bearing on natural soils or new structural fills.

Environmental Assessments

- A copy of the Phase I Environmental Assessment Report dated December 7, 2017 was provided for our review.
- The Phase I indicated not recognized environmental conditions.
- A potential concern is radon levels in this area. It is recommended that radon testing be done, to determine if radon mitigation is required.

Construction Schedule

- A Preliminary CPM Schedule dated March 30, 2023 was included as exhibit in GC Contract.
- Construction is scheduled to commence August 2023 with substantial completion March 25, 2024 and turnover April 22, 2024.
- Milestone are as follows:
 - Foundation: August 2023 – November 2023
 - Superstructure: December 2023 – April 2024
 - Façade Complete: August 2024
 - Building Watertight: June 15, 2024
 - Interiors: February 2023 – January 2024
- A 20-month schedule is reasonable for this project with adequate manpower and resources.

PROJECT OVERVIEW, Continued

Executive Summary, Continued

General Contract

- A copy of the AIA Document A133 – 2009 Standard Form of Agreement between Owner and Construction Manager as Constructor where the basis for payment is the cost of the work plus a fee with a Guaranteed Maximum Price dated February 11, 2023 was provided for our review.
- Owner and Contractor appear to be unrelated parties.
- The GMP price is \$45,293,536. (This matches the budget provided.)
- The CM fee is \$1,619,293.
- Retainage equal to ten percent (10%) of the amount requested in each Application for Payment shall be withheld by the Owner until fifty percent (50%) of the Work has been completed. Once fifty percent (50%) of the Work is completed, the Owner shall begin to hold five percent (5%) retainage until Substantial Completion. Early release of retainage for Subcontractors that complete their Work early in the Project shall be addressed on a case by case basis, in the Owner's sole and absolute discretion and subject to the Lender's approval.
- A CPM Schedule is included as an exhibit to the contract. The schedule shows an August 2023 start date for site work and a March 25, 2021 for substantial completion and April 2021 for turnover of the building. Liquidated damages of \$6,150 per day will be applied if substantial completion is not achieved on time.
- Savings will be shared with the first \$260,000 of savings split 50/50, savings exceeding \$260,000 split 80% to Owner and 20% to Construction Manager.
- A list of qualifications and valued engineering are included as an exhibit to the contract. We have included copies in the appendix of our report.
- Allowances are detailed in the body of this report.
- The contract is not signed. A copy of the executed contract should be provided once signed.

PROJECT OVERVIEW, Continued

Executive Summary, Continued

Architect's Contract:

- A copy of the executed Architect's Contract dated July 27, 2018 was provided for our review.
- The Architect has been retained for full Construction Administration Services including monthly site visits at stages appropriate to construction, review/approve Contractor's submittals such as shop drawings, review and certification of Contractor's application for payment requests and determination of substantial completion.

Construction Budget

- A copy of the budget dated January 23, 2023 was provided for our review. The budget was included as an exhibit to the General Contract. According to the budget, the total Hard Cost for the project is \$45,293,536 which includes General Conditions, Insurance, CM fee, and contingency but not bond. The budget is not very detailed did not provide sub-trade pricing and did not provide unit pricing.
- The budget was reviewed utilizing unit cost analysis and comparisons to projects of similar scope in the region.
- The Cost per Square Foot (based on 181,188 SF) for Total Hard Cost is \$249.98/SF and \$235.76/SF for trade costs. This appears in the reasonable range.
- The Cost per Unit (based on 146 units) is \$310,229/unit for Total Hard Cost and \$292,582/unit trade costs. This also appears in the reasonable range.
- Site Work accounts for 7.56% of the budget which is reasonable for the scope of work (5-10% typical).
- Concrete accounts for 15.74% of the budget, which is slightly low (15-20% typical).
- Masonry accounts for 4.69% of the budget which is reasonable (4-8% typical).
- Metals accounts for 3.83% of the budget which is reasonable (1-3% typical).
- Woods/Plastics/Composites accounts for 13.03% of the budget which is reasonable (8-15% typical).
- Thermal and Moisture Protection account for 4.33% of the budget which is reasonable (1-5% of the budget is typical).
- Doors and Windows accounts for 9.05% of the budget which is reasonable (6-10% typical).

PROJECT OVERVIEW, Continued

Executive Summary, Continued

Construction Budget, Continued

- Finishes accounts for 3.95% of the budget which is reasonable (3-8% typical).
- Specialties accounts for 2.52% of the budget which is reasonable (2-6% typical).
- Equipment accounts for 1.15% of the budget which is reasonable (0-1% typical).
- Furnishings accounts for 0.20% of the budget which is reasonable (0-1% typical).
- Conveying systems accounts for 1.37% of the budget which is reasonable and comes to approximately \$27,700/stop which is also reasonable (1-5% typical).
- Mechanical accounts for 14.72% of the budget which is reasonable (10-20% typical).
- Electrical accounts for 12.29% of the budget which is reasonable (8-12% typical).
- General Conditions have been included at 8.49% of the budget which is within a reasonable range. Typically, General Conditions accounts for 4-10% of the budget for projects of this scope.
- CM fee is budgeted at \$1,619,293 (3.75%) which matches the General Contract and is reasonable.
- The Budget includes a \$589,061 contractor's contingency. A separate Owner's contingency of 5-10% should also be provided.
- There is a line item for a credit in the amount of \$1,484,905 for approved valued engineering items and a list of valued engineered items is included in the appendix.
- Overall, the budget appears reasonable for the proposed project.

PROJECT OVERVIEW, Continued

Critical Issues Affecting Project

The following items appear most critical to the project's overall success and include:

- Copies of plan approval and permits should be provided to our office.
- A potential concern is radon levels in this area. It is recommended that radon testing be done, to determine if radon mitigation is required.
- There is a line item for a credit in the amount of \$1,484,905 for approved valued engineering items and a list of valued engineered items is included in the appendix.

SITE OVERVIEW

Site Description

Site Information:

Address:	444 E Main Street
City:	Rocky Point, South Carolina
Tax Block:	Tax Map TD44
Tax Lot:	3C
Special District:	No
Environmental Restrictions:	None
Last Survey Date:	February 16, 2018
Frontage:	Along Deer Park Avenue
Site Area:	5.44 acres

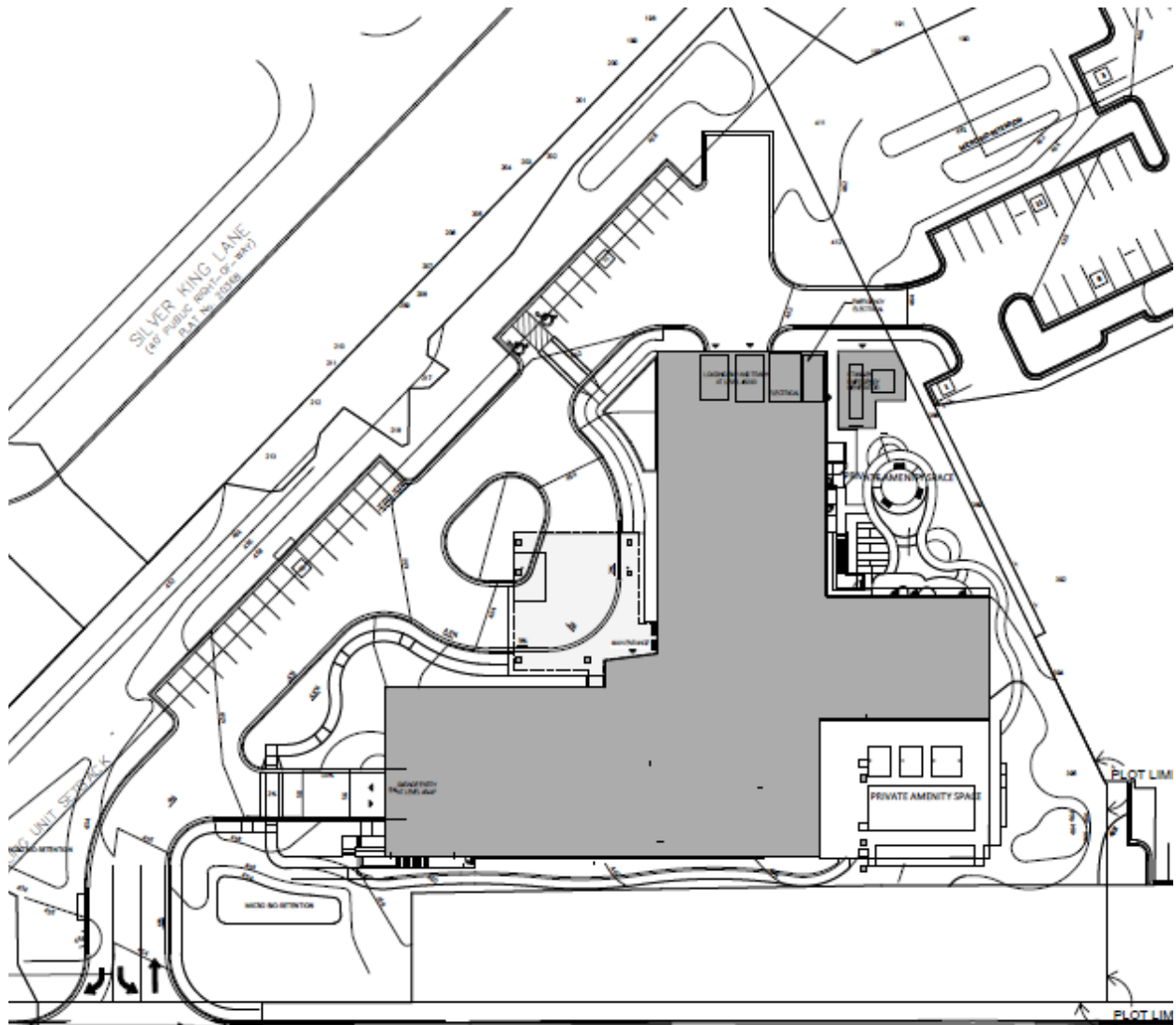
Parking and Paving:

Number of Parking Spaces Provided:	91 total spaces, 64 provided at the garage and 27 provided onsite
Covered Parking Structures:	64 parking spaces provided at the cellar level parking garage
Required Parking:	Not detailed
Parking Accessories:	None
Curbs:	Concrete
Access Control:	Not Detailed
Bicycle Parking:	None

SITE OVERVIEW, Continued

Site Description, Continued

Site Plan:



SITE OVERVIEW, Continued

Initial Site Visit Notes

An initial site visit was performed by Chris Sager of our office on June 3, 2023. The purpose of the site visit was to review the proposed Scope of Work with the existing conditions. The following is a description of our findings:

- The site is an asphalt parking lot with islands made with concrete curbs that house trees, grass and sidewalks. There is also a concrete curb that runs the entire boundary of the parcel. The parcel has a sloped grade, sloping from the southeast corner towards the northwest.
- The entrance to the parcel is on Deer Park Avenue. The parcel is West of Commack Road and to the east of Bellmont Road.
- There are two 4-story buildings used for administration offices by the Rocky Point Public Schools to the east of the parcel. Carillon residential housing development resides to the north and west of the parcel. There are also commercial businesses close by.
- There is a gas line that runs parallel between Deer Park Avenue and the north and west property line of the parcel. There may also be underground utilities running through the parcel since there was nothing visually overhead.

SITE OVERVIEW, Continued

Initial Site Visit Photographs



Photo 1 – Entrance at Deer Park Avenue.



Photo 2 - View of adjacent buildings/structures.

SITE OVERVIEW, Continued

Initial Site Visit Photographs, Continued



Photo 3 – East view of Commack Road in front of entrance.



Photo 4 – West view of Commack Road in front of entrance.

SITE OVERVIEW, Continued

Initial Site Visit Photographs, Continued



Photo 5 - Parking lot drive-thru to parcel.



Photo 6 – South view of parcel.

SITE OVERVIEW, Continued

Initial Site Visit Photographs, Continued



Photo 7 - North View of parcel.



Photo 8 – East view of parcel.

SITE OVERVIEW, Continued

Initial Site Visit Photographs, Continued



Photo 9 - Residential community adjacent to the west of parcel.



Photo 10 – 3 sides of parcel is surrounded by tree buffer.

SITE OVERVIEW, Continued

Geotechnical Investigations

Type of Report:	Geotechnical Report
Date:	September 3, 2018
Author:	
Consistent with Proposed Project:	Appears so
Signed by Engineer:	Yes, by Peter Johnson, P.E.
Soils Description:	<p>Subsurface conditions encountered generally consisted of fill materials extending to depths of 2.5 to 6 feet below existing grade. Natural soils were encountered below the surface cover and fill materials with the natural soils extending to depths of 30 feet. The natural soils were classified as clays (CL), silts (ML), sands (SM, SP-SM), and gravels (GP).</p> <p>Decomposed/Weathered rock was encountered at some borings. The decomposed/weathered rock was encountered at depths ranging from approximately 18.5 to 28.5 feet below existing grades. Based on a lowest finished floor level, materials requiring rock removal were generally encountered below the range of anticipated excavation levels for the proposed building; however, some rock excavation could be necessary in deeper utility excavations.</p> <p>Ground water was found at 27' below grade.</p>
Geographic Concerns:	None
Boring/Test Pit Description:	Twenty-one (21) soil test borings drilled to depths between approximately 10 and 44 feet.
Conclusions for Earth Disturbance, Foundation, Slab on Grade and Pavement Sections:	The planned assisted living facility can be supported by conventional shallow foundations consisting of individual column footings and continuous wall footings bearing on natural soils or new structural fills.
Hazards Noted (Flood, Seismic, Karst, Mining):	Seismic site class D
Soil Bearing Capacity and Anticipated Differential Settlement:	<p>7,000 psf</p> <p>Total settlement of 1" and total differential settlement of ½".</p>
Underpinning Required:	Not detailed

SITE OVERVIEW, Continued

Environmental Investigations

Type of Report:	Phase I Environmental Assessment Report dated December 12, 2017
Prepared By:	
Recognized Environmental Conditions (RECs):	None
Potential Issues for Concern:	Radon could be present in this area. It is recommended that radon testing be done.
Potential Impact on Budget or Schedule:	If radon is detected an active radon mitigation system should be installed.

Utility Availability

A letter was provided by Rocky Point Gas dated December 4, 2018 indicating that natural gas service is available for this project.

A letter was provided by Electro dated December 6, 2018 indicating that electric service is available in the area.

A letter was provided by Verizon dated December 5, 2018 indicating that communication services are available to the site.

A letter was provided by Rocky Point Water Authority dated July 6, 2018 and indicates that water and sewer is available to the site. A pressure reducing valve is required for the water line.

SITE OVERVIEW, Continued

Site Survey

ALTA/ACSM Format:	Yes, dated January 11, 2018
Stamped by Licensed Land Surveyor:	No
Certified to the Bank:	No
Easements Affecting Proposed Improvements:	Utility easements noes on survey, Tree conservation easement, 50' Transco right of way.
Access to Site:	Deer Park Avenue
Encroachments:	None
Survey and Civil Plans Consistency:	Appears so

BUILDING CONSTRUCTION

Building Layout

	444 E Main Street
Total Building Height:	75'
No. of Floors Above Grade:	6
No. of Floors Below Grade:	1
No. of Residential Units:	146 units/164 beds

Gross Floor Area By Floor:

Garage:	32,382 GSF
Floor 1:	29,317 GSF
Floor 2:	24,681 GSF
Floor 3:	23,702 GSF
Floor 4:	23,702 GSF
Floor 5:	23,702 GSF
Floor 6:	<u>23,702 GSF</u>
Total:	181,188 GSF

BUILDING CONSTRUCTION, Continued

Building Layout, Continued

Residential Units Per Floor:

Floor	Elev	Use	Units
Garage	454.66		
Floor 1	466.00	Common	
Floor 2	481.00	MC	30
Floor 3	493.00	AL	29
Floor 4	503.66	AL	29
Floor 5	514.33	AL	29
Floor 6	525.00	AL	29
Penthouse	537.00		
Total units			146
		total beds (MC/AL)	164

BUILDING CONSTRUCTION, Continued

Building Layout, Continued

Basement: Parking garage, fire/water room, resident storage, gas meter room, mechanical boiler room, storage rooms, two (2) elevator lobbies.

First Floor: Building entry, vestibule, lobby, bistro, bistro seating, community room, bar/lounge, billiards/cards room, arts and crafts room, hospitality room, men's bathroom, women's bathroom, waiting area, dining room, private dining room, casual dining room, wait station, display kitchen, pantry, commercial kitchen, laundry room, clean utility room, soiled utility room, staff lounge, staff lockers, housekeeping, marketing office, offices, maintenance office, electric room, loading alcove, salon, exercise room, therapy room, exam room, men's bathroom, women's bathroom and corridors.

Second Floor: Elevator lobby, corridor, memory care units, activity area, living room areas, salon, linen room, clean utility room, soiled utility room, laundry room, IT room, electric room, med room, bathroom, director's room, dining room, kitchen and pantry.

Third Floor: Corridor, assisted living units, activity areas, living room areas, laundry room, housekeeping, IT room, electric room, med room, bathroom, dining area, and pantry.

Fourth – Sixth Floor: Corridor, assisted living units, activity areas, living room areas, laundry room, housekeeping, IT room, electric room, med room, and bathroom.

Memory Care room: Foyer, Bedroom(s), bathrooms. Shared rooms will have a living room.

Assisted Living room: Living room, kitchen, Bedroom(s), bathrooms.

Bathrooms: Water closet, lavatory and roll-in shower.

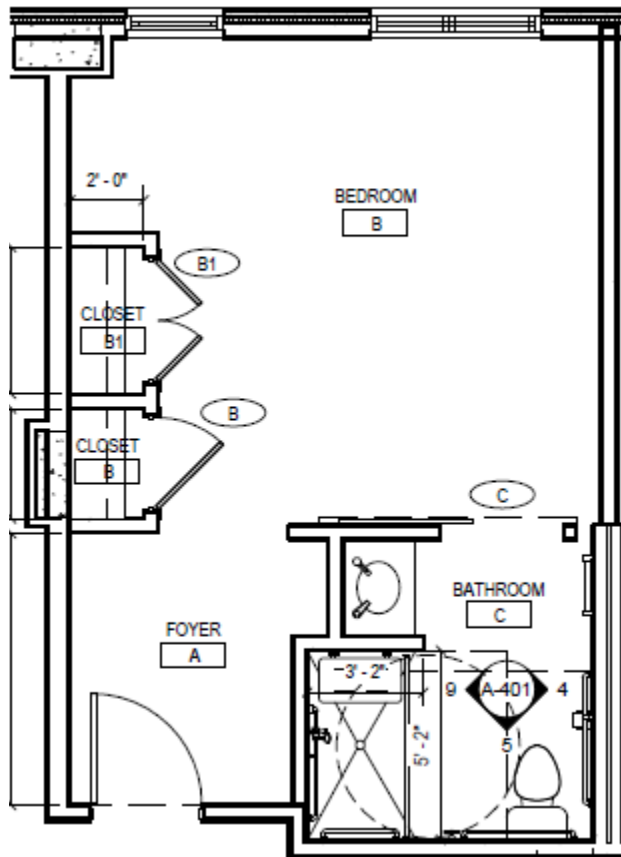
Kitchens: Sink and refrigerator

Vertical Access: Three (3) interior staircases, three (3) passenger elevator.

BUILDING CONSTRUCTION, Continued

Typical Unit Layout

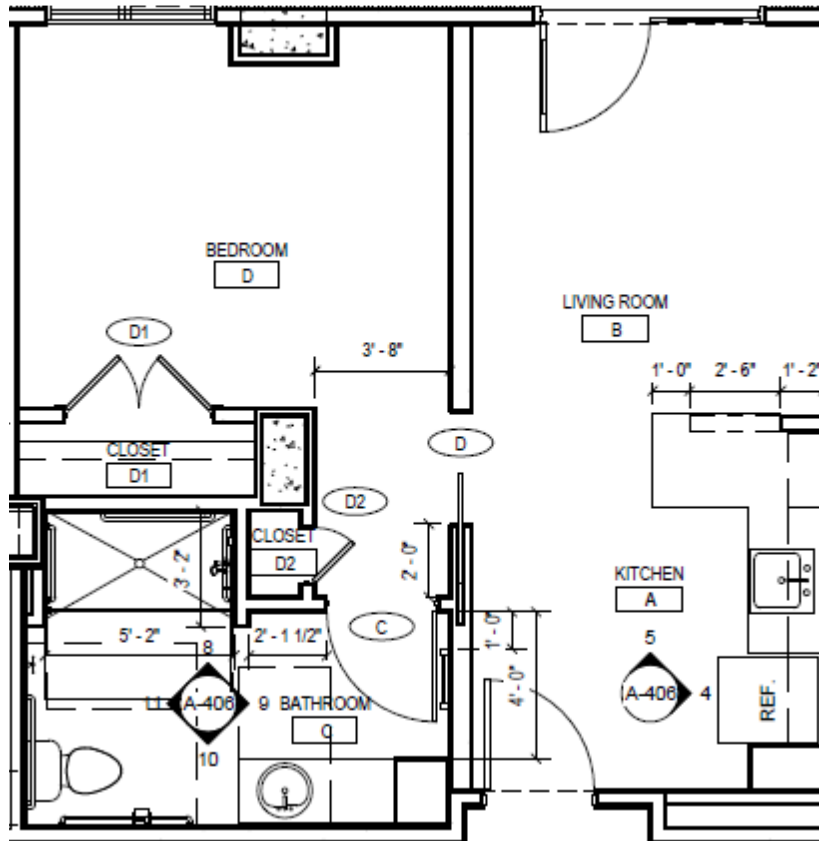
Memory Care Unit



BUILDING CONSTRUCTION, Continued

Typical Unit Layout

Assisted Living Unit



BUILDING CONSTRUCTION, Continued

Design and Structure

Foundation Design:

Concrete Slab:	4" concrete slab reinforced with 6x6W1.4xW1.4 welded wire fabric on 10 mil vapor barrier on 4" layer of compacted stone.	
Underslab Drainage:	No active underslab system specified. Perimeter foundation drain will be provided.	
Foundation Walls and Footings:	Concrete footings and foundation walls.	
Concrete Strength:	-FOOTINGS -SLAB-ON-GRADE -FOUNDATION WALLS (MAX W/C RATIO=0.45) -ELEVATED SLABS & BEAMS AT SECOND FLOOR -ELEVATED SLABS & BEAMS -COLUMNS -COLUMNS WITHIN BASEMENT WALLS -SHEARWALLS	3,000 PSI 3,500 PSI 4,000 PSI 6,000 PSI 5,000 PSI PER COLUMN 4,000 PSI PER COLUMN
Soil Bearing:	3,000 psf for level 1 and 7,000psf for the garage.	
Vapor Barrier:	10 mil vapor barrier.	

Floor Construction:

Framing:	First floor will be 12" concrete two-way flat slab with drop panels, Second -Sixth Floor will be 8" post tensioned concrete two-way flat slab.
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Exterior Construction:

Roofing (Type/Manufacturer and warranty):	Ultra Ply TPO by Firestone Building Products over 10" post tensioned concrete two-way flat slab, 15 year warranty.
Windows (Type/Manufacturer and warranty):	Aluminum windows by Peerless.
Exterior Doors:	Aluminum storefront type.
Interior Doors:	A mix of hollow metal and wood doors.
Facade:	A mix of Brick and Fiber cement panel system, and stone veneer.

BUILDING CONSTRUCTION, Continued

Vertical Transportation

Stairs:

Stringers:	Concrete
Tread:	Concrete
Riser:	Concrete
Landings:	Concrete slab
Railings:	1 ½" Metal rails attached to ½"x1/2" bar stock balusters at 4 ¼" on center
Wall Construction:	2-hour rated gypsum board partition
Fire Escape:	None
Elevator Pits:	Two (2)

Elevators:

Number of Elevators:	Three (2) residential passenger elevator will be provided
Type:	Machine room-less traction
Manufacturers:	a. Otis b. Kone c. Schindler d. Thyssenkrupp e. Mitsubishi
Capacity:	4,500 lbs for elevator 1 and 3,500 lbs for elevator 2 and 3
Stops:	7 stops
Speed:	350 fpm

DESIGN OVERVIEW

Fair Housing Act and Accessibility Requirements

Fair Housing Act specifies seven (7) design and construction for proposed construction:

Design Requirement:	Achieved By:
Building Entrance on an Accessible Route	<ul style="list-style-type: none"> • At least one entry, except for extreme terrain situations • Cross slopes 1:48 max. running slopes 1:20 max, ramp 1:12 max needs rails and edges • Widths 36" clear
Accessible Public and Common Areas	<ul style="list-style-type: none"> • Residential Parking – 2% of parking spaces with at least one minimum • Visitor Parking – Minimum one at sales/office • ADA says 8' space, 5' buffer typical and 8' buffer for van loading • Toilet rooms must be accessible including 5' radius, grab bars, roll under sink, lowered mirror/features • Access to a swimming pool, but not into the swimming pool • Laundry rooms, dumpsters (no more than 5 pound pressure) and mailboxes must be accessible • Drinking Fountains – 50% must be accessible
Usable Doors	<ul style="list-style-type: none"> • Width – 32" Clear within unit • Maneuvering Clearances – 18" clear floor space on the pull side of door • Thresholds – ¼" max, ¼"-½" beveled 1:2 or less, over ½" sloped 1:12 or less • Hardware – No tight grasping or twisting (but not within unit) • Opening Force – No more than 5 pounds pressure or automatic controls
Accessible Routes into and through Unit	<ul style="list-style-type: none"> • 36" to unit with 32" clearance at interior door • Entry threshold – not to exceed ¾" above finish floor or beveled 1:2 or less and abrupt vertical changes are not to exceed ¼" • Secondary entry doors (i.e. sliding glass doors), ½" threshold or less if pervious or 4" or less if impervious
Light switches, outlets and thermostats, etc.	<ul style="list-style-type: none"> • Operable parts 15" minimum from floor • Switches no more than 48" above floor • Controls over counters 44" to 48" depending on counter depth
Reinforced walls in bathrooms for grab bars	<ul style="list-style-type: none"> • Only public and common toilet rooms require grab bar installation, otherwise just blocking is required • 6" wide by 24" long min., bars behind toilet. • Reinforcing alongside wall, if applicable • Powder rooms exempt if other accessible toilet room is on the same level • May need floor reinforcement if 90° bars are needed for a toilet between a tub and sink (or can do fold down bars) • Tub reinforcing should be along entire tub from 32" to 38" above floor level • Can use wood or metal
Usable Kitchen and Bathrooms	<ul style="list-style-type: none"> • Clear floor space at appliances – 30"x48" to fit a wheelchair • Clearance between countertops, appliances and walls – 40" between cabinets and refrigerators and handles can impede space. At narrow U-shaped 30"x48" workspace it is acceptable if knee space is provided or adapted cabinet is provided • Specification A Bathroom Type – less accessible, all fixtures must be usable and a 30"x48" workspace is provided • Specification B Bathroom Type – more accessible, one of each fixture type must be usable and a 30"x48" workspace is provided • Roll in showers are not required as long as access, work space, bars, seat, shower wand, lowered controls, etc., are provided

DESIGN OVERVIEW, Continued

Accessibility Compliance

Plans provide generic detailing regarding handicap accessibility design requirements.

A letter prepared by the Architect has been provided to our office dated January 4, 2023 and indicates the building has been designed in compliance with applicable codes and regulations including, COMAR. It does not state anything specifically regarding accessibility.

LEED Design, Energy Audits

The building will meet requirements of ASHRAE90.1-2010 and LEEDv4 for new construction.

Codes

- 2015 International Building Code (IBC)
- 2015 International Energy Conservation Code (IECC)
- 2015 International Mechanical Code (IMC)
- 2015 International Plumbing Code (IPC)
- 2015 International Fuel Gas Code (IFGC)
- 2015 NFPA 101 Life Safety Code
- 2014 National Electrical Code (NFPA 70)
- 2015 NFPA 1 Fire Code
- 2013 NFPA 72 Fire Alarm Code
- 2010 ADA Standards

SCHEDULES, CONTRACTS AND AGREEMENTS

Construction Schedule

Type:	Preliminary CPM Schedule dated April 4, 2023 included as exhibit in GC Contract
Detail Adequacy:	Adequate
Commencement Date:	August 2023
Completion Date:	March 25, 2023 for substantial completion and April 22, 2024 for turnover
Milestones:	Foundation: August 2023 – November 2023 Superstructure: December 2023 – April 2024 Façade Complete: August 2024 Building Watertight: June 15, 2024 Interiors: February 2023 – January 2024
Reasonableness Considering Weather Delays, Labor Issues and Historical Perspective:	A 20-month schedule is reasonable for this project with adequate manpower and resources.

SCHEDULES, CONTRACTS AND AGREEMENTS, Continued

Review of General Contract

Agreement Type:	AIA Document A133 – 2009 Standard Form of Agreement between Owner and Construction Manager as Constructor where the basis for payment is the cost of the work plus a fee with a Guaranteed Maximum Price dated February 11, 2023
Owner:	Rockville Community Inc.
General Contractor:	
Appropriateness:	Appears appropriate
Basis of Payment and Contract Sum:	GMP price of \$45,293,536 (This matches the budget provided.) CM fee of \$1,619,293 GMP will include a \$589,061 contractor's contingency. General conditions of \$2,986,926
Retainage Provisions:	Retainage equal to ten percent (10%) of the amount requested in each Application for Payment shall be withheld by the Owner until fifty percent (50%) of the Work has been completed. Once fifty percent (50%) of the Work is completed, the Owner shall begin to hold five percent (5%) retainage until Substantial Completion. Once Substantial Completion is achieved, (i) the Owner shall hold two hundred percent (200%) of the Owner approved estimated cost to complete the remaining Work and achieve Final Completion. Early release of retainage for Subcontractors that complete their Work early in the Project shall be addressed on a case-by-case basis, in the Owner's sole and absolute discretion and subject to the Lender's approval.
Stored Material, Deposit Funding:	Subject to Owner prior approval.
Liquidated Damages:	\$6,150 per day until substantial completion is achieved.
Savings:	First \$260,000 of savings split 50/50, savings exceeding \$260,000 split 80% to Owner and 20% to Construction Manager.
Early Bonus:	None indicated
Change Order Process:	3.75% Mark up on change orders for CM fee
Lien Waiver Requirements:	Per Contract Terms
Construction Schedule:	A CPM Schedule is included as an exhibit to the contract. The schedule shows an August 2023 start date for site work and a March 25, 2021 for substantial completion and April 2021 for turnover of the building.
Contract Exclusions and Clarifications:	A list of qualifications is included as an exhibit to the contract. We have included a copy in the appendix of our report.

SCHEDULES, CONTRACTS AND AGREEMENTS, Continued

Review of General Contract, continued

Unit Prices and Add Alternates, and Value Engineering:	A valued engineering list has been included in the General Contract. A copy is included in the appendix of this report.
Allowances:	<ol style="list-style-type: none"> 1. Allowance for Temporary Water - \$5,000 2. Allowance for Temporary Power - \$15,000 3. Temporary Heating Costs - \$30,000 4. Temporary Generator & Power \$52,000 5. Wine Storage/Cabinet at Private Dining - \$20,000 6. 3rd Party Testing for Water Spray Test \$3,000 7. Parking Gate to Matan Lot \$20,000 8. Allowance Loose Pots/Planters \$15,000 9. Allowance for Site Security \$15,000
Quality Assurance/ Quality Control Procedures (construction testing):	Per Contract Terms.
Owner/Builder Relationship and Experience:	Parties appear to be unrelated
Labor Requirements:	None indicated
Is it executed:	No
Attachments:	Exhibit A Form of Guaranteed Maximum Price Amendment Exhibit B Lien Release Forms Exhibit C AIA Document A201–2007, General Conditions of the Contract for Construction, as amended Exhibit D Form of Data Transfer Agreement Exhibit E Condominium Conversion Addendum

SCHEDULES, CONTRACTS AND AGREEMENTS, Continued

Review of Major Sub-Contracts

Subcontractor contracts were not provided for our review.

Review of Architect's Contract

Agreement Type:	AIA Document B101- 2007 Standard Form of Agreement Between the Owner and Architect
Date:	July 27, 2018
Is it executed:	Yes
Owner:	Rockville Community Inc.
Architect:	Awesome Architects
Construction Administration:	Yes, Included in Services
Site Inspections/Meetings:	Yes, Included in Services
Certification of Payment Applications:	Yes, Included in Services
Preparation of Change Orders?	Yes, Included in Services
Coordination of the Request for Information (RFI) Process:	Yes, Included in Services
Determination of Substantial Completion?	Yes, Included in Services

BUILDING DEPARTMENT FILINGS

Filed Applications

None provided for our review.

Zoning Approvals

None provided for our review.

Issued Permits

No permits have been provided to our office. It is not known if permits have been pulled.

Violations

Our office is not aware of any violations associated with the site.

BUDGET ANALYSIS

Overview

A copy of the budget prepared by Build Up Contractors dated January 14, 2023 was provided for our review. The budget was included as an exhibit to the General Contract. According to the budget, the total Hard Cost for the project is \$45,293,536 which includes General Conditions, Insurance, CM fee, and contingency but not bond. The budget is not very detailed did not provide sub-trade pricing and did not provide unit pricing.

The budget was reviewed utilizing unit cost analysis and comparisons to projects of similar scope in the region.

Square Footage Cost Analysis

- The Cost per Square Foot (based on 181,188 SF) for Total Hard Cost is \$249.98/SF and \$235.76/SF for trade costs. This appears in the reasonable range.

Unit Cost Analysis

- The Cost per Unit (based on 146 units) is \$310,229/unit for Total Hard Cost and \$292,582/unit trade costs. This also appears in the reasonable range.

Trade Related Comments

- Site Work accounts for 7.56% of the budget which is reasonable for the scope of work (5-10% typical).
- Concrete accounts for 15.74% of the budget, which is slightly low (15-20% typical).
- Masonry accounts for 4.69% of the budget which is reasonable (4-8% typical).
- Metals accounts for 3.83% of the budget which is reasonable (1-3% typical).
- Woods/Plastics/Composites accounts for 13.03% of the budget which is reasonable (8-15% typical).
- Thermal and Moisture Protection account for 4.33% of the budget which is reasonable (1-5% of the budget is typical).

BUDGET ANALYSIS, Continued

Trade Related Comments, Continued

- Doors and Windows accounts for 9.05% of the budget which is reasonable (6-10% typical).
- Finishes accounts for 3.95% of the budget which is reasonable (3-8% typical).
- Specialties accounts for 2.52% of the budget which is reasonable (2-6% typical).
- Equipment accounts for 1.15% of the budget which is reasonable (0-1% typical).
- Furnishings accounts for 0.20% of the budget which is reasonable (0-1% typical).
- Conveying systems accounts for 1.37% of the budget which is reasonable and comes to approximately \$27,700/stop which is also reasonable (1-5% typical).
- Mechanical accounts for 14.72% of the budget which is reasonable (10-20% typical).
- Electrical accounts for 12.29% of the budget which is reasonable (8-12% typical).

General Conditions

- General Conditions have been included at 8.49% of the budget which is within a reasonable range. Typically, General Conditions accounts for 4-10% of the budget for projects of this scope.

Contractor's Profit / Overhead

- CM fee is budgeted at \$1,619,293 (3.75%) which matches the General Contract and is reasonable.

Contingency

- The Budget includes a \$589,061 contractor's contingency. A separate Owner's contingency of 5-10% should also be provided.

Value Engineering

- There is a line item for a credit in the amount of \$1,484,905 for approved valued engineering items and a list of valued engineered items is included in the appendix.

Conclusion

- Overall, the budget appears reasonable for the proposed project.

CONSTRUCTION PHASE DOCUMENTATION

Construction Phase Documentation

KOW Building Consultants would like to request the following documents be provided to our office as part of our construction phase site observation report (SOR) service. This standing list applies to the project once work has begun, as applicable. All documents should be provided monthly to coincide with our monthly requisition site observation, at a minimum. We respectfully request that any critical or noteworthy items be brought to our attention as opposed to a monthly basis if that applies.

Provide Monthly to KOW:

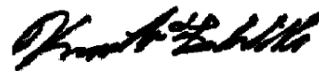
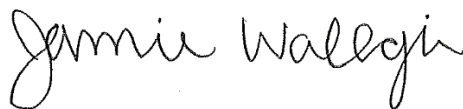
- Executed Application for Payment G702 and G703.
- Partial Waiver of Lien for General Contractor.
- Partial Waivers of Lien for Subcontractors.
- Executed Change Orders
- Construction Schedule, as updated.
- Request for Information Log.
- Submittal/Shop Drawing Log.
- Change Order Log.
- Potential Change Order Log.
- Buyout Log or Anticipate Cost Report (ACR).
- Controlled Inspection Log.
- Non-Compliance Report (NCR).

Not all items listed above will apply to the project each month or at all. It is merely a complete list of documents that are requested.

LIMITING CONDITIONS

Neither our review of the plans nor any subsequent site observations or reports concerning the project during construction shall constitute a warranty by us or any of our agents, representatives or designees as to the technical sufficiency of adequacy or safety of the structure or any of their component parts, including, without limitation, fixtures, roofing, equipment or furnishings, nor shall such reports or site observations constitute such a warranty as to the sub-soil conditions involved in the project or any other physical condition or feature pertaining to the project. This Report should not be construed as a zoning analysis or code compliance Report. Adherence to code and other governmental regulations is the sole responsibility of the design professional and this Report reviews and comments on design aspects as a matter of overall feasibility and not as a code check. All comments regarding budgeting are a matter of overall cost assessments and not a cost certification or "take off" cost analysis. All acts, including any failure to act, relating to this project by any of our agents, representatives or designees are performed solely for the benefit of the lending institution to aid in their disbursement of funds from the construction loan and not for the benefit of any other person, including without limitation, owner, contractor, purchasers, tenants or any other parties. No warranties or guarantees made by any Insured; no of probable construction costs, or any cost estimated being exceeded; no commingling of or inability or failure to safeguard funds; no services rendered by or on behalf of the Named Insured as an Architect and/or Engineer have been made.

KOW Building Consultants



Jamie Walegir Potucek, P.E., LEED AP Kenneth F. Wille, PE., LEED AP

REFERENCES FOR KOW BUILDING CONSULTANTS

List of References:

John Oddo, Vice President Real Estate Services

Wells Fargo

john.oddo@wellsfargo.com; 908-598-3553

Bernard Tyminski, Senior Vice President

Bank of America

bernard.tyminski@baml.com; 646-855-2696

John Tucci, Vice President

The Community Preservation Corporation

tucci@communitycp.com; 646-822-9355

Kristen Smith, Vice President

M&T Bank

kasmith@mtb.com; 201-368-4519

Claire Tolmie, Banking Officer

M&T Bank

ctolmie@mtb.com; 212-350-2447

Paul Bonvicino Jr., AIA

Capital One Bank

Paul.Bonvicino@capitalone.com; 646-836-5228

Kevin Murphy, Assistant Vice President

Hudson Housing Capital

kevin.murphy@hudsonhousing.com; 212-218-4471

Richard A. Meyer

Freddie Mac

Richard.Meyer@freddiemac.com; 703-714-3384

Emilie B. Seif, Project Manager

NYC Dept. of HPD

SeifE@hpd.nyc.gov; 212-863-5085

Cliff Archer, VP-HFA Construction Services

NYSHFA

carcher@nyshcr.org; 212-688-4000

Johnny Reyes, Vice President Business Development Officer

Victory State Bank

jreyes@victorystatebank.com; 718-889-3612

Valerie DeCola, Construction Coordinator

TD Bank

Valerie.DeCola@td.com; 856-437-3874

APPENDICES

Attachments

- Trade Budget Provided for our Review.
- Comparative Cost Budget Analysis prepared by KOW Building Consultants.