

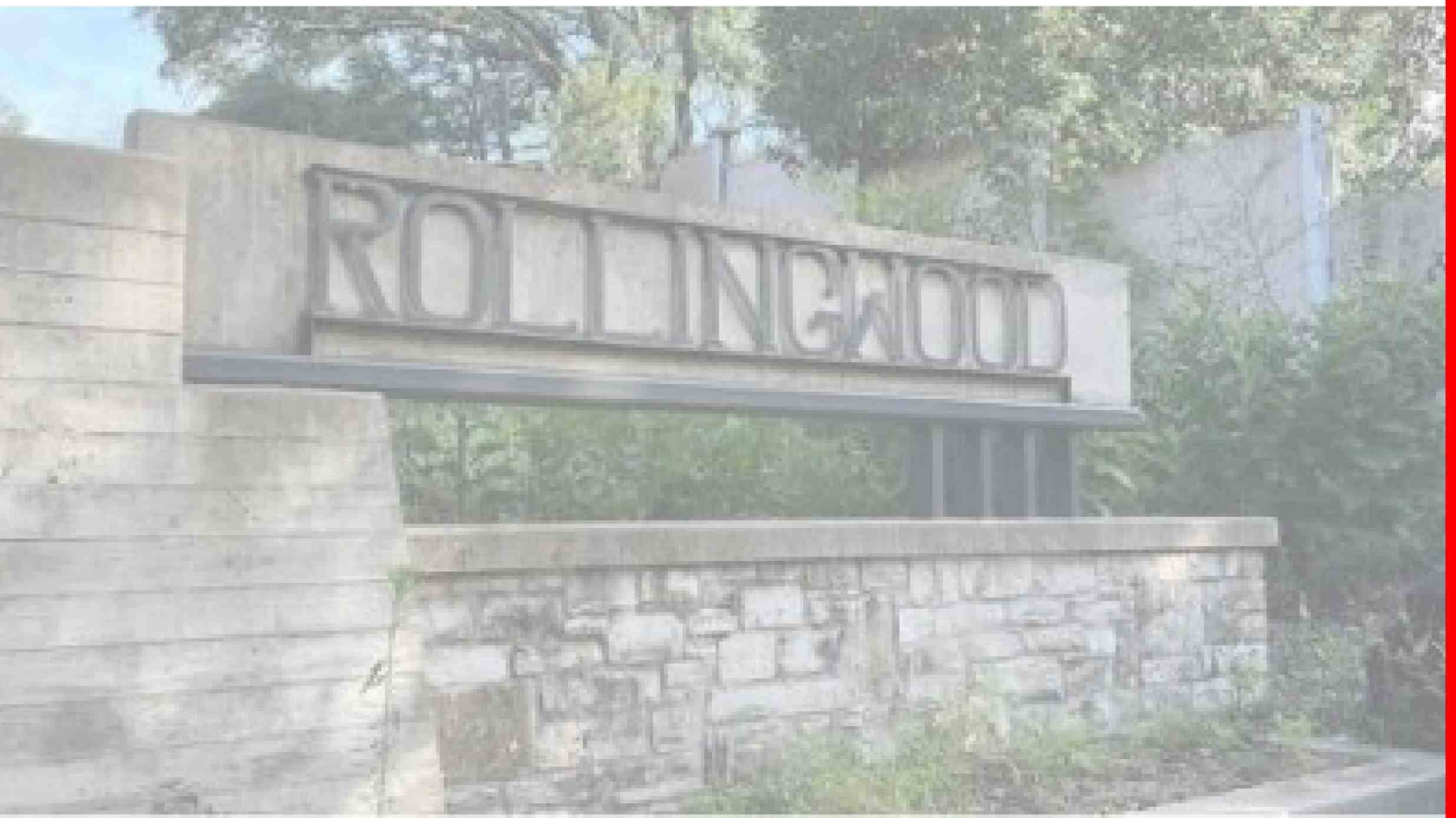
City of Rollingwood
Proposal for
Owners Representative Services
City Hall Improvements

June 8, 2026
512.222.7979
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Right-sized leadership.
Public accountability.
Built for Rollingwood.

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Introduction/Cover Letter

Executive Letter of Interest and Qualifications Summary

Alun Thomas
City Administrator
City of Rollingwood
403 Nixon Drive
Rollingwood, TX 78746

Re: RFQ Response – Owner’s Representative Services for City Hall Improvements

Dear Mr. Thomas:

The City of Rollingwood has an opportunity to make a meaningful investment in its future through the City Hall Improvements project. Projects like this do more than improve buildings—they strengthen the City’s ability to serve residents, support public safety operations, enhance day-to-day functionality for staff, and create lasting value for the community. With a total project budget of up to \$4 million shared between the City and Travis County ESD No. 9, this initiative presents an opportunity to thoughtfully evaluate current and future needs, align stakeholders around a common vision, and deliver a facility solution that serves Rollingwood well for years to come. Achieving that outcome requires disciplined owner-side leadership, clear scope definition, the right delivery strategy, coordination of municipal and fire department needs, careful budget stewardship, and informed decision-making throughout the process.

Windsor Group Advisory & Management was built for assignments like this.

Rollingwood does not need a large, layered project-management apparatus for a project of this scale. The City needs a senior, accountable owner’s representative: one clear point of contact, direct access to the person responsible for the work, practical public-sector judgment, and a process scaled to a small city delivering a visible civic facility under budget, schedule, regulatory, and stakeholder pressure.

Greg Smith, Principal and Founder of Windsor Group, will serve as the City’s principal point of contact and accountable lead from planning through closeout. The City will know who owns the action list, who is reviewing the budget, who is coordinating architect and contractor procurement, who is preparing Council-ready recommendations, and who is escalating risk before it becomes a public problem. Windsor’s support resources will be applied deliberately and efficiently, but the City will not be handed off to a rotating cast of staff.

We understand Rollingwood’s assignment as a governance, budget, and scope-control challenge first — and a construction challenge second. The RFQ asks the Owner’s Representative to assist with needs refinement, delivery-method selection, architect and contractor procurement, budget tracking, cost estimating, schedule monitoring, design review, City Council communication, construction oversight, documentation, closeout, and warranty support. Windsor’s approach is organized around those responsibilities, with a focus on early decisions that prevent late-stage cost, schedule, and stakeholder surprises.

Our experience is directly relevant. Windsor has represented owners through complex renovation and civic-facing projects where success depended on disciplined scope definition, stakeholder alignment, budget control, and clear communication. Our work on the All Saints' Gregg House renovation provides a close same-scale renovation comparison, with an institutional owner, existing-building constraints, and active stakeholder expectations. Our Brownsville Communications Complex work demonstrates Windsor's ability to support a public-sector owner in a civic renovation environment with public accountability, operational requirements, and practical project leadership.

For Rollingwood, we would begin by helping the City confirm the real project problem before the solution hardens prematurely. Improvement, remodeling, and replacement each carry different budget, schedule, procurement, permitting, operational, and public-communication implications. Windsor would approach those options without bias. The right recommendation should come from the facts: confirmed program needs, existing-building conditions, site constraints, total project cost, schedule, operational continuity, regulatory requirements, and long-term value to the City. If renovation is the best path, we will help the City make it disciplined and cost-effective. If replacement better serves the City's needs within the available budget, we will help the City reach that conclusion clearly and defensibly.

Windsor would help the City and ESD No. 9 establish clear decision criteria, validate must-have versus should-have requirements, identify site and regulatory constraints early, and prepare a documented delivery-method recommendation suitable for City Council action. Our role is not to force a predetermined solution. Our role is to give Rollingwood the structure, information, and owner-side judgment needed to make the right decision and then deliver it well.

This project is important to Windsor. We are based in the Austin area, we understand the character and expectations of communities like Rollingwood, and we are pursuing this assignment because it fits who we are and the kind of work we want to be known for: practical, principled, owner-first leadership for civic and community-serving projects. We would be proud to help the City deliver a facility that supports municipal operations, public safety, and the long-term needs of Rollingwood residents.

Thank you for your consideration. We would welcome the opportunity to serve as the City's Owner's Representative.



Respectfully submitted,

Greg Smith

Principal & Founder
Windsor Group Advisory & Management LLC



Windsor Group Advisory and Management

Where public vision becomes executable.

Firm Description

FIRM DESCRIPTION

Firm Information

Firm Name: Windsor Group Advisory & Management LLC
Address: 2105 E Martin Luther King Jr Blvd, Suite 220, Austin, TX 78702
Phone: 512.222.7979
Office Principally Responsible for the Project: Austin, Texas

Parent Office(s)

Not applicable. Windsor Group Advisory & Management LLC is an Austin-based firm.

Authorized Contact

Greg Smith
Principal
Windsor Group Advisory & Management LLC
2105 E Martin Luther King Jr Blvd, Suite 220
Austin, TX 78702
512.222.7979
gregs@windsor-groupllc.com

Years Providing Owner's Representative / Development Management / Project Management Services

20+ years

Years Providing Owner's Representative / Project Management Services for Local Government Entities

~15 years

Overview

Windsor Group Advisory & Management LLC is an Austin-based owner's representation, development advisory, and project management firm. Windsor supports owners through planning, due diligence, procurement, design, construction, closeout, and post-occupancy coordination for civic, institutional, community-serving, and real estate development projects.

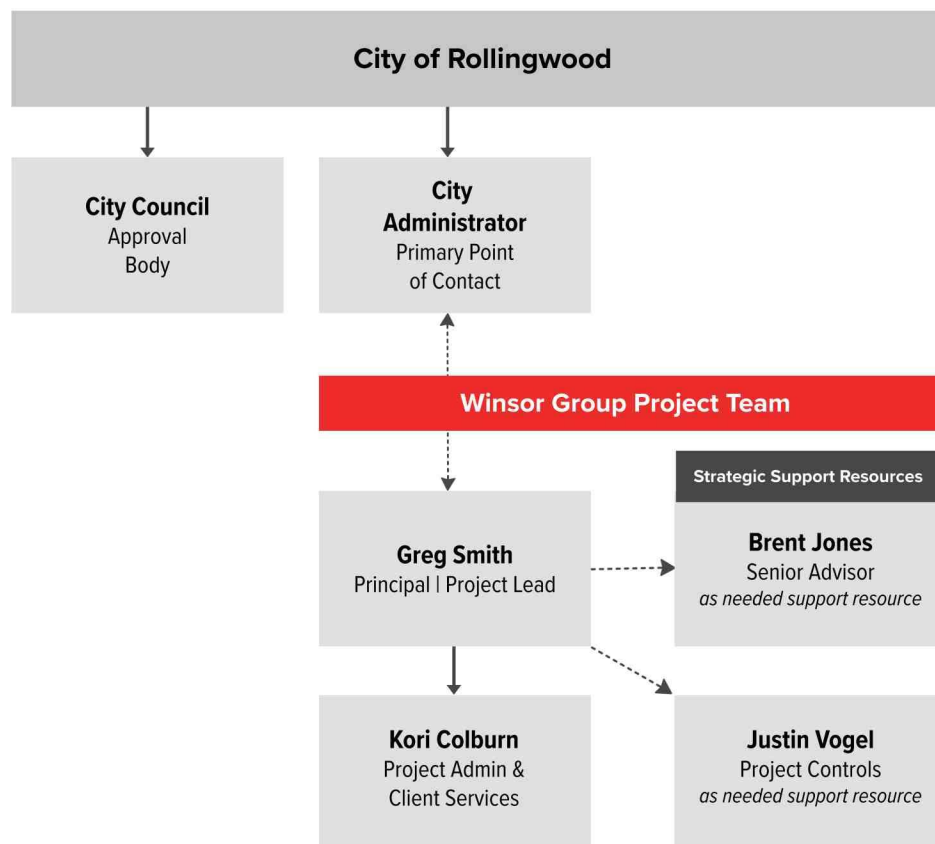
For the City of Rollingwood, Windsor's services will be led directly by Greg Smith, who will serve as the City's principal point of contact and accountable project lead. Windsor's support structure is intentionally lean and scaled to the size and needs of the assignment.

Windsor has supported municipalities and public-facing owners across Texas, as well as local government entities outside of Texas through Greg Smith's earlier career experience. Through that work, Windsor has developed a firm grasp of public-sector project delivery, including procurement discipline, consultant and contractor coordination, budget control, schedule management, documentation, reporting, stakeholder communication, and public accountability.

*FIRM DESCRIPTION Continued***Relevant Firm Capabilities**

Windsor's services align with the Owner's Representative responsibilities requested by the City, including:

- Project definition and early due diligence
- Owner's representative and project leadership services
- Budget development and total project cost control
- Schedule development and milestone tracking
- Architect, contractor, and vendor procurement support
- Public-sector RFP / RFQ coordination and evaluation support
- Design-phase coordination and document review
- Contractor / CMAR coordination and preconstruction support
- Construction-phase oversight, meeting management, and reporting
- Pay application, change order, and cost review
- City Council, board, and stakeholder reporting
- Closeout, turnover, training, warranty, and post-occupancy support

Organization Chart

Key Staff

Team Member	Role	Experience	Expected Services to the City
Greg Smith	Principal / Accountable Lead	20 years	Greg will serve as the City's principal point of contact and accountable project lead. He will be responsible for overall owner representation, City communication, project strategy, scope and budget decision support, procurement guidance, consultant and contractor coordination, City Council reporting, and executive-level issue resolution.
Kori Colburn	Project Administration & Client Services	8 years	Kori will support project documentation, project accounting, procurement support, administrative coordination, contract support, project reporting, invoicing, and accounts receivable. For Rollingwood, Kori will help Greg maintain organized records, timely follow-up, and consistent administrative support throughout the assignment.
Justin Vogel	Project Controls as need support resource	15 years	Justin supports Windsor's project-controls efforts on an as-needed basis. Windsor uses this resource to right-size controls for each project, including customized schedule tools, cost tracking formats, reporting mechanisms, budget-control systems, and related resources when needed. For Rollingwood, this support would be provided at no additional cost to the City and would not add another management layer or point of contact.
Brent Jones	Senior Advisor as need support resource	40 years	Brent provides senior-level advisory support on project strategy, procurement, stakeholder alignment, owner decision-making, and complex capital project planning, if and when requested by Greg or the City. Brent is not proposed as an additional layer between the City and the work.

Staffing Approach

Greg Smith will remain the City's primary contact and accountable lead throughout the assignment. Windsor's support model is intentionally lean and appropriate for a project of this scale. Greg will lead the work directly, with support from Kori Colburn for project administration, documentation, project accounting, procurement support, contract support, reporting, invoicing, accounts receivable, and administrative follow-through.

Depending on workload, project phase, and task-order requirements, Windsor may also involve an Assistant Project Manager to support Greg with coordination, meeting follow-up, document tracking, schedule updates, and administrative project controls. Any APM would be identified after award and submitted to the City for review and approval before supporting the project. The APM would not replace Greg as the City's primary contact or accountable lead.

Staffing Approach Continued

Brent Jones will serve as a senior advisory resource only where his experience adds value. He is not proposed as an additional layer between the City and the work.

If specialized expertise is needed — such as facility condition assessment, cost estimating, code consulting, environmental review, materials testing, inspections, technology, security, or AV — Windsor will help the City identify the need, define the scope, and procure or coordinate those resources in accordance with the City's requirements. Any proposed subcontractor or specialty consultant would be presented to the City for review and approval before engagement.



Project Team and Qualifications

PROJECT TEAM AND QUALIFICATIONS

Proposed Project Team

Windsor Group Advisory & Management proposes a lean, senior-led team for the City of Rollingwood's City Hall Improvements project. Greg Smith will serve as the City's principal point of contact and accountable project lead. He will be supported by Kori Colburn for project administration and client services, with additional project controls, advisory, and coordination support available as needed.

This staffing approach is intentional. The City's project requires experienced owner-side leadership, disciplined decision-making, public-sector procurement awareness, budget control, schedule management, and clear communication with City staff, City Council, Travis County ESD No. 9 / Westlake Fire Department, consultants, contractors, and vendors. Windsor's proposed structure gives the City direct access to senior leadership without creating unnecessary management layers.

Key Personnel and Support Resources

Windsor's proposed team is intentionally structured around direct senior accountability, efficient administration, and targeted technical support. Greg Smith will lead the assignment and remain the City's primary point of contact. Kori Colburn will provide project administration and client services support. Additional resources may be used selectively when they add value to the City's schedule, budget, reporting, or decision-making needs.

Greg Smith, PMP

Principal / Accountable Lead / Primary City Contact

- Experience: 20 years
- Credentials: Project Management Professional (PMP); B.S., Construction Engineering & Mgt; LEED AP; ULI P3 Local Members Committee Colead, CMAA Member, OSHA 4-HR Certified
- Years with Firm: 5.5 years since Windsor Group Advisory & Management LLC founding
- Estimated Level of Effort: Primary lead throughout the assignment; highest involvement during project definition, due diligence, procurement, budget strategy, City/ESD coordination, delivery-method decisions, Council-facing work, and major project issue resolution.

Relationship to the Project

Greg will serve as the City's principal point of contact and accountable project lead. He will lead Windsor's owner representation services, manage the City-facing relationship, coordinate consultants and contractors, support procurement and delivery-method decisions, guide budget and schedule strategy, and prepare decision-ready recommendations for City leadership.

Why Greg is Valuable to the City of Rollingwood

Rollingwood's project needs a senior owner-side decision manager, not a layered project-management structure. Greg brings the direct experience needed to help the City define the project before overcommitting to a renovation, replacement, or hybrid solution. His value is strongest at the front end: due diligence, programming, budget definition, procurement sequencing, delivery-method evaluation, and City/ESD stakeholder alignment.

Why Greg is Valuable to the City of Rollingwood Continued

Greg is also comfortable operating at both levels required for this assignment. He can participate in technical conversations with architects, engineers, contractors, inspectors, and specialty consultants to make sure proposed solutions are cost-effective, technically appropriate, durable for the City over the long term, and structured to minimize owner risk. He can then translate those technical considerations into clear recommendations for City leadership, City Council, and stakeholders who do not engage with construction every day.

That communication role is central to successful public work. Greg has presented to and worked with city councils, school boards, C-suite leadership, community stakeholders, board members, public-sector staff, and project users. His experience includes public-facing and leadership-facing work with the City of Brownsville, Austin Independent School District, Bastrop Economic Development Corporation, and Hays Central Appraisal District. He understands how to interface with political entities and community stakeholders while keeping the project grounded in facts, budget discipline, and practical owner-side judgment.

Relevant Similar Experience and Role

- **City of Brownsville, Communications & Marketing Department Building:** Owner-side project leadership for a civic facility renovation, including procurement support, consultant and contractor coordination, specialty vendor coordination, budget awareness, project reporting, and public-owner communication.
- **Hays Central Appraisal District:** Facility planning and feasibility support for a public-sector owner evaluating office/facility needs, including early project definition, budget implications, and leadership decision support.
- **City of Georgetown, Downtown Master Plan Update:** Development advisory and municipal planning support related to implementation, feasibility, stakeholder priorities, and City decision-making.
- **Austin Independent School District:** Public-sector / K-12 experience involving planning, stakeholder coordination, community engagement, technical team coordination, and communication with public audiences.
- **City of Bastrop and Bastrop Economic Development Corporation:** Municipal and economic-development advisory experience involving feasibility, implementation strategy, stakeholder considerations, and owner-side decision support.
- **All Saints' Episcopal Church, Gregg House Renovation:** Owner representation for an approximately \$4 million renovation of an administrative and community-serving building, including project definition, stakeholder coordination, design and construction planning, budget management, and schedule awareness.

Municipal Facilities / Public-Sector Experience

Greg has the most extensive municipal and public-sector experience on the proposed team and will lead the City's assignment directly. His experience includes municipal, appraisal district, K-12, higher education, federal, economic development, religious/institutional, and other public-facing owner types.

Project Team and Qualifications Continued

Kori Colburn

Project Administration and Client Services

- Experience: 8 years
- Credentials: B.B.A., Business Administration, M.S., Management and Leadership
- Years with Firm: 1 Year
- Estimated Level of Effort: Ongoing administrative, documentation, reporting, procurement support, project accounting, and contract support throughout the assignment.

Relationship to the Project

Kori will support Greg with project documentation, project accounting, procurement support, administrative coordination, contract support, project reporting, invoicing, and accounts receivable. She will help maintain the administrative backbone of the project so that meetings, action items, documentation, invoices, reports, and follow-up items remain organized and timely.

Why Kori is Valuable to the City of Rollingwood

Kori helps Windsor keep the project organized, current, and cost-effective. Her role allows Greg and other technical resources to spend more of their time on project strategy, scope, budget, procurement, consultant/contractor coordination, and technical issue resolution rather than routine administrative tasks.

For the City, this creates two practical benefits. First, it helps control cost by assigning administrative work to the appropriate resource instead of pushing all project tasks through senior technical staff. Second, it keeps important project information organized and readily available, including contract documentation, invoices, project accounting, cost tracking support, reporting materials, and follow-up items.

On a public project, that organization matters. The City needs a clear paper trail, accurate invoicing, accessible cost information, organized project records, and timely follow-through. Kori's support helps Windsor maintain that discipline while allowing the technical team to stay focused on the decisions and project issues that most affect outcome, cost, schedule, and risk.

Relevant Similar Experience and Role

Supports Windsor's project documentation, client communication, proposal/procurement support, reporting, invoicing, project accounting, contract coordination, and administrative follow-through across civic, institutional, and community-serving projects.

Provides project administration and client services support for owner's representative assignments requiring organized documentation, action-item follow-up, report assembly, contract/invoice coordination, and cost tracking support.

Municipal Facilities / Public-Sector Experience

Kori supports municipal/public-sector work through documentation, procurement support, reporting, formatting of public-facing materials, contract coordination, invoicing, project accounting, and cost tracking support. For Hays Central Appraisal District, Kori was instrumental in organizing, developing, and formatting the final report and board-level presentation materials for public consumption. She is not proposed as the lead public-sector advisor; that role will remain with Greg.

Additional Support Resources

Assistant Project Manager

Project Coordination Support, if needed

- Experience: 3–7 years anticipated
- Credentials: To be identified if assigned
- Years with Firm: To be identified if assigned
- Estimated Level of Effort: As needed, based on workload, project phase, task-order requirements, and City approval.

Relationship to the Project

Depending on workload, project phase, and task-order requirements, Windsor may involve an Assistant Project Manager to support Greg with coordination, meeting follow-up, document tracking, schedule updates, and administrative project controls. Any APM would be identified after award and submitted to the City for review and approval before supporting the project.

Why This Resource is Valuable to the City of Rollingwood

The APM role gives Windsor the ability to scale responsibly if the project requires additional coordination support. This protects the City's schedule and responsiveness without changing the accountability structure. Greg would remain the City's primary contact and accountable lead; the APM would support execution, follow-up, and project organization.

This approach is intentionally flexible. Windsor is not proposing unnecessary full-time staffing before the actual workload is known, but we can add support if the project pace, meeting cadence, procurement workload, or construction-phase demands require it.

Justin Vogel, PMP

Project Controls Support

- Experience: 15 years
- Credentials: Project Management Professional (PMP); Procore project controls and construction management systems experience; B.S./M.S. Civil Engineering; Engineering in Training (EIT), LEED Green Associate; Member of ULI, Project Management Institute, Real Estate Council of Austin, and American Society of Civil Engineers
- Years with Windsor: Project Controls Support for 5 years
- Estimated Level of Effort: As needed for schedule, cost, reporting, budget-control tools, project databases, and related project-control resources.

Relationship to the Project

Justin supports Windsor's project-controls efforts on an as-needed basis. For Rollingwood, his role would be to help Windsor develop or refine schedule tools, cost tracking formats, reporting mechanisms, budget-control systems, project databases, and other project-control resources if and when those tools are useful to the assignment.

Why Justin is Valuable to Rollingwood

Justin brings a rare combination of project controls, construction management systems, and real project management experience. He has worked directly for Procore and focused on project management systems, giving him deep familiarity with one of the leading construction project management platforms and the workflows that support effective project delivery. He has also worked with a consultancy focused on claims and litigation, giving him a practical understanding of why documentation, cost tracking, schedule records, and project controls matter when projects become complicated.

Why Justin is Valuable to Rollingwood Continued

Just as important, Justin has been a project manager himself for much of his career. He understands the owner's representative role from the inside because he has managed projects, dealt with contractors and designers, tracked budgets and schedules, and seen what project teams actually need from a controls system. His support is not just software setup or spreadsheet work; it is practical project judgment translated into usable systems.

For Rollingwood, Justin gives Windsor the ability to provide high-quality project controls without overstaffing the assignment or assigning a full-time controls resource the City may not need. His involvement can be tailored to the City's actual needs: a budget dashboard, schedule tracker, reporting mechanism, cost-control system, project database, or other tools that support timely decision-making. This allows Greg to stay focused on leading the project, working with the City and project team, evaluating options, and maintaining the big-picture view, while the City still receives disciplined cost, schedule, and reporting systems.

This supports one of Windsor's core value propositions: senior-led owner representation supported by practical, right-sized systems. The City receives strong controls and reporting without adding another management layer, another point of contact, or unnecessary cost.

Public-Sector / Institutional Experience

Justin's experience includes project controls, construction coordination, reporting, schedule tools, cost tracking, and technical documentation for public-sector and institutional environments, including work associated with Texas State University, Stanford University, and the City of Bensenville. His role for Rollingwood would be limited to project controls support if and when needed.

Brent Jones*Senior Advisor / Strategic Project Advisor*

- Experience: 40 years
- Years with Firm: Senior advisory resource for 5 years
- Estimated Level of Effort: Limited advisory support if and when his experience adds value.

Relationship to the Project

Brent will serve as a targeted senior advisory resource. He is not proposed as a separate project manager, additional point of contact, or layer between the City and Greg. His involvement would be selective and focused on specific project questions where his experience can help the City make better decisions.

Why Brent is Valuable to Rollingwood

Brent brings deep experience in workplace, office environments, development, and capital project planning. His background includes substantial office/workplace projects, ground-up development, renovations, technical project judgment, and long-standing knowledge of the Austin market. For a City Hall project, that experience can be valuable during project definition, programming, renovation-versus-replacement evaluation, workplace functionality review, constructability conversations, procurement strategy, and owner decision-making. Brent also brings a long professional network across real estate, design, construction, and development that can help Windsor test assumptions, identify practical options, and bring market-informed judgment to the City when needed.

His role is deliberately limited: targeted senior input, not a second lead. This keeps the team lean while giving Rollingwood access to seasoned workplace and development judgment when it would be useful.

Certified Construction Manager Credentials

Windsor's proposed team includes two Project Management Professional (PMP) credential holders: Greg Smith, Windsor's proposed accountable lead and primary City contact, and Justin Vogel, Windsor's project controls support resource. The PMP is a widely recognized project management credential used across construction, development, public-sector, institutional, technology, and complex capital project environments.

Windsor has historically prioritized the PMP credential because of its broad industry acceptance and applicability across the diverse project types we manage, including municipal, institutional, civic, development, renovation, and construction projects. While the PMP and Certified Construction Manager (CCM) credentials are not identical, both reflect formal training and demonstrated competency in project leadership, delivery processes, cost, schedule, risk, communication, and stakeholder management.

At the time of submission, no staff member proposed by Windsor in a project leadership capacity holds a Certified Construction Manager credential as an employee of the prime firm. Windsor's qualifications are grounded in direct owner-side project leadership, municipal and public-sector project experience, budget and schedule management, procurement support, consultant and contractor coordination, and practical construction delivery experience.

Municipal Facilities and Public-Sector Experience

Windsor's proposed team includes personnel with municipal and public-sector experience.

Primary Contact with the City

Greg Smith will be the person primarily responsible for contact with the City of Rollingwood and will lead communications with the City Administrator, Alun Thomas; City staff; City Council as requested; ESD No. 9 / Westlake Fire Department stakeholders; consultants; contractors; vendors; and other project participants. Kori Colburn and any support resources will assist Greg but will not replace him as the City's primary contact or accountable lead.

Similar Project Experience and Personnel Roles

City of Brownsville — Communications & Marketing Department Building

Relevant to Rollingwood because: This was a civic facility project requiring public-sector coordination, procurement support, consultant and contractor management, specialty vendor coordination, budget awareness, and reporting.

Greg Smith's role:

Owner-side project leadership, public-owner coordination, procurement and vendor support, consultant and contractor coordination, budget and schedule awareness, and project reporting.

Similar tasks to the City of Rollingwood's RFQ:

- Public-sector owner representation; Consultant and contractor coordination; Procurement and vendor-selection support; Budget and schedule tracking; Civic facility project delivery; Coordination of specialty scopes, including AV, IT, security, engineering/testing/inspection, and other vendors; Public-facing project communication and reporting.

*Similar Project Experience and Personnel Roles Continued***Hays Central Appraisal District — Facility Planning / Feasibility Support**

Relevant to Rollingwood because: The assignment involved early facility planning and decision support for a public-sector owner evaluating its office/facility needs.

Greg Smith's role:

Facility planning, feasibility support, owner-side advisory, budget and implementation analysis, and leadership decision support.

Similar tasks to Rollingwood's RFQ:

- Early project definition
- Facility needs evaluation
- Budget and implementation considerations
- Owner decision support
- Public-sector facility planning

City of Georgetown — Downtown Master Plan Update

Relevant to the City of Rollingwood because: The assignment involved municipal advisory support, stakeholder-aware planning, feasibility evaluation, and practical recommendations for public-sector decision-making.

Greg Smith's role:

Development advisory and municipal planning support related to downtown implementation, project feasibility, stakeholder priorities, and public-sector decision-making.

Similar tasks to Rollingwood's RFQ:

- Municipal client coordination
- Public-sector advisory support
- Stakeholder-aware recommendations
- Feasibility and implementation analysis
- Decision-ready communication for City leadership

All Saints' Episcopal Church — Gregg House Renovation

Relevant to Rollingwood because: This is an approximately \$4 million renovation of an administrative and community-serving building, similar in scale and owner-side complexity to Rollingwood's City Hall Improvements.

Greg Smith's role:

Owner representation, project definition, stakeholder coordination, design and construction planning, budget management, schedule awareness, and project leadership.

Similar tasks to Rollingwood's RFQ:

- Same-scale renovation planning
- Administrative/community facility use
- Budget control
- Stakeholder coordination
- Design and construction planning
- Owner-side decision support

Staffing Capacity and Ability to Meet Schedule and Deadlines

Windsor has the staffing capacity and delivery structure to meet the schedule and deadlines described in the RFQ.

The City will have a dedicated, experienced principal leading the assignment. Greg Smith will remain directly responsible for the work and will be supported by administrative, project controls, advisory, and project coordination resources as needed. This model allows Windsor to move quickly without assigning unnecessary full-time personnel to the City's project.

Kori Colburn will support project administration, documentation, procurement support, reporting, contract support, invoicing, and related administrative needs. Her involvement will help Windsor maintain pace, organization, and follow-through.

If workload, task orders, or schedule demands require additional support, Windsor can add an Assistant Project Manager to support Greg with coordination, meeting follow-up, document tracking, schedule updates, and administrative project controls, subject to City review and approval. Windsor can also utilize Justin Vogel for project controls support, including schedule tools, cost tracking formats, reporting mechanisms, and budget-control systems, at no additional cost to the City.

Windsor also uses internal technology and AI-enabled systems to improve efficiency in documentation, meeting preparation, issue tracking, reporting, research, and project organization. These tools do not replace professional judgment or owner-side leadership, but they allow Windsor to produce high-quality work efficiently and reduce unnecessary administrative burden.

Windsor's advantage is not just staffing availability; it is senior-led execution. On a project of this size, speed and accuracy often come from experienced people making good decisions early, not from assigning inexperienced staff and training them on the job. Windsor's senior-led model reduces rework, improves judgment, and helps avoid the kinds of preventable errors that create delay, confusion, or cost exposure.

Windsor is also technically minded, not merely administrative. The team brings field experience, construction awareness, procurement experience, and owner-side project judgment. That allows us to identify issues early, ask better questions, coordinate technical conversations productively, and bring the City practical recommendations rather than simply passing information back and forth.

Knowledge of Applicable Regulations and Local Requirements

Windsor has a strong working knowledge of the regulatory and procedural issues that affect public-sector facility projects in Texas and Central Texas, including construction, development, procurement, building code, environmental, drainage, permitting, inspection, and public-approval considerations.

For Rollingwood, Windsor would pay particular attention to:

- Public-sector procurement requirements and proper documentation
- Architect, contractor, CMAR, vendor, and consultant procurement processes
- Texas public works delivery considerations
- City permitting and inspection processes

Knowledge of Applicable Regulations and Local Requirements Continued

For Rollingwood, Windsor would pay particular attention to (continued):

- Building code, accessibility, fire/life safety, and occupancy requirements
- ESD No. 9 / Westlake Fire Department operational and review requirements
- Drainage, stormwater, and site-development considerations
- Environmental and water-quality requirements that may apply to site disturbance
- Utility coordination
- Construction logistics, neighborhood impacts, and public communication
- Record documentation, closeout, warranties, and owner training

Windsor's role will be to identify these issues early, incorporate them into the project schedule and risk management process, and coordinate the appropriate consultants, reviewers, inspectors, and City stakeholders at the right time. The goal is to avoid late surprises and ensure the project is structured correctly from due diligence through closeout.

Subcontractors

Windsor does not propose any subcontractors for the Owner's Representative services at this time.

If Windsor determines that supplementary support may be beneficial — such as facility condition assessment, cost estimating, code consulting, environmental review, materials testing, inspections, technology, security, AV, or other specialized expertise — Windsor will notify the City in advance, explain the need, define the proposed role, and obtain City approval before any such resource is engaged or coordinated as part of the project.





WINDSOR GROUP ADVISORY & MANAGEMENT

Gregory R. Smith

PRINCIPAL | STRATEGIC PROJECT LEAD

EDUCATION

B.S., Construction Engineering & Management
North Carolina State University

CERTIFICATION

Project Management Professional (PMP) Certification
LEED Accredited Professional
Building Design & Construction (USGBC) USGreen Building Council

PROFESSIONAL AFFILIATIONS

- ULI: Local Member Council P3 Co-Chair, Building Industry Leaders Program Participant, Next Program Participant
- AISD NE Middle School CAT Member
- Association for Learning Environments (A4LE)

EXPERTISE

- Project Controls
- Claim and Litigation Support
- Complex Project Management
- Risk Mitigation
- Schedule Development & Analysis
- Design Oversight and leadership
- Contractor Performance Management
- Pre-Development Management
- Value Engineering and Cost Control

PROFILE

Founder Greg Smith has worked extensively throughout Texas, covering most major metropolitan areas in the state. Greg has a strong and diverse background in project management and real estate development advisory services, spanning over 15 years of experience, and was recently recognized by ENR as a top professional under 40 in the Texas-Louisiana region. His portfolio spans municipal, higher education, commercial, and mission-based clients. Greg has worked on over 50 projects, totaling more than \$1 billion in construction, and is a published author and speaker on a range of construction and development topics.

RELEVANT PROJECTS

City of Brownsville Communications & Marketing Headquarters and Event Center Brownsville, TX

Owner's Representative for a \$4.5M adaptive reuse project creating new civic event space, offices, and A/V infrastructure for a municipal owner. Supported public-sector project coordination, procurement, consultant and contractor coordination, specialty vendor scopes, public approvals, funding requests, budget awareness, and transparent communication with City leadership.

City of Georgetown Downtown Master Plan Update | Georgetown, TX

Implementation lead for a multi-year downtown revitalization planning effort focused on public realm improvements, parks, placemaking, feasibility, phasing, constructability, and long-range budgeting. Supported municipal decision-making for civic infrastructure and downtown implementation strategies in a historic community setting.

Hays Central Appraisal District Facility Planning / Feasibility Support | Kyle, TX

Provided facility planning and feasibility-related support for a public-sector office/facility need. Helped the owner evaluate project direction, facility requirements, budget and implementation implications, and decision-making materials for leadership and board-level review.

City of Bastrop/Bastrop Economic Development Corporation Youth Sports Complex Feasibility Study | Bastrop, TX

Provided project management and advisory support for a youth sports complex feasibility study intended to evaluate community needs, site feasibility, market demand, economic impact, and implementation strategy. Managed consultant coordination, reviewed technical findings, coordinated civil/site feasibility considerations, supported P3 and funding strategy evaluation, administered contracts, and presented recommendations to the EDC board.

Austin Independent School District Planning and Community Engagement | Austin, TX

Supported public-sector planning and community engagement efforts involving technical team coordination, stakeholder communication, and public-facing presentation of project information. Experience included helping communicate complex project considerations to community stakeholders and public audiences in a clear, accessible manner.

Relevant Projects Continued on Next Page

**WINDSOR GROUP ADVISORY & MANAGEMENT****Gregory R. Smith****PRINCIPAL | STRATEGIC PROJECT LEAD****RELEVANT PROJECTS CONTINUED****St. Austin's Catholic Parish & School Redevelopment****Austin, TX**

Principal-in-Charge for a \$41M K–8 school and parish redevelopment within a mixed-use P3 structure. Led all phases from entitlements through construction, addressing stakeholder concerns, coordinating institutional priorities, managing budget and schedule issues, and supporting a long-term facility solution on a constrained urban site.

All Saints' Episcopal Church – Gregg House Renovation**Austin, TX**

Project Manager for an approximately \$4M renovation of a multi-use administrative and community-serving building. Guiding early design, budget alignment, stakeholder coordination, permitting strategy, and planning for major building system upgrades, improved accessibility, preschool/playground considerations, and potential enhanced gathering space.

AFIAA Mid-Rise Office Repositioning**Austin, TX**

CMA advisor for a \$125M renovation of an occupied mid-rise office tower. Led pre-construction planning, phasing strategy, logistics coordination, and coordination with global ownership, tenants, and permitting staff for a complex occupied-building repositioning.

Additional Municipal and Public-Sector Client Experience

Greg Smith's public-sector and civic experience includes work for or with the following municipal and public-sector clients:

- City of Pflugerville, TX
- City of Alexandria, VA
- Port of Laredo, TX
- City of Laredo, TX
- City of Austin, TX

Greg's broader public-sector experience also includes:

- Higher education
- K–12
- Federal
- Economic Development
- and other public-facing institutional clients



WINDSOR GROUP ADVISORY & MANAGEMENT

Brent Jones

Senior Advisor (as needed support resource)

EDUCATION

Bachelor of Architecture
University of Texas at Austin

CERTIFICATION

Licensed Architect, State of Texas

PROFESSIONAL AFFILIATIONS

- Texas Institute of Architects, Austin
- Real Estate Council of Austin
- Boy Scouts of America

EXPERTISE

- Complex Project Management
- Risk Mitigation
- Market Strategy
- Contractor Performance Management
- Pre-Development Strategic Management
- Due Diligence
- Investment Strategy
- Ground Up Development
- Office and Workspace Expertise

PROFILE

Brent is a licensed architect and senior real estate advisor with more than four decades of experience guiding development, renovation, construction, and workplace projects from strategy through delivery. His background spans real estate investment, development and management, construction management, market strategy, and client advisory, with leadership on more than 140 projects totaling over 15 million SF and \$800 million in value. Brent brings deep experience in ground-up office development, major renovations, corporate workplace environments, and mixed-use projects, including Class A office towers, boutique creative office space, headquarters facilities, student housing, office/retail developments, and large-scale tenant improvements.

His work includes projects for Austin Community College, the Lower Colorado River Authority, National Instruments, Highland Resources, and multiple technology clients. As a senior advisor, Brent helps clients evaluate options, manage risk, align scope with operational needs, and make informed decisions through each project phase. His combined architecture, development, and project management background allows him to bridge strategy, design, budget, constructability, and execution with a practical, owner-focused perspective.

RELEVANT PROJECTS

Blackbaud – Corporate Headquarters Interior, Project Manager

140,000 SF interior buildout including open office layout, training and conference rooms, data infrastructure, kitchen and dining areas, and breakout collaboration zones.

Lower Colorado River Authority, Project Manager

80,000 SF Headquarters Complex

Dell at Arboretum D – Office Fit-Out, Project Manager

150,000 SF corporate office space for Dell's regional operations. Managed full design and construction delivery.

501 Congress Avenue – Class A Office Renovation, Project Manager

106,000 SF renovation of downtown Austin office tower into boutique creative workspace.

Highland Resources – Mixed-Use and Office Developments, Project Manager

Managed multiple projects, including the Southwest Office Tower (180,000 SF) and 3800 N. Lamar (168,000 SF office and retail development).

Confidential Social Media Tech Client – Multiple Interior Projects, PM

Tenant improvement of over 450,000 SF across multiple Austin buildings for a high-profile tech client. Scopes included high-end interiors with collaboration spaces, open workstations, conference rooms, commercial kitchens, DIY studios, training rooms, data centers, and specialty research spaces.



WINDSOR GROUP ADVISORY & MANAGEMENT

Justin Vogel

Project Controls (as needed support resource)

EDUCATION

M.S., Civil Engineering, Global Leaders in Construction Management Program
University of Illinois

B.S., Civil Engineering
University of Illinois

Hoeft Technology & Management Program
University of Illinois

CERTIFICATION

Project Management Professional
LEED Green Associate
Engineer in Training

PROFESSIONAL AFFILIATIONS

- Urban Land Institute
- Project Management Institute
- Real Estate Council of Austin
- American Society of Civil Engineers

EXPERTISE

- Complex Project Management
- Project Controls
- Cost & Schedule Management
- Construction Technology
- Procurement Analysis

PROFILE

Justin brings a unique background in construction engineering, project management, and dispute resolution across commercial, residential, and industrial sectors. Involved in over \$2.5 billion worth of construction, his diverse experience has allowed him to approach projects from different perspectives, including those of developers, CEOs, contractors, third-party consultants, and construction attorneys. This knowledge translates into careful planning and effective facilitation among project team members. He excels at applying best practices and mitigating risk to ensure that projects are delivered to exceed client expectations.

RELEVANT PROJECTS

City of Bensenville – North Industrial Park Infrastructure (Bensenville, IL)

Resident Engineering / Assistant PM

Supported municipal infrastructure upgrades across a 1,200-acre industrial park. Provided field coordination, phasing logistics, schedule tracking, and reporting to the public works department—demonstrating public-sector delivery and stakeholder alignment.

Texas State University – Ingram Hall Engineering Building (San Marcos, TX)

Led schedule and cost documentation review for a 166,000 SF STEM facility. Provided forensic analysis, change tracking, and delay impact assessments on behalf of university counsel—coordinating closely with contractors and design teams.

Hankook Tire Manufacturing Plant (Clarksville, TN)

Technical Claims Expert

Oversaw schedule and cost impact analysis on a 1.5 million SF industrial facility. Led detailed forensic reviews and collaborated with global stakeholders and legal teams on a highly complex construction program.

Stanford University – Bass Biology Building (Palo Alto, CA)

Project Controls Engineer

Provided controls support on a \$100M+ academic lab facility. Maintained master schedules, reviewed sequencing and critical paths, and delivered progress reporting to the owner—demonstrating hands-on schedule management.

Exelon – Medway Peaker Plant II (Medway, MA)

Technical Claims Expert

Supported claims resolution for a 200 MW gas-fired power plant. Analyzed documentation, change orders, and contracts to evaluate exposure and entitlement—requiring detailed records management and technical clarity.

Scope of Services

Scope of Services

Our Role: An Owner's Representative Working Exclusively for the City

Rollingwood's City Hall project is an opportunity to create a more functional, durable, and well-coordinated civic facility for the City, its staff, its residents, and its public safety partners. It is also an opportunity to make careful early decisions that improve long-term value: defining the right scope, aligning City and ESD / Westlake Fire Department needs, protecting the public budget, navigating local regulatory requirements, and setting the project up for successful delivery before design and construction commitments are made.

Windsor Group Advisory & Management will serve as an extension of the City of Rollingwood — not as a designer, not as a contractor, and not as a party with divided incentives. Our responsibility is to represent the City's interests first and exclusively. That means protecting the City's budget, clarifying choices, coordinating technical input, reducing staff burden, and helping elected officials make timely, informed, and defensible decisions.

Greg Smith will serve as Windsor's principal point of contact and accountable owner's representative for Rollingwood, supported by Windsor team members as needed for documentation, reporting, technical review, project controls, and procurement support. The City will know who owns the action list, who is briefing leadership, who is tracking budget risk, and who is responsible for bringing forward clear recommendations.

Windsor's role is to manage the complexity around the City, not push that complexity back onto City staff. We will lead the day-to-day project effort, organize consultant and contractor input, manage technical conversations, track budget and schedule risk, prepare decision-ready recommendations, and keep the project moving without asking the City to become its own full-time project management office.

In practice, Windsor will manage the "80 percent" of project work that involves investigation, coordination, technical review, vendor communication, issue tracking, procurement support, cost analysis, and option development. We will then bring the City the "20 percent" that requires owner judgment: clear choices, documented recommendations, budget implications, schedule impacts, stakeholder considerations, and our recommended path forward. The City remains the decision-maker. Windsor makes sure those decisions are informed, timely, and defensible.



*Scope of Services Continued***Summary of Windsor's Project Approach**

Windsor's approach is organized around a practical sequence of owner-side controls:

Project Phase	Windsor's Primary Role	Key Deliverables
Project initiation	Establish governance and control structure	Project charter, communication protocol, stakeholder matrix, decision log
Due diligence and programming	Define the right project before commitments harden	Existing-condition review, program validation, City/ESD needs matrix, constraints log
Budget strategy	Reverse-engineer scope from the total project cap	Total project budget, target construction budget, contingency structure, budget dashboard
Delivery method	Help the City select the right procurement path	DBB/CMAR comparison, procurement strategy, Council-ready recommendation
Architect procurement and design management	Keep design aligned with scope, budget, and public priorities	Architect RFQ support, milestone reviews, estimate reconciliation, value-decision log
Contractor / CMAR procurement and preconstruction	Bring construction knowledge into the process at the right time	Procurement support, constructability review, schedule/logistics review, GMP or bid review
Construction	Represent the City through active oversight and issue resolution	Field reports, pay application review, change-order log, issue log, deficiency tracking
Closeout and warranty	Leave the City with a complete, usable project record	Punch-list tracking, record document review, O&M/warranty verification, training coordination

This approach is intentionally front-loaded. The most important owner's representative work on this project will happen before the City is locked into a design, budget, delivery method, or construction contract. Windsor will help Rollingwood make those early decisions deliberately, then carry that discipline through execution.

Phase 1: Due Diligence, Programming, and Project Definition

The first and most important step is to avoid committing the City to the wrong project too early.

The RFQ identifies improvement, remodeling, or replacement of the municipal building as potential paths. Those options carry very different implications for scope, budget, schedule, procurement, permitting, City operations, ESD functionality, and long-term value. Before selecting a delivery method, procuring the full design team, or moving into design, the City needs a disciplined project-definition process.

Windsor recommends beginning with a targeted due-diligence and programming phase designed to gather the most important decision-making information while spending as little money as reasonably possible. The goal is not to study endlessly. The goal is to determine what the City is solving for, what the existing building can reasonably support, and which project path offers the best value within the City's budget.

Existing Building and Site Due Diligence

Windsor will help the City determine what level of facilities assessment is needed to support an informed renovation-versus-replacement decision. This may include a targeted facility condition assessment or similar due-diligence effort focused on building systems, structure, envelope, accessibility, life safety, code issues, utilities, site conditions, drainage, and other constraints that could materially affect cost or feasibility.

For a project of this size, due diligence should be practical and purposeful. Windsor will focus the investigation on the questions that affect the City's decision:

- Does the existing building have enough useful life to justify reinvestment?
- Can it support the City's functional and operational needs?
- Can it support ESD / Westlake Fire Department requirements?
- What code, accessibility, MEP, structural, drainage, water-quality, or site issues could create hidden cost?
- Would renovation trigger enough corrective work that replacement becomes more rational?
- Could a new building be delivered within the \$4 million total project budget if the scope is controlled early?

Programming and Scope Hierarchy

In parallel with building due diligence, Windsor will lead or support a practical programming effort to confirm what the building actually needs to do before designing what it looks like.

This includes City administrative functions, public interface needs, police or public safety functions if applicable, ESD / Westlake Fire Department needs, storage, meeting space, technology, security, staff workflow, public access, parking, site circulation, and temporary operational requirements during construction.

Windsor will help the City organize the program into a clear scope hierarchy:

- Must-have operational requirements
- Important but adjustable priorities
- Alternates, deferrals, or future-phase items

Programming and Scope Hierarchy Continued

This is especially important because Rollingwood is balancing City functions, potential public safety functions, a fixed budget, local constraints, and public expectations. The project should not drift into a design exercise before the City understands what is essential, what is flexible, and what belongs outside the initial scope if the budget requires discipline.

At the end of this phase, Windsor will prepare a project-definition recommendation for City review. This will summarize the confirmed program, major constraints, existing-building findings, likely scope options, ROM budget comparisons, schedule implications, procurement considerations, and key risks. The deliverable will not be a design solution. It will be a decision tool to help Rollingwood decide whether to proceed with renovation, targeted improvement, expansion, replacement, or a hybrid approach — and then structure the rest of the project accordingly.

Budget Strategy: Reverse-Engineering the Project from the \$4 Million Cap

The RFQ identifies a total project budget of no more than \$4 million, with \$2.5 million authorized by the City and \$1.5 million authorized by Travis County ESD No. 9. Windsor will treat that number as a total project control requirement, not simply a construction budget.

Our first budget task will be to build a complete project budget at the outset. That budget will include, as applicable:

- Design and engineering fees
- Owner's Representative services
- Surveys, testing, inspections, and due diligence
- Permitting and regulatory costs
- Construction hard costs
- Contractor general conditions, overhead, profit, and insurance
- Technology, security, AV, furniture, fixtures, and equipment
- Temporary operations or move-related costs, if needed
- Owner contingency
- Design contingency
- Construction contingency
- Closeout and warranty support allowances

From there, Windsor will reverse-engineer the target construction budget. If the City has \$4 million total available, we will identify the likely soft costs, owner costs, contingency requirements, and other non-construction costs first, then determine the hard-cost target that the design and construction scope must meet.

That approach protects the City from a common public-project problem: designing to a construction number that does not leave enough room for the rest of the project. At each major phase, Windsor will update the total project budget, reconcile estimates, track contingency, identify pending decisions with cost impacts, and report budget status in a clear format suitable for City staff and City Council.

The budget report will not be a passive accounting document. It will be an early-warning tool that helps the City see trends, understand tradeoffs, and make timely decisions. Windsor will manage contingency as a governed reserve, not a slush fund. Each use of contingency should be tied to a documented issue, decision, change, or regulatory requirement.

Delivery Method and Procurement Strategy

Windsor will help the City evaluate and select the delivery method that best fits the final project definition. The RFQ specifically identifies design-bid-build and Construction Manager at Risk as potential delivery methods, and Windsor will approach that decision deliberately rather than assume the answer in advance.

For renovation, adaptive reuse, and technically constrained projects, Windsor often sees strong value in bringing the contractor into the process early. CMAR can allow the City, architect, contractor, and Owner's Representative to test cost, constructability, phasing, schedule, procurement, and existing-condition risk before the design is too far advanced. That early input can reduce redesign, improve budget certainty, and help the City make better long-term decisions.

That said, Windsor will not recommend CMAR or design-bid-build as a matter of habit. We will evaluate delivery method based on Rollingwood's actual conditions:

- Scope clarity after due diligence and programming
- Renovation versus replacement decision
- Existing-building unknowns
- Need for early contractor pricing and constructability input
- Public transparency and procurement requirements
- Schedule sensitivity
- City and ESD operational needs
- Market conditions
- Budget certainty
- City Council and stakeholder preferences

If CMAR is the best fit, Windsor will help the City structure a compliant and transparent procurement process. If design-bid-build or another method is more appropriate, Windsor will support that path with the same discipline.

Windsor has supported public-sector procurement processes for owners including the Brownsville Communications Complex, Austin ISD, Bastrop EDC, and Hays Central Appraisal District. Our work has included preparing and supporting RFQ / RFP processes, coordinating with procurement departments, developing evaluation criteria, facilitating vendor communications, reviewing submissions, supporting interviews, and helping public owners document award recommendations.

On the Brownsville Communications Complex project, Windsor supported the public owner through multiple procurements and vendor-selection processes, including contractor procurement, architect selection, AV subconsultant engagement, engineering / testing / inspection consultants, security vendors, IT-related vendors, and other specialty service providers. That experience is directly relevant to Rollingwood because this project will likely require more than one major procurement decision. Windsor's procurement role will be to help the City get the right expertise at the right time, in the right sequence, under a process that is fair, compliant, well-documented, and aligned with the City's goals.

Architect Selection and Design-Phase Management

Once the City has completed the appropriate due-diligence and project-definition work, Windsor will assist with the procurement of the architect, consistent with the RFQ.

This may include:

- Developing or refining the architect RFQ
- Defining the design scope based on project-definition findings
- Preparing evaluation criteria
- Supporting pre-submittal communications
- Reviewing qualifications
- Supporting shortlist and interview processes
- Preparing evaluation summaries and recommendation materials
- Assisting with contract scope and fee review
- Coordinating kickoff and design-phase expectations

During design, Windsor will manage the process from the owner's side. We will help establish the design schedule, decision milestones, budget checkpoints, stakeholder review process, City / ESD coordination cadence, and document-review expectations.

Our design-phase focus will include:

- Confirming program alignment
- Managing City and ESD input
- Reviewing design documents for consistency with owner priorities
- Tracking decisions and unresolved issues
- Coordinating cost estimates at key milestones
- Reviewing constructability and phasing considerations
- Monitoring schedule and deliverables
- Supporting value-management decisions
- Preparing Council-ready updates and recommendations

Windsor's role is not to replace the architect's professional judgment. It is to keep the design process aligned with the City's scope, budget, schedule, procurement strategy, operational requirements, and public commitments. A project of this scale does not benefit from unnecessary layers, but it does require disciplined owner-side leadership. Windsor will keep the City close to the decisions that matter and shield City staff from the day-to-day churn that can slow a project down.

Contractor / CMAR Selection and Preconstruction

Windsor will support the City in procuring the general contractor or CMAR, depending on the delivery method selected.

For a CMAR approach, Windsor will help structure a process that evaluates qualifications, team experience, preconstruction approach, staffing, fee proposal, general conditions, project understanding, renovation experience, public-sector experience, and ability to provide meaningful early cost and constructability input.

For a design-bid-build approach, Windsor will help coordinate the bid package, bid schedule, addenda process, pre-bid communications, bid review, scope leveling, and recommendation for award.

Contractor / CMAR Selection and Preconstruction Continued

Once a contractor or CMAR is engaged, Windsor will manage preconstruction coordination with a focus on preventing rework and protecting the budget. That includes:

- Reviewing contractor cost models and assumptions
- Coordinating constructability review
- Testing renovation or replacement assumptions
- Evaluating logistics and phasing
- Reviewing schedule assumptions
- Identifying long-lead items
- Coordinating site investigations
- Managing value-management options
- Supporting GMP or contract-price review, if applicable
- Preparing recommendation materials for City approval

This is where early contractor engagement can be especially valuable. If the City is renovating, the contractor can help identify hidden costs and constructability risks before design is complete. If the City is replacing the building, the contractor can help test whether the budget, site constraints, schedule, and procurement assumptions are realistic.

Windsor's approach is collaborative, but not passive. We want the architect, contractor, consultants, and owner stakeholders solving problems together early, while the cost of change is low. That does not mean surrendering owner control. It means using the right expertise at the right time so the City can make better decisions.

Communication, Governance, and City Council Support

Communication is not a soft service. On a public project, it is a core project control. Windsor will establish a communication and governance structure at the beginning of the assignment so the City knows how decisions will be made, who needs to be involved, when issues will be escalated, and how project information will be reported.

Our communication model is designed to reduce staff burden while maintaining owner control. Windsor will handle technical coordination with architects, engineers, contractors, consultants, vendors, and inspectors. When a City decision is required, we will bring the City a concise recommendation or a defined set of options with budget, schedule, operational, and risk implications clearly explained.

Typical project communication tools may include:

- Project charter
- Stakeholder matrix
- Communication protocol
- Decision log
- Action-item log
- Risk register
- Budget dashboard
- Schedule dashboard
- Procurement tracker
- Change-order log
- Council update materials
- Meeting agendas and minutes
- Monthly executive summaries

Communication, Governance, and City Council Support Continued

Windsor is comfortable presenting in public and political environments. On the Brownsville Communications Complex project, Windsor supported public-facing commission communication and project reporting. On Austin ISD work, Windsor participated in a major community engagement process where technical project information had to be communicated clearly to communities across Austin. On Hays Central Appraisal District, Windsor supported the development and formatting of final reporting and board-level presentation materials for public consumption.

For Rollingwood, Windsor will be prepared to attend, support, and present at City Council meetings, stakeholder meetings, project briefings, and other public or internal sessions as requested by the City. Our goal is to make project information clear enough that City leaders can act with confidence, not force elected officials to sort through technical noise.

Regulatory, Local, and Stakeholder Coordination

The RFQ specifically asks respondents to address knowledge of applicable local, state, and federal regulations, including construction, development, building codes, environmental quality, and drainage. It also assigns evaluation points to knowledge of local issues in Rollingwood and the surrounding region.

Windsor will treat regulatory and local-issue coordination as an early project-management priority. Depending on the final project scope, this may include coordination related to:

- City of Rollingwood permitting
- Building code and accessibility requirements
- Fire and life safety review
- Westlake Fire Department / ESD No. 9 operational and review requirements
- Drainage and stormwater requirements
- Edwards Aquifer / water-quality considerations
- Impervious cover assumptions
- City Engineer review requirements
- Utility coordination
- Site access and construction logistics
- Construction-hour limitations
- Inspection and testing requirements
- Public notice or resident-impact considerations
- Temporary operations and continuity of City services

Rollingwood's project is not occurring in a generic setting. It is a highly visible civic project in a small community with strong neighborhood character, infrastructure sensitivity, drainage concerns, and public accountability. Windsor will identify these constraints early, put them into the project schedule and risk register, and make sure the City is not surprised by issues that could have been anticipated.

This is also where City / ESD coordination matters. ESD / Westlake Fire Department requirements should not be allowed to emerge late as design revisions or operational conflicts. Windsor will help establish a clear process for confirming ESD needs, reviewing operational criteria, integrating fire review timing, and documenting decisions so the City can balance public safety functionality with municipal operations, site constraints, budget, and long-term value.

Construction-Phase Owner Representation

During construction, Windsor will represent the City's interests through active project management, field coordination, documentation, budget tracking, schedule oversight, and issue resolution.

Our construction-phase services will include:

- Establishing construction-phase communication protocols
- Attending and leading project meetings as appropriate
- Tracking RFIs, submittals, ASIs, change events, and owner decisions
- Reviewing contractor schedules and schedule updates
- Monitoring work progress and major activities
- Reviewing pay applications and supporting documentation
- Reviewing change-order requests and pricing
- Evaluating schedule impacts
- Coordinating inspections, testing, and deficiency tracking
- Maintaining site observation reports and photo documentation
- Tracking budget commitments and contingency usage
- Coordinating City, ESD, architect, contractor, vendor, and consultant input
- Escalating risks and unresolved issues
- Preparing regular status reports for City leadership and Council

Windsor's construction role is not passive observation. We will stay engaged in the details that affect budget, schedule, quality, and owner decision-making. When issues arise, our approach is to work through the technical facts with the project team, identify options, seek fair and practical resolutions, and then bring the City a clear recommendation when owner direction is needed.

Windsor will also pay particular attention to coordination among owner-hired vendors and contractor-managed vendors. Small public projects can become complicated when technology, security, AV, furniture, move planning, utilities, inspections, and contractor work overlap. Windsor will help define responsibility early and manage coordination so these items do not become late-stage owner burdens.

Change Management and Cost Control During Construction

Change management is one of the places where an Owner's Representative creates the most value. Windsor will establish a clear change-management process before construction begins. The process will define how potential changes are identified, priced, reviewed, negotiated, approved, tracked, and reported. No change should become a surprise to the City after the fact.

Our change-management process will include:

- Maintaining a change-event log
- Separating owner-requested changes from unforeseen conditions and design-related issues
- Reviewing contractor pricing for reasonableness
- Evaluating labor, material, equipment, subcontractor, general conditions, overhead, and profit assumptions
- Assessing schedule impacts
- Comparing proposed changes against remaining contingency
- Preparing recommendations for City approval or rejection
- Tracking approved changes against the total project budget

Change Management and Cost Control During Construction Continued

The goal is simple: protect the City's budget while resolving legitimate project issues fairly and efficiently. Windsor does not approach change orders as an automatic fight with the contractor. Legitimate changes should be resolved fairly. But every change must be documented, scoped correctly, priced accurately, reviewed against the contract documents, and understood in relation to the total project budget. That is how Windsor protects the City without creating an adversarial project culture.

Closeout, Turnover, and Warranty Support

A project is not complete when the contractor says it is complete. For a municipal facility, closeout must be organized, documented, and useful to the City staff who will operate the building.

Windsor will manage closeout as a formal project phase, including:

- Punch-list coordination and tracking
- Verification of corrective work
- Record drawing and as-built document collection
- O&M manual review and turnover
- Warranty documentation
- Training coordination for City staff
- Testing and inspection closeout
- Final payment review
- Certificate of occupancy and final approvals coordination
- FF&E / technology / security / AV turnover coordination, if applicable
- Warranty log setup
- Post-occupancy issue tracking

We will remain engaged through closeout and warranty support to help the City avoid the common problem of unresolved issues lingering after occupancy. Our objective is to leave Rollingwood with a complete project record, trained staff, documented warranties, and a clear process for addressing post-occupancy issues.

Summary of Windsor's Value to Rollingwood

Rollingwood does not need a generic project manager for this assignment. The City needs a senior owner's representative who can help define the right project before commitments harden, protect a fixed public budget, coordinate City and ESD requirements, guide procurement, and keep elected officials and staff equipped to make clear, defensible decisions. *That is Windsor's role.*

This project is modest in dollar value but meaningful in civic value. A \$4 million City Hall improvement involving municipal operations, potential fire department functionality, public procurement, local regulatory constraints, neighborhood sensitivity, and City Council accountability cannot be managed successfully by simply waiting for design to finish and then monitoring construction. The important decisions start earlier: what problem the City is solving, whether improvement, renovation, expansion, or replacement creates the best long-term value, how much construction scope the total budget can actually support, when contractor input is needed, and how City and ESD priorities will be reconciled before they become late-stage conflicts.

Summary of Windsor's Value to Rollingwood Continued

Windsor is built for that kind of assignment. Our value is not a large organizational chart or a layered management structure. It is senior, owner-side judgment applied at the right moments. Greg Smith will serve as the City's accountable point of contact, supported by a focused team that can provide reporting, documentation, technical review, procurement support, and project controls without creating unnecessary bureaucracy.

Our approach is intentionally front-loaded. We will help the City answer the right first questions before committing to the wrong solution. We will build the budget backward from the \$4 million total project cap, not forward from an aspirational construction scope. We will help structure procurement so the City gets the right architect, contractor, and specialty support at the right time. We will bring contractor and market input into the process when it can still improve the outcome, not after the cost of change is high. We will identify local constraints — including drainage, water-quality, permitting, fire review, neighborhood impact, and continuity of City operations — early enough to manage them.

Most importantly, Windsor will reduce the burden on City staff and elected officials without reducing the City's control. We will absorb the investigation, coordination, technical review, budget tracking, issue management, vendor communication, and documentation required to move the project forward. When City decisions are needed, we will bring forward clear options, budget and schedule implications, stakeholder considerations, and our recommended path.

This is the same owner-side discipline Windsor has applied on public and public-facing assignments including Brownsville CMD, Austin ISD, Bastrop EDC, Hays Central Appraisal District, and All Saints' Gregg House. Brownsville demonstrates our ability to support a civic owner through procurement, reporting, consultant/vendor coordination, and construction-phase issue resolution. All Saints demonstrates our ability to manage a similarly scaled renovation/restoration effort where stakeholder alignment, budget discipline, existing-building conditions, and clear owner decision-making mattered. Hays CAD reflects our ability to develop board-level reporting and public-facing project materials that make technical information understandable and useful.

For Rollingwood, that experience translates into a practical, right-sized approach: principal-led accountability, early scope discipline, total-budget control, transparent procurement, City/ESD coordination, Council-ready communication, local regulatory awareness, and careful execution through closeout.

Windsor will represent Rollingwood's interests exclusively from the first decision through final turnover. Our commitment is to help the City set the project up correctly, make disciplined decisions, avoid preventable surprises, and deliver a facility solution that serves Rollingwood well beyond the construction period.

References

Project References

Windsor Group Advisory & Management LLC is pleased to provide the following references. The first three entries are municipal or public-sector references, consistent with the RFQ's preference for similar clients and municipal government experience in Texas. Additional institutional references are included because they are relevant to Rollingwood's facility type, budget scale, renovation complexity, stakeholder environment, and owner-side decision-making needs.

Municipal Project: City of Brownsville, Texas

Windsor supported the City on a civic facility renovation involving public-sector project coordination, procurement support, consultant and contractor coordination, budget awareness, stakeholder communication, and project reporting. This reference is directly relevant to Rollingwood's need for a public-owner representative in a civic facility environment.

MUNICIPAL REFERENCE	CONTACT INFO
Flip Romero Director of Communications & Marketing Port of Laredo <i>Formerly AISD & City of Brownsville</i>	fgromero@ci.laredo.tx.us 210.304.9275
Helen Ramirez Director, Economic & Business Development City of San Marcos <i>Formerly City Manager, City of Brownsville</i>	hrameriz@sanmarcostx.gov 512.966.5161

Municipal Project: Hays Central Appraisal District, Texas

Windsor supported Hays CAD with facility planning and feasibility-related services for its office/facility needs, including project direction, facility requirements, budget implications, and leadership decision support. This reference is relevant to Rollingwood's early project-definition needs.

MUNICIPAL REFERENCE	CONTACT INFO
Laura Raven Chief Appraiser Hays Central Appraisal District	lraven@hayscad.com 512.268.2522

*Project References Continued***Municipal Project: City of Georgetown, Texas**

Windsor supported Georgetown's Downtown Master Plan Update with development advisory and public-sector planning support related to implementation, feasibility, stakeholder priorities, and municipal decision-making. This reference is relevant to owner-side advisory support in a municipal environment.

MUNICIPAL REFERENCE	CONTACT INFO
Kim McAuliffe Director, Downtown & Tourism City of Georgetown	kim.mcauliffe@georgetown.org 512.930.2027

Non-Municipal Project: St. Austin Catholic Church & School, Austin, Texas

Windsor supported St. Austin's through a complex, multi-phase redevelopment involving institutional ownership, stakeholder coordination, design and construction oversight, budget and schedule management, and owner-side decision support.

REFERENCE	CONTACT INFO
Trish Dolese Parish Finance Council St. Austin Catholic Church & School	pdolese@emmausprojects.com 512.656.3185

Non-Municipal Project: All Saints' Episcopal Church, Austin, Texas

Windsor is supporting All Saints on the approximately \$4 million Gregg House renovation, an administrative and community-serving building project involving project definition, stakeholder coordination, budget management, schedule awareness, and owner representation.

REFERENCE	CONTACT INFO
Genevieve Razim Rector All Saints' Episcopal Church	genevieve@allsaints-austin.org 281.881.8557

Quality Control

Quality Control

Windsor Group's approach to quality control is based on a simple principle: the least expensive time to solve a project issue is before it becomes field rework, a change order, or a public-facing decision problem. For Rollingwood, quality control should not be limited to periodic construction observation after the work is already in place. It should begin during scope definition and design, continue through procurement and preconstruction, and remain active through construction, closeout, and warranty.

This is especially important for a municipal building project with a defined budget, public accountability, existing-building conditions, and multiple stakeholders, including the City and Travis County ESD No. 9 / Westlake Fire Department. Windsor's role will be to help the City make informed decisions early, document expectations clearly, verify that the project team is working from the same set of assumptions, and identify issues before they become expensive.

Quality Control Philosophy: Resolve Risk When the Cost of Change Is Low

Windsor's quality control process is intentionally front-loaded. We believe the best owner's representative is not simply the person who catches problems in the field; it is the person who helps the owner, architect, contractor, consultants, and key users avoid preventable problems before construction begins.

For Rollingwood, that means Windsor would emphasize:

- Early design involvement so that scope, budget, code, operational, and constructability issues are identified before drawings are finalized.
- Early contractor engagement, where appropriate, to test assumptions, review cost implications, evaluate phasing, and identify constructability issues before they appear in the field.
- Structured preconstruction meetings that align the City, architect, contractor, consultants, vendors, and users around expectations, constraints, schedule, documentation, and decision-making protocols.
- Trade-specific pre-installation meetings before critical scopes begin, with Windsor participating to review the applicable specification section, drawings, site conditions, mock-up requirements, submittals, quality expectations, and coordination needs.
- Mock-ups, first-in-place reviews, and early inspections so the team agrees on qualitative expectations before large areas of work are installed.
- Clear documentation through issue logs, decision logs, change-order logs, field reports, photo documentation, pay application checklists, deficiency lists, and closeout trackers.

This approach is collaborative, not adversarial. Windsor's goal is not to "catch" the architect, contractor, or consultants in mistakes. Our goal is to create a project environment where expectations are clear, issues are surfaced early, and the City receives a durable, cost-effective, technically appropriate project with minimal owner risk.

Design and Document Quality Control

During planning and design, Windsor will review the architect's and consultants' documents for consistency, constructability, scope alignment, cost-effectiveness, and coordination. This review will not replace the professional responsibility of the architect or engineers; rather, it will provide the City with an owner-side review focused on budget, operations, long-term maintainability, public accountability, and risk.

Windsor's design-phase QC process will include:

- Reviewing design documents and specifications for consistency with the City's approved scope, budget, operational priorities, and schedule.
- Cross-checking drawings against specifications to identify gaps, conflicts, exclusions, or unclear scope before procurement.
- Reviewing architectural, civil, structural, MEP, fire protection, technology, security, and owner-furnished scope for coordination risks.
- Confirming that City and ESD operational requirements are documented and incorporated at appropriate design milestones.
- Identifying design decisions that may create avoidable cost, maintenance, phasing, or constructability issues.
- Maintaining a design comment log that tracks Windsor's comments, architect/consultant responses, unresolved items, and decisions required from the City.
- Supporting milestone cost reviews and estimate reconciliation so the City understands whether the design remains aligned with the total project budget.

For a project like Rollingwood's, where improvement, remodeling, or replacement may involve existing-building constraints, this design-phase review is critical. Existing municipal buildings often contain unknowns, legacy conditions, utility constraints, code issues, accessibility issues, drainage impacts, and operational limitations that can create downstream cost exposure. Windsor's process is designed to identify those issues early and help the City make disciplined decisions while options are still available.

Procurement, Bids, and Scope Quality Control

Windsor will support the City's procurement process with a focus on clarity, fairness, completeness, and defensibility. Quality control during procurement means making sure bidders or proposers understand the work, the City receives comparable responses, exclusions are identified, and scope gaps are resolved before award.

Windsor's procurement QC process will include:

- Reviewing RFQs, RFPs, bid forms, instructions to proposers, scopes of work, and evaluation criteria for clarity and alignment with the City's procurement requirements.
- Helping develop bid packages or proposal requirements that reduce ambiguity and produce comparable responses.
- Reviewing contractor assumptions, clarifications, alternates, unit prices, allowances, exclusions, and schedule commitments.
- Preparing bid or proposal comparison tools that distinguish true value from incomplete pricing.

Windsor's Procurement QC Process will Include Continued

- Checking that contractor pricing aligns with the drawings, specifications, addenda, and owner requirements.
- Identifying scope gaps between owner-hired vendors, contractor-provided work, consultant scope, utility work, technology, security, FF&E, and permitting responsibilities.
- Preparing recommendation summaries that are suitable for City leadership and, when needed, City Council consideration.

This is especially important where multiple parties may touch the same scope. For example, technology, access control, furniture, fire/life safety, utilities, refrigeration or specialty equipment, and owner-furnished items can easily fall into gaps between the owner, contractor, consultants, and vendors. Windsor's role is to identify those gaps early, assign responsibility clearly, and help the City avoid late-stage coordination surprises.

Contractor, Consultant, and Vendor Work Quality Control

During construction, Windsor will monitor the contractor's work and consultant responses for general conformance with the contract documents, the approved scope, the project schedule, and the City's expectations. Windsor will maintain regular field presence and will document observations through site reports, photographs, deficiency lists, meeting minutes, and issue logs.

Windsor's construction-phase QC process will include:

- Frequent site walks to observe progress, workmanship, sequencing, and general conformance with the contract documents.
- Review of contractor work against drawings, specifications, approved submittals, RFIs, ASIs, change directives, and other project documents.
- Coordination with the architect, engineers, inspectors, testing agencies, and City representatives regarding observed deficiencies or unresolved issues.
- Tracking of submittals, RFIs, ASIs, field reports, testing reports, inspection results, deficiency items, and punch-list items through resolution.
- Documenting non-conforming or questionable work promptly and communicating it to the appropriate parties.
- Verifying that corrected work has been reinspected, accepted, or otherwise resolved by the appropriate design professional or authority.
- Maintaining photo documentation of progress, concealed conditions, deficiencies, completed work, and corrected items

Windsor places particular emphasis on inspections before work is concealed. For example, after rough-ins and before walls or ceilings are closed, Windsor will walk affected spaces with the contractor, design team, and owner representatives as needed to verify that key infrastructure, equipment, blocking, penetrations, access panels, technology pathways, fire/life safety elements, and owner requirements are located correctly. These inspections help avoid costly rework and give the City confidence that decisions are being checked before the project advances to the next stage.

Trade Pre-Installation Meetings, Mock-Ups, and First-In-Place Reviews

Windsor strongly believes that trade-specific pre-installation meetings are one of the most effective quality control tools on a construction project. Before significant or risk-sensitive scopes begin, Windsor will work with the contractor to conduct focused pre-installation meetings for relevant trades.

These meetings may include, as applicable:

- Review of the applicable specification section.
- Review of contract drawings and relevant details.
- Review of approved submittals and product data.
- Review of mock-up or sample requirements.
- Review of site conditions and sequencing constraints.
- Review of testing, inspection, and documentation requirements.
- Review of coordination with adjacent trades and owner vendors.
- Confirmation of responsible parties, schedule, access, safety, and communication protocols.

For scopes where workmanship, finish quality, waterproofing, envelope performance, or coordination are critical, Windsor will advocate for mock-ups or first-in-place reviews. If a full mock-up is not practical, Windsor will recommend controlled installation of a limited initial area so the team can review quality before the work is repeated across the project.

This process helps the City avoid a common construction failure: discovering too late that the contractor, subcontractor, architect, and owner had different expectations for the finished work.

Invoicing and Pay Application Quality Control

Windsor will review contractor pay applications, consultant invoices, and vendor invoices against the contract, approved scope, schedule of values, work completed, stored materials, approved change orders, retainage requirements, and supporting documentation.

For contractor pay applications, Windsor's process will include:

- Reviewing each pay application against the approved schedule of values and contract amount.
- Confirming that approved change orders are properly incorporated and pending changes are not billed prematurely.
- Comparing billed percentages to observed work in place.
- Walking the project with the contractor, as appropriate, so the contractor can identify the work being billed.
- Reviewing stored material charges for proper backup, including invoices, delivery tickets, photographs, insurance documentation, and verification of delivery or secure storage.
- Checking retainage, previous payments, current payment requested, and balance to finish.
- Confirming that required lien waivers, affidavits, certified payrolls if applicable, or other contract-required documents are included before recommending payment.

For Contractor Pay Applications, Windsor's Process will Include Continued

- Providing the City with a clear recommendation for approval, revision, or withholding.

For consultant and vendor invoices, Windsor will review the invoice against the approved agreement, authorized scope, progress to date, reimbursables, additional service requests, and any task-order limitations. The objective is to protect the City while keeping the project team paid fairly and on time for properly completed and documented work.

Quantities, Allowances, Unit Prices, and Cost Verification

Windsor will review quantities and pricing with a practical owner-side lens. When a change order, allowance draw, unit price item, or bid clarification depends on quantities, Windsor will verify that the quantities are reasonable and tied to the scope of work. This may include:

- Reviewing contractor takeoffs and backup.
- Comparing proposed quantities to drawings, field conditions, specifications, and photographs.
- Requesting subcontractor quotes, material invoices, labor breakdowns, equipment rates, and markups where appropriate.
- Reviewing unit prices against contract terms or market reasonableness.
- Confirming that proposed work is not already included in the base scope.
- Reviewing credits for deleted or reduced work.
- Checking whether a proposed change affects schedule, sequencing, general conditions, or contingency use

Windsor's approach is firm but fair. We do not believe in reflexively beating down a contractor when a change is legitimate and substantiated. We do believe every change should be tied to the contract documents, priced accurately, supported by backup, and explained clearly enough that the City can approve it with confidence.

Change Order Quality Control

Windsor's strongest change-order control is early prevention: better scope definition, early constructability input, preconstruction coordination, thorough document review, and disciplined issue tracking. When changes do arise, Windsor will manage them through a structured process.

Windsor's change-order QC process will include:

- Maintaining a change-order log that tracks potential changes, formal proposals, pending items, approved changes, rejected items, cost impacts, schedule impacts, contingency use, and decision status.
- Reviewing each proposed change against the contract documents, drawings, specifications, RFIs, ASIs, field conditions, and prior meeting documentation.
- Confirming whether the work is truly a change or already part of the contractor's scope.
- Reviewing labor, material, equipment, subcontractor costs, markups, quantities, schedule impacts, and credits.
- Coordinating review with the architect, engineers, and City as appropriate.
- Negotiating fair and equitable resolution when pricing, quantities, entitlement, or schedule impacts are unclear.
- Providing the City with a written recommendation before approval.
- Tracking approved changes against the total project budget and contingency.

This process is particularly important for a public project because change orders are not only cost events; they are governance events. The City needs a documented basis for approving or rejecting changes, and Windsor will help maintain that record.

Issue Resolution and Escalation

Windsor will maintain an active issue log throughout the project. Each issue will be assigned a responsible party, due date, status, cost implication, schedule implication, and required decision. This tool will be reviewed regularly in project meetings and used to prevent unresolved items from drifting.

Issues will be escalated based on severity:

- Field-level coordination items will be resolved with the contractor, architect, consultants, and affected vendors.
- Cost, schedule, scope, or stakeholder-impact items will be elevated to the owner core team.
- Policy, budget, procurement, or public-facing decisions will be prepared for City leadership or City Council consideration, as directed by the City.

This escalation process helps preserve momentum while ensuring that the right decisions are made at the right level.

Closeout and Warranty Quality Control

Windsor will treat closeout as an active phase, not an administrative afterthought. For small municipalities, poor closeout can create long-term burden for staff, especially when record documents, warranties, training, O&M manuals, and unresolved punch-list items are incomplete.

Windsor's closeout QC process will include:

- Coordinating substantial completion inspections and punch-list development.
- Tracking punch-list items through completion.
- Verifying delivery of record drawings, O&M manuals, warranties, attic stock, keys, access credentials, testing reports, inspection approvals, and closeout documents.
- Confirming that City staff receive required training for building systems and equipment.
- Coordinating owner vendor turnover, technology turnover, FF&E completion, and occupancy-related activities.
- Maintaining a warranty log after completion and helping the City track warranty requests through resolution.

The goal is for the City to receive not only a completed building, but a usable, documented, maintainable facility.

Relevant Examples

St. Austin's Catholic Parish Redevelopment — Mock-Ups and Early Quality Alignment

On the St. Austin's Catholic Parish Redevelopment, Windsor used mock-ups as a practical quality control tool to align expectations before repeated work proceeded. A classroom mock-up was completed in advance so the owner, design team, contractor, and users could understand and evaluate the expectations for the finished space. The exterior envelope was also mocked up and reviewed by the full team. Windsor participated in a formal punch review of the mock-up so that items such as grout color, connections, finish quality, and waterproofing tie-ins were reviewed and resolved before the work was broadly installed.

St. Austin's Catholic Parish Redevelopment Example Continued

This is the same philosophy Windsor would bring to Rollingwood: establish quality expectations early, review work in a controlled setting, document comments, and correct issues before they become widespread or expensive.

Kwik Ice Light Industrial / Flex Project
Early Contractor and Specialty Vendor Coordination

On the Kwik Ice light industrial / flex project, Windsor brought the contractor into the process during schematic design so the team could engage in large-scale design assist with the pre-engineered metal building subcontractor. Rather than waiting until construction for the specialty subcontractor to identify conflicts through shop drawings, the team involved the expert early while design decisions were still flexible.

This early contractor and subcontractor involvement helped the client evaluate constructability, structural approach, pricing, and procurement strategy before the project moved too far downstream. Windsor also helped coordinate early with a refrigeration vendor and, after owner requirements were clarified, helped transition that scope to the general contractor so it could be managed within the construction contract. This reduced owner coordination risk and created a clearer path for delivery. For Rollingwood, the lesson is directly applicable: when specialized scopes, public safety requirements, existing-building constraints, or owner vendors are involved, the owner's representative should facilitate early coordination so responsibility is clear before construction begins.

Brownsville Communications and Marketing Department Renovation
Change Order Review and Contract Enforcement

On the Brownsville CMD project, Windsor reviewed and negotiated a roofing-related change order after field inspections showed that the contractor had not followed the repair methodology outlined in the contract documents. Windsor had performed routine inspections, documented the work with photographs, and previously requested that the contractor adjust its approach to comply with the documents.

When the contractor later submitted a change related to roof damage, Windsor was able to rely on the contract documents, prior written direction, and photo documentation to challenge the request. That process resulted in more than \$60,000 in negotiated savings for the owner. This example demonstrates Windsor's approach to change-order quality control: understand the documents, inspect the work, document issues contemporaneously, communicate expectations clearly, and protect the owner with facts rather than opinion.

Summary

Windsor's quality control process is designed to give Rollingwood confidence before, during, and after construction. We will focus on early risk identification, clear documentation, collaborative preconstruction planning, trade-specific alignment, rigorous invoice and change-order review, frequent field observation, mock-ups and first-in-place reviews, deficiency tracking, and disciplined closeout. For the City, this means fewer surprises, stronger documentation, better cost control, clearer decisions, and a higher likelihood that the final project meets the City's operational, budgetary, technical, and public-accountability requirements.

Additional Data

Example

PROJECT STATUS REPORT

April 1, 20XX

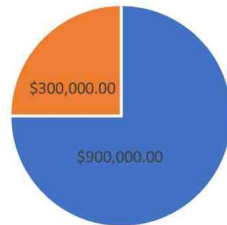


SCHEDULE SUMMARY

Construction NTP:	December 18, 20XX	Project Duration:	112
Today's Date:	April 1, 20XX	% of Duration Used:	94%
Total Days Complete:	105	Total Days Added:	0
Substantial Completion:	April 8, 20XX		

FINANCIAL SUMMARY

DRAW SUMMARY		CHANGE SUMMARY	
Contract Current GMP Value:	\$1,200,000.00	Total COR's Submitted	22
Contractor Paid to Date:	\$900,000.00	Total COR's in Review	2
Pay App's Submitted:	5	Total Executed COR's	14
		Value of COR's in Review:	\$7,500.00
		Value of Approved COR's:	\$50,000.00
		GC Contingency Remaining:	\$5,500.00
		% GC Contingency Remaining:	17.4%
		Owner Contingency Remaining:	\$15,000.00
		% Owner Contingency Remaining:	47.4%
		GMP Allowances:	\$30,000.00
		Approved Allowances Balance:	\$15,000.00
		Anticipated Allowances:	\$25,000.00
		Allowances Anticipated Delta:	\$5,000.00



RISK SUMMARY

Total # of Cost Exposures:	3	Potential Change Orders:	0
Exposures Estimated Value:	\$8,250.00		

Exposures Include: Wood Floors change in material due to lead time and floating of the floor, Door Hardware possible change, Exit sign extension code compliance investigation

STATUS / WORK COMPLETED

Paint nearly complete, Test and balancing done and report issued, D1 lighting fixtures on site now and being installed, receptionist millwork has started at desk area (4-/8 - 4/12 is targeted completion of the millwork in this area), technician demountable glazing systems installed, pre-testing of the fire alarm system before end of the week, tracking mid-April for FF&E delivery, Drapes will arrive on site for Thursday, countertop stone expected for next week, safe move - 4/17 (Owner has communicated security needs to be up), final cleans are starting and will continue through to completion, AV and data work to start this week or beginning of next.

Pay Application #3 is has been reviewed and final pay app sent to Owner for approval. Two CE's are in discussion with Contractor to finalize and then will be sent to Owner for approval.

Hypthetical Project Budget Example - City of Rollingwood

Civic Building, Renovation



Land Costs:	COST	COST / RSF	SPENT TO DATE	Notes / Assumptions
Land Purchase Price:	\$ -	\$ -		No land purchase
Due Diligence				
Architectural Feasibility / Concept Plan	\$ 5,000			Proposal in hand
Civil Site Study & Feasibility	\$ 7,000			Typical cost from previous civil feasibilities
Entitlements Review & Analysis	\$ 7,500			Typical cost from previously completed entitlement review
Geotech Report	\$ 5,500			Typical cost. Ay fluctuate based on land size and site abnormalities
ALTA Survey	\$ 7,500			Typical cost
Environmental Report	\$ 2,500			Typical cost
PM Support	\$ 20,000			Estimation
Due Diligence Total:	\$ 55,000			
Soft Costs (inc. A/E, subconsultants, inspections, PM, etc.):				
Architect	\$ 150,000	\$ 10		Estimated from proposals of similar sized project
Civil Engineer & Landscape	\$ 125,000			For SDP, Site civil, and landscape
Consultants / 3rd Party Inspections	\$ 30,000			Assumption that some specialty consultants and inspections may be needed
Project Management	\$ 200,000			Based on 4% fee submitted
Pre-construction Fee	\$ 25,000			Contractors often waiver this or small fee
Signage / Branding / Art	\$ 25,000			Assuming some signage by owner
Soft Cost Contingency	\$ 55,500			Holding 10% of soft costs for now until further refined and more certainty
ROM Soft Costs:	\$ 610,500	\$ 41	\$ -	
Construction Hard Costs:				
Base Build (all contractor scope):	\$ 3,000,000	\$ 200		From IE2 bid - updated with negotiated costs, new PEMB vendor cost, and clarified assumptions
Cabling & IT	\$ 30,000			AV and IT scope contracted through owner, guesstimate on cost, will depend on what's required
OFOI / Appliances	\$ 10,000			General assumption, will verify if needed (fridge, microwave, etc)
Escalation	\$ 106,400			Construction to start in 12 months, assume 3.5% escalation
Off-sites	\$ -			Assuming no off-site construction
Owner Contingency	\$ 235,980			Recommend 7.5% of cost of work at this stage
ROM Hard Costs:	\$ 3,382,380	\$ 225		
Other Costs:				
Permits / Fees	\$ 75,000			Typically not held in hard costs, placeholder for now. Permitting costs and impact / utility fees
Austin Energy Related Cost	\$ 35,000			Depends on site conditions and design and renovation vs new build
Legal / Accounting	\$ 15,000			Holding as allowance, likely some funds have been expended here
FF&E	\$ -	\$ -		Assuming no FF&E at this time
ROM Costs:	\$ 125,000		\$ -	
Total Project Costs	\$ 4,117,880	\$ 274.53		
ROM Project Budget:	\$ 4,118,000	\$ 274.53		
Total Spent to Date (inc land):			\$ -	

Notes / Assumptions:

*This is a draft / hypothetical project budget simply for the purposes of showing our budgeting form and process. This is continually updated at cost certainty increases through pre-con.

*Permitting fees and expediting are not included with GC GMP

*Assumes Signage branding and art should be held in overall budget

*Assumes 7.5% owner contingency on hard costs at this time

*Assumes 10% Soft Cost Contingency

*Assumes project start is Summer 2027, target of July / August timeframe

*No FF&E is included in the budget

*Assumes we would utilize a CMAR delivery method.

*Contractor costs are still being reviewed for scope accuracy

*Budget shows no off-site utility work.

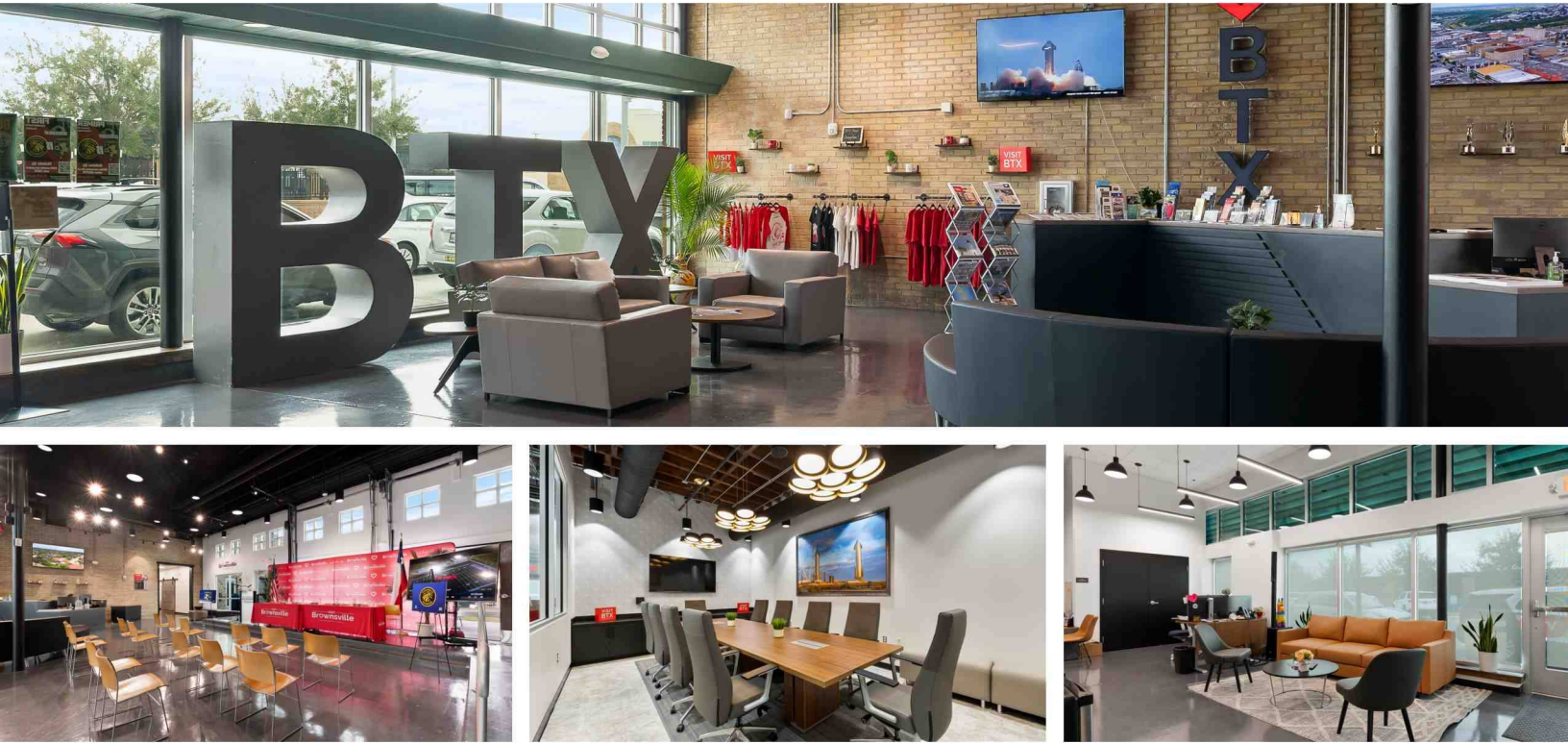
*There may be accounting or other administrative related costs that are not being shown here.

*No Tariff related increases or cost changes have been factored into this beyond market level pricing

*Permitting fees and impact fees are based on a separate estimate using past project knowledge but are subject to change based on actual conditions.

*Base Build Hard Cost would come from most recent cost estimate provided from by contractor.

*Costs are still evolving and being determine and subject to change up to Construction Documents Design Phase



The transformation of a former auto supply store into a vibrant, multi-functional complex for the City of Brownsville. The facility now houses the Communications and Marketing Department, the Convention and Visitors Bureau (CVB), the Office of Space Commerce, and Brownsville TV. The complex has become a cornerstone of Brownsville's downtown revitalization, promoting collaboration and community engagement.

Public Funding Management

The project was funded entirely through Public, Educational, and Governmental (PEG) funding, allocated to support public-access facilities. Windsor Group helped navigate funding guidelines to ensure compliance while maximizing facility functionality for public broadcasting and educational programming.

Video Link:

<https://www.youtube.com/watch?v=q8uEhK42fl4&t=89s>

PROJECT TYPE

Adaptive Re-Use / Historic Renovation

CLIENT

City of Brownsville

LOCATION

Brownsville, TX

COMPLETION

2023

PROJECT SIZE

12,000 SQ FT

PROJECT BUDGET

\$5 Million



WINDGRO-03

TCUEVAS

CERTIFICATE OF LIABILITY INSURANCE

 DATE (MM/DD/YYYY)
 5/29/2026

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

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

PRODUCER Alliant Insurance Services, Inc. 1421 Hanz Dr New Braunfels, TX 78130	CONTACT NAME: Thalia Cuevas PHONE (A/C, No, Ext): (830) 730-5375 FAX (A/C, No): E-MAIL ADDRESS: thalia.cuevas@alliant.com														
INSURED Windsor Group Advisory & Management, LLC 2105 East MLK Jr Blvd Suite 220 Austin, TX 78702	<table border="1"> <thead> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A: Massachusetts Bay Insurance Company</td> <td>22306</td> </tr> <tr> <td>INSURER B: Hiscox Insurance Company Inc.</td> <td>10200</td> </tr> <tr> <td>INSURER C:</td> <td></td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </tbody> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Massachusetts Bay Insurance Company	22306	INSURER B: Hiscox Insurance Company Inc.	10200	INSURER C:		INSURER D:		INSURER E:		INSURER F:	
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INSURER D:															
INSURER E:															
INSURER F:															

COVERAGES		CERTIFICATE NUMBER:		REVISION NUMBER:		
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.						
INBR LTR	TYPE OF INSURANCE	ADD'L INSR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PRO-JECT ☐ LOC OTHER:		ODDH606514	5/12/2025	5/12/2026	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ Included GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMPIOP AGG \$ Included
A	AUTOMOBILE LIABILITY ☐ ANY AUTO OWNED AUTOS ONLY ☒ HIRER AUTOS ONLY ☐ SCHEDULED AUTOS ☒ NON-OWNED AUTOS ONLY		ODDH606514	5/12/2025	5/12/2026	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ \$
	UMBRELLA LIAB ☐ OCCUR EXCESS LIAB ☐ CLAIMS-MADE DED ☐ RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/OWNER EXCLUDED? (N/A) Y/N ☐ N/A If yes, describe under DESCRIPTION OF OPERATIONS below					PER STATUTE ☐ OTH-ER ☐ E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
B	Professional Liab		ANE4817699.25	5/12/2025	5/12/2026	Each Occurrence/Agg 1,000,000
B	Professional Liab		ANE4817699.25	5/12/2025	5/12/2026	Retention 2,500

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 The general liability and commercial auto policy includes a blanket automatic additional insured endorsement that provides additional insured status to the certificate holder only when there is a written contract between the named insured and the certificate holder that requires such status. The general liability, and commercial auto policy includes a blanket automatic waiver of subrogation endorsement that provides this feature only when there is a written contract between the named insured and the certificate holder that requires it. The "Primary and Non-contributory" wording is included in the General Liability & Automobile Additional Insured Endorsement where there is a written contract that requires such status.

CERTIFICATE HOLDER City of Rollingwood 403 Nixon Drive Rollingwood, TX 78746	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
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ACORD 25 (2016/03)

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Website: windsor-groupllc.com

Results.

Disciplined cost and schedule, robust quality, clean audits, smooth approvals, and a project delivered with clarity, confidence, and trust.