

Town of Southborough, Massachusetts
Neary Building Committee
Neary Building Committee – OPM Subcommittee
Tuesday, May 16, 2023 7:00 PM
Virtual Zoom Meeting

Pursuant to Chapter 20 of the Acts of 2021, An Act Relative to Extending Certain COVID-19 Measures Adopted during the State of Emergency, signed into law on June 16, 2021, this meeting will be conducted via remote participation. No in-person attendance by members of the public will be permitted.

Neary Building Committee

Members Present: Jason Malinowski, Andrew Pfaff, Roger Challen, Mark Davis, and Denise Eddy

Members Absent: Jen Donato and Anuradha Khemka

Ex-Officio Members Present: Gregory Martineau Superintendent of Schools, Keith Lavoie Assistant Superintendent of Operations, and Rebecca Pellegrino Director of Finance

Ex-Officio Members Absent: Stefanie Reinhorn Assistant Superintendent of Teaching and Learning, Steve Mucci Woodward School Principal, Kathleen Valenti Neary School Principal, Mark Purple Town Administrator and Brian Ballantine Town Treasurer/ Finance Director

Neary Building Committee - OPM Subcommittee

Members Present: Jason Malinowski, Denise Eddy, Mark Davis, Andrew Pfaff, and Roger Challen

Members Absent: None

I. Call Meeting to Order

Jason Malinowski called the Neary Building Committee - OPM Subcommittee Meeting to order at 7:02 PM.

Jason Malinowski noted that this meeting is posted as a Neary Building Committee - OPM Subcommittee meeting given that there is a quorum of the Neary Building Committee present for logistical purposes.

II. Organization of Subcommittee and introduction of SC Representative

Jason Malinowski welcomed Roger Challen, Southborough School Committee member, to the Neary Building Committee. Denise Eddy stated that Jason should remain in his current position as they all think he is doing a great job and she is willing to become Vice-Chair if needed.

Jason Malinowski requested a vote and discussion.

Denise Eddy moved, Andrew Pfaff seconded and voted 4-0-1 by roll call, (Jason Malinowski abstained), "To elect Jason Malinowski as Chair of the OPM Subcommittee and Denise Eddy as Vice Chair of the OPM Subcommittee."

Roll Call

For: Denise Eddy, Andrew Pfaff, Roger Challen, and Mark Davis

MOTION TO
ELECT A CHAIR
AND VICE CHAIR
FOR THE OPM
SUBCOMMITTEE

Opposed: None
Abstained: Jason Malinowski

III. Review of OPM Selection Process (No questions or concerns at this time)

IV. Review and vote on draft version of RFS for OPM Services to be sent to MSBA

Jason Malinowski reported that the RFS is a template from the Massachusetts School Building Authority. Jason thanked Rebecca Pellegrino, Director of Finance, Keith Lavoie, Assistant Superintendent of Operations, and Gregory Martineau, Superintendent of Schools for taking the first attempt at the red line and believed it was a great start to create conversation. Although Andrew Pfaff and Roger Challen are apprehensive about the amount specified, everyone agrees that it was necessary to provide a figure for the Neary Building project. Once work commences, a more accurate estimate can be determined. Mark Davis aimed to ensure a precise comprehension of the Project Objectives regarding the suitability and environmental reviews of the current site for a new school building. Rebecca assured they would select the optimal location for construction, if it were to be a construction project, regardless of where it may be. Before the meeting, Jason shared his comments with Rebecca to ensure they were well-prepared. His comments were already included in the red line. Jason highlighted the timeline dates that will require Committee action. Once they hear back from the MSBA, they will have to meet again and officially vote as a Neary Building Committee, not as an OPM Subcommittee. The Neary Building Committee will meet on July 26th for scorecard reviews on their top firms, and on July 28th interviews will take place.

Jason Malinowski asked for a discussion and a vote.

Jason Malinowski moved, Roger Challen seconded and it was unanimously voted by roll call "That the OPM Subcommittee approve the request for services with the edits discussed this evening and give authorization to Rebecca Pellegrino and Keith Lavoie as the MCPPO certified and are welcomed to consult with the Chair to make any scriveners updates as they do a final pass."

MOTION TO
APPROVE THE
RFS FOR OPM
SERVICES TO
SEND TO MSBA

Roll Call

For: Roger Challen, Denise Eddy, Andrew Pfaff, Mark Davis, and Jason Malinowski

Opposed: None

Abstained: None

V. Public Comment (None at this time)

VI. Meeting Schedule - They discussed the meeting schedule during agenda item 3.

VII. Other business that may properly come before the Subcommittee

Jason Malinowski commented that they continue to be in recruitment mode for the Neary Building Committee, as it is also his understanding there have been applications that have come in. There will be a need for three at-large members going into the next year.

VIII. Adjournment

Jason Malinowski moved, Denise Eddy seconded, and it was unanimously voted by roll call, "To adjourn the Neary Building Committee Meeting of May 16, 2023."

MOTION TO
ADJOURN

Roll Call

For: Roger Challen, Denise Eddy, Andrew Pfaff, Mark Davis, and Jason Malinowski

Opposed: None

Abstained: None

Jason Malinowski adjourned the meeting at 7:55 PM.

Respectfully submitted,
Mariana Silva, Central Office Administrative Assistant
Office of Superintendent

Documents used at this meeting:

1. Neary Building Committee – OPM Subcommittee Meeting Agenda dated May 16, 2023
2. Draft Request for Owner’s Project Management Services (“OPM RFS”)

INSTRUCTIONS FOR COMPLETING THE REQUEST FOR SERVICES (“RFS”)

This model RFS is intended for use in the procurement of an Owner’s Project Manager (“OPM”) by cities, towns, and regional school districts that have been invited by the Massachusetts School Building Authority (the “MSBA”) to conduct a feasibility study or that have been approved for a project by the MSBA. Unless otherwise approved by the MSBA in writing, a city, town, or regional school district shall use this model RFS in the procurement of an OPM in order to qualify for MSBA funding. Each city, town, and regional school district shall be responsible for inserting project and district specific information where indicated in the RFS. Although this model RFS is intended to be comprehensive in meeting MSBA requirements for the procurement of an OPM, each city, town and regional school district shall be solely responsible for ensuring that its particular RFS complies with all applicable provisions of federal, state, and local law, including, but not limited to, all procurement laws. The MSBA recommends that each city, town, and regional school district have its legal counsel review its RFS to ensure that it is in compliance with all provisions of federal, state and local law prior to its publication. No addition, deletion or revision to the model RFS of any kind shall be valid unless approved in writing by the MSBA. The written approval given by the MSBA in this instance is solely for the purpose of determining whether the proposed RFS appears consistent with the MSBA’s guidelines and requirements for OPM procurement and is not for the purpose of determining whether the proposed RFS meets any other legal requirements imposed by federal, state or local law, including, but not limited to, public procurement laws. The MSBA shall not be responsible for any legal fees or costs of any kind that may be incurred by a city, town or regional school district in relation to its preparation or review of its RFS.

- 1) Each city, town and regional school district (“Owner”) shall follow the instructions designated by italics and bold-face lettering in the body of the model RFS.
- 2) The Owner is responsible for reviewing its RFS to ensure that all template information and preparation guidance has been replaced with project and Owner specific information in the final RFS.
- 3) The Owner should review the RFS with its legal counsel to ensure it is in compliance with all federal, state and local laws.
- 4) The Owner shall submit a red-lined version of its final RFS indicating any and all additions, deletions or revisions to the model RFS for MSBA approval prior to the advertisement being placed.
- 5) The Owner shall include in the final RFS all attachments indicated in the RFS model.
- 6) A copy of the final RFS and the advertisement must be submitted to the MSBA as part of the required documentation in accordance with the sample narrative summary and checklist in the MSBA’s OPM Guidelines.
- 7) The Owner should allow a minimum of ten business days for MSBA review of the RFS. Actual review time may vary.
- 8) Unless agreed to in writing by the MSBA, the Owner should not advertise the RFS until the MSBA has approved the form of the RFS.

REQUEST FOR OWNER’S PROJECT MANAGEMENT SERVICES (“OPM RFS”)

1. Introduction

The **Town of Southborough**, (“Owner”) is seeking the services of a qualified OPM “Owner’s Project Manager” as defined in Massachusetts General Laws Chapter 149, Section 44A½ and as further defined by the provisions of this RFS, to provide Project Management Services for the design, construction, addition to and /or renovation of the **Margaret A. Neary School** (“School”) in **Southborough**, Massachusetts (“Project”).

The Owner is requesting the services of an OPM to represent the Owner during the feasibility study and schematic design phases of the project initially. Subject to the approval of the Project by the Massachusetts School Building Authority (the “MSBA”) and further subject to continued funding authorized by the **Town of Southborough**, the contract between the Owner and the Owner’s Project Manager may be amended to include continued Project Management Services through design development, construction documents, bid and award, construction and final closeout of the potential Project. A potential approved Project may include a renovation of the existing School, a renovation and addition of the existing School and/or new construction. The estimated total project costs of an approved potential Project may range from **(\$50,000,000 to \$90,000,000)** depending upon the solution that is agreed upon by the Owner and the MSBA and that is ultimately approved by a vote of the MSBA Board of Directors.

2. Background

Originally constructed in 1970, the Margaret A. Neary School is a 62,736 gross square foot facility on a single level located on a eighty-one (81) acre site located in Southborough, Massachusetts. During the 1990’s, the Town of Southborough responded to its population growth by building/renovating several schools in rapid succession; the Margaret A. Neary School was not part of that investment. While maintained over the years, most of the facility’s building systems and components are nearing the end of life expectancy, especially the roof and electrical system. To support this determination, the District contracted with Vertex Companies, Inc. (Chester, PA) to complete a Facilities Conditions Assessment (March 2021). This assessment confirmed the needs for renovation or replacement of the roof, electrical, and other building modifications to meet building code requirements.

The goal of the District is to modernize and expand the Margaret A. Neary School to a condition that rectifies current deficiencies and satisfies projected future requirements for educational programs. The Margaret A. Neary School provides a comprehensive educational program designed to support state standards. Components of this program are highly challenged and in some cases inadequate due to space limitations. Special education instruction, literacy programs, mathematics, ELL intervention, the Library/Media Center, the STEM laboratory, and the fine arts program are struggling in compromised, undedicated spaces. Additional space is required to advance the development of these programs to meet goals in the spirit they were intended. The District re-authored its Strategic Plan (*Vision 2026: Educate, Inspire, and Challenge*) in 2020 and recognizes that the vision for its school is attained when the following indicators are present in the school facility:

- Space to engage students in small group critical thinking, creativity and problem solving and opportunities to share thinking with peers and adults in all academic spaces;
- Efficient and effective space is available to differentiate instruction so the needs of struggling, average and advanced learners can be met in an inclusive setting;
- Instructional space has the electrical and networking capacity necessary to integrate technology into curriculum and engage students in a digitally learning environment;
- Students have access a state-of-the-art Library/Media Center and have space to investigate essential questions and a space that reflects the value of information and literacy in the 21st century;

- Students have a multipurpose instructional learning lab that has the electrical, networking and scientific equipment necessary for students to participate in multi-content inquiry designed to address and evaluate skills and strategies critical for success in the 21st century;
- Professional space is available for teachers to participate in collaborative learning exercises that increases student achievement;
- Space is available for parent learning, participation, and volunteering, i.e. auditorium space.

In addition, the intention of the project is also to consolidate the number of school buildings in Southborough. This may include, but is not limited to, the decommissioning of the Albert S. Woodward Memorial School (28 Cordaville Road) or the Mary E. Finn Elementary School (60 Richards Road) to the Town to be repurposed for non-school uses. The current structure of the schools is:

- Mary E. Finn Elementary School – Grades PreK – 1
- Albert S. Woodward Memorial School – Grades 2-3
- Margaret A Neary School – Grades 4-5

The feasibility study shall weigh all the options available to the citizens of Southborough. To begin this study, The Public Schools of Southborough, Southborough Capital Planning Board, and Southborough Select Board have conducted a space needs assessment for the Town of Southborough and commissioned an enrollment study with RLS Demographics, Inc.

3. Project Description, Objectives and Scope of Services

On or about **June 22, 2021**, the Owner submitted a Statement of Interest (Attachment A) to the MSBA for **the Margaret A. Neary School**. The MSBA is an independent public authority that administers and funds a program for grants to eligible cities, towns, and regional school districts for school construction and renovation projects. The MSBA's grant program is discretionary, and no city, town, or regional school district has any entitlement to any funds from the MSBA. At the April 26, 2023 Board of Directors meeting, the MSBA voted to issue an invitation to the Owner to conduct a feasibility study for this Statement of Interest to identify and study possible solutions and, through a collaborative process with the MSBA, reach a mutually-agreed upon solution. The MSBA has not approved a Project and the results of this feasibility study may or may not result in an approved Project.

It is anticipated that the feasibility study will review the problems identified in the Statement of Interest at the **Margaret A. Neary School**.

The Margaret A. Neary School was constructed in 1970 and encompasses an approximate area of 63,000 gross square feet on a single level and is located on a eighty-one (81) acre site. The site is separated by wetlands and the Margaret A. Neary School half of the lot is twenty-seven (27) acres. The building currently services grades four and five for the community of Southborough.

As a result of a collaborative analysis with the MSBA of enrollment projections the agreed upon enrollment is as follows:

Enrollment for Grades 4-5 at the Margaret A. Neary School	Enrollment for Grades 3-5 at a Consolidated Margaret A. Neary School and Albert S. Woodward Memorial School	Enrollment for Grades 2-5 at a Consolidated Margaret A. Neary School and Albert S. Woodward Memorial School
305 students	450 students	610 students

The building is a structural block construction with masonry in-fill walls and exterior face brick veneer. Steel roof joists support a flat Carlisle EDPM membrane roof. There was an addition of two (2) modular classrooms added to the building in 2001, adding 2,744 square feet. The interior finishes include vinyl roll, vinyl asbestos tile, ceramic tile, vinyl gym flooring, and quarry tile as well as exposed concrete flooring and concrete block walls, and plaster, acoustic tile and lay-in acoustic tile (LAT) ceilings. A complete EPDM roof replacement occurred in 1990. Since then only repairs have occurred. Doors and windows are original construction. There has been no significant modification from the original design. An upgrade of the HVAC equipment, generator, and electrical system completed in 2007. This upgrade also included new clocks and a communication system. A voice over IP phone system was installed in 2018. Asbestos containing building materials are present in the form of pipe fittings, vinyl asbestos tile flooring throughout the majority of the facility, and 12x12 acoustic wall tile in classrooms.

Project Objectives under consideration by the Owner include:

- *Identification of community concerns that may impact study options;*
- *Identification of specific milestone requirements and/or constraints of the District – e.g. Town votes, swing space, occupancy issues;*
- *Ensure that the School meets current and future educational program needs and code requirements;*
- *Consideration of options for different grade level configurations;*
- *Addition, renovation, or replacement of existing buildings and facilities to provide for a full range of programs consistent with state and approved local requirements;*
- *Suitability of the current location for construction of a new school building;*
- *Identification of alternative sites;*
- *Life cycle costs of operating the School as it relates to future operational budgets;*
- *Northeast Collaborative for High Performance Schools (NE-CHPS) criteria or US Green Building Council's LEED for Schools (LEED-S) Rating System*
- *CM-at-Risk Delivery Method.*

The required scope of services is set forth in Article 8 of the standard contract for Owner's Project Management Services for a Design/Bid/Build project that is attached hereto as Attachment B and incorporated by reference herein. If the Owner determines to use a CM-at-Risk delivery method, this contract shall need to be amended and/or substituted. The work is divided into the Project Phases as listed in Attachment A of this contract. The durations of the Phases shown below are estimates only, based on the Owner's experience. Actual durations may vary depending upon the Project agreed upon by the Owner and the MSBA. The total duration of the Contract is estimated as follows:

- | | | |
|----|--------------------------------------------------------------|----------------------|
| 1. | Feasibility Study/Schematic Design Phase; | 20-24 months* |
| 2. | Design Development/Construction Documents/Bidding Phase; and | 10-12 months* |
| 3. | Construction Phase. | 24-36 months* |

*These ranges for scheduling timeframes are provided as guidelines only and are based upon schedules established by other Owners.

4. Minimum Requirements and Evaluation Criteria:

Minimum Requirements:

In order to be eligible for selection, each Respondent must certify that it meets the following minimum requirements. Any Response that fails to include such certification in its response, demonstrating that these criteria have been met, may be rejected without further consideration.

Each Respondent must designate an individual who will serve as the Project Director. The Project Director shall be certified in the Massachusetts Certified Public Purchasing Officer Program (the "MCPPO") as administered by the Inspector General of the Commonwealth of Massachusetts and must also meet the following minimum requirements:

- The Project Director shall be a person who is registered by the Commonwealth of Massachusetts as an architect or professional engineer and who has at least five years' experience in the construction and supervision of construction and design of public buildings;
- or,**
- if not registered as an architect or professional engineer, the Project Director must be a person who has at least seven years' experience in the construction and supervision of construction and design of public buildings.

Evaluation Criteria

In addition to the minimum requirements set forth above, all Respondents must demonstrate that they have significant experience, knowledge and abilities with respect to public construction projects, particularly involving the construction and renovation of K-12 schools in Massachusetts. The Owner will evaluate Responses based on criteria that shall include, but not be limited to, the following:

- 1) Past performance of the Respondent, if any, with regard to public, private, Department Of Education funded and MSBA-funded school projects across the Commonwealth, as evidenced by:
 - a) Documented performance on previous projects as set forth in Attachment C, including the number of projects managed, project dollar value, number and percentage completed on time, number and dollar value of change orders, average number of projects per project manager per year, number of accidents and safety violations, dollar value of any safety fines, and number and outcome of any legal actions; (10 points)
 - b) Satisfactory working relationship with designers, contractors, Owner, the MSBA and local officials. (10 points)
- 2) Thorough knowledge of the Massachusetts State Building Code, regulations related to the Americans with Disabilities Act, and all other pertinent codes and regulations related to successful completion of the project. (10 points)
- 3) Thorough knowledge of Commonwealth construction procurement laws, regulations, policies and procedures, as amended by the 2004 Construction Reform laws. **(5 points)**
- 4) Management approach: Describe the Respondent's approach to providing the level and nature of services required as evidenced by proposed project staffing for a potential (hypothetical) proposed project for new construction of 90,000 square feet or renovation/construction of similar square footage; proposed project management systems; effective information management; and examples of problem solving approaches to resolving issues that impact time and cost. (10 points)
- 5) Key personnel: Provide an organizational chart that shows the interrelationship of key personnel to be provided by the Respondent for this project and that identifies the individuals and

associated firms (if any) who will fill the roles of Project Director, Project Representative and any other key roles identified by the Respondent, including but not limited to roles in design review, estimating, cost and schedule control. Specifically, describe the time commitment, experience and references for these key personnel including relevant experience in the supervision of construction of several projects that have been either successfully completed or in process that are similar in type, size, dollar value and complexity to the project being considered. (10 points)

- 6) Capacity and skills: Identify existing employees by number and area of expertise (e.g. field supervision, cost estimating, schedule analysis, value engineering, constructability review, quality control and safety). Identify any services to be provided by sub-consultants. (5 points)
- 7) Identify the Respondent's current and projected workload for projects estimated to cost in excess of \$1.5 million. (5 points)
- 8) Familiarity with Northeast Collaborative for High Performance Schools criteria or US Green Building Council's LEED for Schools Rating System. Demonstrated experience working on high performance green buildings (if any), green building rating system used (e.g., NE-CHPS or LEED-S), life cycle cost analysis and recommendations to Owners about building materials, finishes etc., ability to assist in grant applications for funding and track Owner documentation for NE-CHPS or LEED-S prerequisites. (5 points)
- 9) Thorough knowledge and demonstrated experience with life cycle cost analysis, cost estimating and value engineering with actual examples of recommendations and associated benefits to Owners. (5 points)
- 10) Knowledge of the purpose and practices of the services of Building Commissioning Consultants. (10 points)
- 11) Financial Stability: Provide current balance sheet and income statement as evidence of the Respondent's financial stability and capacity to support the proposed contract. (10 points)
- 12) Demonstrated experience with the consolidation of multiple schools into one new/renovated school. (5 points)

In order to establish a short-list of Respondents to be interviewed, the Owner will base its initial ranking of Respondents on the above Evaluation Criteria. The Owner will establish its final ranking of the short-listed Respondents after conducting interviews.

The Owner reserves the right to consider any other relevant criteria that it may deem appropriate, within its sole discretion, and such other relevant criteria as the MSBA may request. The Owner may or may not, within its sole discretion, seek additional information from Respondents.

This RFS, any addenda issued by the Owner, and the selected Respondent's response, will become part of the executed contract. The key personnel that the Respondent identifies in its response must be contractually committed for the Project. No substitution or replacement of key personnel or change in the sub-consultants identified in the response shall take place without the prior written approval of the Owner and the MSBA.

The selected Respondent(s) will be required to execute a Contract for Project Management Services with the Owner in the form that is attached hereto as Attachment B and incorporated by reference herein. Prior to execution of the Contract for Project Management Services with the Owner, the selected Respondent will be required to submit to the Owner a certificate of insurance that meets the requirements set forth in the Contract for Project Management Services.

Prior to execution of the Contract for Project Management Services, the fee for services shall be negotiated between the Owner and the selected Respondent to the satisfaction of the Owner, within its

sole discretion. The initial fee structure will be negotiated through the Feasibility Study/Schematic Design Phase. The selected Respondent, however, will be required to provide pricing information for all Phases specified in the Contract at the time of fee negotiation.

5. Selection Process and Selection Schedule

Process

- 1) *A subcommittee of the Neary School Building Committee will determine whether respondents have provided all required information and that the minimum requirements as outlined in the OPM RFS have been met utilizing a standard checklist. Any responses that do not meet the minimum requirement will be removed from the selection process.*
- 2) *The subcommittee will rank all responses based on the weighted evaluation criteria outlined in Section 4 of the OPM RFS utilizing a scoring tool. The ranking will be used to develop a short list consisting of a minimum of three (3) respondents. Identified reviewers must rank the Responses based on the weighted evaluation criteria identified in the RFS and must short-list a minimum of three Responses. Upon approval of the short list of respondents, all references of the top ranked respondents will be checked via phone interview or email correspondence.*
- 3) *The subcommittee will interview the short-listed respondents. The interview process will consist of a presentation by the respondents related to the evaluation criteria identified in Section 4. Each respondent must present its key personnel, including the individual(s) who will work on this project as their primary job. Following the presentation, the subcommittee may ask questions related to the evaluation criteria, information provided in the response to the RFS and information gathered from the reference checks. Each candidate will be ranked by the subcommittee based on specific criterion that will be provided to each respondent prior to the interview. Following the interviews and/or collection of additional information, the subcommittee will re-rank the short-listed respondents based on all available information. The subcommittee will recommend to the Neary School Building Committee the top ranked respondent. The Neary School Building Committee as a whole will review and approve the recommendations from the subcommittee .*
- 4) *Upon final approval by the Neary School Building Committee, the First Ranked Respondent will be required to provide a detailed breakdown of the scope of service and of their fee proposal. The breakdown shall provide the costs for services along with the scope of work during the Designer Selection Phase, the Feasibility Study/Schematic Design Phases, the Design Development/Contract Document Phases, the Bidding Phase, and the Contract Administration Phase. The breakdown shall separate the costs of each consultant used by the OPM during each of the listed phases. The breakdown shall also include the anticipated monthly costs of full time on-site clerk(s) of the works for the full duration of the construction phase of the work. An itemized breakdown of all other costs included in the fee proposal shall be provided. The initial contract for services shall only be through the end of the Feasibility Study/Schematic Design Phases.*
- 5) The Owner will commence fee negotiations with the first-ranked selection.
- 6) If the Owner is unable to negotiate a contract with the first-ranked selection, the Owner will then commence negotiations with its second-ranked selection and so on, until a contract is successfully negotiated and approved by the Owner.
- 7) The selected firm will be submitted to the MSBA for its approval.
- 8) The selected firm may be asked to participate in a presentation to the MSBA and/or submit additional documentation, as required by MSBA, as part of the MSBA approval process.

- 9) *If negotiations with one or more of the short-listed respondents prove unsuccessful, or if fewer than three responses are received, the Owner may reject all responses and may choose to re-advertise for services if deemed in its best interest to do so.*

The following is a tentative schedule of the selection process, subject to change at the Owner's and MSBA's discretion.

June 7, 2023	RFS appears in the Central Register of the Commonwealth of Massachusetts, COMMBUYS, the Metrowest Daily News, and the Worcester Telegram and Gazette
June 12, 2023 3:30 PM	Voluntary informational meeting and site inspection of Margaret E. Neary School, 53 Parkerville Road, Southborough, MA 01772
June 16, 2023	Last day for questions from Respondents
June 21, 2023 11:00 AM	Responses due
June 22, 2023	Respondents short-listed
June 26, 2023	Interview short-listed Respondents
June 30, 2023	Negotiate with selected Respondent
July 12, 2023	Final selection submitted to the MSBA for review and approval
August 7, 2023	Anticipated MSBA OPM Review Panel Meeting
August 10, 2023	Anticipated execution of contract

The RFS may be obtained from:

Rebecca Pellegrino, Director of Finance
53 Parkerville Road, Southborough, MA 01772
(508) 486-5115
rpellegrino@nsboro.k12.ma.us

On or after **June 7, 2023.**

Any questions concerning this RFS must be submitted in writing to:

Rebecca Pellegrino, Director of Finance
53 Parkerville Road, Southborough, MA 01772(508) 486-
5115rpellegrino@nsboro.k12.ma.usFacsimile: 508-486-5123

By 3:00 PM on Friday, June 16, 2023.

Sealed Responses to the RFS for OPM services must be clearly labeled "Owner's Project Management Services for Margaret A. Neary School" and delivered to:

Rebecca Pellegrino, Director of Finance
53 Parkerville Road, Southborough, MA
01772
508-486-5115

no later than 11:00 AM on Wednesday, June 21, 2023. The Owner assumes no responsibility or liability for late delivery or receipt of Responses. All responses received after the stated submittal date and time will be judged to be unacceptable and will be returned unopened to the sender.

6. Requirements for content of response:

Submit **three(3)**¹ hard copies of the response to this RFS and one electronic version in PDF format on thumb drive. All responses shall be:

- In ink or typewritten;
- Presented in an organized and clear manner;
- Must include the required forms in Attachment C;
- Must include all required Attachments and certifications;
- Must include the following information:

1. Cover letter shall be a maximum of two pages in length and include:

- a. An acknowledgement of any addendum issued to the RFS.
- b. An acknowledgement that the Respondent has read the RFS. Respondent shall note any exceptions to the RFS in its cover letter.
- c. An acknowledgement that the Respondent has read the Contract for Project Management Services. Respondent shall note any exceptions to the Contract for Project Management Services in its cover letter.
- d. A specific statement regarding compliance with the minimum requirements identified in Item 4 of this RFS to include identification of registration, number of years of experience and where obtained (as supported by the resume section of Attachment C), as well as the date of the MCPPO certification. (A copy of the MCPPO certification must be attached to the cover letter).
- e. A description of the Respondent's organization and its history.
- f. The signature of an individual authorized to negotiate and execute the Contract for Project Management Services, in the form that is attached to the RFS, on behalf of the Respondent.
- g. The name, title, address, e-mail and telephone number of the contact person who can respond to requests for additional information.

2. Selection Criteria: The response shall address the Respondent's ability to meet the "Selection Criteria" Section including submittal of additional information as needed. The total length of the Response (including Attachment C only but excluding Attachments A, B and D) may not exceed twenty (20) single-sided numbered pages with a minimum acceptable font size of "12 pt" for all text.

¹ *The Owner should determine the number of copies required for its selection committee and other local representatives as needed. Please include two additional copies to be sent to the MSBA as part of the approval documentation required.*

Respondents may supplement this proposal with graphic materials and photographs that best demonstrate its project management capabilities of the team proposed for this project. **Limit this additional information to a maximum of three 8½” x 11” pages, double-sided.**

Certifications: The following certificates (Attachment D) shall be included in the proposal:

- 1. Certificate of Non-Collusion***
- 2. Tax Compliance Certification***
- 3. Certificate of Vote***

7. Payment Schedule and Fee Explanation:

The Owner will negotiate the fee for services dependent upon an evaluation of the level of effort required, job complexity, specialized knowledge required, estimated construction cost, comparison with past project fees, and other considerations. As construction cost is but one of several factors, a final construction figure in excess of the initial construction estimate will not, in and of itself, constitute a justification for an increased OPM fee.

8. Other Provisions

A. Public Record

All responses and information submitted in response to this RFS are subject to the Massachusetts Public Records Law, M.G.L. c. 66, § 10 and c. 4, § 7(26). Any statements in submitted responses that are inconsistent with the provisions of these statutes shall be disregarded.

B. Waiver/Cure of Minor Informalities, Errors and Omissions

The Owner reserves the right to waive or permit cure of minor informalities, errors or omissions prior to the selection of a Respondent, and to conduct discussions with any qualified Respondents and to take any other measures with respect to this RFS in any manner necessary to serve the best interest of the Owner and its beneficiaries.

C. Communications with the Owner

The Owner's Procurement Officer for this RFS is:

Rebecca Pellegrino, Director of Finance
53 Parkerville Road, Southborough, MA 01772 Telephone: (508) 486-5115
Email address: rpellegrino@nsboro.k12.ma.us
Facsimile: (508) 486-5123

Respondents that intend to submit a response are prohibited from contacting any of the Owner's staff other than the Procurement Officer. An exception to this rule applies to Respondents that currently do

business with the Owner, but any contact made with persons other than the Procurement Officer must be limited to that business, and must not relate to this RFS. In addition, such respondents shall not discuss this RFS with any of the Owner's consultants, legal counsel or other advisors. ***FAILURE TO OBSERVE THIS RULE MAY BE GROUNDS FOR DISQUALIFICATION.***

D. Costs

Neither the Owner nor the MSBA will be liable for any costs incurred by any Respondent in preparing a response to this RFS or for any other costs incurred prior to entering into a Contract with an OPM approved by the MSBA.

E. Withdrawn/Irrevocability of Responses

A Respondent may withdraw and resubmit their response prior to the deadline. No withdrawals or re-submissions will be allowed after the deadline.

F. Rejection of Responses, Modification of RFS

The Owner reserves the right to reject any and all responses if the Owner determines, within its own discretion, that it is in the Owner's best interests to do so. This RFS does not commit the Owner to select any Respondent, award any contract, pay any costs in preparing a response, or procure a contract for any services. The Owner also reserves the right to cancel or modify this RFS in part or in its entirety, or to change the RFS guidelines. A Respondent may not alter the RFS or its components.

G. Subcontracting and Joint Ventures

Respondent's intention to subcontract or partner or joint venture with other firm(s), individual or entity must be clearly described in the response.

H. Validity of Response

Submitted responses must be valid in all respects for a minimum period of ninety (90) days after the submission deadline.

FURTHER INFORMATION

ATTACHMENTS:

Attachment A: Statement of Interest

Attachment B: Contract for Owner's Project Management Services

Attachment C: OPM Application Form – March 2017

Attachment D: Required Certifications

ATTACHMENT A
STATEMENT OF INTEREST

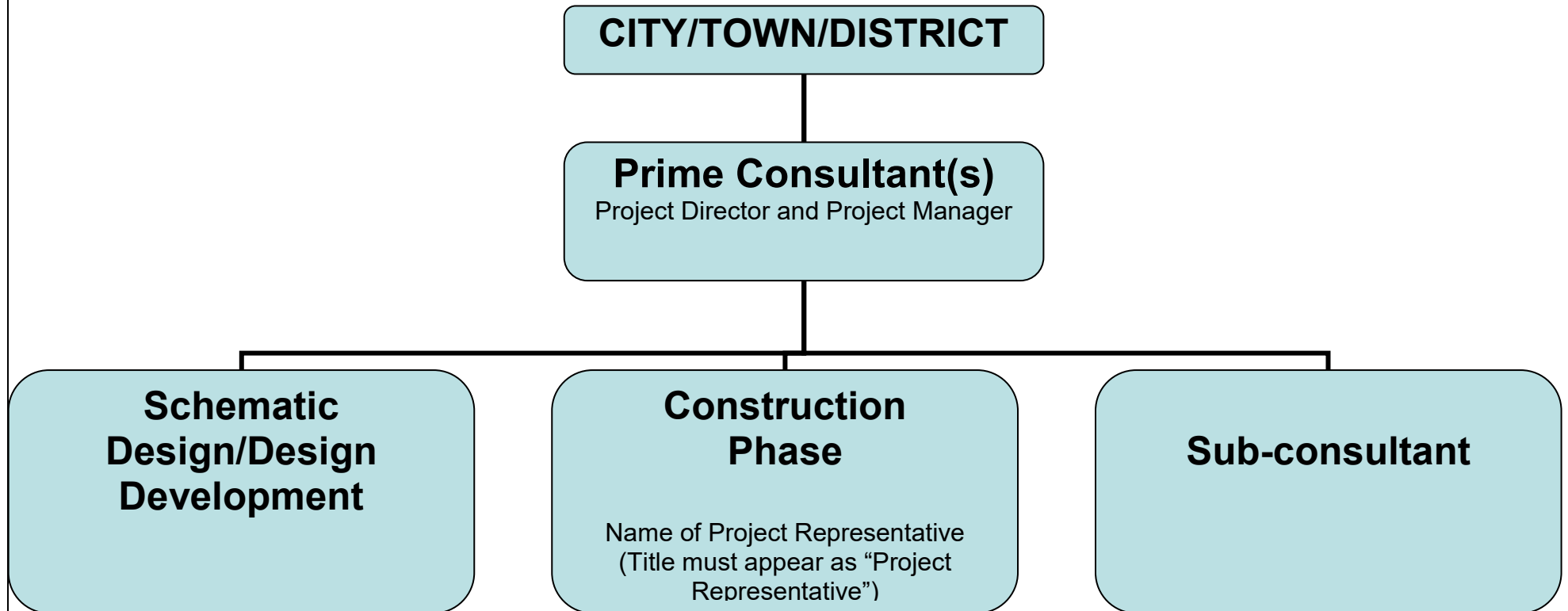
(DISTRICT TO ATTACH)

ATTACHMENT B
MSBA STANDARD CONTRACT
(Design/Bid/Build or CM-at-Risk)

Owner's Project Manager Application Form – March 2017			
1. Project Name/Location for Which Firm is Filing:			
1a. MSBA Project Number:			
2a. Respondent, Firm (Or Joint-Venture) - Name And Address Of Primary Office To Perform The Work:	2b. Name And Address Of Other Participating Offices Of The Prime Applicant, If Different From Item 3a Above:		
2c. Date Present And Predecessor Firms Were Established:	2d. Name And Address Of Parent Company, If Any:		
2e. Federal ID #:	2f. Name of Proposed Project Director:		
3. Personnel From Prime Firm Included In Question #2 Above By Discipline (List Each Person Only Once, By Primary Function -- Average Number Employed Throughout The Preceding 6 Month Period. Indicate Both The Total Number In Each Discipline):			
Admin. Personnel	_____	Cost Estimators	_____
Architects	_____	Electrical Engrs.	_____
Acoustical Engrs.	_____	Environmental Engrs.	_____
Civil Engrs.	_____	Licensed Site Profs.	_____
Code Specialists	_____	Mechanical Engrs.	_____
Construction Inspectors	_____	Other	_____
		Total	_____
4. Has this Joint-Venture previously worked together? <input type="checkbox"/> Yes <input type="checkbox"/> No			

5.

List **ONLY** Those Prime and Sub-Consultant Personnel identified as Key personnel in the Response to Request for Services. This Information Should Be Presented Below In The Form Of An Organizational Chart modified to fit the firm's proposed management approach. Include Name of Firm And Name Of The Person:



6. Brief Resume for Key Personnel ONLY as indicated in the Request for Services. Resumes Should Be Consistent With The Persons Listed On The Organizational Chart In Question # 5. Additional Sheets Should Be Provided Only As Required For The Number Of Key Personnel And They Must Be In The Format Provided. By Including A Firm As A Subconsultant, The Prime Applicant Certifies That The Listed Firm Has Agreed To Work On This Project, Should The Team Be Selected.	
a. Name And Title Within Firm:	a. Name And Title Within Firm:
b. Project Assignment:	b. Project Assignment:
c. Name And Address Of Office In Which Individual Identified In 6a Resides:	c. Name And Address Of Office In Which Individual Identified In 6a Resides:
d. Years Experience: With This Firm: _____ With Other Firms: _____	d. Years Experience: With This Firm: _____ With Other Firms: _____
e. Education: Degree(s) /Year/Specialization	e. Education: Degree(s) /Year/Specialization
f. Date of MCPPO Certification:	f. Date of MCPPO Certification:
g. Applicable Registrations and Certifications :	g. Applicable Registrations and Certifications:
h. Current Work Assignments And Availability For This Project (<i>availability should be identified as a percentage: eg: "As of 5/30, 50% available"</i>):	h. Current Work Assignments And Availability For This Project (<i>availability should be identified as a percentage: eg: "As of 5/30, 50% available"</i>):
i. Other Experience And Qualifications Relevant To The Proposed Project: (Identify OPM Firm By Which Employed, If Not Current Firm. Please distinguish between OPM work and any design work performed by the firm.):	i. Other Experience And Qualifications Relevant To The Proposed Project: (Identify OPM Firm By Which Employed, If Not Current Firm. Please distinguish between OPM work and any design work performed by the firm.):

7a	Past Performance: List all Completed Projects, in excess of \$1.5 million, for which the Prime Applicant has performed, or has entered into a contract to perform Owner's Project Management Services for all Public Agencies within the Commonwealth within the past 10 years.									
a.	Project Name And Location Project Director	b. Brief Description Of Project And Services (Include Reference To Areas Of Similar Experience)	c. Project Dollar Value	d. Completion Date (Actual Or Estimate)	e. On Time (Yes Or No)	f. Original Construction Contract Value	g. Change Orders	h. Number of Accidents and Safety Violations	i. Dollar Value of any Safety fines	j. Number And Outcome Of Legal Actions
(1)										
(2)										
(3)										
(4)										
(5)										

7b. Past Performance: Provide the following information for those completed Projects listed above in 7a for which the Prime Applicant has performed, or has entered into a contract to perform (cont) Owner's Project Management Services for all Public Agencies within the Commonwealth within the past 10 years.						
a. Project Name And Location Project Director	b. Original Project Budget	c. Final Project Budget	d. If different, provide reason(s) for variance	e. Original Project Completion	e. Actual Project Completion On Time (Yes or No)	f. If different, provide reason(s) for variance.
(1)						
(2)						
(3)						
(4)						
(5)						

8. Capacity: Identify all current/ongoing Work by Prime Applicant, Joint-Venture Members or Sub-consultants. Identify project participants and highlight any work involving the project participants identified in the response.								
Project Name And Location Project Director	b. Brief Description Of Project And Services (Include Reference To Areas Of Similar Experience)	c. Original Project Budget	d. Current Project Budget	d. Project Completion Date	e. Current forecast completion date On Time (Yes Or No)	f. Original Construction Contract Value	g. Number and dollar value of Change Orders	h. Number and dollar value of claims
1.								
2.								
3.								
4.								
5.								
6.								
7.								
8.								

9. References: Provide the following information for completed and current Projects listed above in 7 and 8 for which the Prime Applicant has performed, or has entered into a contract to perform Owner's Project Management Services for all Public Agencies within the Commonwealth within the past 10 years.						
a.	Project Name And Location Project Director	Client's Name, Address and Phone Number. Include Name of Contact Person	Project Name And Location Project Director	Client's Name, Address and Phone Number. Include Name of Contact Person	Project Name And Location Project Director	Client's Name, Address and Phone Number. Include Name of Contact Person
1)			5)		9)	
2)			6)		10)	
3)			7)		11)	
4)			8)		12)	

9. Use This Space To Provide Any Additional Information Or Description Of Resources Supporting The Qualifications Of Your Firm And That Of Your Sub-consultants. If Needed, Up To Three, Double-Sided 8 1/2" X 11" Supplementary Sheets Will Be Accepted. **APPLICANTS ARE REQUIRED TO RESPOND SPECIFICALLY IN THIS SECTION TO THE AREAS OF EXPERIENCE REQUESTED.**

10. I hereby certify that the undersigned is an Authorized Signatory of Firm and is a Principal or Officer of Firm. The information contained in this application is true, accurate and sworn to by the undersigned under the pains and penalties of perjury.

Submitted By (Signature) _____ Printed Name And Title _____ Date _____

Attachment D
Required Certifications (*To be developed by the Owner*)