

## Project Minutes

Project: Stoneham High School Feasibility Study Project No.: 20033  
 Prepared by: Joel Seeley Meeting Date: 11/2/2020  
 Re: CM Prequalification and Selection Committee Meeting Time: 7:00pm  
 Location: Remote Participation Meeting No: 1  
 Distribution: Attendees (MF)

### Attendees:

PRESENT	NAME	AFFILIATION
✓	Douglas Gove	Co-Chair, CM Prequalification and Selection Committee, Community Member with Engineering Experience
✓	Stephen O'Neill	Co-Chair, CM Prequalification and Selection Committee, Community Member with Engineering Experience
✓	Marie Christie	Co-Chair, School Building Committee
✓	David Bois	Co-Chair, School Building Committee; Community Member with Architecture Experience
✓	Jeanne Craigie	Town Moderator
✓	Paul Ryder	Community Member with Construction Experience
✓	Kevin Yianacopolus	Local Official responsible for Building Maintenance
✓	Dennis Sheehan	Town Administrator / MCPPO Certified
✓	Brian McNeil	Facilities Director
✓	April Lanni	Town Procurement Officer
✓	Brooke Trivas	Perkins and Will
✓	Joel Seeley	SMMA

Item #	Action	Discussion
1.1	Record	Call to Order, 7:00 PM, meeting opened by roll call.
1.2	Record	A motion was made by J. Craigie and seconded by P. Ryder to appoint D. Gove and S. O'Neill as co-chairs of the CM Prequalification and Selection Committee. No discussion, motion passed unanimous by roll call vote.
1.3	J. Seeley	<p>J. Seeley distributed and reviewed the CM Selection Timeline and Project Schedule, attached.</p> <p>Committee Discussion:</p> <ol style="list-style-type: none"> <li>P. Ryder asked how many firms are anticipated to apply? <i>J. Seeley indicated potentially 5 - 10 firms could apply.</i></li> <li>D. Gove asked if there is a State list of approved CMs? <i>J. Seeley indicated no there is not.</i></li> </ol>

Item #	Action	Discussion
		<p>3. D. Sheehan asked if the CMs are DCAMM certified? <i>J. Seeley indicated yes, the CMs are required to be certified by DCAMM in General Building Construction.</i></p> <p>4. J. Craigie asked if MSBA participates in the selection of the CM? <i>J. Seeley indicated no, the selection is made at the local level.</i></p> <p>5. D. Gove asked if the project size and cost will limit the amount of interested CMs? <i>J. Seeley indicated no, the project size and cost will not be a limitation.</i></p> <p>6. P. Ryder asked if Perkins and Will and SMMA will provide feedback to the Committee on the CM applicants that they have worked with in the past? <i>B. Trivas and J. Seeley indicated yes.</i></p> <p>The Committee approves the timeline and dates with the following edits:</p> <ol style="list-style-type: none"> <li>The 11/18/20 Informational Briefing and Tour is to be remote with potentially a video tour. J. Seeley to coordinate with A. Brough Palmerino on a GoToMeeting Link for the meeting and J. Macero on a video tour.</li> <li>Keep the 1/18/21 Optional Site visit for now and revisit prior to issuing the RFP.</li> </ol>
1.4	J. Seeley	<p>J. Seeley reviewed the Draft Request for Qualifications for CM at Risk Services (RFQ), attached.</p> <p>Committee Discussion:</p> <ol style="list-style-type: none"> <li>CM to provide (1) original hardcopy for the Town's file, (5) hardcopies (for M. Christie, D. Gove, S. O'Neill, J. Craigie and P. Ryder) and an electronic copy.</li> </ol> <p>The Committee approves the draft Request for Qualifications for issuance with the above edits.</p>
1.5	Record	<p>J. Seeley distributed and reviewed the Application to Obtain a Notice to Proceed for the CM at Risk Delivery Method to the Office of the Inspector General, attached.</p>
1.6	Record	<p><b>Next Meeting: December 7, 2020 at 6:00 pm.</b></p>
1.7	Record	<p>A Motion was made by J. Craigie and seconded by M. Christie to adjourn the meeting. No discussion, motion passed unanimous by roll call vote.</p>

Attachments: Agenda, CM Selection Timeline and Project Schedule, Draft Request for Qualifications for CM at Risk Services, Application to Obtain a Notice to Proceed for the CM at Risk Delivery Method to the Office of the Inspector General

The information herein reflects the understanding reached. Please contact the author if you have any questions or are not in agreement with these Project Minutes

## Agenda

Project:	Stoneham High School Feasibility Study	Project No.:	20033
Re:	CM at Risk Prequalification Committee Meeting	Meeting Date:	11/2/2020
Prepared by:	Joel Seeley	Meeting Time:	7:00 PM
Location:	Remote Participation		
Distribution:	Attendees (MF)		

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1. Call to Order
2. Appoint Committee Chair
3. Review CM Selection Timeline and Procedures
4. Review Draft Request for Qualifications (RFQ)
5. Next Meeting: December 7, 2020
6. Adjourn

**Join GoToMeeting:**

<https://global.gotomeeting.com/join/788785613>

**Dial-In:** [+1 \(646\) 749-3122](tel:+16467493122)

**Access Code:** 788-785-613

## Stoneham High School Feasibility Study October 19, 2020

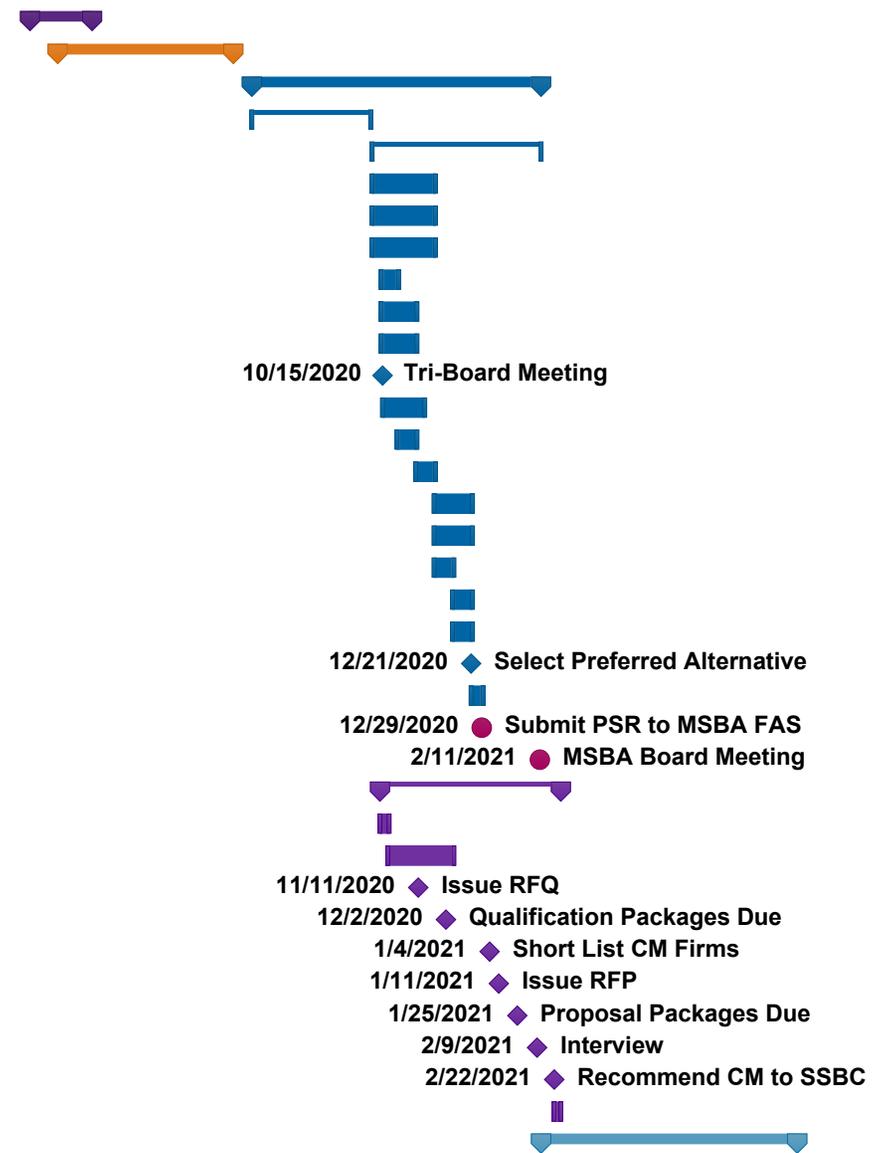
### Construction Manager Selection Timeline

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October 13, 2020	SBC Decide CM at Risk Approach, Appoint CM Prequalification and Selection Subcommittee
October 13 – October 19, 2020	Develop Application to Inspector General
October 19, 2020	Submit Application to Inspector General
October 14 – November 2, 2020	Develop Request for Qualifications (RFQ)
<b>November 2, 2020 @ 7:00 PM</b>	<b>CM Prequalification Subcommittee Meeting: Review Draft RFQ and Schedule</b>
November 5, 2020	Submit RFQ Advertisement to: 1. Central Register and Local Newspaper
November 11, 2020	RFQ Advertisement Noticed in: 1. Central Register and Local Newspaper
November 9 – December 7, 2020	Develop Request for Proposal (RFP)
<b>November 18, 2020 @ 3:30 PM</b>	<b>Informational Meeting at Stoneham High School and Tour</b>
December 7, 2020	Notice to Proceed with CM at Risk from Inspector General
November 19, 2020 @ 2:00 PM	Deadline for Submission of CM Questions
December 2, 2020	CM Qualification Packages Due
December 2, 2020 – January 4, 2021	Review CM Qualification Packages
<b>December 7, 2020 @ 6:00 PM (prior to SBC Meeting)</b>	<b>CM Prequalification Subcommittee Meeting: Review Draft RFP, Progress Review of Qualifications</b>
<b>January 4, 2020 @ 6:00 PM</b>	<b>CM Prequalification Subcommittee Meeting: Prequalify CM Firms to Receive RFP</b>
January 11, 2021	Distribute RFP to Prequalified CM Firms
<b>January 18, 2021</b>	<b>Optional Site Visit</b>
January 19, 2021 @ 2:00 PM	Deadline for Submission of CM Questions on RFP
January 25, 2021	CM Proposal Packages Due
January 25 – February 9, 2021	Review CM Proposal Packages
<b>February 2, 2021 (Tuesday) @ 6:00 PM</b>	<b>CM Selection Subcommittee Meeting: Review CM Proposals, Finalize Questions for Interviews</b>
<b>February 9, 2021(Tuesday) @ 4:00 PM</b>	<b>CM Interviews, Rank CM Firms</b>
February 22, 2021	SBC Meeting: CM Selection Subcommittee to Recommend CM Firm, Introduce CM
February 22 - 26, 2021	Finalize Agreement with Selected CM Firm

Stoneham High School  
Feasibility Study  
Preliminary Project Schedule

ID	Task Name	Duration	Start	Finish	2020												2021																			
					Q1				Q2				Q3				Q4				Q1				Q2				Q3				Q4			
					D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N								
1	<b>MSBA PREREQUISITES</b>	158 days	3/22/2019	10/30/2019																																
4	<b>RETAIN OPM</b>	33 days	1/22/2020	3/9/2020																																
10	<b>RETAIN DESIGNER</b>	95 days	2/12/2020	6/23/2020																																
20	<b>FEASIBILITY STUDY (FS)</b>	157 days	7/8/2020	2/11/2021																																
21	Develop Preliminary Design Program (PDP)	64 days	7/8/2020	10/6/2020																																
40	Develop Preferred Schematic Report (PSR)	92 days	10/7/2020	2/11/2021																																
41	Refine Site Plans	34 days	10/7/2020	11/23/2020																																
42	Refine Construction Phasing Plans	34 days	10/7/2020	11/23/2020																																
43	Develop Floor Plans	34 days	10/7/2020	11/23/2020																																
44	Develop Structural Systems Narrative	9 days	10/14/2020	10/26/2020																																
45	Develop MEP Systems Narrative	19 days	10/14/2020	11/9/2020																																
46	Develop ZNE Systems	19 days	10/14/2020	11/9/2020																																
47	Tri-Board Meeting	0 days	10/15/2020	10/15/2020																																
48	PTO Meetings	23 days	10/15/2020	11/15/2020																																
49	Community Forum No. 3	11 days	10/26/2020	11/9/2020																																
50	Develop Cost Models	11 days	11/9/2020	11/23/2020																																
51	Update Site Plans and Floor Plans	21 days	11/23/2020	12/21/2020																																
52	Update Cost Models	21 days	11/23/2020	12/21/2020																																
53	Community Survey	11 days	11/23/2020	12/7/2020																																
54	Community Forum No. 4	11 days	12/7/2020	12/21/2020																																
55	Tri-Board Meeting	11 days	12/7/2020	12/21/2020																																
56	Select Preferred Alternative	0 days	12/21/2020	12/21/2020																																
57	Assemble PSR Documents	7 days	12/21/2020	12/29/2020																																
58	Submit PSR to MSBA FAS	0 days	12/29/2020	12/29/2020																																
59	MSBA Board Meeting	0 days	2/11/2021	2/11/2021																																
60	<b>CONSTRUCTION MANAGER (CM)</b>	99 days	10/13/2020	2/26/2021																																
61	Develop and Submit IG Application	5 days	10/13/2020	10/19/2020																																
62	IG Application and Approval	36 days	10/19/2020	12/7/2020																																
63	Issue RFQ	0 days	11/11/2020	11/11/2020																																
64	Qualification Packages Due	0 days	12/2/2020	12/2/2020																																
65	Short List CM Firms	0 days	1/4/2021	1/4/2021																																
66	Issue RFP	0 days	1/11/2021	1/11/2021																																
67	Proposal Packages Due	0 days	1/25/2021	1/25/2021																																
68	Interview	0 days	2/9/2021	2/9/2021																																
69	Recommend CM to SSBC	0 days	2/22/2021	2/22/2021																																
70	Negotiate CM Contract	5 days	2/22/2021	2/26/2021																																
71	<b>SCHEMATIC DESIGN (SD)</b>	138 days	2/12/2021	8/25/2021																																
77	<b>LOCAL APPROPRIATION</b>																																			
80	<b>DESIGN AND CONSTRUCTION (TBD)</b>																																			





Town of Stoneham  
**Stoneham High School Project**

**Request for Qualifications for  
Construction Management at Risk Services**

Date: November 11, 2020

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**Owner:**

Town of Stoneham  
35 Central Street  
Stoneham, Massachusetts 02180

**Architect:**

Perkins & Will Architects  
225 Franklin Street, Suite 1100  
Boston, Massachusetts 02110  
Principal: Brooke Trivas, AIA

**Owners Project Manager:**

Symmes Maini & McKee Associates (SMMA)  
1000 Massachusetts Avenue  
Cambridge, Massachusetts 02138  
Principal: Joel Seeley

**Submission Deadline: 2:00 PM EST on December 2, 2020**

**Submit Statement of Qualifications to:**

Town of Stoneham  
Town Administrator's Office  
35 Central Street  
Stoneham, Massachusetts 02180

# Request for Qualifications for Construction Management at Risk Services

## I. General Information

### A. Project Information

Awarding Authority: Town of Stoneham

Project Title: Stoneham High School Project  
149 Franklin Street  
Stoneham, Massachusetts 02180

**Submission Deadline: 2:00 PM EST on December 2, 2020**

Submit one (1) original, and **nine (9)** complete bound copies, one (1) set of financials in a separate envelope, and one (1) complete electronic copy on a CD (without the Financials) of the Statement of Qualifications (SOQ) with all required forms, attachments, supporting documentation and information to:

Town of Stoneham  
Town Administrator's Office  
35 Central Street  
Stoneham, Massachusetts 02180

Package must be labeled on the outside with the following information:

***"SOQ for Construction Management Services (CM at Risk),"***  
***"Stoneham High School, Stoneham, Massachusetts,"*** and ***CM firm's name, business address and telephone number.***

Qualification Statements will not be opened or read publically.

**The RFQ Informational Meeting will be held at 3:30 PM EST on November 18, 2020, at the Stoneham High School, 149 Franklin Street, Stoneham, Massachusetts 02180**

Estimated Construction Cost: \$140,000,000  
Estimated Construction Duration: 36 Months

*Project Team:* Owner's Project Manager: Symmes Maini & McKee Associates (SMMA)  
1000 Massachusetts Avenue  
Cambridge, Massachusetts 02138

Designer: Perkins & Will Architects  
225 Franklin Street, Suite 1100  
Boston, Massachusetts 02110

**RFQ Interest Form:**

Firms interested in this Project must submit an **RFQ Interest Form** with a copy of your firm's **DCAM Certificate** to Town of Stoneham c/o Symmes Maini & McKee Associates (SMMA) by mail or email no later than 5:00 PM on November 19, 2020 to:

Town of Stoneham  
 c/o Symmes Maini & McKee Associates (SMMA)  
 Attn: Joel G. Seeley  
 1000 Massachusetts Avenue  
 Cambridge, Massachusetts 02138  
 email [opm@smma.com](mailto:opm@smma.com)

**B. Introduction**

Firms interested in providing Public Construction Manager at Risk Services ("CM" or "CM at Risk") for the Stoneham High School, ("Project") are invited to submit a Statement of Qualifications ("SOQ") to the Town of Stoneham ("Owner/ Awarding Authority). This CM at Risk services procurement is conducted pursuant to M.G.L. Chapter 149A, contained in Chapter 193 of the Acts of 2004. This Request for Qualifications ("RFQ") is the first phase of a two-phase procurement process as set forth in MGL Chapter 149A. The Town of Stoneham's School Building Committee is prequalifying firms interested in providing public CM at Risk services for the project through this RFQ process. The submitted SOQ's will be evaluated based upon the identified evaluation criteria and the Prequalification Committee will select those respondents it deems qualified. Only those respondents deemed qualified will be invited to submit a Proposal in response to a detailed Request for Proposals ("RFP") which will be issued in the second phase of the procurement process. The Town of Stoneham expects the RFP will be available in January 2021. The project delivery method for construction will be public CM at Risk with a Guaranteed Maximum Price ("GMP") under M.G.L. Chapter 149A. **Firms interested in being prequalified must demonstrate that they have prior experience as a CM. In addition this firm must have constructed schools under M.G.L. ch.149A of similar cost, complexity, type and size, including phasing and adjacency to an occupied school.**

**C. Project Description**

The project consists of the renovation and addition or construction of a 695 student Stoneham High School on the site of the existing Stoneham High School.

The school will contain 204,107 GSF located either in front of or to the east side of the existing Stoneham High School. This concept strives for a compact building footprint while still providing small learning communities as envisioned during the planning stages. The building is clearly and intentionally zoned with public and private areas for safety and security reasons. The site provides adequate parking, fields, separation of cars and buses, and an access road around the building.

The Town of Stoneham has elected to pursue a Zero Net Energy approach, Path 1 of the MassSave Energy Savings Program and LEED V4 for Schools through the United States Green Building Council (USGBC). The project will strive to be certified as established under the LEED rating system and maximize the Energy Efficiency incentive points allowed by the MSBA. The Construction Management Team will also be responsible for achieving these goals.

The project will be subject to the minimum wage rates set under the Massachusetts Prevailing Wage Laws. Workforce utilization percentages apply to the project.

The combined project Minority Business Enterprise (“MBE”) and Women Business Enterprise (“WBE”) is 10.4%.

Pursuant to M.G.L.c.30, 39S (a) (2) all employees to be employed on the Project must have successfully completed a course in construction safety and health approved by OSHA and of at least 10 hours duration. All Trade Contractors and Other Subcontractors on the project will also be required to provide written verification of compliance with Federal Department of Homeland Security Requirements, including but not limited to the Employment Verification (Form I-9) Process. All Contractors, Trade Subcontractors and other Subcontractors on the project will be required to complete a CORI check through the Stoneham Public Schools Administration.

The selected Construction Manager will be required to utilize or implement project management system software for project communication, tracking, etc. that is accessible and useable by the Owner, OPM and Designer via the internet. This software must also be acceptable to the Town of Stoneham’s School Building Committee, Designer, and OPM.

Access to the school property is restricted.

Additional information is available on the project website: <https://www.stoneham-ma.gov/hsbc>.

**The Town of Stoneham makes no representation or warranty to the accuracy of any information received through the Town and School websites.**

#### **D. Project Schedule**

The architectural firm of Perkins & Will Architects completed the Preliminary Design Program (PDP), which was submitted to MSBA on October 6, 2020. The project anticipates a possible early site package to allow construction to start in the summer of 2022 with completion of the building for occupancy by June 2024 followed by demolition of the existing building and construction of the playfields, to be completed Winter 2024/Spring 2025. (Note: These dates may be subject to change.)

#### **E. Construction Manager at Risk Two-Phase Selection Process**

The CM selection process is a two-phase process as set forth in M.G.L. c. 149A, contained in Chapter 193 of the Acts of 2004. Phase One, the Request for Qualifications (RFQ) phase, is the prequalification phase. Only firms selected during the Phase One prequalification phase will be permitted to participate in Phase Two, the Request for Proposals (RFP) phase used to select a CM firm. The RFQ phase will be used to pre-qualify construction management at risk firms. Interested firms must submit a Statement of Qualifications, (SOQ) by the deadline set for submission. The Town of Stoneham, through its School Building Committee has appointed and assembled a Prequalification Committee in accordance with the regulations to review and evaluate the SOQ’s received. The Town of Stoneham’s School Building Committee anticipates concluding the RFQ evaluation process within 30 days from submission of SOQ’s. **Only those firms determined to be qualified by the Prequalification Committee will be invited and permitted to submit a proposal in response to the Phase Two RFP. Firms that are not**

**selected as qualified by the Prequalification Committee and firms that do not participate in the RFQ phase will be precluded from participating in the RFP CM selection phase.**

**This RFQ is Phase One of the procurement process.** After the deadline for the submission of SOQs has passed, the School Building Committee and Owner's Project Manager will prepare a register of names of the firms submitting SOQs which will be available for public viewing. SOQ's will not be opened or read publicly. The Prequalification Committee will review and evaluate the SOQ's submitted, information contained in the DCAM certification files, information on current and prior project performance and its relevancy to experience requirements, information obtained from references, information obtained from government agencies and entities, and such other information as may be obtained. The Town of Stoneham's School Building Committee, at its sole discretion, may request additional information to clarify or supplement the information obtained from Architects, Owners, and Owner's Project Managers and from other town's School Building Committees, or other town or city departments from projects listed and/or not listed in your SOQ.

Based upon its review and evaluation of responses to established project parameters and specific and overall qualification criteria, the Prequalification Committee will determine which respondents are qualified to serve as Construction Manager at Risk for the Project, in the best interests of the Town, its School Department and the Project. Such determination shall be based upon the criteria stated in this RFQ. The Committee shall prepare a written record of its determination with respect to each respondent. The Prequalification Committee shall endeavor to identify at least three CM firms which it deems qualified. If the Prequalification Committee does not rate at least three CM's as qualified, it will either repeat the RFQ process or procure the project under the provisions of the M.G.L. c. 149, §44A-44J. The Town of Stoneham's School Building Committee shall complete the Phase One process by written notice to all firms advising them as to whether they were determined to be "qualified" or "not qualified" and those CM firms deemed "qualified" will be invited to participate in Phase Two (RFP) phase.

**In Phase Two, a detailed Request for Proposals for CM at Risk will be issued to the CM Firms deemed qualified in the Phase One prequalification process.** The RFP Selection Committee ("Selection Committee") will evaluate the proposals on multiple factors, which may include interviews or presentations, rank the proposals based on the composite ratings including their fee proposal and general conditions, and then make a recommendation for the preferred CM Firm to the Town of Stoneham's School Building Committee, and commence negotiations with the highest ranked CM at Risk firm. In the event negotiations with the highest ranked firm will not result in a contract acceptable to the Town of Stoneham, negotiations will be terminated and negotiations will commence with the next highest ranked firm, and the process will continue until the Town of Stoneham can reach an acceptable contract with one of the prequalified CM at Risk firms that submitted an advantageous proposal.

#### **F. Treatment of Information submitted to the Town of Stoneham**

The Town of Stoneham shall have no obligation to treat any information submitted in or in connection with an SOQ as proprietary or confidential, with the exception of the audited financial statement, which is deemed confidential. The Town of Stoneham's obligation with respect to protection and disclosure of such information shall at all times be subject to applicable laws, including the Massachusetts Public Records law. The audited financial statement shall remain confidential and shall not be a public record to the fullest extent permissible under the law. The Town of Stoneham shall have the right to use all or portions of the SOQ and accompanying information, as it considers necessary or desirable in connection with the Project. By the submission of an SOQ, the respondent thereby grants to the Town of Stoneham

an unrestricted license to use the SOQ, including all material submitted therewith, in connection with the Project.

**The Town will endeavor to keep the audited financial statement confidential but shall have no liability if it is disclosed.**

**The Town of Stoneham reserves the right to reject any or all SOQs and to waive any informalities or to take any other action that may be deemed necessary in the best interest of the Town of Stoneham.**

**The Respondent agrees that the Town of Stoneham, its agents, servants and employees shall not have any liability as a result of the review of the qualifications of the Respondent or the publishing of any evaluation of the Respondent.**

**G. Communication between the Town of Stoneham and Respondents**

**Unauthorized communications or contact between CM firms, their employees, agents or other related entities interested in submitting SOQ's and the Town of Stoneham, the OPM, the Designer, or any other person or entity participating on the Prequalification Committee or Selection Committee with regard to this project are strictly prohibited.** The only authorized communication shall be 1) inquires to the Town of Stoneham through its Owner's Project Manager ("OPM") for general information about obtaining the RFQ, RFQ submission deadlines, and the existence of any relevant addenda to the RFQ, and 2) inquires made at the official RFQ Informational Meeting held by the Town of Stoneham. The Town of Stoneham's official RFQ Informational Meeting will be held at the date and time set above.

Any issues brought to the Town of Stoneham's attention must be done so in writing to Town of Stoneham c/o Symmes Maini & McKee Associates (SMMA). The Town of Stoneham will determine if additional clarification or interpretations will be addressed and if so, will respond by issuing a written addendum. The Owner may decline to answer any inquiry. Oral and other communications, clarifications, or interpretations will be without legal effect. All such addenda will be considered part of this RFQ, and the respondent shall be required to acknowledge receipt of all addenda on the RFQ Proposal Response Form attached to this RFQ. The Town of Stoneham's OPM will email the addenda to all respondents who have mailed or emailed an RFQ Interest Form for the Project, or who received the RFQ. It shall be the sole responsibility of the respondent to ascertain the existence of any and all addenda issued by the Town of Stoneham.

From the date of issuance of this RFQ, any respondent that contacts directly or indirectly any member or employee of the Town of Stoneham, or the Designer or Owner's Project Manager, or any member of the Prequalification Committee in connection with the selection process or the contract contemplated herein for this project is subject to disqualification. Contact is only permitted with the Town of Stoneham's OPM for the purpose of obtaining a copy of this RFQ or submitting a request for clarification or information.

All questions must be submitted in writing to the Town of Stoneham, by mail or email addressed to:

***Town of Stoneham  
c/o Symmes Maini & McKee Associates (SMMA)  
Attn: Joel G. Seeley***

*1000 Massachusetts Avenue  
Cambridge, Massachusetts 02138  
Email: [opm@smma.com](mailto:opm@smma.com)*

The deadline for receipt of written questions is **2:00 PM EST on November 19, 2020**. The OPM will respond to all written questions which, in the Town of Stoneham's sole judgment, may have a material effect on the RFQ by faxing or emailing responses to all applicants that requested an RFQ.

**H. Status of Request for Qualifications**

This Request for Qualifications is solely a request for information. It does not represent an offer nor does it confer any rights on any respondent. The Town of Stoneham shall not be responsible under any circumstances for any costs incurred by any respondents to this RFQ. The Town of Stoneham reserves the right to modify, suspend or cancel this procurement at any time at its sole discretion. In the event a respondent modifies the forms and schedules to change the meaning of any terms or requirements, the original version, as contained in this RFQ, shall take precedence.

DRAFT

## **Request for Qualifications of Construction Management at Risk Services**

### **II. Scope of Services for Construction Management**

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*The Construction Manager at Risk (CM at Risk) shall be responsible for complete construction management services for all phases of the project for a guaranteed maximum price. At each phase, the Town of Stoneham, at its sole discretion, will determine whether it will proceed to the next phase or terminate the Construction Manager's services on the project. Certain trade construction work will be procured using procedures similar to the Mass General Laws Chapter 149 Filed Sub-bid laws after a prequalification process. This procedure is specified in Chapter 193 of the Acts of 2004 in the Massachusetts General Laws Chapter 149A. A detailed scope of services will be included in the Request for Proposals. The following is an outline of services anticipated.*

**NOTE: As stated above, the Project is expected to be a phased project. It is anticipated that the Pre-Construction Phase and the Construction Phase will run concurrently for portions of design and construction during the first Phase of the Project.**

#### **A. Pre-Construction (Design) Phase**

1. Review and recommend revisions, if appropriate, to the project Master Schedule, Construction Budget and permitting plan developed by the Town of Stoneham School Building Committee (SBC) and/or OPM and the Designer.
2. Develop the scope of work and prepare bid packages in concert with the School Building Committee, Designer, and OPM for each Trade to be bid and participate in the prequalification and qualification of each of the Trade Contractors and other subcontractors as defined by law.
3. Attend the Town of Stoneham School Building Committee meetings. Schedule and lead periodic project meetings and special meetings for the exchange of information concerning the Project, and review, permits and approvals. All meetings shall be held at a time and place convenient to the Designer, OPM and SBC, and assist the Owner in obtaining all permits with all authorities having jurisdiction.
4. For each phase of design, participate in design review meetings as requested by the Town of Stoneham School Building Committee and/or OPM, perform constructability reviews and provide comments with the submission of cost estimates, provide value engineering recommendations (with cost and schedule support) at times as requested by the Town of Stoneham School Building Committee and/or OPM, provide an assessment of materials and equipment availability along with life cycle cost value, prepare an initial project construction schedule with updates submitted along with each cost estimate. The Construction Manager shall make such recommendations and value engineering options while cognizant of the Zero Net Energy and LEED goals for the project and shall at no time jeopardize those goals. Note: the intent of the Town of Stoneham is to bring the Construction Manager into the project team as early as is possible during the Schematic Design phase. This will allow the Construction Manager to have a greater effect for input during the development of the documents, phasing and cost.
5. The CM shall perform periodic detailed cost estimates as deemed necessary (but at a minimum –at the Schematic Design, Design Development, 60% CD and 90% CD phases) by the Owner's Project

Manager for the entire construction and for phases or portions of the work as directed by the Town of Stoneham and work with the Designer (who each will obtain independent cost estimates) and Owner's Project Manager to reconcile differences.

6. The CM will perform detailed value engineering analyses during the Design Development and Construction Documentation phase of the project to find ways to reduce cost without compromising quality.
7. The Town of Stoneham School Building Committee and/or OPM may require additional cost estimates to confirm budget due to modifications made during the design and construction phase. The CM shall work with the Designer and the Owner's Project Manager to reconcile differences.
8. The CM shall assign a professional project scheduler possessing building and site design and construction experience. If deemed qualified and upon written approval by the Town of Stoneham School Building Committee, the CM can assign an in-house scheduler. The scheduler shall develop a detailed Critical Path Method (CPM) schedule that identifies all design activities, permits and all other activities required to be completed before construction activities can begin, a preliminary construction schedule and a complete construction baseline schedule. The CPM project schedules shall be developed using Primavera or similar software as determined acceptable by the Town of Stoneham School Building Committee, Designer, and OPM.
9. In coordination with the Town of Stoneham School Building Committee and/or OPM, maintain a tracking system during the design phase with regular updates which clearly reflects the status of the construction budget. Develop an initial cash flow schedule based on the design development budget for the Town of Stoneham's School Building Committee and/or OPM use. Provide the first cash flow projection within 30 days of award for submission to the Town of Stoneham School Building Committee and /or OPM, and subsequent cash flow projections monthly or other such intervals as set by the Town of Stoneham School Building Committee and/or OPM.
10. The CM shall provide a designated representative as approved by the Town of Stoneham School Building Committee and OPM to participate in the Subcontractor Prequalification Selection Committee. The CM shall conduct activities and solicit procurement relating to the award of Trade Contracts, Purchase Orders, and all other Subcontracts for the furnishing of labor, materials, equipment, or other services in connection with the construction of this project, in accordance with the procedures to be developed by the Town of Stoneham School Building Committee and/or OPM and in a manner that will meet Minority Business Enterprise and Women Business Enterprise percentages set by the Town of Stoneham School Building Committee for the Project.
11. The CM shall work with the Town of Stoneham School Building Committee, Design Team and OPM in the development of a project specific construction logistics and phasing plan. The plan shall include study of existing conditions, including the existing building, utilities and services for the development of a project logistics and phasing plan which provides the least impact to maintaining the existing Stoneham High School in unaffected operation during construction. The CM shall work with the Design Team in identifying all necessary temporary construction measures as a result of the phasing for incorporation into the construction documents. The CM shall provide a detailed site logistics plan which address the following but not limited to: mitigation measures for issues such as construction access to the site, trade parking, construction deliveries, construction trailers and laydown areas, off-site dust control, construction noise mitigation, construction fencing

locations, signage, lighting and safety measures with the full understanding that the CM will be performing construction Work adjacent to an occupied school and within a residential neighborhood.

12. Experience with (BIM). Participate in the development of a Building Information Modeling (BIM) Work Plan for implementation during the Pre-construction and Construction Phase Services.

## **B. Construction Phase**

1. Obtain and pay for, with the exception of the building permit fees, all required construction related permits. Inspection fees will be paid for by the Trade Contractors and Other Subcontractors.
2. Furnish bonds and insurance as required by the contract documents.
3. In addition to providing the CM's construction site office requirements, the CM shall provide and maintain a construction site office for the Owner's Project Manager and the Designer. Office shall include provisions for a conference area to accommodate up to 20 people.
4. Provide a designated representative as approved by the Town of Stoneham School Building Committee and/or OPM to manage and coordinate all Trade Contractors and subcontractors and others engaged in the performance of Work.
5. Manage and meet the Minority Business Enterprise and Women Business Enterprise participation percentages and minority work force percentages for the Project, including providing monthly status updates.
6. Implement procedures for reviewing and processing requests for information or clarifications and interpretations of the contract documents; shop drawings, samples, and all other submittals, contract schedule adjustments, change order proposals, proposals for substitutions, payment applications, as-built drawings, and maintenance of logs using internet-based system software or similar software as determined acceptable by the Town of Stoneham School Building Committee, Designer and OPM.
7. Continuously supervise and observe all Work in progress so as to ensure that the Work is proceeding in accordance with the construction contract documents and amendments. Track all long lead items to ensure arrival on time for incorporation into the Work as scheduled. Bring to the attention of the Owner any issues with regard to materials delays, and any opportunities with regard to material procurement that could save the project cost and/or time.
8. Attend, schedule and conduct regular weekly project and construction progress meetings (Owner/Architect/Contractor or O/A/C). Attend design coordination meetings, School Building Committee, Select Board, Conservation Commission, Planning Board, Historical, and any other project related meetings when requested by the Town of Stoneham School Building Committee and/or OPM. All meetings shall be held at a time and place convenient to the School Building Committee, Designer and OPM.

9. Develop and implement a change order control system for use during construction using internet-based system software or similar software as determined acceptable by the Town of Stoneham School Building Committee, Designer, and OPM.
10. Maintain budget control immediately advising the Town of Stoneham School Building Committee, Designer and OPM of any design changes or events which may lead to an increase and/or decrease in the construction budget.
11. Establish and maintain a Quality Control program including monitoring the quality programs of all Trade and Other Subcontractors in accordance with the construction documents. The CM is expected to assist the Town of Stoneham School Building Committee and/or OPM in the scheduling of all Owner required Quality Assurance testing and inspections during the duration and the post completion warranty period of the project.
12. Establish and implement a project-specific safety program for use during construction, including monitoring and enforcement of the program with Trade Contractors and Other Subcontractors, including a specific section regarding Indoor Air Quality (IAQ) as mandated by the MSBA. The CM is expected to provide a qualified safety representative independent of the Superintendent or Project Manager.
13. Provide a dedicated scheduler to develop, maintain and update the detailed CPM schedule. Monitor closely the progress of construction of each Trade Contractor and other Subcontractors against the baseline CPM schedule, ensure that adequate manpower is being employed to meet the progress of the work, provide a monthly updated construction schedule report detailing delays, change orders, etc. and, if necessary, prepare and submit recovery schedules.
14. Furnish monthly reports or at more frequent intervals as requested by the Town of Stoneham School Building Committee and/or OPM, concerning the progress of the work which address: (a) compliance with the construction schedule, (b) status of testing and inspection activities performed by the CM and subcontractors, (c) status of shop drawings, RFI's and submittals, (d) status of change orders, (e) status of MBE/WBE participation, and (f) other matters relating to the progress of work as directed by the Town of Stoneham School Building Committee and/or OPM, and the MSBA including assistance with procurement of delinquent Minimum Wage Compliance reports and Weekly Payroll reports, if needed.
15. Determine when each Trade Contractors or Other Subcontractor's work is substantially complete and prepare a list of incomplete work and work which does not conform to the requirements of the construction documents.
16. Maintain complete and accurate records, including (a) correspondence, (b) meeting notes and minutes, (c) shop drawings and submittals, (d) construction documents including change orders, (e) clarifications and interpretations of the construction documents issued by the project designer, (f) progress reports including observations of any testing performed, (g) close out documents, as-built drawings, and (h) all other project related documents such as; SK's, RFI's, ASI's, PR's, etc, utilizing electronic construction document management software, internet accessible to the Town of Stoneham School Building Committee and/or OPM, and Design Team, as determined acceptable by the Town of Stoneham School Building Committee and/or OPM, and the Designer.

17. Cooperate and provide labor to support the Commissioning Agent assigned by the MSBA for the building commissioning outlined in the construction documents.
18. Building Information Modeling (BIM) shall be used as a means of improving the coordination, logistic, planning and quality of the overall project, and the CM shall participate in the application of BIM during the construction phase as outlined in the Work Plan developed either during Pre-construction Phase or at any time thereafter.
19. The CM will be required to agree to any “Pass Through” terms set forth by MSBA in the MSBA Project Scope & Budget Agreement and the Project Funding Agreement. For further information please refer to the MSBA website. (<http://massschoolbuildings.org/>) for sample copies of those agreements.

**C. Post-Construction Phase**

In accordance with the Town of Stoneham School Building Committee and/or OPM and Designer, develop and implement procedures for orderly completion of punch list items, checkout of utilities, operational systems and equipment including initial start, testing, balancing, commissioning and training. Preparation and delivery to the Town of Stoneham School Building Committee and/or OPM and Designer warranties, as-built drawings, maintenance manuals, and the like, and generally administer closeout of the project. Ensure performance of all warranty obligations, resolution of all claims, and other post-construction requirements. Coordinate and schedule a 12-month warranty inspection 11 months after Substantial Completion with all the appropriate parties and manage the closeout of any noted items.

DRAFT

## Request for Qualifications for Construction Management at Risk Services

### III. Submission Instructions and Requirements and Evaluation Criteria

#### A. Submission Deadline

2:00 PM EST on December 2, 2020

Submit one (1) original and **nine (9)** complete bound copies, one (1) set of financials in a separate envelope, and one (1) complete electronic copy on a disk (without the Financials) of the Statement of Qualifications with all required forms, attachments, supporting documentation and information to the Town of Stoneham on or before submission time and date set forth above. All envelopes must be labeled “**SOQ for Construction Management Services, Stoneham High School**”, with the **respondent firm’s name, business address and telephone number** and be hand-delivered or mailed to the following address:

*Town of Stoneham  
Town Administrator’s Office  
35 Central Street  
Stoneham, Massachusetts 02180*

Statements of Qualification received by the Town of Stoneham later than the submission deadline specified above will be rejected and returned to the respondent. Respondents are cautioned to allow sufficient time for mailed materials to be received. **Telecopied, faxed or emailed qualifications will not be accepted.** Immediately following the RFQ, after the deadline for the submission of SOQ’s has passed, the Town of Stoneham will prepare a register of names of the firms submitting SOQ’s which will be available for public viewing. Qualification statements will not be opened or read publicly.

#### B. Submission Requirements

The respondent **must** submit all of the information and documentation listed below. Selection of the respondents for Phase One, the prequalification process, will be based on the submitted information and materials, information on prior project performance, information obtained from references (including credit references), information obtained from government agencies and entities, information contained within DCAM certification files, and such other information may be obtained including information from Architects, Owners, Owner Project Managers, from other town’s School Building Committees, or other town or city departments, and from projects listed and/or not listed in the response to this RFQ. Respondents are urged to confirm the contact information of their references, both project and credit, before providing contact info. Lack of response from references may affect the review.

**The Town of Stoneham will endeavor to keep the audited financial statement confidential but shall have no liability if it is disclosed.**

**The Town of Stoneham reserves the right to reject any or all SOQs and to waive any informalities or to take any other action that may be deemed necessary in the best interest of the Town of Stoneham.**

**The Respondent agrees that the Town of Stoneham, its agents, servants and employees shall not have any liability as a result of the review of the qualifications of the Respondent or the publishing of any evaluation of the Respondent.**

**Do not include superfluous material. Respondents must include the CM at Risk Statement of Qualifications Response Form attached below and signed by an authorized representative, and all of the forms and materials required for Schedules A through N.** Respondents must give complete and accurate answers to all questions and provide all of the information requested. Respondents can not alter the text of the forms or schedules in anyway; any such alteration will be grounds for disqualification. Making a false or misleading statement and/or omission in this submission is grounds for rejecting a Statement of Qualifications submission and may subject respondent to other civil or criminal penalties.

1. Qualifications Application: Respondent **must complete** the CM at Risk Qualifications Application **Schedule A** attached to the SOQ below. Joint Ventures must provide information about each of the Joint Venture partners.
2. Executive Summary: Respondent **must attach** as **Schedule B** to the SOQ a cover letter or executive summary detailing the key elements and factors that differentiate the respondent firm from other firms. Joint Ventures must provide information about the nature of the Joint Venture including the approximate participation by each Joint Venture partner and the division of responsibility among the Joint Venture partners. This letter/executive summary should not exceed six (6) pages. Joint Ventures must include a signed copy of the Joint Venture agreement in a separate envelope, financial agreements can be redacted.
3. Management Personnel and Project Organizational Chart: Respondent **must complete Schedule C** attached to the SOQ below, and **must attach** at Schedule C *both*: i) an organizational chart which includes the amount of time each person has been with the firm, approximate percentage of time that each member will be assigned to the project *and* ii) a resume for each and every person who will have **any** management responsibility, direct or indirect, for the Project, including but not limited to project executives, project managers, field superintendents, field engineers, safety personnel, MEP coordinators & managers, project engineers and Zero Net Energy (ZNE) and LEED coordinators. Joint Ventures must identify the company that employs each individual listed. The Construction Manager agrees that all personnel identified on the organization chart shall be available for the Pre-construction and Construction phases of the work and shall not replace any previously approved personnel without the prior consent of the Town of Stoneham School Building Committee and/or OPM.
4. Similar Project Experience: Respondent **must complete Schedule D** attached to the SOQ below, listing similar projects the firm has completed during the last five (5) years. The first part of Schedule D requests information for similar projects that used the construction manager at risk delivery method and the second part of Schedule D requests information on similar projects in general. For each project, respondent must include the name of the project, location, description of project, description of respondent firm's scope of work, original contract sum, final contract sum (with explanation), date completed and the name, organization, address and telephone contact information for the Owner, Owner's Project Manager, and project architect for each such project. For the purpose of this RFQ, "similar projects" shall mean projects where the construction cost is similar to, or greater than, the upper limit of the estimated construction cost of this Project; projects that were completed under M.G.L. Chapter 149A procurement; the projects of similar size, complexity, type and scope including phasing and adjacency to an occupied school; projects that are Zero Net Energy (ZNE), MA-CHPS or LEED certified. The

respondent may list only projects that the respondent has completed, they may not list what an affiliate or predecessor of the respondent completed. Joint Ventures must complete a Schedule D for each individual Joint Venture partner.

5. **Terminations and Legal Proceedings:** Respondent **must complete Schedule E** attached to the SOQ below. **Part A** of Schedule E requires a complete listing of each and every project on which the respondent firm was **terminated or failed to complete** the work within the past five (5) years. **Part B** of Schedule E requires a complete listing of any **convictions or fines** incurred by the respondent firm or any of its principals for violations of any state or federal law within the past five (5) years. **Part C** of Schedule E is divided into three (3) subparts. **Section 1 of Part C** requires a complete listing of **all litigation** involving a construction project or contract (excluding personal injury and workers' compensation) whether currently pending or concluded within the past five (5) years in which the respondent firm was a named party. **Section 2 of Part C** requires a complete listing of all **administrative proceedings** involving a construction project or contract, whether currently pending or concluded within the past five (5) years, in which the respondent firm was a named party. (**NOTE: Administrative Proceedings** shall include: (i) any action taken or proceeding brought by a governmental agency, department, or officer to enforce any law, regulation, code, legal, or contractual requirement, except for those brought in state or federal courts; (ii) any action taken by a governmental agency, department, or officer imposing penalties, fines, or other sanctions for failure to comply with any such legal or contractual requirement, or (iii) any other matter before an administrative body; (iv) and any injunctions imposed by the respondent against any owner for any reason for projects listed and projects not listed in this response). **Section 3 of Part C** requires a complete listing of all **arbitrations and/or mediations** involving a construction project or contract, whether currently pending or concluded in the past five (5) years, in which the respondent firm was a named party. Include information from the resulting determination. **The respondent must disclose and list in this section, any legal proceeding described in this section, for any entity which the respondent is in any way related, and any entity which owner or principal of the respondent had any interest in. These disclosures must be listed in Schedule E.** Joint Ventures must complete all parts and subparts of Schedule E for each individual Joint Venture partner.
  
6. **Safety Record:** Respondent **must provide** its experience modifier for the past three (3) years by writing it in on the SOQ in the space provided on **Schedule F** to the SOQ and attach documentation from its insurance carrier of its Workers' Compensation Experience Modifier for the past three (3) years. Include information on all Workmen's Compensation claims within the past five (5) years for all claims resolved, unresolved, negotiated, currently under negotiation, settled, and pending resolution with explanation for each claim. Include subcontractor claims where the applicant is named in the claim. Joint Ventures must complete a Schedule F for each individual Joint Venture partner.
  
7. **MBE/WBE and Workforce Compliance Record:** Respondent **must complete Schedule G** attached to the SOQ below providing information on the firm's compliance record with respect to Minority Business Enterprise and Women's Business Enterprise participation percentages and workforce inclusion percentages for each and every project completed within the past five (5) years that had contractual MBE/WBE participation percentages or minority and women workforce percentages. In addition, respondent **must attach** documentation provided by the project owner or Owner Project Manager supporting the actual participation and inclusion amounts it reports on Schedule G. Joint Ventures must complete a Schedule G for each individual Joint Venture partner.

8. Audited Financial Statement: Respondent **must attach** at **Schedule H** to the SOQ a complete copy of its audited financial statement for the most recent fiscal year. Joint Ventures must complete a Schedule H for each individual Joint Venture partner.
9. Respondent must provide a list of at least five (5) credit references.
10. Letter from Surety Company Evidencing Bonding: Respondent **must attach** at **Schedule I** to the SOQ a letter from a surety company that is licensed to do business in the Commonwealth of Massachusetts and whose name appears on United States Treasury Department Circular 570 on the surety companies letterhead (or a letter from a surety agent with attorney in fact authority and an original power of attorney accompanying the letter) confirming that it will provide respondent firm with payment and performance bonds on the Project in an amount equal to or greater than 110 percent of the upper limit of the estimated construction cost of the Project. This letter can either reference the Joint Venture's bonding or submit separate letters from each individual Joint Venture partner.
11. Certificate of Eligibility and Update Statement: Respondent **must attach** at **Schedule J** to the SOQ **both i** a current **Certificate of Eligibility** (issued by DCAM) showing respondent is certified in General Building Construction with appropriate single project limits and aggregate limits based on the upper limit or greater of the estimated construction cost as set forth above, **and ii** a completed **Update Statement, on the current form of Update Statement available on DCAM's website**. Joint Ventures which are not yet DCAM certified as a Joint Venture must submit a Certificate of Eligibility and Update Statement for each individual Joint Venture partner.
12. Examples of Project Management Reports and Operating Philosophy: Respondent **must attach** at **Schedule K** specific examples (no more than 3) of Project Management Reports that were prepared by respondent on one or more of the Construction Manager projects listed on Schedule D, Part A. In addition, respondent **may**, at its option, include a brief statement of its operating philosophy. If information on respondent's operating philosophy is contained in its Executive Summary attached at Schedule B, the information should not be repeated at Schedule K, but can be referenced.
13. Examples of Prior Experience on Sustainable Construction, Zero Net Energy (ZNE) and LEED certified buildings: Respondent **must complete Schedule L** attached to the SOQ below, listing prior similar project experience involving Zero Net Energy Buildings and sustainable construction using Massachusetts Certified High Performance Schools and/or LEED certified buildings, including current contact information for the Owner, Designer, and Owner Project manager for each and every project listed. Joint Ventures must complete a Schedule L for each individual Joint Venture partner.
14. Provide examples if any, of Building Information Modeling (BIM) documents: Respondent **Must complete Schedule M** attached to the SOQ below with examples of BIM coordination, logistic, and planning documents used by the respondent on previous projects. List those projects and the depth of usage of BIM software. Include information on whether the process was performed internally or outsourced.

15. Lists of Projects currently in Process with estimated completion dates including identification of any management (field or project management) personnel on current projects which may be proposed for the Stoneham High School project, Completed Projects and Certification Page from most recent DCAM Application for Certification: **Respondent must attach at Schedule N a copy of those portions of the most recent application for DCAM certification that contains the listings of respondent's Projects in Process and its Completed Projects.** Specifically, respondent must submit copies of 1) Section F. Projects in Process (including estimated construction volume for the next two years); 2) Section G. Completed Projects for the last three years; and, 3) a copy of the signed and dated final page, Section J. Certification, showing the date the application for certification was submitted to DCAM, all copied from their most recent Application for Prime/General Contractor Certificate of Eligibility submitted to DCAM's Certification Office.

### **C. Evaluation Criteria for Selection**

The respondent must submit all of the information and documentation listed in this RFQ. Selection of the respondent for Phase One, the prequalification process will be based on the submitted information and materials, information on prior project performance, information obtained from references (including credit references), information obtained from governmental agencies and entities, information contained within DCAM certification files, and such other information as may be obtained, including information from Architects, Owners, Owner Project Managers, other School Building Committees or other town or city departments, and Engineers, from projects listed and/or not listed in your response to this RFQ. Respondents must include the CM at Risk Statement of Qualifications Response Form and all of the materials required for Schedules A through N. Respondents must give complete and accurate answers to all questions and provide all of the information requested. Altering the text of the forms or schedules in any way or making any false or misleading statement and/or omission in this submission is grounds for rejecting a Statement of Qualifications submission and may subject the respondent to other civil or criminal penalties.

#### **1. Certification, Capacity and Bonding**

##### **a. Required Construction Manager at Risk Experience**

**All respondents must have prior experience as a CM. In addition this firm must have constructed schools of similar cost, complexity, type and size, including phasing and adjacency to an occupied school under M.G.L. ch.149A (CM) procurement.**

The prior CM at Risk experience **must be** on projects with a total construction cost in an amount similar or larger than the estimated upper limit of the total construction cost of this Project and **must be** on projects that achieved MA-CHPS or LEED certification.

**b. Bonding Capacity**

The respondent **shall provide evidence of bonding capability** in an amount equal to or greater than 110 percent of the upper limit or greater of the estimated construction cost for this Project (as set forth in the General Information section above). The evidence of bonding capability shall be in the form of a letter from the surety company (or a surety agent with attorney in fact authority and an original power of attorney accompanying the letter). The surety company must be a surety licensed to do business in the Commonwealth of Massachusetts and whose name appears on the United States Treasury Department Circular 570.

**c. DCAM Certification – Copy Form CQ7**

The respondent **shall provide a copy of a current Certificate of Eligibility** (Form CQ7) issued by DCAM showing respondent is DCAM certified in General Building Construction with a single project limit in an amount equal to, or greater than the upper limit or greater of the estimated construction cost for this Project (as set forth in the General Information section above).

To submit a proposal in response to this RFQ, a Respondent, whether an individual firm or a Joint Venture, **must be certified in General Building Construction** by DCAM for a single project limit in the amount of the upper limit or greater of the Estimated Construction Cost set above for the Project or greater and must also be within the aggregate limit of its DCAM Certificate of Eligibility (Form CQ7), and a copy of the Respondent's current DCAM Certificate of Eligibility must be included in the SOQ. Note, however, that a Joint Venture team must be certified in General Building Construction by DCAM for a single project limit in the amount of the upper limit or greater of the Project Estimated Construction Cost or greater and must also be within the aggregate limits of its DCAM Certificate of Eligibility, a copy of which must be included in the SOQ at the time it submits its RFQ. If a respondent to the RFQ is a proposed Joint Venture ("JV") that is newly formed or is not currently certified, then i) each party to the proposed Joint Venture must be individually certified by DCAM and must submit a copy of its DCAM Certificate of Eligibility with its SOQ; ii) the JV respondent must state in the SOQ that it will seek Certification from DCAM as a Joint Venture in the category of General Building Construction for the required limits, and state that it understands and agrees that if JV respondent is selected to participate in the RFP phase it will be required to submit a DCAM Certificate of Eligibility for the Joint Venture with its response to the RFP; iii) at least one of the parties of the Joint Venture must be certified by DCAM in the category of General Building Construction for a single project limit in the amount of the upper limit or greater of the Estimated Construction Cost for the Project and must be within the aggregate limits of its Certificate of Eligibility at the time the SOQ is submitted; and iv) the JV respondent shall provide evidence satisfactory to the Town of Stoneham of bonding capacity, in the form set above and satisfactory to the Town of Stoneham, for the proposed Joint Venture in the amount equal to or greater than 110 percent of the upper limit of the Estimated Construction Cost for the Project. In the second phase of the selection process the RFP phase, a JV respondent that has been selected in the RFQ process, will be required to have obtained a DCAM Certificate of Eligibility for the Joint Venture and must submit its DCAM Certificate of Eligibility for the Joint Venture meeting the above requirements with its proposal in response to the RFP.

For certification forms and additional information see DCAM's website:  
(<http://www.state.ma.us/cam/dlforms/eligible.pdf>)

Or contact the Certification Office at:

DCAM Contractor Certification Office  
One Ashburton Place  
Boston, Massachusetts 02108  
Telephone Number (617)727-4050 ext. 415

**d. DCAM Update Statement – Use Form CQ3**

**A complete and signed update statement must be submitted as part of the SOQ.** For the Town of Stoneham's analysis of the Aggregate Work Limit for this RFQ, the Estimated Construction Cost for the project as set forth above will be used with a construction duration for the Project as set forth above. The Town of Stoneham will compare the above numbers with the respondent's current annualized value of all incomplete work to determine eligibility within the Aggregate Work Limit.

If a respondent to the RFQ is a proposed Joint Venture and the proposed Joint Venture is not yet certified, then: i) each party to the proposed Joint Venture must be certified by DCAM and each must submit its own signed update statement (Form CQ3) as part of its SOQ; ii) at least one of the parties to the Joint Venture must be certified by DCAM in the category of General Building Construction for a single project limit equal to or greater than the upper limit of the Estimated Construction Cost of the Project and must be within the aggregate limits of its Certification of Eligibility. When the second phase of the selection process is undertaken through an RFP, a Joint Venture respondent that has been selected in the RFQ process will be required to submit its Certificate of Eligibility for the Joint Venture meeting the above requirements with its proposal to the RFP.

For the required Update Statement Form and individual information see DCAM website:  
(<http://www.state.ma.us/cam/dlforms/eligible.pdf>)

Or contact the Certification Office at:

DCAM Contractor Certification Office  
One Ashburton Place  
Boston, Massachusetts 02108  
Telephone Number (617)727-4050 ext. 415

**Firms meeting the minimum experience criteria set forth above, submitting a completed SOQ with Schedules and required attachments and the required Certificate of Eligibility, Update Statement Tax Compliance Certificate, and letter evidencing bonding capacity will be evaluated on the following criteria:**

- Prior Similar Project Experience. Respondent's ability to demonstrate that they possess the capability, capacity and experience to perform construction management services for

a project of the size and scope of the Project and on the terms set forth in this RFQ, including specifically the advisory services required for the Pre-Construction Phase and the construction, management, oversight and cost control services required during the Construction Phase. **In addition this firm must have constructed schools of similar cost, complexity, type and size, including phasing and adjacency to an occupied school under M.G.L. ch.149A (CM) procurement.**

- Management Team and Organization for the Project. Respondent's ability to demonstrate that the proposed Project Superintendent, Project Manager and Team possess the capability, capacity and experience with projects of similar size, scope and delivery method are qualified to meet the specific requirements of this Project.
- Respondent's ability to demonstrate an understanding of Project goals, particularly the quality standards required, the dates for substantial completion of each phase, and an ability and commitment to meet those goals and dates.
- Respondent's references from Owners, for projects listed and/or not listed in your response to this RFQ as well as with Architects, Owner Project Managers, other town's School Building Committees or other town or city departments, and or Engineers indicating that they have completed work similar to the project for which this Proposal is being submitted in a satisfactory and timely manner. If delays occurred, evidence explaining and exonerating the Respondent shall also be provided.
- Respondent's record of harmonious, cooperative, non-adversarial and honest relationships with Owners for projects listed and/or not listed in this RFQ as well as with Architects, Owners Project Managers, from other town's School Building Committees, or other town or city departments, and Engineers, Consultants, Subcontractors and Suppliers on the current and prior projects.
- Financial Status
- Prior Project Experience, including quality of performance on prior projects
- Litigation and Performance/Termination History/Mediation
- Safety Record
- Volume of current work.
- History of Compliance with MBE/WBE participation and workforce percentages
- Quality of performance on prior projects
- Reference Information
- Experience with Zero Net Energy Buildings and sustainable construction MA-CHPS and LEED-certified buildings
- Similar projects with phasing and experience, if any, with schools operating on site during construction
- Experience with utilization of BIM.

Respondents are urged to confirm the contact information of their references, both project and credit, before providing contact info. Lack of response from references may affect the review.

As provided by law, the Town of Stoneham's School Building Committee decision on prequalification shall be final and binding and shall not be subject to appeal except on grounds of arbitrary and capriciousness, fraud or collusion.

**CM AT RISK RFQ INTEREST FORM**  
**(For Submission to Town of Stoneham Immediately)**

Instruction: If your firm is interested in responding to this RFQ for Prequalification of CM at Risk firms for this Project then you **MUST** fill out this CM at Risk RFQ Interest Form and submit it to **Town of Stoneham** by facsimile, mail or email as soon as possible and **BEFORE** you submit your response to the RFQ. Please note that this form may be mailed or emailed to the **Town of Stoneham**. However the Statement of Qualifications (“SOQ”) with all required forms, attachments, supporting documentation and information submitted in response to this RFQ, can not be faxed, it must be either hand-delivered or mailed to **Town of Stoneham**, and be received by the time and date set forth in the RFQ.

Awarding Authority: **Town of Stoneham**

Project Title: **Stoneham High School**

Mail or Email this CM at Risk RFQ Interest Form to:  
*Town of Stoneham*  
*c/o Symmes Maini & McKee Associates (SMMA)*  
*Attn: Joel G. Seeley*  
*1000 Massachusetts Avenue*  
*Cambridge, Massachusetts 02138*  
*Email: [opm@smma.com](mailto:opm@smma.com)*

By submitting this CM at Risk RFQ Interest Form the below identified firm is expressing its interest in the above-referenced public building project and is requesting that it be added to the list of firms that will receive any addenda to the RFQ on the Project. **Town of Stoneham assumes no responsibility for a firm’s failure to receive any addenda or other correspondence related to this RFQ due to the firm’s failure to submit an RFQ Interest Form to Town of Stoneham as directed above, or for any other reason.**

Firm Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_

Email address \_\_\_\_\_

By: \_\_\_\_\_

*(Signature of Authorized Representative)*

*(Print Name/Title)*

Date

**STATEMENT OF QUALIFICATIONS SUBMISSION CHECKLIST**  
**for Prequalification of CM at Risk Firms**

**PLEASE NOTE THAT INCOMPLETE OR LATE STATEMENTS OF QUALIFICATION FOR CM at RISK PREQUALIFICATION WILL NOT BE CONSIDERED. THEREFORE, BEFORE SUBMITTING YOUR FIRM'S RESPONSE TO THIS RFQ PLEASE REVIEW THE FOLLOWING:**

- Respondent has hand-delivered or mailed its CM at Risk RFQ Interest Form.  
(If not, see form in this RFQ package, fill it out and hand deliver or mail it immediately.)
- Respondent completed the SOQ Form and all schedules and attachments in their entirety.
- Respondent has completed *Schedules A through N* and attached required documentation (i.e., resumes of all management personnel, organizational chart, commitment letter from bonding company, letter evidencing workers compensation experience modifier, letter from Project Owner and/or Owner Project Manager documenting prior MBE/ WBE participation sample firm project management reports, etc.).
- Respondent has submitted current DCAM Certificate of Eligibility.
- Respondent has submitted complete Update Statement.
- Respondent has submitted Audited Financial Statement.
- Respondent has submitted Certificate of Tax Compliance
- Respondent submission package includes one (1) original and **nine (9)** complete bound copies, one (1) set of financials in a separate envelope, and one (1) complete electronic copy on a disk (without the Financials)
- Respondent has provided current contact information for its firm and all of its project Contacts/references, etc.
- Respondent addressed the SOQ envelope correctly (i.e., to reference the Project and other required information set forth herein).

## CM at Risk Statement of Qualifications Form (SOQ)

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Firm Name: \_\_\_\_\_

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

\_\_\_\_\_

Street Address (if different from mailing address): \_\_\_\_\_

\_\_\_\_\_

Telephone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

E-mail Address \_\_\_\_\_

Contact Person: \_\_\_\_\_ Title: \_\_\_\_\_ Email: \_\_\_\_\_

Firm acknowledges Addenda numbered \_\_\_\_\_ (list all)

- A. Qualifications Application:** Respondent **MUST** complete the CM at Risk Qualifications Application **Schedule A** attached below. Joint Ventures must provide information about each of the Joint partners.
- B. Executive Summary:** Respondent **MUST attach** as **Schedule B** to the SOQ a cover letter or executive summary detailing the key elements and factors that differentiate the respondent firm from other firms. Joint Ventures must provide information about the nature of the Joint Venture including the approximate percentage participation by each Joint Venture partner and the division of responsibility among the Joint Venture partners. This letter/executive summary should not exceed six (6) pages.
- C. Management Personnel and Project Organizational Chart:** Respondent **must complete Schedule C** attached to the SOQ below, and **MUST attach** at Schedule C **both: i)** an organizational chart which includes amount of time each person has been with the firm, the approximate percentage of time that each member will be assigned to the project **and ii)** a resume for each and every person who will have **any** management responsibility, direct or indirect, for the Project, including but not limited to project executives, project managers, field superintendents, field engineers, safety personnel, MEP coordinators & managers, project engineers and LEED coordinators. Joint Ventures must identify the company that employs each individual listed. The Construction Manager agrees that all personnel identified on the organization chart shall be available for the Pre-construction and Construction phases of the work and shall not replace any previously approved personnel without the prior consent of the Town of Stoneham School Building Committee and/or OPM.
- D. Similar Project Experience:** Respondent **MUST complete Schedule D** attached to the SOQ below, listing similar projects the firm has completed during the last five (5) years. The first part of Schedule D requests information for similar projects that used the construction manager at risk

delivery method and the second part of Schedule D requests information on similar projects in general. For each project, respondent must include the name of the project, location, description of project, description of respondent firm's scope of work, original contract sum, final contract sum (with explanation), date completed and the name, organization, address and telephone contact information for the Owner, Owner's Project Manager, and project architect for each such project. For the purpose of this RFQ, "similar projects" shall mean projects where the construction cost is for an amount similar to or greater than the upper limit of the estimated construction cost of this Project; projects completed under M.G.L. 149A procurement, projects of similar size, complexity, type or scope including phasing, and adjacency to an occupied school, the projects that are ZNE building projects achieving MA-CHPS or LEED certification. The respondent may list only projects that the respondent has completed, they may not list what an affiliate or predecessor of the respondent completed. Joint Ventures must complete a Schedule D for each individual Joint Venture partner.

- E. Termination and Legal Proceedings:** Respondent **must complete Schedule E** (all parts and subparts) attached to the SOQ below. **Part A** of Schedule E requires a complete listing of each and every project on which the respondent firm was **terminated or failed to complete** the work within the past five (5) years. **Part B** of Schedule E requires a complete listing of any **convictions or fines** incurred by the respondent firm or any of its principals for violations of any state or federal law within the past five (5) years. **Part C** of Schedule E is divided into three (3) subparts. **Section 1 of Part C** requires a complete listing of **all litigation** involving a construction project or contract (excluding personal injury and workers' compensation) whether currently pending or concluded within the past five (5) years in which the respondent firm was a named party. **Section 2 of Part C** requires a complete listing of all **administrative proceedings** involving a construction project or contract, whether currently pending or concluded within the past five (5) years, in which the respondent firm was a named party. (**NOTE: Administrative Proceedings** shall include: (i) any action taken or proceeding brought by a governmental agency, department, or officer to enforce any law, regulation, code, legal, or contractual requirement, except for those brought in state or federal courts; (ii) any action taken by a governmental agency, department, or officer imposing penalties, fines, or other sanctions for failure to comply with any such legal or contractual requirement, or (iii) any other matter before an administrative body; (iv) and any injunctions imposed by the respondent against any owner for any reason for projects listed and projects not listed in this response). **Section 3 of Part C** requires a complete listing of all **arbitrations and/or mediations** involving a construction project or contract, whether currently pending or concluded in the past five (5) years, in which the respondent firm was a named party. Include information from the resulting determination. **The respondent must disclose and list in this section, any legal proceeding described in this section, for any entity which the respondent is in any way related, and any entity which owner or principal of the respondent had any interest in. These disclosures must be listed in Schedule E.** Joint Ventures must complete all parts and subparts of Schedule E for each individual Joint Venture partner.

- F. **Safety Record:** Respondent **MUST provide** its experience modifier for the past three (3) years by writing it in on the SOQ in the space provided on **Schedule F** to the SOQ and attach documentation from its insurance carrier of its Workers’ Compensation Experience Modifier for the past three (3) years. Include Information on all Workmen’s Compensation claims within the past five (5) years for all claims resolved, unresolved, negotiated, currently under negotiation, settled, and pending resolution with explanation for each claim. Include subcontractor claims where the applicant is named in the claim. Joint Ventures must complete a Schedule F for each individual Joint Venture partner.

Year	Workers Compensation Experience Modifier
_____	_____
_____	_____
_____	_____

- G. **MBE/WBE and Workforce Compliance Record:** Respondent **MUST complete Schedule G** attached to the SOQ below providing information on the firm’s compliance record with respect to Minority Business Enterprise and Women’s Business Enterprise participation percentages and workforce inclusion percentages for each and every project completed within the past five (5) years that had contractual MBE/WBE participation percentages or minority and women workforce percentages. In addition, respondent **MUST attach** documentation provided by the project owner or Owner Project Manager supporting the actual participation and inclusion amounts it reports on Schedule G. Joint Ventures must complete a Schedule G for each individual Joint Venture partner.
- H. **Audited Financial Statement:** Respondent **MUST attach** at **Schedule H** to the SOQ a complete copy of its audited financial statement for the most recent fiscal year. Joint Ventures must attach a Schedule H for each individual Joint Venture partner. **Respondent MUST provide a list of at least five (5) credit references.**
- I. **Letter for Surety Company Evidencing Bonding:** Respondent **MUST attach** at **Schedule I** to the SOQ a letter from a surety company that is licensed to do business in the Commonwealth of Massachusetts and whose name appears on United States Treasury Department Circular 570 on the surety companies letterhead (or a letter from a surety agent with attorney in fact authority and an original power of attorney accompanying the letter) confirming that it will provide respondent firm with payment and performance bonds on the Project in an amount equal to or greater than 110 percent of the upper limit of the estimated construction cost of the Project. This letter can either reference the Joint Venture’s bonding or submit separate letters for each individual Joint Venture partner.
- J. **Certificate of Eligibility and Update Statement:** Respondent **MUST attach** at **Schedule J** to the SOQ **both i)** a current **Certificate of Eligibility** (issued by DCAM) showing respondent is certified in General Building Construction with appropriate single project limits and aggregate limits based on the upper limit or greater of the estimated construction cost as set forth above, **and ii)** a completed **Update Statement on the current form of Update Statement available on**

**the DCAM website** ([www.mass.gov/dcam/certification](http://www.mass.gov/dcam/certification)). Joint Ventures which are not yet DCAM certified as a Joint Venture must submit a Certificate of Eligibility and Update Statement for each individual Joint Venture partner.

- K. Examples of Project Management Reports and Operating Philosophy:** Respondent **MUST attach at Schedule K** specific examples (no more than 3) of Project Management Reports that were prepared by respondent on one or more of the Construction Manager projects listed on Schedule D, Part A. In addition respondent **may**, at its option, include a brief statement of its operating philosophy. If information on respondent's operating philosophy is contained in its Executive Summary attached at Schedule B, the information should not be repeated at Schedule K, but can be referenced.
- L. Examples of Prior Experience on Zero Net Energy Buildings and Sustainable Construction and LEED—Certified Buildings:** Respondent **must complete Schedule L** attached to the SOQ below, listing prior similar project experience involving Zero Net Energy Buildings and sustainable construction using Massachusetts Certified High Performance Schools and/or LEED certified buildings, including current contact information for the Owner, Designer, and Owner Project manager for each and every project listed. Joint Ventures must complete a Schedule L for each individual Joint Venture partner.
- M. Provide examples if any, of Building Information Modeling (BIM) documents:** Respondent **Must complete Schedule M** attached to the SOQ below with examples of BIM coordination, logistic, and planning documents used by the respondent on previous projects. List those projects and the depth of usage of BIM software. Include information on whether the process was performed internally or outsourced.
- N.** Respondent **MUST** attach the Lists of Projects currently in Process, with estimated completion dates including identification of any management (field or project management) personnel on current projects which may be proposed for the Stoneham High School project, Completed Projects and Certification Page from most recent DCAM Application for Certification: **Respondent must attach at Schedule N a copy of those portions of the most recent application for DCAM certification that contains the listings of respondent's Projects in Process and its Completed Projects.** Specifically, respondent must submit copies of 1) Section F. Projects in Process (including estimated construction volume for the next two years); 2) Section G. Completed Projects for the last three years; and, 3) a copy of the signed and dated final page, Section J. Certification, showing the date the application for certification was submitted to DCAM, all copied from their most recent Application for Prime/General Contractor Certificate of Eligibility submitted to DCAM's Certification Office

Failure to accurately and completely provide the information requested may result in the disqualification of a respondent.

Respondents are urged to confirm the contact information of their references, both project and credit, before providing contact info. Lack of response from references may affect the review.

This form **MUST** be signed by an officer of the firm or an individual so authorized by an officer of the firm who has personal knowledge regarding the information contained herein and submitted with the SOQ.

To the Town of Stoneham:

The undersigned declares that he or she has carefully examined all the documents contained in the CM at Risk Request for Qualifications (RFQ) solicitation for **Stoneham High School, Stoneham, Massachusetts**, and certifies to the best of his/her knowledge, that this Statement of Qualifications fully complies with all of the requirements of the RFQ and all addenda and clarifications issued in regard to the RFQ.

The undersigned further certifies that he or she (or, if he or she is the authorized representative of a company, the company) is the only person interested in this Statement of Qualifications and any subsequent proposal; that is made without any connection with any other person making any submission for the same work; that no person acting for, or employed by, the Town of Stoneham is directly or indirectly interested in this Statement of Qualifications or any subsequent proposal, or in any contract which may be made under it, or in expected profits to arise therefrom; that the undersigned Respondent has not influenced or attempted to influence any other person or corporation to file a Statement of Qualifications or subsequent proposal or to refrain from doing so or to influence the terms of the Statement of Qualifications or any subsequent proposal of any other person or corporation; and that this submission is made in good faith without collusion or connection with any other person applying for the same work.

The undersigned further certifies under pains and penalties of perjury that the undersigned is not debarred from doing public construction work in the Commonwealth of Massachusetts under the provisions of section Twenty Nine F of Chapter Twenty Nine, or any other applicable debarment provision of any other chapter of the General Laws or any rule or regulation promulgated thereunder, and further is not debarred from doing public construction work under any law, rule or regulation of the federal government.

The undersigned states that he or she has carefully examined all of the information provided and representative made in this Statement of Qualifications and the documents submitted with the SOQ including all schedules, forms and materials, and certifies to the best of his/her knowledge, that this Statement of Qualifications in its entirety is complete, true and accurate and has been submitted in good faith without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

**SIGNED UNDER THE PAINS AND PENALTIES OF PERJURY**

Signature: \_\_\_\_\_  
(*Signature of Authorized Representative*)

Name: \_\_\_\_\_

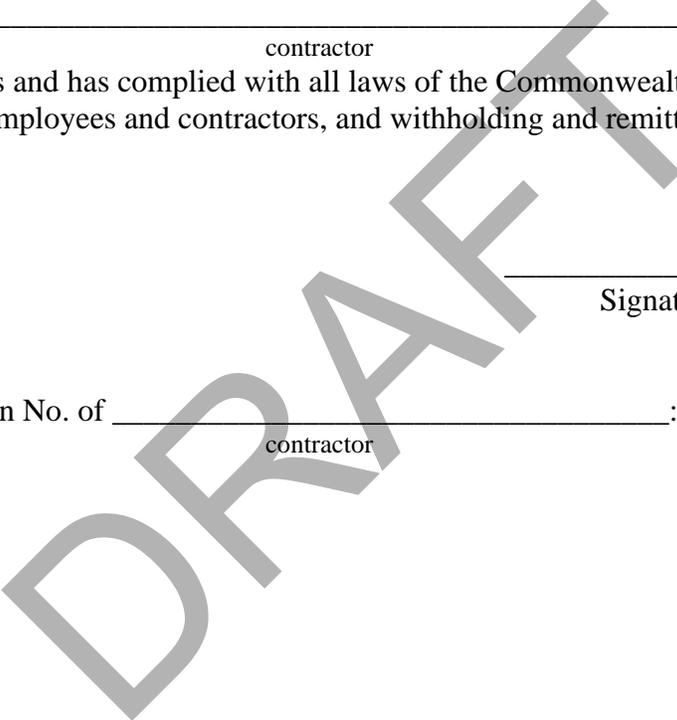
Title: \_\_\_\_\_

Firm Name: \_\_\_\_\_

Date: \_\_\_\_\_

**CERTIFICATE OF STATE TAX COMPLIANCE**

Pursuant to Massachusetts General Laws, Chapter 62C, Section 49A,  
 \_\_\_\_\_, authorized signatory for  
 name of signatory \_\_\_\_\_, whose  
 \_\_\_\_\_ contractor  
 principal place of business is at \_\_\_\_\_,  
 \_\_\_\_\_ does hereby certify under the pains and penalties of perjury that  
 \_\_\_\_\_ contractor  
 has paid all  
 \_\_\_\_\_ contractor  
 Massachusetts taxes and has complied with all laws of the Commonwealth of Massachusetts relating to  
 taxes, reporting of employees and contractors, and withholding and remitting child support.



\_\_\_\_\_  
Signature required

Federal Identification No. of \_\_\_\_\_ contractor : \_\_\_\_\_ number

**SCHEDULE A**

**Schedule A – CM at RISK QUALIFICATIONS APPLICATION**

Firm Name: \_\_\_\_\_

**1. BUSINESS INFORMATION**

Type of business entity (corporation, partnership, Joint Venture, etc.): \_\_\_\_\_

Number of years in business under current business name: \_\_\_\_\_

List all other business names firm has operated under and the time frames for each:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**If firm is a corporation, provide the following information:**

State of Incorporation: \_\_\_\_\_ Date of Incorporation: \_\_\_\_\_

Name of President: \_\_\_\_\_

Name of Vice President: \_\_\_\_\_

Name of Secretary or Clerk: \_\_\_\_\_

Name of Treasurer: \_\_\_\_\_

If firm is a foreign corporation, is it registered to do business in Massachusetts? \_\_\_\_\_

If firm is a foreign corporation and is selected, it is required under M.G.L. C 30, §. 39L to obtain from the Massachusetts Secretary of State, One Ashburton Place, 17<sup>th</sup> Floor, Boston, MA a certificate stating that the corporation is registered to do business in Massachusetts, and to furnish said certificate to the awarding authority prior to the award.

**If firm is a partnership or Joint Venture, provide the following information:**

Type of partnership/Joint Venture: \_\_\_\_\_ Date of organization: \_\_\_\_\_

Name of each partner or Venture:

\_\_\_\_\_  
\_\_\_\_\_

Is partnership or Joint Venture registered in Massachusetts? \_\_\_\_\_

**If Yes, Joint Venture firms must include a copy of the Joint Venture Agreement in a separate envelope, financial agreements can be redacted.**

If firm is a foreign limited partnership and is selected, it is required under M.G.L. C 30, §. 39L to obtain from the Massachusetts Secretary of State, One Ashburton Place, 17<sup>th</sup> Floor, Boston, MA a certificate stating that the corporation is registered to do business in Massachusetts, and to furnish said certificate to the awarding authority prior to the award.

For each general partner or Venture that is a corporation, provide the following information (use additional sheets if necessary).

Name of corporation: \_\_\_\_\_  
State of incorporation: \_\_\_\_\_  
President: \_\_\_\_\_  
Secretary or Clerk: \_\_\_\_\_  
Treasurer: \_\_\_\_\_

Name of corporation: \_\_\_\_\_  
State of incorporation: \_\_\_\_\_  
President: \_\_\_\_\_  
Secretary or Clerk: \_\_\_\_\_  
Treasurer: \_\_\_\_\_

**If firm is individually owned, provide the following information:**

Name of Owner: \_\_\_\_\_  
Date of organization: \_\_\_\_\_  
Owner's Residence Address: \_\_\_\_\_  
Names under which firm does business: \_\_\_\_\_  
Business Address: \_\_\_\_\_  
E-mail \_\_\_\_\_

If selected firm is an individual doing business under a different name then they must furnish evidence of any required DBA filings.

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**2. LICENSURE AND PERFORMANCE INFORMATION**

List all jurisdictions and trade categories in which the firm is legally licensed or otherwise qualified to do business and for each jurisdiction provide registration and license numbers where applicable:

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If the firm customarily provides scopes of work with its own force please identify types/areas of work below:

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**3. REFERENCES - TRADE & BANK**

Provide three (3) trade references below; include name of reference, current contact person, telephone number and address:

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

Provide two (2) bank references below; include name of reference, current contact person, telephone number and address:

4 \_\_\_\_\_

5 \_\_\_\_\_

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**Schedule B – EXECUTIVE SUMMARY**

**Firm Name** \_\_\_\_\_

**Respondent must attach Executive Summary here  
(Size of Font must be 12, Line spacing must be double)**

Not to Exceed 6 Pages

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**Schedule C – MANAGEMENT PERSONNEL**

**Firm Name:** \_\_\_\_\_

Respondent must provide the information requested below for each and every person who will have **any direct or indirect management responsibility for the Project**, including but not limited to project executives, project managers, field superintendents, field engineers, safety personnel, MEP coordinators & managers, project engineers and LEED coordinators. Respondents must **attach a copy of the resume for each person listed**. Respondents **must also attach an Organizational Chart** for the Project to this Schedule C which includes amount of time each person has been with the firm, the approximate percentage of time that each member will be assigned to the project. The Construction Manager agrees that all personnel identified on the organization chart shall be available for the Pre-construction and Construction phases of the work and shall not replace any previously approved personnel without the prior consent of the Town of Stoneham School Building Committee and/or OPM. Attach additional sheets if necessary.

NAME	TITLE	ROLE/JOB RESPONSIBILITIES ON THIS PROJECT	# OR YEARS W/FIRM	EDUCATION & EXPERIENCE	COMPLETED PROJECTS (if resume lists all completed projects this section can reference resume)

**Schedule D – SIMILAR PROJECT INFORMATION**

**Firm Name:** \_\_\_\_\_

**Respondent is required to complete all three parts, Part A, B and C of Schedule D.** List below all similar projects the firm has completed during the last five (5) years. For the purpose of this CM at Risk project “similar projects” shall mean projects where the respondent was the Construction Manager (Part A) or General Contractor (Part B) and the construction cost for the project was at least the amount of or greater than the upper limit of the estimated construction cost of this Project, and those projects were completed under M.G.L. Chapter 149 and/or 149A procurement, the project was one of similar complexity, the project was of similar type or scope including phasing and adjacency to an occupied school, the project was a ZNE project, a MA-CHPS or LEED or equivalent, and the project was the approximate size, or larger, of this Project or larger. The respondent may list only projects that the respondent has completed, they may not list what an affiliate or predecessor of the respondent completed. On Part C list the Contract information for the Owner and Designer, and Owner’s Project Manager for each and every project listed on Part A or Part B. Attach additional sheets if necessary.

**Part A. CM PROJECTS – List only projects on which the firm was the Construction Manager on this section.**

PROJECT NAME & LOCATION	PROJECT OWNER	PROJECT DESCRIPTION	DESCRIPTION OF SERVICES PROVIDED BY FIRM	ORIGINAL AND FINAL CONTRACT AMOUNT WITH EXPLANATION	PROJECT START AND COMPLETION DATE	INDICATE IF PROJECT WAS PHASED (YES OR NO)	INDICATE IF PROJECT WAS 149A

**Schedule D – SIMILAR PROJECT INFORMATION (continued)**

**Firm Name:** \_\_\_\_\_

**Part B. GENERAL CONTRACTOR PROJECTS** – List only projects on which the firm was the General Contractor or Prime Contractor and was not the Construction Manager on this section. The respondent may list only projects that the respondent has completed, they may not list what an affiliate or predecessor of the respondent completed. Attach additional sheets if necessary.

PROJECT NAME & LOCATION	PROJECT OWNER	PROJECT DESCRIPTION	DESCRIPTION OF SERVICES PROVIDED BY FIRM	ORIGINAL AND FINAL CONTRACT AMOUNT WITH EXPLANATION	PROJECT START AND COMPLETION DATE	INDICATE IF PROJECT WAS PHASED (YES OR NO)	INDICATE IF PROJECT WAS 149

**Schedule D – SIMILAR PROJECT INFORMATION (continued)**

**Firm Name:** \_\_\_\_\_

**Part C, PROJECT CONTACTS** – Respondent must list below current contact information for the Owner, Designer, and Owner’s Project Manager on each of the projects listed on Schedule D Part A and Part B above. Be certain to confirm the contact information is current. Attach additional sheets if necessary.

PROJECT NAME & LOCATION	COMPANY NAME	CONTACT PERSON/ADDRESS	TELEPHONE #	FAX #
	OWNER DESIGNER OPM			

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## Schedule E - Terminations and Legal Proceedings

**INSTRUCTIONS:** Respondent **must complete Schedule E** attached to the SOQ below, which consists of **Parts A, B and C** as indicated herein. Be sure to complete all required parts of **Schedule E** as instructed below. **The respondent must disclose and list in this section, any legal proceeding described in this section, for any entity which the respondent is in any way related, and any entity which owner or principal of the respondent had any interest in. These disclosures must be listed in below.** Joint Ventures must complete all parts of Schedule E for each individual joint venture partner. Attach additional sheets of necessary.

- **PART A.** Respondent must complete the chart in Part A by listing **each and every project** on which the firm was **terminated, failed to complete the work, or paid liquidated damages** within the past five (5) years.
- **PART B.** Respondent must provide a complete the chart in Part B by listing of each and every **conviction or fine incurred by the respondent firm or any of its principals** for violations of any state or federal law within the past five (5) years.
- **PART C.** Respondent must complete **Part C, Sections 1 through 3** and provide the required information about **any and all legal proceedings** whether currently pending, or concluded within the past five (5) years, in which the respondent firm was a named party, that involved a construction project or a construction contract. Respondents are not required to include personal injury or workers' compensation matters. Part C is divided into three types of legal proceedings as follows:
  - ⇒ **Section 1.** Requires Respondent to list all **litigation** (excluding personal injury or workers' compensation) involving a construction project or contract.
  - ⇒ **Section 2.** Requires Respondent to list all **administrative proceedings** involving a construction project or contract. (**NOTE:** *Administrative Proceedings* shall include: (i) any action taken or proceeding brought by a governmental agency, department, or officer to enforce any law, regulation, code, legal, or contractual requirement, except for those brought in state or federal courts; (ii) any action taken by a governmental agency, department, or officer imposing penalties, fines, or other sanctions for failure to comply with any such legal or contractual requirement, or (iii) any other matter before an administrative body, (iv) and any injunctions imposed by the respondent against any owner for any reason for projects listed and projects not listed in this response).
  - ⇒ **Section 3.** Requires Respondent to list all **arbitrations and/or mediations** involving a construction project or contract. Include information from the resulting determination.

**Schedule E - Terminations and Legal Proceedings**

**Firm Name:** \_\_\_\_\_

**Part A. Terminations, Incomplete Projects, Liquidated Damages Paid** -List each and every project on which the firm was **terminated, failed to complete the work, or paid liquidated damages** within the past five (5) years. Failure to provide a complete and accurate list may result in a firm being deemed unqualified and further action may be taken against the firm.

Attach Additional Sheets If Necessary.

PROJECT NAME & LOCATION	PROJECT OWNER	SCOPE OF WORK PERFORMED	PROJECT START & END DATES	ESTIMATED CONTRACT AMOUNT	% COMPLETED	REASON FOR FAILURE TO COMPLETE OR TERMINATION

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**Schedule E - Terminations and Legal Proceedings (Continued)**

**Firm Name:** \_\_\_\_\_

**Part B. Convictions And Fines** -List all **convictions and fines** incurred by the respondent firm or any of its principals for **violations of any state or federal law** within the past five (5) years. Failure to provide a complete and accurate list may result in a firm being deemed unqualified and further action may be taken against the firm.

Attach Additional Sheets If Necessary.

PROJECT NAME, LOCATION & OWNER	MATTER CAPTION	LIST ENFORCEMENT AGENCY AND ALL PARTIES	LOCATION OF PROCEEDING	DESCRIPTION OF ACTION	START/END DATES	STATUS AND OUTCOME

**SCHEDULE E - TERMINATIONS and LEGAL PROCEEDINGS (Continued)**

Firm Name: \_\_\_\_\_

**Part C. Legal Proceedings (List by Type of Action Specified in Sections 1 through 3)**

⇒ **Section 1 – Litigation (excluding personal injury or workers’ compensation)** -List **ALL LITIGATION** involving a **construction project or contract** in which respondent firm was a named party, whether currently pending, or concluded within the past five (5) years. (*NOTE: You are **NOT REQUIRED** to list personal injury or workers’ compensation matters.*) Failure to provide a complete and accurate list may result in a firm being deemed unqualified and further action may be taken against the firm. Attach Additional Sheets If Necessary.

PROJECT NAME, LOCATION & OWNER	CASE CAPTION	LIST ALL PARTIES	LOCATION OF PROCEEDING	DESCRIPTION OF DISPUTE	START/END DATES	STATUS AND OUTCOME

**SCHEDULE E - TERMINATIONS and LEGAL PROCEEDINGS (Continued)**

**Firm Name:** \_\_\_\_\_

**Part C. Legal Proceedings (List by Type of Action Specified in Sections 1 through 3)**

⇒ **Section 2 – Administrative Proceedings** -List **ALL ADMINISTRATIVE PROCEEDINGS** involving a construction project or contract in which respondent firm was a named party, whether currently pending, or concluded within the past five (5) years.

**(NOTE:** *Administrative Proceedings* include: (i) any action taken or proceeding brought by a governmental agency, department, or officer to enforce any law, regulation, code, legal, or contractual requirement, except for those brought in state or federal courts; (ii) any action taken by a governmental agency, department, or officer imposing penalties, fines, or other sanctions for failure to comply with any such legal or contractual requirement, or (iii) any other matter before an administrative body. (iv) and any injunctions imposed by the respondent against any owner for any reason for projects listed and projects not listed in this response). Failure to provide a complete and accurate list may result in a firm being deemed unqualified and further action may be taken against the firm. Attach Additional Sheets If Necessary.

PROJECT NAME, LOCATION & OWNER	CASE CAPTION	LIST ALL PARTIES	LOCATION OF PROCEEDING	DESCRIPTION OF DISPUTE	START/END DATES	STATUS AND OUTCOME

**SCHEDULE E - TERMINATIONS and LEGAL PROCEEDINGS (Continued)**

**Firm Name:** \_\_\_\_\_

**Part C. Legal Proceedings (List by Type of Action Specified in Sections 1 through 3)**

⇒ **Section 3 – Arbitrations/Mediations** -List **ALL ARBRITRATIONS and or MEDIATIONS** involving a **construction project or contract** in which respondent firm was a named party, whether currently pending, or concluded within the past five (5) years. Include information from the resulting determination. Failure to provide a complete and accurate list may result in a firm being deemed unqualified and further action may be taken against the firm. Attach Additional Sheets If Necessary.

PROJECT NAME, LOCATION & OWNER	CASE CAPTION	LIST ALL PARTIES	LOCATION OF PROCEEDING	DESCRIPTION OF DISPUTE	START/END DATES	STATUS AND OUTCOME

**Schedule F – SAFETY RECORD**

**Firm Name:** \_\_\_\_\_

Respondents must list their workers compensation experience modifiers for the past three (3) years in the space provided on the Statement of Qualifications form and **must also attach here documentation from their insurance carrier** of their Worker’s Compensation Experience Modifier for the past three (3) years. Include here, information on all Workmen’s Compensation claims within the past five (5) years for all claims resolved, unresolved, negotiated, currently under negotiation, settled, and pending resolution with explanation for each claim. Include subcontractor claims where the applicant is named in the claim. Attach additional sheets if necessary.

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**Schedule G – MBE/WBE and WORKFORCE COMPLIANCE RECORD**

**Firm Name:** \_\_\_\_\_

Respondent is required to list below each and every project completed within the last five (5) years that had contractual MBE/WBE participation percentages or minority and women workforce percentages. For each project with MBE/WBE Percentages, list the contractually required MBE, WBE and workforce participation percentages and the actual MBE, WBE and workforce participation achieved on the project. **Respondents must attach documentation from the Project Owner and/or Owner’s Project Manager supporting the amount of actual MBE/WBE participation posted.** In addition, if the percentages were not met, explain why and indicate whether any sanctions or penalties were imposed. Attach additional sheets if necessary.

PROJECT NAME, LOCATION & AWARDED AUTHORITY	CONTRACT VALUE	MBE PERCENTAGES	ACTUAL MBE PARTICIPATION	WBE PERCENTAGES	ACTUAL WBE PARTICIPATION	WORK FORCE PERCENTAGES	ACTUAL WORK FORCE PARTICIPATION	IF PERCENTAGES NOT MET EXPLAIN WHY	SANCTION OR PENALTY AND AMOUNT

**SCHEDULE H**

**Schedule H – AUDITED FINANCIAL STATEMENT**

**Firm Name:** \_\_\_\_\_

**Respondent must attach its most recent audited financial statement here.**

**Respondent MUST provide a list of at least five (5) credit references.** If Credit Reference information is listed in respondent's Schedule A, the information should not be repeated at Schedule H, but can be referenced.

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**Schedule I – LETTER EVIDENCING BONDING CAPACITY**

**Firm Name:** \_\_\_\_\_

**Respondent must attach here a letter from a surety company** (or from an agent meeting the criteria set forth above) evidencing that the surety company will provide respondent with payment and performance bonds for the Project in an amount equal to or greater than 110% of the estimated upper limit of the construction cost of the Project. The surety company must meet the requirements set forth above.

DRAFT

**Schedule J – CERTIFICATE OF ELIGIBILITY AND UPDATE STATEMENT**

**Firm Name:** \_\_\_\_\_

**Respondent must attach here two (2) documents:**

- 1) a copy of its current **DCAM Certificate of Eligibility** (Form CQ7) meeting the requirements set forth above in this RFQ; **and**
- 2) a completed and signed **DCAM Update Statement** using the current form of Update Statement available on DCAM’s website. ([www.Mass.Gov/dcam](http://www.Mass.Gov/dcam))

DRAFT

**SCHEDULE K**

**Schedule K – EXAMPLES OF PROJECT MANAGEMENT REPORTS  
and BRIEF STATEMENT OF OPERATING PHILOSOPHY**

**Firm Name:** \_\_\_\_\_

Respondent must attach here specific examples (no more than 3) of **Project Management Reports** that were prepared by respondent on one or more of the Construction Manager projects listed on Schedule D, Part A above. In addition, respondent **may**, at their option, include a brief statement of its operating philosophy. If information on respondent's operating philosophy is contained in its Executive Summary attached at Schedule B the information should not be repeated here, but can be referenced.

DRAFT

**SCHEDULE L**

**Schedule L – PROJECTS WITH ZERO NET ENERGY BUILDINGS AND SUSTAINABLE CONSTRUCTION and/or LEED CERTIFIED BUILDINGS**

**Firm Name:** \_\_\_\_\_

**Respondent is required to complete both parts A and B of Schedule L.** List below all prior similar projects the firm has completed which involved Zero Net Energy Buildings and sustainable construction using Massachusetts Certified High Performance Schools and/or LEED certified buildings. On Part B list the current Contact information for the Owner, Designer, and Owner’s Project Manager for each and every project list on Part A. Attach additional sheets if necessary.

**Part A. List Projects Involving Sustainable Design and/or LEED Certified Buildings.**

PROJECT NAME & LCOATION	PROJECT OWNER	PROJECT DESCRIPTION INCLUDING DESCRIPTION OF SUSTAINABLE DESIGN OR LEED CERTIFICATION	DESCRIPTION OF SERVICES PROVIDED BY FIRM	ORIGINAL AND FINAL CONTRACT AMOUNT WITH EXPLANATION	PROJECT START AND COMPLETION DATE

**SCHEDULE L**

**Schedule L – PROJECTS WITH ZERO NET ENERGY BUILDINGS AND SUSTAINABLE CONSTRUCTION and/or LEED CERTIFIED BUILDINGS (continued)**

**Firm Name:** \_\_\_\_\_

**Part B. PROJECT CONTACTS** – Respondent must list below current contact information for the Owner, Designer, and Owner’s Project Manager on each of the projects listed on Schedule L Part A above. Be certain to confirm the contact information is current.

PROJECT NAME & LOCATION	COMPANY NAME	CONTACT PERSON/ADDRESS	TELEPHONE #	FAX #
	OWNER DESIGNER OPM			

**SCHEDULE M**

**Schedule M – LIST EXAMPLES, IF ANY, OF BUILDING INFORMATION MODELING DOCUMENTS AND EXPERIENCE:**

**Experience with (BIM) is desirable but not required.**

**Firm Name:** \_\_\_\_\_

**Respondent Must attached here examples, if any, of BIM coordination, logistic, and planning documents used by the respondent on previous projects. List those projects and the depth of usage of BIM software. Include information on whether the process was performed internally or outsourced. If Respondent has no experience with BIM, indicate by inserting “NONE” on first line.**

PROJECT NAME & LCOATION	PROJECT OWNER	PROJECT DESCRIPTION	DESCRIPTION OF BIM COORDINATION, LOGISTIC, AND PLANNING DOCUMENTS.	DEPTH OF USAGE/ INTERNALLY OR OUTSOURCED?	PROJECT START AND COMPLETION DATE

**Schedule N – LIST OF PROJECTS CURRENTLY IN PROCESS; ATTACH COPIES OF THREE SECTIONS FROM THE MOST RECENT APPLICATION FOR CERTIFICATION SUBMITTED TO DCAM**

**Firm Name:** \_\_\_\_\_

**Respondent MUST attach here three documents:** a copy of those portions of the Respondent's most recent application for DCAM certification that contain the listings of the Respondent's Projects currently in Process and its Completed Projects. Include the estimated completion dates identifying any management (field or project management) personnel on current projects which may be proposed for the Stoneham High School project, specifically, respondent must submit copies of their most recent Application for Prime/General Contractor Certificate of Eligibility submitted to DCAM's Certification Office.

- 1) **DCAM Certificate of Eligibility** Section F. Projects in Process (including estimated construction volume for the next two years); **and**
- 2) **DCAM Certificate of Eligibility** Section G. Completed Projects for the last three years; **and**
- 3) a copy of the signed and dated final page from **DCAM Certificate of Eligibility** Section J. Certification, showing the date the application for certification was submitted to DCAM.

DRAFT

October 19, 2020

Mr. Glenn A. Cunha  
Inspector General  
Massachusetts Office of the Inspector General  
One Ashburton Place, Room 1311  
Boston, Massachusetts 02108

**Re: Stoneham High School**

**Stoneham, Massachusetts**

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*Application to Obtain a Notice to Proceed for the CM at Risk Method of Delivery* SMMA No. 20033

Dear Mr. Cunha:

In March of 2018, the Town of Stoneham submitted a Statement of Interest for the Stoneham High School to the Massachusetts School Building Authority (MSBA). In December 2018, the MSBA Board of Directors invited the Town of Stoneham to undertake a Feasibility Study for the project.

On behalf of the Town of Stoneham, we respectfully submit this application to obtain a Notice to Proceed with the CM at Risk method of delivery for the Stoneham High School. The Stoneham High School project will be a renovation and addition or a new school, either being constructed adjacent to the existing Stoneham High School, followed by the latter's demolition and the construction of the playfields. The CM at Risk method of delivery will allow greater control over access and egress for construction related operations, manpower requirements, hours of operation, and sequencing of disruptive tasks. Greater control will equate to greater levels of safety for the students, teachers, and staff, and allow a less disruptive environment for the neighborhood and the educational learning process.

If the Town is awarded this request, construction would begin during summer of 2022 with the release of early bid packages for construction of temporary access drives, site preparation and foundations. This would allow the project to have the temporary roadways constructed and in place during the summer months. The ability to begin the project early, along with the need for a high level of oversight due to the project size, scope, the adjacent operating school and residential neighborhood traffic, makes this project ideal for the CM at Risk method of delivery.

Town Meeting authorization will take place in late fall 2021. Once authorized, Town Counsel will sign the Certification of Authority to use the Construction Management at Risk Method of Delivery, Attachment B, and submit same along with a record of the Town Meeting Vote.

If you would like to set up a meeting at your convenience to review this application, please let me know. We would like to have the CM in place in February 2021 to be a part of the Schematic Design process.

**Mr. Glenn A. Cunha**

October 19, 2020

Please call 617-520-9403 or email [jseeley@smma.com](mailto:jseeley@smma.com) if you have any questions or need any additional information.

Very truly yours,

**SMMA**



Joel G. Seeley, AIA, LEED AP, MCPPO  
Owner's Project Manager

Cc: Dennis Sheehan, Town Administrator

enclosures: Request to Receive a Notice to Proceed to Use Construction Management at Risk Services for the Stoneham High School

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1000 Massachusetts Avenue  
Cambridge, MA 02138  
617.547.5400

[www.smma.com](http://www.smma.com)

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# ***Office of the Inspector General***

Commonwealth of Massachusetts

**Glenn A. Cunha**  
Inspector General

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## Request to Receive a Notice to Proceed to Use Construction Management at Risk Services

For the

**Stoneham High School**  
In  
**Stoneham, MA**

Submitted to:  
Glenn A. Cunha, Inspector General  
Room 1311  
John McCormack State Office Building  
One Ashburton Place  
Boston, MA 02108

Submitted by:  
Town of Stoneham  
Dennis Sheehan  
Stoneham Town Administrator

**October 19, 2020**

# Application

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## Part A: General Information

1. Awarding Authority **Town of Stoneham**
  - a. Awarding Authority Person in Charge of Project **Dennis Sheehan, Stoneham Town Administrator**
  - b. Awarding Authority Address **Stoneham Town Hall, 35 Central Street, Stoneham, MA 02180**
  - c. Phone number of Awarding Authority Person in Charge of Project **(781) 279-2600**
  - d. Fax number of Awarding Authority Person in Charge of Project **(781) 279-2602**
  - e. E-mail address of Awarding Authority Person in Charge of Project **dsheehan@stoneham-ma.gov**
2. OPM name **Joel G. Seeley, Symmes Maini & McKee Associates, Inc.**
3. Designer name **Brooke Trivas. AIA, Perkins & Will Architects, Inc.**
4. Narrative description and brief history of the project:

**The project consists of the construction or renovation and addition of a 695 student high school on the site of the existing Stoneham High School.**

**The existing Stoneham High School was constructed in 1968 as a Junior High School with an addition added in 1981 and re-opened as a high school. This 211,000 square foot school is aged and has code, traffic and accessibility issues. The roof and windows are in poor condition and the HVAC, electrical, and plumbing systems are antiquated, inefficient and do not meet code.**

**On or about March 2018, the Town submitted a Statement of Interest to MSBA to address the aged facilities and the Board of Directors of the MSBA voted to issue an invitation to the Town to conduct a feasibility study.**

**The School Building Committee (SBC) retained the OPM firm Symmes Maini & McKee Associates, Inc. (SMMA) in March 2020 and then retained the Architectural firm Perkins & Will Architects, Inc. (P&W) in July 2020 to conduct a feasibility study to review potential options for addressing the needs of the existing Stoneham High School.**

**The SBC evaluated many alternatives, ranging from repairs-only to new construction. After an in-depth analysis, the SBC is considering renovations and additions or new construction for the High School. The decision on renovation and addition or new construction will be made by the SBC prior to retaining the Construction Manager.**

**The project will be 204,107 GSF on the site of the existing Stoneham High School. This design strives for a compact building footprint while still providing small learning communities as envisioned during the planning stages. The design provides flexibility for multiple organizational concepts. The building is clearly and intentionally zoned with public and private areas for safety and**

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**Stoneham High School,  
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**security reasons. The site provides adequate parking, fields, separation of cars and buses, and an access road around the building.**

**Once the project is complete, the remaining portion of the existing Stoneham High School will be demolished to make way for the playing fields. Other site improvements will include new roadways, parking, walkways, landscaping, and site utilities.**

- a. estimated square feet      **204,107**
  - b. program type                **School**
  - c. building type                **Renovations and Additions or New Construction**
5. Project schedule elements, including, but not limited to:
- a. Feasibility study completion date    **July 7, 2021**
  - b. Owner's Project Manager contract execution date    **March 9, 2020**
  - c. Designer contract execution date    **July 10, 2020**
  - d. Projected procurement milestone dates, including but not limited to the following items: Request for prequalification issuance, request for proposals issuance, CM at risk firm contract execution date, other . . .
    - Request for Prequalification Issuance:    **November 23, 2020**
    - Request for Proposals Issuance:    **January 11, 2021**
    - CM at Risk Firm Contract Execution dates:
      - Preconstruction Services:    **February 22, 2021**
      - GMP:    **December 16, 2022**
  - e. Projected completion date (use and/or occupancy)
    - School Building Occupancy:    **August 2024**
    - Project Completion:                **December 2024**
6. Submit an estimated total project budget, including but not limited to line items for the following items: **See Attachment A**
- a. Owner's Project Manager contract amount:    **\$4,800,000**
  - b. Designer contract amount:    **\$13,600,000**
  - c. Estimated construction cost:    **\$138,000,000**
  - d. Other costs    **\$35,000,000**
  - e. Identify the source of the estimated project budget and estimated construction costs.

**The estimated construction cost is based on the Preliminary Design Program plans and specifications, as estimated by a professional estimator.**

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**Furnishings and Technology costs were based on the educational program and student enrollments. Other soft costs were based on project conditions and MSBA project criteria.**

7. Submit the attached certification form regarding the authorization from the awarding authority's governing body that the awarding authority may enter into a contract with a construction management at risk firm, including the date of authorization. Submit copies of any public vote if applicable. **See Attachment B.**
8. Submit the name(s) and title(s) of the individuals authorized to sign the CM at risk contract on behalf of the awarding authority.

**Dennis Sheehan, Town Administrator**

9. Submit written evidence of the approval of the governing body of the project plan and procedures, if applicable. **See Attachment C.**

**The SBC evaluated many alternatives, ranging from repairs-only to new construction. The SBC reviewed and discussed the CM@Risk delivery method during several SBC meetings and voted to approve the CM@Risk plan and procedure for the project at their October 13, 2020 meeting.**

10. Submit the written determination by the awarding authority that the use of CM at risk services is appropriate for the building project and the reasons for the determination.

**The SBC reviewed and discussed the CM@Risk procedure during several SBC meetings and voted to approve the CM@Risk procedure for the project at their October 13, 2020 meeting.**

**The project is the construction or renovation and additions of a 695 student high school that is 204,107 square feet located on the site of the existing Stoneham High School. The existing Stoneham High School will remain in operation for the duration of construction. Maintaining the operation of the existing school and not impacting the neighborhood vehicular traffic are several of the key reasons the SBC has chosen the CM@Risk delivery method.**

**Other key reasons that influenced the decision to utilize CM@Risk are:**

- **Coordination and supervision of major construction activities with the ongoing school activities of the existing school for the duration of construction.**
- **CM@Risk pre-construction services such as constructability reviews, scheduling and site logistics reviews to minimize construction changes, impacts to schedule and scope.**
- **CM@Risk pre-construction services for construction estimating to maximize project scope while reducing uncertainty in meeting the budget.**
- **CM@Risk enables the team to have the option to issue an "early" site package, which may allow the team to reduce the overall schedule of the project and accelerate completion.**

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- **Ability to review, pre-qualify and select a qualified, competent Construction Manager to deliver the project on schedule and on budget and to have input on the selection of non-trade contractors which is not an option under D-B-B method.**
- **Ability to utilize the CM@Risk team in Trade-subcontractor process, including definition of scope, pre-qualification and selection.**
- **Ability to define and commence with specific scopes of work in early packages before final GMP.**
- **Ability to negotiate GMP to maximize scope and reduce bid day uncertainty, and cost monitoring in a transparent, open book format.**
- **Ability to create and foster team approach between the SBC, OPM, Architect and CM@Risk firm.**

**Part B. Awarding Authority Capacity Information**

11. Provide an organizational chart of the project organization showing the roles and responsibilities of each individual or entity participating on the project, including contractors.

**See Attachment D.**

**The organization chart shows the relationship between key members of the Team, including major sub-consultants to the architectural team.**

**The SBC will oversee the design and construction of the project on behalf of the Town. They will be responsible to ensure that all parties are fulfilling their obligations in designing a school that meets the educational and community goals, is constructed on time and under budget and with the quality that the citizens of Stoneham expect.**

**The OPM will be the liaison and day to day contact between the Town, MSBA, Designer and CM and will maintain the master project files including all project documents and correspondence from planning through commissioning and closeout. They will develop and maintain the overall project budget, including detailed construction estimates during the design phases and make recommendations as needed to recover any perceived overruns. They will develop and maintain the overall project schedule and make recommendations as needed to recover any perceived delays. They will review and process Designer invoices, FF&E and Town and consultant expenses and review CM payment applications, including review of general conditions expenditures. They will provide full time on site construction monitoring and reporting, including daily log of weather, workers, safety, work accomplished, materials used and stored, problems encountered, verbal and written instructions, verification of claims of extra work, CM contingency usage, change orders and scheduling and coordinating of testing and inspections. Review and comment on CM's baseline construction schedule. Attend design and construction progress meetings. Review weekly-certified payroll and quarterly MBE/WBE reports. Prepare and maintain a master change order log to include request for proposal, proposed change order values, change directives and change orders.**

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Stoneham, Massachusetts**

**The Designer will be responsible for ensuring the building layout, construction, materials and systems meets the SBC requirements. The Designer will solicit input on the design pertaining to education from the School Superintendent and Administration team and input on systems from the School Facilities Director. The Designer will provide construction phase services in accordance with their agreement.**

**Once on board, the CM will be tasked with reviewing all programming and design information, and Design Documents for constructability and estimate confirmation. They will also offer “Lessons Learned” from previous projects of similar nature and size in helping shape the final design. All CM information and review sessions will be coordinated with the OPM.**

**The OPM staff at SMMA have been involved in multiple CM@Risk projects in both the public and private sector. The SMMA staff have recently completed Wellesley High School, Quincy High School, Grafton High School, Andover Bancroft School, Winchester High School, Ayer-Shirley Regional High School, and Holbrook PreK-12 School, and are currently working on the Framingham Fuller Middle School and the Northbridge Elementary School, all of which are CM@Risk projects. They are very familiar with how CM@Risk projects are managed.**

**Perkins&Will has experience with CM at Risk projects and is familiar with the project delivery method having recently and very successfully completed under this model, the Billerica Memorial High School at 324,000 square feet and the Belmont High School at 424,000 square feet. Both projects were with the Massachusetts School Building Authority.**

12. Provide the name, affiliation, and contact information for all key members of the project team. List all relevant qualifications and experience, including any public project experience and any CM at risk experience (public or private) on project(s) of similar size and complexity or on any other projects, for:
  - a. the individual/s within the awarding authority that will make project decisions for the awarding authority and that will supervise the Owner’s Project Manager,

**School Building Committee members:**

**Marie Christie, School Building Committee Co-Chair and has extensive experience with the CM@Risk process having completed the Stoneham Middle School project**

**David Bois, School Building Committee Co-Chair, is an Architect and has extensive experience with the CM@Risk process**

**Nicole Nial, School Committee Member**

**Raymie Parker, Select Board Member**

**Albert Talarico, Community Member with Building Commissioner Experience and has extensive experience with the CM@Risk process**

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**Douglas Gove, Community Member with Engineering Experience**

**Stephen O'Neill, Community Member with Engineering Experience and has extensive experience have completed the CM@Risk process**

**Josephine Thomson, Community Member**

**Jeanne Craigie, Town Moderator and has extensive experience with the CM@Risk process with the Stoneham Middle School project**

**Lisa Gallagher, Community Member, School Secretary, and has extensive experience having completed the Stoneham Middle School project**

**Sharon Iovanni, Community Member**

**Cory Mashburn, Finance and Advisory Board**

**Paul Ryder, Community Member with Construction Experience and has extensive experience with the CM@Risk process**

**David Pignone, Athletic Director, Member knowledgeable in educational mission and function of facility**

**Kevin Yianacopolus, Local Official responsible for Building Maintenance**

**Dennis Sheehan, Town Administrator / MCPPO Certified**

**John Macero, Superintendent of Schools**

**Bryan Lombardi, Stoneham High School Principal**

**Brian McNeil, Facilities Director**

b. the Owner's Project Manager (OPM),<sup>1</sup>

**Joel Seeley is the project director and is the day to day contact between the SBC, MSBA, Designer, and CM. He is MCPPO certified and has 35 years of experience. He has significant private and public CM@Risk experience. Mr. Seeley will oversee all aspects of the project budget and schedule, including all contract oversight. Mr. Seeley will oversee the design phase, ensuring that the Designer has developed the design in accordance with SBC requirements, has engaged with local and state permitting authorities and has successfully completed each submission to MSBA. Mr. Seeley has successfully managed the Wellesley High School, Ayer-Shirley Regional High School and Holbrook PreK-12 School using the CM@Risk project delivery method which were completed ahead of schedule and under budget.**

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<sup>1</sup> M.G.L. c. 149A, § 3(a) states that "Before procuring the services of a designer ... and prior to submitting an application to use the construction management at risk delivery method ... the awarding authority shall procure or otherwise employ the services of an owner's project manager pursuant to section 44A 1/2 of chapter 149. The owner's project manager may assist the awarding authority in the procurement of the designer."

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**Robert Smith has over 30 years of experience, is the onsite project manager during construction and will provide construction monitoring and reporting, including daily logs, resolution of problems encountered, monitoring of claims of extra work, CM contingency usage, change orders and coordination of testing and inspections. Mr. Smith has significant CM@Risk experience, and is currently constructing the Framingham Fuller Middle School, a CM@Risk project.**

**Antone Dias is the assistant onsite manager during construction with over 20 years of experience and will be responsible for schedule review, certified payroll and MBE/WBE monitoring, report development and monitoring of the construction. Mr. Dias has extensive experience with CM@Risk, recently on the Holbrook PreK-12 School and Northbridge Elementary School.**

- c. the Designer,<sup>2</sup> and

**Brooke Trivas is a Principal at Perkins & Will and has over 30 years of experience in the design and construction of large school projects. Ms. Trivas will lead the Stoneham Design Team and will assist them as they seek to pursue the Ch. 149A CM at-risk construction delivery method. She has led both Ch. 149 and 149A projects since the inception of the 2004 Construction Reform Act and under her leadership Perkins & Will has participated in successful CM at-risk projects, namely, the Billerica Memorial High School and the Belmont Middle School and High School, currently underway. She is MCPPO certified, has participated in the pre-qualification of CM firms, and has been on the CM selection committees for many of these projects.**

- d. any other members of the project team or special consultants to be used to support the project (e.g., counsel, accountant, financial advisor), if any. **The Town's legal counsel will assist in the RFP/RFQ and contract negotiation process.**

13. Submit a copy of the scope of services portion of the a) OPM contract and b) designer's contract. If the OPM is an employee, submit the individual's title, job description, and scope of work related to the CM at risk project.

**See Attachment E.**

[Note: You do not need to send in copies of the scopes of services if the project is a school building project receiving assistance from the

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<sup>2</sup> M.G.L. c. 149A, § 3(b) states that "Before submitting an application to use the construction management at risk delivery method ... the awarding authority shall procure the services of a designer for the building project. In procuring the services of a designer, the awarding authority shall do so in a manner consistent with sections 38A ½ to 39O, inclusive, of chapter 7. The designer procured by the awarding authority shall be independent of the owner's project manager and the construction management at risk firm. "

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**Stoneham High School,  
Stoneham, Massachusetts**

Massachusetts School Building Authority (MSBA) and the OPM and Designer will be signing the MSBA contracts for CM at risk services in their entirety with no changes. However, submit a copy of the signed signatory pages.]

The OIG reviews the awarding authority's plan and procedures<sup>3</sup> for procuring and managing the CM at risk services to ascertain whether the awarding authority has in place procedures, in accordance with M.G.L. c. 149A, to ensure fairness in competition, evaluation and reporting of results at every stage in the procurement process. Therefore, provide information regarding each of the following components of a CM at risk project:

14a. The awarding authority's plan and procedures for acquiring appropriate expertise to assist where the team may not have the necessary experience to meet anticipated challenges. **The Town included in the RFS for OPM Services that the OPM have CM@Risk experience and SMMA was selected partially because they are very experienced with the CM@Risk project delivery method. The Town included in the RFS for Architectural Services that the design team have CM@Risk experience and P&W was selected partially because they are very experienced with the CM@Risk project delivery method. Members of the SBC also have experience with the CM@Risk process. This team has extensive experience with both public and private construction projects including CM@Risk. Description of the project team, relevant experience and their roles and responsibilities has been summarized in the prior sections. This team has the experience and depth to manage the new school project effectively.**

14b. The awarding authority's plan and procedures for conducting the two-phase selection process for hiring a construction manager at risk firm and the methods that will be used to ensure fairness in competition, evaluation, and reporting of results at every stage in the procurement.

**Selecting a qualified construction management firm will be completed in accordance with M.G.L. Chapter 149a. The Town will seek Construction Management Services as outlined below:**

**Establishment of a prequalification committee comprised of the project designer, the OPM, and two members of the School Building Committee. The prequalification committee will continue as the selection committee through the request for proposal process.**

**Prepare and Issue a Request for Qualifications (RFQ) for CM@Risk and create a short list of pre-qualified firms as determined by responses to the RFQ. The RFQ will require CM@Risk firms to submit information outlining their qualifications including but not**

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<sup>3</sup> The plan and procedures must be approved by the governing body, where appropriate. [M.G.L. c. 149A, § 4(a)(2)]

Office of the Inspector General  
Construction Management at Risk Application to Proceed

**Stoneham High School,  
Stoneham, Massachusetts**

**necessarily limited to:**

1. **General business information**
2. **Financial Capacity with audited financial statements**
3. **Lawsuits and arbitrations**
4. **Organization, key personnel and consultants**
5. **Ability to provide performance and payment bonds**
6. **Safety record and workers compensation experience modifier**
7. **MBE / WBE compliance record**
8. **Similar building project experience and references**
9. **CM@Risk experience and references**
10. **Projects that the firm failed to complete, was assessed liquidated damages or was terminated.**
11. **DCAM certificate of eligibility showing capacity rating and including update statement.**

**The selection committee will prepare and issue a Request for Proposal (RFP) to be forwarded to those on the short list of firms deemed qualified from the evaluation of the submitted qualification packages. The RFP will require the submission of separate price and technical proposals from each firm.**

**The price submission will be supported by sufficient detail and explanations supporting the basis of all the following:**

1. **Proposed fee for pre-construction services**
2. **Proposed fee for construction services**
3. **Estimated costs of general conditions**

**The technical component will include:**

1. **Detailed project approach including**
  - a **Pre-construction phase services**
  - b **Bidding phase services**
  - c **Construction phase services**
2. **References**
3. **Staffing plan**
4. **Construction management plan**
5. **Prevailing wage compliance affidavit**
6. **Bonding commitment**
7. **Project challenges and solutions plan**
8. **Bid bond for 5% of estimated construction costs**
9. **List of qualifications and/or exception to the proposed form of contract, general or supplemental conditions (included in the RFP)**
10. **Anticipated project schedule**

**Having previously established grading guidelines, the selection committee will evaluate all proposals received and develop a ranking of the CM firms. The selection committee will then interview the three highest ranked CM firms. Based on the proposal evaluations and**

**Stoneham High School,  
Stoneham, Massachusetts**

**interviews, the selection committee will enter into negotiations with the highest rank firm. If the selection committee determines negotiations with the highest rank firm will not result in an acceptable contract, they will terminate those negotiations and will begin negotiations with the next highest ranked CM firm. This process will continue until an acceptable contract is agreed upon with one of the pre-qualified CM firms.**

- 14c. The awarding authority's plan and procedures for developing the cost-plus not to exceed guaranteed maximum price form of contract. Include information on negotiating the contract, including establishing the general condition items, CM at risk fee, cost of the work, and other contract components. Include information on what level of design development the awarding authority plans on establishing the GMP, contingency, and other components of the final contract amendment.

**The Town will execute a contract with a CM firm after negotiations of the selected firm's fee and general conditions costs and terms of contract are completed. This will include submission of acceptable payment and performance bonds, certificates of insurance and other documents required for the execution of the contract. The cost of work portion of the GMP contract will be established through:**

1. **Procurement of Filed sub-Trade contractors**
2. **Procurement of Sub-contractors**
3. **Estimates of sub-contract and supplier costs not bid at the time the GMP is established**
4. **CM firm's contingency based on a percentage of cost of work and the level of completion of the construction documents at the time the GMP is established.**

**The contract between the CM firm and the Town will outline the process for determining a guaranteed maximum price (GMP) and will include, at a minimum the following:**

1. **GMP will be based on design drawings and project specifications of at least 60% completion. It is very likely that the Town will want to negotiate the GMP with documents that are at least 90% complete.**
2. **The work for site preparation, construction of a temporary construction access road, fencing to isolate the existing School from the construction area, construction of building foundations and steel may start in advance of the construction of the full building and prior to the execution of a full GMP. The selected CM and the Town will agree upon any early packages. The Town and CM will execute contract amendments for this work. A detailed scope of work will be developed as the basis for each contract amendment.**
3. **The GMP for the full scope of the project work will be agreed to as an amendment to the contract between the Town and the CM**

**Stoneham High School,  
Stoneham, Massachusetts**

**firm.**

4. **The GMP amendment will state the total project scope and sum for performing/providing that scope. The GMP will cover the costs of direct work, general conditions, fees and if any a contingencies for the CM firm. All classes of work as required will be procured in accordance with the trade contractor selection procedures.**
5. **If the Town and the CM firm cannot negotiate an acceptable GMP, all agreements for work between the CM firm and trade contractors or trade contractor work for work selected to start under prior amendments will be assigned to the Town or to another CM@Risk firm selected by the Town.**
6. **The GMP amendment will include:**
  - a. **Detailed breakdowns of all costs of work for each trade.**
  - b. **Amount for the CM's contingency.**
  - c. **Amount for the CM's general conditions and fees, including amount of any work selected to start prior to execution of the amendment for the GMP.**
  - d. **A list of all information on which the GMP is based on (drawings, specifications, etc.).**
  - e. **A detailed list of the scope and amounts of any allowances being carried.**
  - f. **The list of assumptions and/or clarifications, which the GMP is based.**
  - g. **A list of project milestone, substantial and final completion dates for each phase and the total project, that the GMP is based.**
  - h. **Detailed scope, costs and unit prices of any alternates that may be included in the project.**
7. **The CM@Risk firm will provide required performance and payment bonds in the full amount of the GMP.**

**If the Town and the CM cannot agree to a GMP, the Town will begin negotiations with the next highest ranked CM firm. If an agreement cannot be reached with the next highest ranked CM firm, the procurement process will be terminated and the Town will procure the project in accordance with MGL, Chapter 149.**

- 14d. The awarding authority's plan and procedures for conducting the two-phase selection process for obtaining trade contractors and the methods that will be used to ensure fairness in competition, evaluation, and reporting of results at every stage in the procurement.

**Procedures for the selection of trade contractors and subcontractors will be in accordance with MGL, Chapter 149a and will be divided into two parts.**

1. **The Town will establish a prequalification committee to administer the selection of trade contractors. The Town will**

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**issue a RFQ for each trade contractor category required for the project. The RFQ will require submission of information necessary for the selection committee to evaluate the qualification package submissions and determine if the trade contractor is qualified to perform the work of trade category the contractor is seeking prequalification for on this project. The prequalification committee may include the same members used during the CM selection process.**

**The prequalification Committee will establish grading guidelines to be used in evaluating packages received from all trade contractors. Trade contractors submitting qualification packages will be notified of those firms eligible to submit bids for this project. This notification will also include anticipated schedule and timing for the submission for the Request for Bid.**

2. **Prequalified trade contractors will be invited to submit a bid. The CM firm will prepare the Request for Bids (RFB). Bids will be submitted in accordance to the requirements outlined in the RFB and will include without limitation all information required by the RFB. Any bids received which are incomplete, conditional, contain modifications or information not required or do not include the bid bond or affidavits required in the RFB will be rejected.**

**Bids will be opened publicly by the Town and will be awarded to the lowest prequalified bidder. If fewer than three responsive bidders on any trade are received and the lowest bid exceeds the estimated costs of work for the bid requested, the CM firm will attempt to negotiate an acceptable price with the lowest price bidder. If the CM firm and trade contractor cannot be agree to a price, the CM firm can begin negotiations with the next highest priced bidder. If an agreement cannot be reached with the next highest priced bidder, the CM firm with approval of the Town will solicit additional bids following the procedures for selecting non-trade subcontractors.**

- 14e. The awarding authority's plan and procedures for obtaining subcontractors [M.G.L. c. 149A, § 8(j)] and the methods that will be used to ensure fairness in competition, evaluation, and reporting of results at every stage in the procurement.

**The CM firm will solicit bids for work of non-trade subcontractors whose work is estimated to exceed the thresholds established in MGL, Chapter 149, Section 44F. The CM firm will submit to the Town for approval the qualifications a subcontractor must have to perform work. The CM firm will provide to the Town for approval a list of at least three subcontracting firms which the CM firm believes meets the qualifications. The CM firm will include information outlining how the selection of these firms may enhance the CM firm's ability to comply with MBE/WBE participation goals. In reviewing the list of subcontractors the Town may eliminate**

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**firms from the list or in review with the CM firm add firms to the list.**

**The CM firm will invite each approved subcontractor to submit a bid for the work. Bids will be based on detailed bidding information developed by the CM firm. The CM firm will provide to the Town a list of bids submitted. The CM firm will indicate the subcontracts selected to perform the work including a written explanation as to the reason(s) for award of a subcontract. Award of subcontractors will have no effect on any established GMP.**

- 14f. The awarding authority's plan and procedures relative to administering and coordinating the project and maintaining project communications.

**As outlined above the Town has developed a project team made up of administration, design, project management, legal and construction professionals with the resource, depth of knowledge and experience to properly monitor, manage and administer the project.**

**The OPM team will provide the day-to-day coordination of all program support activities during the design, bidding, construction and move-in and start up phases of the project. The OPM shall be responsible for management, on the behalf of the MSBA, of the project and will work at the direction of and report to the School Building Committee and will:**

1. **Maintain the master project files including all project documents from planning through commissioning and closeout.**
2. **Develop and maintain an overall project schedule and will advise on the adherence to the project schedule and recommend actions to recover any delay in the project schedule.**
3. **Develop, update and report on project budget. This is to include all construction and soft cost items and recommendations as need to recover any perceived overruns.**
4. **Develop, update and report on project cash flow and forecasts of expenditures including requests for payments, invoices, FF&E and Town and consultant expenses.**
5. **Provide detailed construction cost estimates at stages of design required by the OPM Agreement. These estimates will be used to compare and reconcile with the Designer and selected CM firm to track project costs, budgets and negotiated GMP.**
6. **Manage all project documentation and correspondence, seek input from appropriate parties, monitor schedules, ensure information is flowing to and through all parties.**
7. **Develop and maintain a bonding and insurance log.**
8. **Develop and implement a public communication program including a program to monitor and mitigate the impacts of construction on the students and staff.**
9. **Provide full time daily construction monitoring and reporting. This is to include daily log of weather, workers, safety, work accomplished, materials used and stored, problems**

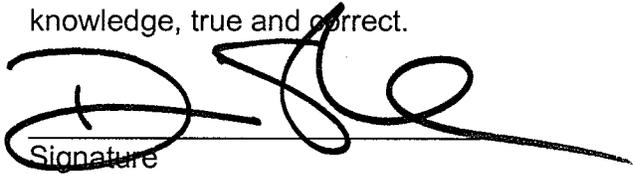
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- encountered, verbal and written instructions, verification of claims of extra work, change orders and scheduling and coordinating of testing and inspections.**
10. **Monitor and observe contractor performance of work, recommend rejection of non-conforming work, verify unit priced and time & material change order work is documented and accurate.**
  11. **Review and comment on CM's baseline construction schedule, including sequence and relationships of construction duration of activities and adherence to established milestone and completion dates.**
  12. **Attend design and construction progress meetings, ensure CM is preparing and distributing meeting minutes identifying significant issues of work, schedule, quality, performance and progress.**
  13. **Review weekly-certified payroll reports received for the CM firm, trade contractors and other subcontractors.**
  14. **Review CM firm's draft application for payment. Provide comments on validity of pay requests for completion of requested pay items, storage of materials offsite, vendor requisitions, and invoices for testing services, utility companies, equipment and furniture expenditures.**
  15. **Prepare and maintain a master change order log to include request for proposal, proposed change order values, change directives and change orders.**
  16. **Review and evaluate with the Designer and Town documentation for claims for additional time, costs, concealed conditions and errors and omissions in the contract plans and specifications.**
- 14g. The awarding authority's plan and procedures relative to monitoring and auditing all project costs.
- Plans and procedures for monitoring and auditing all project costs include providing daily, weekly and monthly reports of project activities to the School Building Committee and MSBA outlining all activities, documenting progress, presenting expenditures and project budget and recommendations, highlighting potential problems and recommendations of actions for maintaining control of the project schedule and budget as enumerated in item 14f above.**

Do not submit requests for qualifications (RFQs), requests for proposals (RFPs), draft contracts, or other such documents related to the CM at risk delivery method procurement.

**Certification**

The undersigned hereby certifies under the pains and penalties of perjury that all answers and all information contained in this application is, to the best of my knowledge, true and correct.

  
Signature

October 19, 2020  
Date

Dennis Sheehan  
Name

Stoneham Town Administrator  
Title

Town of Stoneham  
Awarding Authority

Office of the Inspector General  
Construction Management at Risk Application to Proceed

**Stoneham High School,**  
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**Attachment A: Project Budget**

**The Total Project Budget, dated September 25, 2020, is attached.**

ATTACHMENT A

Total Project Budget: All costs associated with the project are subject to 963 CMR 2.16(5)	Estimated Budget	Scope Items Excluded from the Estimated Basis of Maximum Facilities Grant or Otherwise Ineligible	Estimated Basis of Maximum Total Facilities Grant <sup>1</sup>	Estimated Maximum Total Facilities Grant <sup>1</sup>
<b>Feasibility Study Agreement</b>				
OPM Feasibility Study	\$130,000	\$0	\$130,000	
A&E Feasibility Study	\$420,000	\$0	\$420,000	
Environmental & Site	\$160,000	\$0	\$160,000	
Other	\$40,000	\$0	\$40,000	
<b>Feasibility Study Agreement Subtotal</b>	<b>\$750,000</b>	<b>\$0</b>	<b>\$750,000</b>	<b>\$412,950</b>
<b>Administration</b>				
Legal Fees	\$120,000	\$120,000	\$0	\$0
<b>Owner's Project Manager</b>				
Design Development	\$4,630,751	\$0	\$4,630,751	
Construction Contract Documents	\$0	\$242,798	-\$242,798	
Bidding	\$0	\$0	\$0	
Construction Contract Administration	\$0	\$0	\$0	
Closeout	\$0	\$0	\$0	
Extra Services	\$100,000	\$0	\$100,000	
Reimbursable & Other Services	\$80,000	\$0	\$80,000	
Cost Estimates	\$120,000	\$0	\$120,000	
Advertising	\$20,000	\$0	\$20,000	
Permitting	\$80,000	\$0	\$80,000	
Owner's Insurance	\$200,000	\$0	\$200,000	
Other Administrative Costs	\$300,000	\$0	\$300,000	
<b>Administration Subtotal</b>	<b>\$5,650,751</b>	<b>\$362,798</b>	<b>\$5,287,953</b>	<b>\$2,911,547</b>
<b>Architecture and Engineering</b>				
<b>Basic Services</b>				
Design Development	\$13,182,146	\$0	\$13,182,146	
Construction Contract Documents	\$0	\$693,709	-\$693,709	
Bidding	\$0	\$0	\$0	
Construction Contract Administration	\$0	\$0	\$0	
Closeout	\$0	\$0	\$0	
Other Basic Services	\$0	\$0	\$0	
<b>Basic Services Subtotal</b>	<b>\$13,182,146</b>	<b>\$693,709</b>	<b>\$12,488,437</b>	
<b>Reimbursable Services</b>				
Construction Testing	\$60,000	\$0	\$60,000	
Printing (over minimum)	\$40,000	\$0	\$40,000	
Other Reimbursable Costs	\$500,000	\$0	\$500,000	
Hazardous Materials	\$300,000	\$0	\$300,000	
Geotechnical & Geo-Environmental	\$400,000	\$0	\$400,000	
Site Survey	\$80,000	\$0	\$80,000	
Wetlands	\$40,000	\$0	\$40,000	
Traffic Studies	\$200,000	\$0	\$200,000	
<b>Architectural/Engineering Subtotal</b>	<b>\$14,802,146</b>	<b>\$693,709</b>	<b>\$14,108,437</b>	<b>\$7,768,105</b>
<b>CM at Risk Preconstruction Services</b>				
Pre-Construction Services	\$400,000	\$0	\$400,000	\$220,240
Site Acquisition				
Land / Building Purchase	\$0	\$0	\$0	
Appraisal Fees	\$0	\$0	\$0	
Recording fees	\$0	\$0	\$0	
<b>Site Acquisition Subtotal</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Construction Costs</b>				
<b>SUBSTRUCTURE</b>				
Foundations	\$71,572,955			
Basement Construction	\$0			
<b>SHELL</b>				
Super Structure	\$0			
Exterior Closure	\$0			
Exterior Walls	\$0			
Exterior Windows	\$0			
Exterior Doors	\$0			
Roofing	\$0			
<b>INTERIORS</b>				
Interior Construction	\$0			
Staircases	\$0			
Interior Finishes	\$0			
<b>SERVICES</b>				
Conveying Systems	\$0			
Plumbing	\$0			
HVAC	\$0			
Fire Protection	\$0			
Electrical	\$0			
<b>EQUIPMENT &amp; FURNISHINGS</b>				

Equipment	\$0			
Furnishings	\$0			
<b>SPECIAL CONSTRUCTION &amp; DEMOLITION</b>				
Special Construction	\$0			
Existing Building Demolition	\$1,248,678	\$0		
In-Building Hazardous Material Abatement	\$3,088,000	\$0		
Asbestos Containing Floor Material Abatement	\$412,000	\$412,000		
Other Hazardous Material Abatement	\$0	\$0		
<b>BUILDING SITEWORK</b>				
Site Preparation	\$19,525,591	\$0		
Site Improvements	\$0	\$0		
Site Civil / Mechanical Utilities	\$0	\$0		
Site Electrical Utilities	\$0	\$0		
Concession/Locker Room Building				
Site Cost over Allowance		\$13,799,755		
<b>Construction Trades Subtotal</b>	\$95,847,224	\$14,211,755		
Contingencies (Design and Pricing)	\$15,239,709	\$2,259,669		
GMP Bonds	\$1,168,378	\$173,241		
D/B/B Insurance	\$0	\$0		
General Conditions	\$5,280,000	\$782,892		
General Requirements	\$4,673,511	\$692,965		
GMP Insurance	\$1,635,729	\$242,538		
GMP Fee	\$2,920,944	\$433,103		
GMP Contingency	\$3,505,133	\$519,724		
Escalation to Mid-Point of Construction	\$5,750,833	\$852,705		
Construction Cost over Funding Cap		\$50,381,853		
<b>Construction Budget</b>	<b>\$136,021,461</b>	<b>\$70,550,446</b>	<b>\$65,471,015</b>	<b>\$36,048,341</b>
Alternates				
Concession/Locker Room Building	\$2,250,000	\$2,250,000	\$0	
Alternates Included in the Total Project Budget	\$0	\$0	\$0	
Alternates Excluded from the Total Project Budget	\$0		\$0	
<b>Subtotal to be Included in Total Project Budget</b>	<b>\$2,250,000</b>	<b>\$2,250,000</b>	<b>\$0</b>	<b>\$0</b>
Miscellaneous Project Costs				
Utility Company Fees	\$300,000	\$0	\$300,000	
Testing Services	\$400,000	\$0	\$400,000	
Swing Space / Modulares	\$0	\$0	\$0	
Other Project Costs (Mailing & Moving)	\$300,000	\$300,000	\$0	
<b>Misc. Project Costs Subtotal</b>	<b>\$1,000,000</b>	<b>\$300,000</b>	<b>\$700,000</b>	<b>\$385,420</b>
Furnishings and Equipment				
Furniture, Fixtures, and Equipment	\$1,251,000	\$417,000	\$834,000	
Technology	\$1,251,000	\$417,000	\$834,000	
<b>FF&amp;E Subtotal</b>	<b>\$2,502,000</b>	<b>\$834,000</b>	<b>\$1,668,000</b>	<b>\$918,401</b>
Soft Costs that exceed 20% of Construction Cost			\$0	
<b>Project Budget</b>	<b>\$163,376,358</b>	<b>\$74,990,954</b>	<b>\$88,385,404</b>	<b>\$48,665,004</b>

<b>Board Authorization</b>	
Design Enrollment	695
Total Building Gross Floor Area (GSF)	204,107
Total Project Budget (excluding Contingencies)	\$163,376,358
Scope Items Excluded or Otherwise Ineligible	- \$74,990,954
Third Party Funding (Ineligible)	- \$0
Estimated Basis of Maximum Total Facilities Grant <sup>1</sup>	\$88,385,404
Reimbursement Rate <sup>3,4</sup>	55.06%
Est. Max. Total Facilities Grant (before recovery) <sup>1</sup>	\$48,665,003
Cost Recovery <sup>5</sup>	- \$0
Estimated Maximum Total Facilities Grant <sup>1</sup>	\$48,665,003

52.06 Reimbursement Rate Before Incentive Points  
3.00 Total Incentive Points<sup>3,4</sup>  
55.06% MSBA Reimbursement Rate

Construction Contingency <sup>2</sup>	\$6,801,073
Ineligible Construction Contingency <sup>2</sup>	\$5,440,858
"Potentially Eligible" Construction Contingency <sup>2</sup>	\$1,360,215
Owner's Contingency <sup>2</sup>	\$2,720,429
Ineligible Owner's Contingency <sup>2</sup>	\$0
"Potentially Eligible" Owner's Contingency <sup>2</sup>	\$2,720,429
Total Potentially Eligible Contingency <sup>2</sup>	\$4,080,644
Reimbursement Rate <sup>3,4</sup>	55.06%
Potential Additional Contingency Grant Funds <sup>2</sup>	\$2,246,803
Maximum Total Facilities Grant	\$50,911,806
Total Project Budget	\$172,897,860

Office of the Inspector General  
Construction Management at Risk Application to Proceed

**Stoneham High School,**  
**Stoneham, Massachusetts**

**Attachment B: Authorization**

**CERTIFICATION OF AUTHORITY TO USE THE CONSTRUCTION**  
**MANAGEMENT AT RISK DELIVERY METHOD**

I, \_\_\_\_\_, [legal counsel for the governing body as identified below] do hereby certify to the Office of the Inspector General of the Commonwealth of Massachusetts, in accordance with M.G.L. c. 149A, § 4(a)(1), regarding using construction management at risk services for the following project **Stoneham High School** ("Project"), as follows:

(1) That **the Town of Stoneham** is a public agency as defined in M.G.L. c. 149, § 44A(1), is duly organized and existing under the laws of the Commonwealth of Massachusetts, and has received the necessary authority and power from **Stoneham Town Meeting** to enter into a contract with a construction management at risk firm and to perform all its obligations in connection with the Project.

(2) That the public vote of the governing body, attached hereto (if applicable) was duly adopted and is currently in effect.

**NOTE: Town Meeting Authorization will take place in November, 2021. Once authorized, Town Counsel will sign this document and submit it along with a record of the Town Meeting Vote.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

[SEAL]

Office of the Inspector General  
Construction Management at Risk Application to Proceed

**Stoneham High School,**  
**Stoneham, Massachusetts**

**Attachment C: Approval of Plan and Procedures**

**The SBC approval of the Plan and Procedure for the CM@Risk delivery method is included in the attached meeting minutes, dated October 13, 2020.**

## Project Minutes

Project: Stoneham High School Feasibility Study  
 Prepared by: Joel Seeley  
 Re: School Building Committee Meeting  
 Location: Middle School Gymnasium  
 Distribution: Attendees (MF)

Project No.: 20033  
 Meeting Date: 10/13/2020  
 Time: 7:00pm  
 Meeting No: 11

### Attendees:

PRESENT	NAME	AFFILIATION	VOTING MEMBER
✓	Marie Christie	Co-Chair, School Building Committee	Voting Member
✓	David Bois	Co-Chair, School Building Committee; Community Member with Architecture Experience	Voting Member
✓	Nicole Nial	School Committee Member	Voting Member
✓	Raymie Parker	Chair Select Board	Voting Member
✓	Albert Talarico	Community Member with Building Commissioner Experience	Voting Member
✓	Douglas Gove	Community Member with Engineering Experience	Voting Member
Attended Remote	Stephen O'Neill	Community Member with Engineering Experience	Voting Member
✓	Josephine Thomson	Community Member	Voting Member
Attended Remote	Jeanne Craigie	Town Moderator	Voting Member
	Lisa Gallagher	Community Member, School Secretary, Past member of Middle School Building Committee	Voting Member
✓	Sharon Iovanni	Community Member	Voting Member
✓	Cory Mashburn	Community Member, Finance and Advisory Board	Voting Member
✓	Paul Ryder	Community Member with Construction Experience	Voting Member
Attended Remote	David Pignone	Athletic Director, Member knowledgeable in educational mission and function of facility	Voting Member
✓	Kevin Yianacopolus	Local Official responsible for Building Maintenance	Voting Member
✓	Dennis Sheehan	Town Administrator / MCPPO Certified	Non-Voting Member
✓	John Macero	Superintendent of Schools, Secretary of School Building Committee	Non-Voting Member
✓	Bryan Lombardi	Stoneham High School Principal	Non-Voting Member
✓	Brian McNeil	Facilities Director	Non-Voting Member
Attended Remote	Brooke Trivas	Perkins and Will	
Attended Remote	Patrick Cunningham	Perkins and Will	
Attended Remote	Leo Liu	Perkins and Will	
✓	Joel Seeley	SMMA	

Item #	Action	Discussion
11.1	Record	Call to Order, 7:00 PM, meeting opened by roll call.
11.2	Record	In accordance with the executive order issued by the Governor on March 10, 2020, this meeting will be held via video conference and a recording of such will be posted on the Town's website.
11.3	Record	<p>J. Seeley reviewed the MassSave Engineering Services Agreement, dated 10/6/20 and attached, for ZNE Expert Services to be performed by the MassSave TA Vendor, Thornton Tomasetti. MassSave will cost share 50% of the TA Vendor's fee, which is \$19,000. Stoneham's share to be funded out of the Other Budget (Owner's Contingency), ProPay Code 0004-0000, which has a current balance of \$39,385.92, however only \$7,500.00 is applied to the Feasibility/Schematic Design Phase.</p> <p>A motion was made by R. Parker and seconded by N. Nial to approve the MassSave Engineering Services Agreement and recommend execution by D. Sheehan. No discussion, motion passed unanimous by roll call vote.</p>
11.4	J. Seeley	<p>J. Seeley reviewed Warrant No. 4, attached.</p> <p>A motion was made by R. Parker and seconded by N. Nial to approve Warrant No. 4. No discussion, motion passed unanimous by roll call vote.</p> <p>J. Seeley to forward Warrant No. 4 to D. Bois for signature.</p>
11.5	Record	J. Seeley distributed and reviewed the PSR Phase Meetings and Agenda Schedule and the Preliminary Project Schedule with PSR Phase Tasks, attached.
11.6	Record	J. Seeley distributed the PSR Submission Requirements and Responsibilities List, dated 10/4/20, attached.
11.7	J. Macero	J. Macero to review if there is a Pre-K Guideline that the proposed Pre-K program can be compared to. <i>(from prior meeting)</i>
11.8	J. Seeley	<p>J. Seeley provided an overview of the PDP Submission, submitted to MSBA on 10/6/20. The submission has been uploaded to the SSBC Project Website and a link has been forwarded to the Committee.</p> <p>Committee Discussion:</p> <ol style="list-style-type: none"> <li>D. Bois indicated the link may have downloading restrictions. <i>J. Seeley will review and correct any issues.</i></li> </ol>
11.9	B. Trivas J. Seeley	<p>D. Sheehan reviewed the Project Finance Considerations, attached, defining the approximate PDP Total Project Costs, Reimbursement and Residential Tax Impact based on a 20-year bond at 3.00% interest, for each Option.</p> <p>Committee Discussion:</p>

Item #	Action	Discussion
		<ol style="list-style-type: none"><li data-bbox="532 401 1425 600">1. R. Parker asked if there is any retiring debt that could offset the tax increase? <i>D. Sheehan indicated the elementary school debt retires by 2023, but since the Town currently receives reimbursement payments from the MSBA for the elementary schools, the net reduction in debt is not significant. The middle school debt retires in 2033.</i></li><li data-bbox="532 621 1425 751">2. R. Parker asked if the interest rates of 3.0% for 20-year bond and 3.5% for the 30-year bond are more favorable than a few years ago? <i>D. Sheehan indicated yes and explained the Town's current bond rating outlook.</i></li><li data-bbox="532 772 1425 1010">3. D. Bois asked if the effective reimbursement rate, after calculating in the ineligible costs, is conservative? <i>J. Seeley indicated the MSBA Total Project Budget form, which calculates the reimbursement, is largely formulaic. The amount of site costs over the 8% cap and the costs over the \$333/SF cap are by formula. The amount of ineligible square feet above MSBA Guideline was conservatively input, as this will be defined by MSBA in their review of the PDP.</i></li><li data-bbox="532 1031 1425 1161">4. D. Bois asked if the PreK Program square feet was input as eligible or ineligible? <i>J. Seeley indicated it was input as eligible square feet per the Town's discussion with the MSBA during the Eligibility Phase.</i></li><li data-bbox="532 1182 1425 1352">5. D. Bois asked how conservative are the cost and tax figures? <i>D. Sheehan indicated the assumptions made on the assessed values and interest rates are conservative. J. Seeley indicated the construction cost estimates include design and pricing contingencies appropriate to the level of design.</i></li><li data-bbox="532 1373 1425 1503">6. A. Talarico asked how is the Town's Base Reimbursement Rate calculated? <i>J. Seeley indicated the MSBA calculates the Base Rate using the same methodology for all communities, factoring in each community's income factor, property wealth factor and poverty factor.</i></li><li data-bbox="532 1524 1425 1591">7. A. Talarico indicated concern over the amount of square feet the project is above MSBA Guidelines.</li><li data-bbox="532 1612 1425 1703">8. D. Bois requested a breakdown of the ineligible costs in each option. <i>B. Trivas and J. Seeley to provide a breakdown for review at the next Committee meeting.</i></li></ol>

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Item #	Action	Discussion
11.10	J. Macero B. Trivas J. Seeley	<p>J. Seeley distributed and reviewed the Space Summary and Total Project Cost for the District Offices Memo, dated 10/11/20 and attached. The offices are 3,900 square feet with a \$2.3M total project cost, which would not be reimbursable.</p> <p>Committee Discussion:</p> <ol style="list-style-type: none"><li>1. D. Bois asked where would the District Offices be located if they were to be located in the middle school? <i>J. Macero reviewed a potential location and indicated he would prefer the District Offices not be included in the high school project due to the cost impact.</i></li><li>2. S. Iovanni asked if the District Offices are included in the PDP project estimates? <i>D. Sheehan indicated the District Offices and their costs are not included in the PDP cost estimates.</i></li><li>3. D. Bois asked when does the Committee need to decide on whether to add the District Offices into the project? <i>B. Trivas indicated if not tonight, the Committee needs to decide by next meeting.</i></li><li>4. N. Nial asked how close is the middle school to capacity and will it need the space for the potential District Offices in the future? <i>J. Macero will review and provide direction</i></li><li>5. J. Macero indicated it may be better to show the District Offices in the project now and remove if needed at a future time. <i>D. Sheehan indicated the District Offices should be added to the list of ineligible costs by option to assist the Committee in making decisions. B. Trivas and J. Seeley to provide for the next Committee meeting.</i></li><li>6. J. Craigie recommended the District Offices be included in the project and if needed, could be value engineered out at a future time.</li><li>7. J. Craigie indicated she believes the middle school does not have the space to accommodate the District Offices and that the District Offices should not be located in former classrooms.</li><li>8. J. Craigie indicated she believes the District Offices belong in the high school.</li><li>9. J. Thomson indicated she believes the District Offices do not belong in the middle school, but should be located in the high school and that the middle school may need the space in the future.</li></ol>

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Item #	Action	Discussion
		<p>10. J. Macero indicated the District Offices have been located in the high school since 1981, and this needs to be discussed with MSBA for consideration of reimbursement.</p>
11.11	Committee	<p>J. Seeley reviewed the MSBA DBB and CM at Risk Comparison, attached, described the CM at Risk selection process, and explained if the Committee had a preference to utilize the CM at Risk methodology, there would be benefit to retain the CM by the start of the Schematic Design Phase to provide cost estimating and construction logistics planning.</p> <p>Committee Discussion:</p> <ol style="list-style-type: none"> <li>1. J. Macero indicated the CM at Risk process was used at his former school and was very successful.</li> <li>2. D. Bois indicated the CM at Risk not only will provide estimates, but can also assist the Committee in making smart decisions on cost avoidance strategies as well.</li> <li>3. M. Christie indicated the middle school utilized the CM at Risk process and would recommend this process for the high school project.</li> <li>4. J. Craigie indicated the middle school project benefited from the knowledge of the CM staff and she would highly recommend the CM at Risk process.</li> </ol> <p>A Motion was made by N. Nial and seconded by J. Craigie to approve the CM at Risk process for the high school project. No discussion, motion passed unanimous by roll call vote.</p> <p>Committee members to email J. Seeley if they would like to volunteer for the CM Prequalification and Selection Subcommittee.</p>
11.12	B. Trivas J. Seeley	<p>J. Seeley provided an overview of the presentation to the remote participation Tri-Board meeting, scheduled for 10/15/20.</p>
11.13	Committee PR Subcommittee J. Seeley	<p><b>Subcommittee Updates</b></p> <p><b>Public Relations Subcommittee</b></p> <ol style="list-style-type: none"> <li>1. S. Iovanni reviewed a Promotional Branding memo, dated 9/30/20 and attached, and asked the Committee for feedback. The promotional branding will be developed by the Public Relations Subcommittee at their next meeting.</li> <li>2. S. Iovanni reviewed the Updated FAQ, dated 10/8/20 and attached and asked the Committee to email any comments to J. Seeley, who will update the FAQ posted on the SSBC project website with this version.</li> </ol>

Item #	Action	Discussion
		<p><b>Educational Mission Subcommittee</b></p> <p>1. J. Seeley reviewed the 9/21/20 Educational Mission Subcommittee Meeting Minutes, attached.</p> <p><b>Green Building Initiatives</b></p> <p>1. J. Seeley reviewed the 9/29/20 Green Building Initiatives Meeting Minutes, attached.</p>
11.14	Record	<b>Committee Questions</b> - none
11.15	Record	<p><b>Old or New Business</b></p> <p>1. D. Sheehan asked if the Committee preferred to continue with in-person SSBC meetings in the Middle School Gymnasium? <i>The Committee indicated they preferred to meet in-person.</i></p>
11.16	Record	<b>Public Comment</b> - none
11.17	Record	Next <b>SBC Meeting: Tuesday, October 13, 2020 at 7:00 pm.</b>
11.18	Record	A Motion was made by N. Nial and seconded by D. Bois to adjourn the meeting. No discussion, motion passed unanimous by roll call vote.

Attachments: Agenda, MassSave Engineering Services Agreement, Warrant No. 4, PSR Phase Meetings and Agenda Schedule and the Preliminary Project Schedule, PSR Submission Requirements and Responsibilities List, Project Finance Considerations, Approximate PDP Total Project Costs, Reimbursement and Residential Tax Impact, Space Summary and Total Project Cost for the District Offices Memo, MSBA DBB and CM at Risk Comparison, Promotional Branding memo, Updated FAQ, 9/21/20 Educational Mission Subcommittee Meeting Minutes, 9/29/20 Green Building Initiatives Meeting Minutes

The information herein reflects the understanding reached. Please contact the author if you have any questions or are not in agreement with these Project Minutes

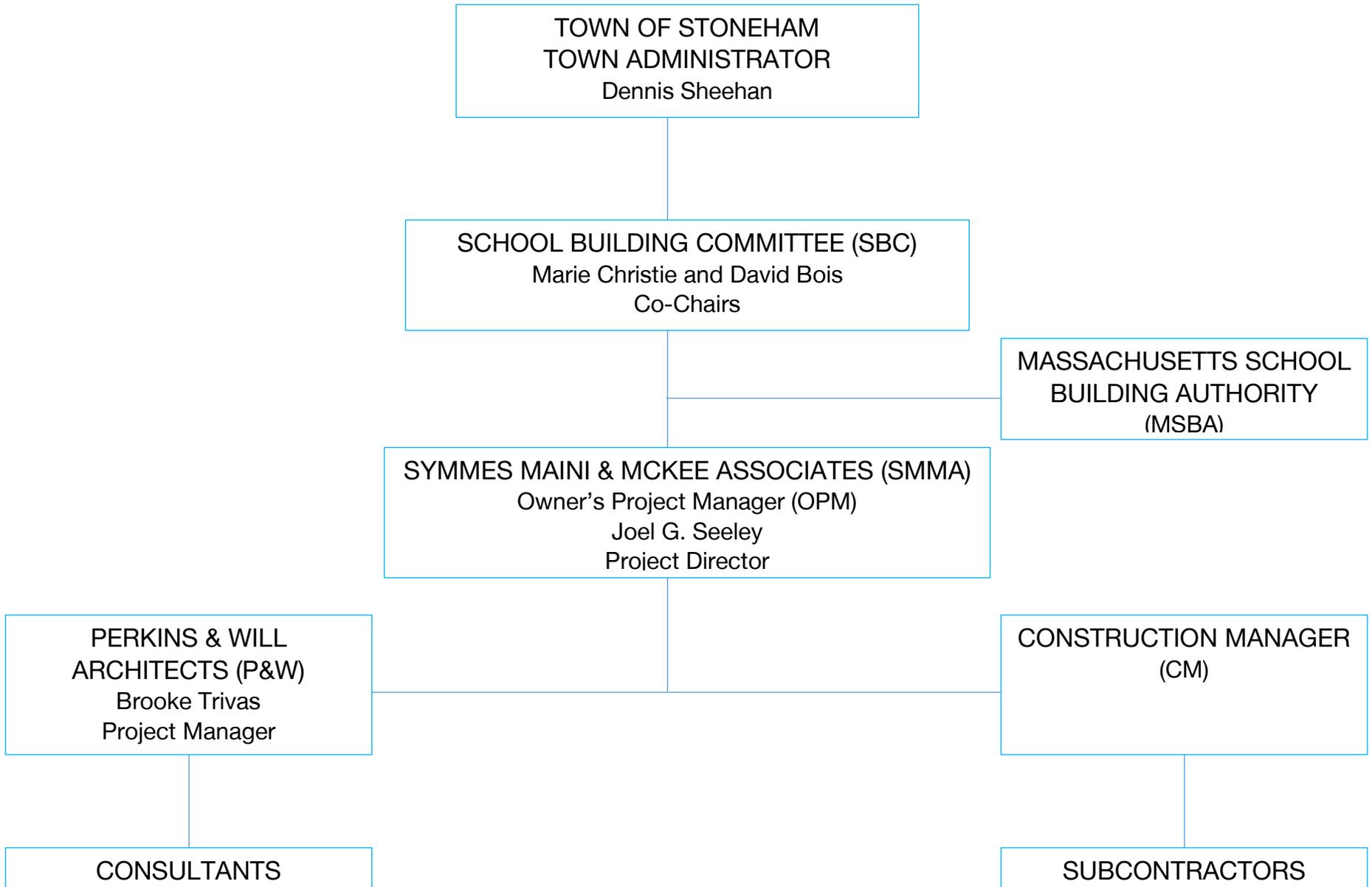
Office of the Inspector General  
Construction Management at Risk Application to Proceed

**Stoneham High School,**  
**Stoneham, Massachusetts**

**Attachment D: Organizational Chart**

The Organizational Chart is attached.

# STONEHAM HIGH SCHOOL PROJECT ORGANIZATIONAL CHART



Office of the Inspector General  
Construction Management at Risk Application to Proceed

**Stoneham High School,**  
**Stoneham, Massachusetts**

**Attachment E: OPM and Designer Agreement Signature Pages  
(MSBA Standard Contract)**

The signature page of the OPM agreement, dated March 9, 2020 and the signature page of the Designer agreement, dated July 10, 2020 are attached.

**CONTRACT FOR PROJECT MANAGEMENT SERVICES**

This Contract is made this 9th day of March in the year Two Thousand Twenty between  
the Town of Stoneham, 35 Central Street, Stoneham, Massachusetts 02180  
(Owner) (street) (City) (State) (Zip Code)  
hereinafter called "the Owner" and Symmes Maini & McKee Associates, Inc. (SMMA)  
(Owner's Project Manager)  
1000 Massachusetts Avenue, Cambridge, Massachusetts 02138  
(street) (city) (State) (Zip Code)  
hereinafter called the "Owner's Project Manager" to provide the Project Management services required to complete  
the Basic and Extra Services described herein at Stoneham High School, 149 Franklin Street, Stoneham, MA 02180  
(name/description of Project)

The Owner's Project Manager is authorized to perform the services required by this Contract through the Feasibility Study Phase and, pending receipt of a written Approval to proceed from the Owner, through the Schematic Design Phase. At the Owner's option, the Owner's Project Manager may be authorized to perform services for subsequent design phases and/or the Construction Phases and Completion Phase, at which time a mutually agreed upon amendment to this Contract will be executed between the Owner and the Owner's Project Manager. If the Owner elects to construct the project pursuant to G.L. c. 149, the amendment to this Contract shall include the Authority's Base OPM Contract Amendment for DBB for Basic Services required for the design-bid-build construction delivery method. If the Owner elects to construct the project pursuant to G.L. c. 149A, the amendment to this Contract shall include the insertion of the Authority's Base OPM Contract Amendment for CM at Risk, for Basic Services required for the CM at Risk construction delivery method.

For the performance of the services required under this Contract for the Feasibility Study Phase and the Schematic Design Phase, the Owner's Project Manager shall be compensated by the Owner for Basic Services in accordance with the Payment Schedule included as Attachment A.

IN WITNESS WHEREOF, the Owner and the Owner's Project Manager have caused this Contract to be executed by their respective authorized officers.

OWNER  
Dennis J. Sheehan  
(print name)  
Town Administrator  
(print title)  
By   
(signature and seal)  
Date 3/10/20

OWNER'S PROJECT MANAGER  
Joel G. Seeley  
(print name)  
Executive Vice President  
(print title)  
By   
(signature)  
Date 3/19/20

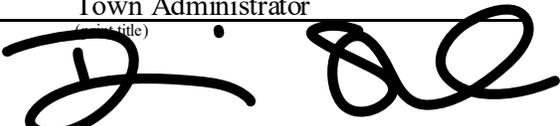
(Attach Certificate of Vote of Authorization)

Electrical/Lighting/	BALA	Michael J. Rossini, PE	
Data/Communications	Edvance	Doug Faria	
Environmental Permitting	Nitsch Engineering	David Conway, P.E.	WBE
Geotechnical Engineering	Lahlaf	Madjid M. Lahlaf	MBE
Geoenvironmental Engineering	FS Engineers	Farooq Siddiwue, PE, LSP	MBE
Hazardous Materials	Universal Environmental	Ammar Dieb	
Cost Estimating	PM&C	Peter Bradley, LEED AP	
Kitchen/Food Service Consultant	Crabtree McGrath	John Sousa	
Laboratory Consultant	Perkins&Will	Jacob Werner	
Acoustical Consultant	Acentech	Brian Masiello	
Specifications Consultant	Kalin Associates	Mark Kalin	
Library/Media	Perkins&Will	Jennifer Miller	
Technology Consultant/Audio Visual Consultant	Edvance	Doug Faria	
Theatrical Consultant	Next Stage Design	Gene Leitermann	
Sustainable/Green Design/Renewable Energy Consultant	AKF/In Posse	Robert Diemer	
Code Consultant	Code Red	Carl Nelson	
Accessibility Consultant	Code Red	Carl Nelson	
Traffic Consultant	Nelson Nygaard	Alyson Fetcher	
Furniture, Fixtures and Equipment Consultant	Perkins&Will	Jennifer Miller	
Site Surveying	Nitsch Engineering	Denis Seguin	WBE
Security Consultant	DVS Security	Philip Santore	

IN WITNESS WHEREOF, the Owner and the Designer hereby agree to the terms of the Contract and have caused this Contract to be executed by their respective authorized officers or other authorized representatives.

OWNER

Dennis Sheehan  
(print name)  
Town Administrator  
(print title)

By   
(signature)

Date 7/14/20

DESIGNER

Robert Brown, AIA, IIDA, LEED AP  
(print name)  
Managing Director  
(print title)

By   
(signature)

Date July 13, 2020