



Belmont High School Owner's Project Management Services Interview

February 15, 2017



Team Organization



Owner
Town of Belmont



Project Executive
Tom Ellis, Jr., AIA, LEED AP BD+C



Project Director
▶ Tony Pruner, PE, MCPPO/OPM
(50% to 100% FTE)



DESIGN PHASE

Design Review/Support Services Team

- ▶ **Scheduler**
Ken Kropa, EIT (5%)
- ▶ **Professional Estimator**
Greg Ridgely, LEED AP (15%)
- ▶ **Design Review / Constructability & Environment**
Ted Fiffy, MCPPO/OPM, CSL *
- Design Phase Review / Programming & Phasing Logistics**
Mark Lydon, CCM, EIT *
Peter Collins, CCM, LEED AP BD+C *
- Civil/Site Review/Quality Control**
Marwan Abi-Elias, CSL *
- Mechanical Review**
David Pope, PE, CEM, LEED AP *
- Electrical Review**
Mike Trinker *
- Plumbing & Fire Protection Review**
Craig Joyner, PE *



CONSTRUCTION PHASE

Construction Support Services Team

- ▶ **Construction Representative**
Dennis Pacitti, MCPPO/OPM (100% FTE)
- ▶ **Project Engineer/Hazardous Materials Oversight**
Ted Fiffy, MCPPO/OPM, CSL (100% FTE)
- ▶ **Scheduler**
Ken Kropa, EIT *
- ▶ **Change Order Review**
Greg Ridgely, LEED AP *



▶ = Key Personnel
* = Involvement as Required



MSBA Module / Staffing

Addresses Question 1

MSBA Module	Oversight	Key Staff			Support Staff			
	Tom Ellis	Tony Pruner	Dennis Pacitti	Ted Fiffy	Peter Collins	Mark Lydon	Greg Ridgely	Kenny Kropa
	Project Executive	Project Director	Construction Representative	Project Engineer	Design Phase Review	Design Phase Review	Cost Estimating	Scheduling
1. Eligibility Period								
2. Project Team								
3. Feasibility Study	√	50%		5%	5%	5%	10%	5%
4. Schematic Design	√	60%	5%	5%	5%	5%	10%	5%
5. Project Funding	√	60%	5%	5%	5%	5%	10%	5%
6. Detailed Design	√	40%	10%	10%	10%	10%	10%	5%
7. Construction	√	50%	100%	100%			5%	
8. Project Completion	√	30%	10%					



Keeping the Team Synchronized and Informed

Addresses Question 2

*The project schedule is the unifying tool...
It outlines the process and records the performance*

HEERY		North Middlesex Regional High School: OPM Project Milestone Schedule Rev: October 26, 2016				2010	2011	2012	2013	2014	2015	2016
ID	Task Name	Duration	Start	Finish								
1	Eligibility Period Activity	470 days	11/21/11	9/9/13								
2	NMRHS Submits Statement of Interest to MSBA	0 days	11/21/11	11/21/11			◆ 11/21/11					
3	Invite to Eligibility Period - MSBA Invites NMRHS to FSA	270 days	1/27/12	2/7/13								
4	a) ICC - Initial Compliance Certificate (90 days)	0 days	2/3/12	2/3/12			◆ 2/3/12					
5	b) MSBA Approval of Building Committee (60 days)	0 days	8/13/12	8/13/12			◆ 8/13/12					
6	c) NMRHS Submission of Funding Capacities	0 days	8/13/13	8/13/13				◆ 8/13/13				
7	d) NMRHS Submission of Maintenance Practices (180 days)	0 days	8/13/13	8/13/13				◆ 8/13/13				
8	e) Enrollment Certification Agreement (180 days)	0 days	5/17/12	5/17/12			◆ 5/17/12					
9	f) NMRHS Community Funding Authorization (270 days)	0 days	9/9/13	9/9/13				◆ 9/9/13				
10	Invite to Feasibility Study	0 days	6/6/12	6/6/12			◆ 6/6/12					
11	Propay Training Date #1											
12	Owners Project Manager Selection	73 days	8/1/12	11/9/12								
13	RFS Ad Appears											
14	OPM Panel Meeting	0 days	11/8/12	11/8/12			◆ 11/8/12					
15	OPM Contract Executed	0 days	11/9/12	11/9/12			◆ 11/9/12					
16	Designer Selection	88 days	11/28/12	4/1/13								
17	RFS Ad Appears	0 days	11/28/12	11/28/12			◆ 11/28/12					
18	Hold Designer on Site Briefing Session	0 days	12/12/12	12/12/12			◆ 12/12/12					
19	Responses Due - Designers RFS	0 days	12/19/12	12/19/12			◆ 12/19/12					
20	Materials Received by the MSBA - Assemble Designers Package	2 days	12/20/12	12/21/12								
21	DSP Meeting Date	0 days	1/22/13	1/22/13			◆ 1/22/13					
22	DSP Interview Date	0 days	2/19/13	2/19/13			◆ 2/19/13					
23	Designer Contract Executed	30 days	2/19/13	4/1/13								
24	Designer Notice of Award	0 days	2/19/13	2/19/13			◆ 2/19/13					
25	Designers Contract Approved	0 days	4/1/13	4/1/13			◆ 4/1/13					
26	Designer Contract Received By MSBA											
27	Site Survey and Topography (elevations)	54 days	12/19/12	3/3/13								
28	Project Introduction to School Committee & Selectmen	30 days	11/12/12	12/21/12								
29	NMRHS Community Outreach	304 days	1/1/13	2/28/14								

- Listen
- Align Goals and Expectations
- “No Surprises” Approach
- Keep the Scope, Budget and Schedule “In Balance”
- Proactive Management Teams Solve Problems Come with solutions not problems

Establishing the Total Project Budget

Addresses Question 3



- A cost estimate is not an effort to predict the lowest bid – it is an effort to determine the true value of the work and reasonably anticipate the future.
- The most important cost estimate is the one which establishes the Project Funding by the MSBA at the end of the Schematic Design Phase
- Construction Costs constitutes approximately 75% of the total project budget.

“Heery’s ability to develop a conceptual estimate very early in the design process was critical to getting our community to understand the magnitude of the effort and resources we needed to properly meet the educational needs of our community.”

C. Allen Merritt, Jr. - Chair, Lynnfield School Building Committee

HEERY

Estimating Performance

Addresses Question 3

NAME	PROJECT TYPE	M.G.L. DELIVERY	HEERY ESTIMATE DATE	CONTRACTOR BID DATE	HEERY ESTIMATE PHASE	HEERY ESTIMATE	Actual Bid Amount	CHANGE ORDERS	FINAL COST with CO's	OVERALL PROJECT CONTINGENCY	CONTINGENCY PERCENTAGE OF ESTIMATE	PROJECT STATUS
Beverly High School	Reno/New	149	5/8/2008	9/12/2008	CD	\$ 67,538,093	\$ 67,134,217	\$860,792	\$ 67,995,009	\$ 1,936,351	3%	COMPLETE
Tewksbury High School	New	149	7/23/2010	10/6/2010	90% CD	\$ 65,927,839	\$ 51,600,000	\$4,899,332	\$ 56,499,332	\$ 4,606,061	7%	COMPLETE
Cameron Senior Center	Reno	149	4/1/2009	06/11/09	CD	\$ 3,967,000	\$ 3,307,539	\$152,445	\$ 3,459,984	\$75,000	2.5%	COMPLETE
Whittier Technical High School	Reno	149	1/31/2010	4/09/2010	100% SD	\$ 2,396,821	\$ 1,542,000	-\$3,967	\$ 1,538,034	\$ 284,452	12%	COMPLETE
Douglas Elementary/Middle School	New/Reno	149	11/11/2011	1/20/2012	90% CD	\$ 39,937,215	\$ 36,226,678	\$968,320	\$ 37,194,998	\$ 3,810,692	10%	COMPLETE
Bay Path VoTech	Reno/New	149A	7/30/2013	10/11/2013	90%CD	\$ 58,832,051	\$ 57,024,455	\$4,377,742	\$ 61,402,197	\$ 5,296,920	9%	COMPLETE
Lynnfield High School Expansion	Reno	149	2/10/2012	5/10/2012	90% CD	\$ 3,170,700	\$ 3,110,346	\$259,284	\$ 3,369,630	\$ 208,258	7%	COMPLETE
Bresnahan Model School Project	New	149	10/23/2012	1/31/2013	90%CD	\$ 31,166,011	\$ 28,190,000	\$1,093,589	\$ 29,283,589	\$ 1,451,565	5%	COMPLETE
Nock Molin	Reno	149A	10/23/2012	5/1/2013	DD	\$ 21,760,018	\$ 20,877,414	\$1,640,289	\$ 22,517,703	\$ 1,256,639	6%	COMPLETE
Newburyport Senior Center	New	149	2/29/2012	8/5/2014	100% SD	\$ 6,135,226	\$ 5,585,000	\$177,162	\$ 5,762,162	\$ 197,540	3%	COMPLETE
Westborough Fire Station	New	149	4/26/2013	8/8/2013	100% DD	\$ 10,791,269	\$ 8,169,000	\$271,138	\$ 8,440,138	\$ 1,233,373	11%	COMPLETE
Westborough Town Hall	Reno	149	5/23/2013	11/20/2013	100% DD	\$ 5,305,332	\$ 5,394,700	\$696,507	\$ 6,091,207	\$ 1,276,770	24%	COMPLETE
North Middlesex High School	New	149	2/27/2015	5/21/2015	90%CD	\$ 70,313,167	\$ 64,995,000	\$282,000	\$ 65,277,000	\$ 7,108,348	10%	UNDER CONSTRUCTION
Beverly Middle School	New	149A	7/25/2016	2/28/2017	90% CD	\$ 90,465,243	\$ 90,128,105	\$0	\$ 90,128,105	\$ 3,983,883	4%	UNDER CONSTRUCTION

Table shows an aggregate estimating accuracy of 3.5% including CO for \$1/2 Billion in actual costs over a significantly volatile economic period.



BMS Commissioning and Training

Addresses Question #4

Worcester Technical High School

400,000 SF

\$89.9M (\$144M escalated to 2017)

Occupancy 8/2009

New Construction

- Created Job Description for New Facility Manager
- Commissioning within contract scope
- 18 month start up period from submittal review through functional testing.
- eBuilder project electronic information turnover
- Managed equipment training and video recording of sessions



BMS Commissioning and Training

Addresses Question #4

Bay Path Regional Vocational Technical HS
250,000 SF
\$73.8M Occupancy 8/2015
Addition / Renovation

Beverly Middle School
233,000 SF
\$110.0M Under Construction
New Construction



- “Cold Eyes” / Independent Review
- Commissioning / Operations focused design review
- In-House Engineering oversight and review
- Close Out Playbook

Why Heery

Addresses Question #5

- The benefit of our experience constructing a total of \$3/4 Billion (current \$) of MA High Schools
- 30-Year Continuous Operations under the Heery Banner in Boston
- Heery Leadership Team Average Tenure – 19 Years
- Credentialed Professional Staff –
AIA, PE, CCM, LEED AP, CSL, OSHA 10/30/HAZWOPER
- Financial Stability –Debt Free for over 25 years
- Peer / Industry Recognition – Worcester Tech. HS, Lawrence HS, & Bay Path HS CMAA Awards
- Student / Staff Educational Opportunities
- MSBA Work Group Leaders –
Maintenance Task Force / Cost Analysis
- Sustainable Budget Development



“One of the keys of the final success of the Lawrence High School was the close collaboration and cooperation between Tony Pruner and the entire Heery team.”

Dr. Mary Lou Bergeron, Assistant Superintendent, Lawrence Public Schools

HEERY

Q&A





Thank you







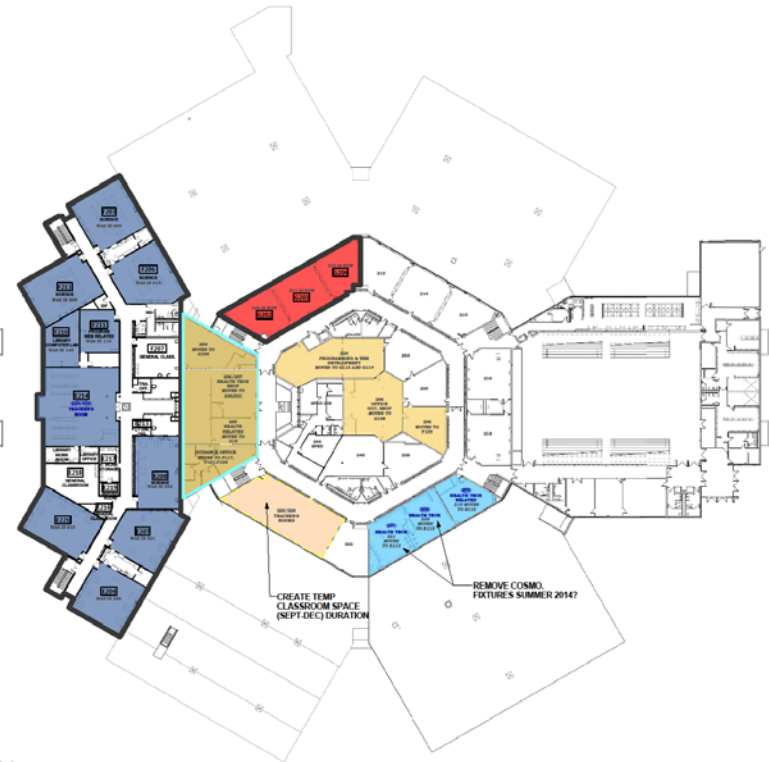
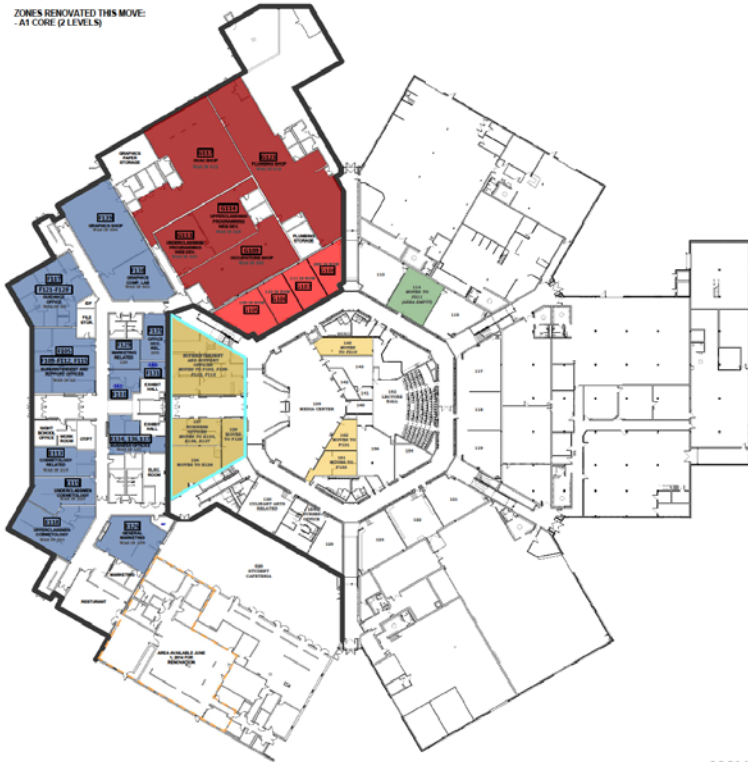




RELOCATION CHART			
ROOM NO.	OLD LOC.	TEMP. LOC.	FINAL LOC.
129			F129
134			E195
131(1)			E137
131(2)			E136
131(3)			E134
209			G108
209			G108
205	219		
206	220		
207	221		
145			F210
161			F133
162			F131
225			G114
236			F135
256			G199
219			E113
220			E115
221			E118
601			F138
604			F139
605			F203
609			F213
610			F206
612			G117
618			G123
619			E221
620			E204
621			E207
642			E208
109			G105
110			G106
111			G107
210			G202
211			G203
212			G204
114			F211
223	E214		
224	E214		
EMPTY AREAS			
114	145	161	
162	225	236	
256	223	224	

ZONES COMPLETE:
 - E & F Addition Complete
 - D & G Shops Renovated
 - G Classrooms Renovated (2 Levels)

ZONES RENOVATED THIS MOVE:
 - A1 CORE (2 LEVELS)



LEGEND

AREAS COMPLETE BY AUG. 21, 2014
 COYON PALLADIUM AREA

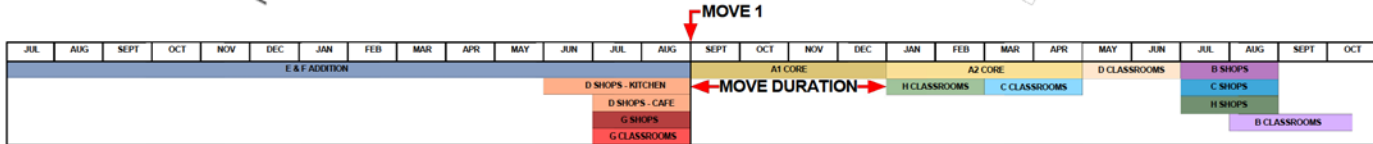
ROOMS TO BE RENOVATED AVAILABLE FOR START OF SCHOOL BY AUG. 21, 2014
 COMPLETE BY DEC. 31, 2014

AREAS AVAILABLE AS OF 1/1/14
 COMPLETE BY AUG. 21, 2014

WORK TO COMPLETE (TEMP PERIOD)

LOCATION NOT SHOWN ON PLAN

ROOM INFORMATION FORMAT



START OF SCHOOL YEAR FALL 2014
MOVE IN OR OUT OF BY AUGUST 21, 2014



