

**LEGAL NOTICE
REQUEST FOR SERVICES
OWNER'S PROJECT MANAGER SERVICES**

The **Town of Natick** (the "Owner") is seeking the services of a qualified "Owner's Project Manager" as defined in Massachusetts General Laws Chapter 149, § 44A½(c) and as further defined by provisions stated in the Request for Services (RFS) to provide Project Management Services for the design, construction, demolition, addition to and/or renovation of the John F. Kennedy Middle School (the "Proposed Project"), located at 165 Mill Street, Natick, Massachusetts.

The Town of Natick is requesting the services of an Owner's Project Manager to represent the Owner during the feasibility study and schematic design phases of the contract, which may be amended to include continued Project Management Services through design development, construction documents, bid and award, construction, and final closeout of the Proposed Project. The estimated total project costs of an approved Proposed Project may range from \$90 million to \$110 million depending upon the solution agreed upon by the Owner and the Massachusetts School Building Authority (MSBA) and ultimately approved by a vote of the MSBA Board of Directors.

A voluntary informational meeting and site inspection will be conducted by Peter Gray, Director of Finance, Natick Public Schools, on Thursday, November 14, 2016 at 2:30 PM at the John F. Kennedy Middle School site located at 165 Mill Street, Natick, Massachusetts 01760.

The complete RFS may be obtained on November 9, 2016 electronically by contacting Peter, Gray, Director of Finance, Natick Public Schools pgray@natickps.org, ph. 508-647-6491 from 8:00 a.m. to 4:00 p.m., Monday-Friday.

Proposals will be received at the Natick Town Hall, located at 13 East Central Street – 3rd third floor, Natick, Massachusetts 01760 until 1:00 PM on Wednesday, November 23, 2016.

All questions regarding this RFS should be directed to Peter Gray, Director of Finance, by email to: pgray@natickps.org. Questions will be accepted until Wednesday, November 16, 2016 at 4:00 PM.



REQUEST FOR OWNER'S PROJECT MANAGEMENT SERVICES (RFS)

1. Introduction

The Town of Natick ("Owner") is seeking the services of a qualified "Owner's Project Manager" as defined in Massachusetts General Laws Chapter 149, Section 44A½ and as further defined by the provisions of this RFS, to provide Project Management Services for the design, construction, addition to and /or renovation of the John F. Kennedy Middle School ("School") in Natick, Massachusetts ("Project").

The Owner is requesting the services of an Owner's Project Manager to represent the Owner during the feasibility study and schematic design phases of the project initially. Subject to the approval of the Project by the Massachusetts School Building Authority (the "MSBA") and further subject to continued funding authorized by the Town of Natick, the contract between the Owner and the Owner's Project Manager may be amended to include continued Project Management Services through design development, construction documents, bid and award, construction and final closeout of the potential Project. A potential approved Project may include a renovation of the existing School, a renovation and addition of the existing School and/or new construction. The estimated total project costs of an approved potential Project may range from \$90 to \$110 million dollars depending upon the solution that is agreed upon by the Owner and the MSBA and that is ultimately approved by a vote of the MSBA Board of Directors.

2. Background

The Town of Natick, incorporated in 1781, is located near the center of the MetroWest region of Massachusetts, with a population of 32,786 at the 2010 census. Only 10 miles west from Boston, Natick is considered part of the Greater Boston area. The town has a total area of 16.1 square miles and has four distinct neighborhoods: Natick Center, East Natick, South Natick and West Natick.

A three school master study was conducted by Dore and Whittier Architects, Inc, in May, 2012, including the John F. Kennedy Middle School. The study documented existing conditions and a physical assessment of each building and site, enrollment projects and the impact on future needs and a review of the educational programming needs and deficiencies of each building. The John F. Kennedy Middle School was chosen by the Town of Natick as the school in need of immediate attention. The School is one of two middle schools that serve the entire town of

Natick. The Wilson Middle School has exceeded its capacity and like the John F. Kennedy Middle School, enrollment projections indicate that enrollments at the Wilson will continue to increase before reaching a peak in 2020.

3. Project Description, Objectives and Scope of Services

On May 6, 2011, the Owner submitted a Statement of Interest (Attachment A) to the MSBA for John F. Kennedy Middle School. The MSBA is an independent public authority that administers and funds a program for grants to eligible cities, towns, and regional school districts for school construction and renovation projects. The MSBA's grant program is discretionary, and no city, town, or regional school district has any entitlement to any funds from the MSBA. At the May 26, 2016 Board of Directors meeting, the MSBA voted to issue an invitation to the Owner to conduct a feasibility study for this Statement of Interest to identify and study possible solutions and, through a collaborative process with the MSBA, reach a mutually-agreed upon solution. The MSBA has not approved a Project and the results of this feasibility study may or may not result in an approved Project.

The School was constructed in 1965 to accommodate 600 students as a junior high school. Since 1965, the educational mandates have required districts to add classroom accommodations for many educational purposes such as special education reducing the number of general education classrooms available. The mutually agreed upon enrollment of the proposed project at the John F. Kennedy Middle School shall be based on an enrollment of no more than 1,000 students in grades 5-8.

Project Objectives under consideration by the Owner include:

- Identification of community concerns that may impact study options;
- Review of the Dore & Whittier Architect, Inc. Three School Master Study Report from May 2012;
- Review of Natick Public Schools policies and objectives;
- Identification of specific milestone requirements and/or constraints of the District – e.g. curriculum objectives;
- Life cycle costs of operating the School as it relates to future operational budgets;
- Northeast Collaborative for High Performance Schools (“NE-CHPS”) criteria or US Green Building Council’s LEED for Schools (“LEED-S”) Rating System

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

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

4. Minimum Requirements and Evaluation Criteria:

Minimum Requirements:

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

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

- The Project Director shall be a person who is registered by the Commonwealth of Massachusetts as an architect or professional engineer and who has at least 5 years experience in the construction and supervision of construction and design of public buildings:

or,

- if not registered as an architect or professional engineer, the Project Director must be a person who has at least 7 years experience in the construction and supervision of construction and design of public buildings.

Evaluation Criteria

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

- 1) Past performance of the Respondent, if any, with regard to public, private, DESE funded and MSBA-funded school projects across the Commonwealth, as evidenced by :
 - a) Documented performance on previous projects as set forth in Attachment C, including the number of projects managed, project dollar value, number and percentage completed on time, number and dollar value of change orders, average number of projects per project manager per year, number of accidents and safety violations, dollar value of any safety fines, and number and outcome of any legal actions; (max 10 points)
 - b) Satisfactory working relationship with designers, contractors, Owner, the MSBA and local officials. (max 10 points)
- 2) Thorough knowledge of the Massachusetts State Building Code, regulations related to the Americans with Disabilities Act, and all other pertinent codes and regulations related to successful completion of the project. (max 5 points)
- 3) Thorough knowledge of Commonwealth construction procurement laws, regulations, policies and procedures, as amended by the 2004 Construction Reform laws. Management approach: Describe the Respondent's approach to providing the level and nature of services required as evidenced by proposed project staffing for a potential (hypothetical) proposed project for new construction of 170,000 square feet or renovation of 100,000 square feet; proposed project management systems; effective information management; and examples of problem solving approaches to resolving issues that impact time and cost. (max 5 points)
- 4) Management approach: Describe the Respondent's approach to providing the level and nature of services required as evidenced by proposed project staffing for a potential (hypothetical) proposed project for new construction of 170,000 square feet or renovation of 100,000 square feet; proposed project management systems; effective information management; and examples of problem solving approaches to resolving issues that impact time and cost. (max 15 pts)
- 5) Key personnel: Provide an organizational chart that shows the interrelationship of key personnel to be provided by the Respondent for this project and that identifies the individuals and associated firms (if any) who will fill the

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

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

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

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

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

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

Prior to execution of the Contract for Project Management Services, the fee for services shall be negotiated between the Owner and the selected Respondent to the satisfaction of the Owner, within its sole discretion. The initial fee structure will be negotiated through the Feasibility Study/Schematic Design Phase. The selected Respondent, however, will be required to provide pricing information for all Phases specified in the Contract at the time of fee negotiation.

5. Selection Process and Selection Schedule

Process

- 1) The School Building Subcommittee and the School Procurement Officer will be responsible for initial review of the responses. The responses will be evaluated to determine if they meet the minimum requirements as outlined in Section 4 above. Failure to meet the minimum requirements will disqualify the response from further consideration. Responses that meet the minimum requirements will be further evaluated by the evaluation criteria contained within. All scoring will be documented in writing.
- 2) The School Building Subcommittee (the "Subcommittee") – xxxxxx, xxxxxx, xxxxxx, xxxxx and xxxxx will rank the responses based on the weighted evaluation criteria identified in the RFS and will short-list a minimum of three responses. The three highest responses will be interviewed by the School Building Committee who will recommend a top finalist to the MSBA. The School Building Committee will include an agenda with the interview invitation letter that describes the interview process. Interviewees will be ranked on the following categories: key personnel, experience with past and similar projects, references from past school building projects and answers to specific questions asked by the School Building Committee. The questions to be asked will be provided to the firms prior to the interview. School Building Committee members will evaluate and rank each firm based on their responses to the specific questions. At the conclusion of the interviews the firm with the highest number of points will be considered the first-ranked selection.
- 3) The School Building Committee members are: Jim Kane, Martha White, Julie McDonough, Peter Sanchioni, Jonathan Freedman, Andrew Zitoli, Anna Nolin, John Ciccariello, Mysore Ravindra, Stephen Meyler, Andrew Enright, Richard Foley, Thomas Iskra, John Tracy, Julian Munnich, Peter Gray, William Hurley.]
- 4) The Owner will commence fee negotiations with the first-ranked selection.
 - a. The Owner will require the hourly rates and role for all proposed professional personnel assigned to the project. The owner will consider fee structures from similar projects from other awarded contracts to add knowledge during negotiations.
- 6) If the Owner is unable to negotiate a contract with the first-ranked selection, the Owner will then commence negotiations with its second-ranked selection and so on, until a contract is successfully negotiated and approved by the Owner.
- 7) First-ranked selection will be submitted to the MSBA for its approval.
- 8) The first-ranked selection may be asked to participate in a presentation to the MSBA and/or submit additional documentation, as required by MSBA, as part of the MSBA approval process.
- 9) The Town of Natick reserves the right to re-advertise if less than three responses are received or to re-advertise if fee negotiations fail.

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

11/9/16 Advertise RFS in Central Register of the Commonwealth of Massachusetts and the MetroWest News.

⁵
11/14/16 Informational meeting and site visit (voluntary)

^{2/7}
11/16/16 Last day for questions from Respondents

^{7/14}
11/23/16 Responses due

^{7/21}
11/30/16 Respondents short-listed

^{6/27}
12/06/16 Interview short-listed Respondents

3/30
12/09/16 Negotiate with selected Respondent

5/35
12/14/16 Final selection submitted to the MSBA for review and approval

2.6.15/61
01/09/17 OPM Panel Review with MSBA

01/10/17 Execute contract

Requests for Services may be obtained from:

Peter Gray, MCCPO, School Procurement Officer
Natick Public Schools
13 East Central Street
Natick, MA 01760
Phone: 508-647-6491 Fax: 508-647-6506
Email: pgray@natickps.org

On or after November 9, 2016.

Any questions concerning this Request for Services must be submitted in writing to

Peter Gray, MCCPO, School Procurement Officer
Natick Public Schools
13 East Central Street
Natick, MA 01760
Phone: 508-647-6491 Fax: 508-647-6506
Email: pgray@natickps.org

no later than 11/16/2016 at 4pm.

Sealed Responses to the Requests for Services for Owner's Project Manager Services must be clearly labeled "Owner's Project Management Services for Kennedy Middle School and delivered to

Peter Gray, MCCPO, School Procurement Officer
Natick Public Schools
13 East Central Street
Natick, MA 01760
Phone: 508-647-6491 Fax: 508-647-6506
Email: pgray@natickps.org

no later than 11/23/2016 at 11AM. . The Owner assumes no responsibility or liability for late delivery or receipt of Responses. All responses received after the stated submittal date and time will be judged to be unacceptable and will be returned unopened to the sender.

6. Requirements for content of response:

Submit 17 hard copies of the response to this Request for Services and one electronic version in PDF format on CD.

All responses shall be:

- In ink or typewritten;
- Presented in an organized and clear manner;
- Must include the required forms in Attachment C;

- Must include all required certifications;
 - Must include the following information:
 -
1. Cover letter shall be a maximum of two pages in length and include:
 - a. An acknowledgement of any addendum issued to the RFS.
 - b. An acknowledgement that the Respondent has read the Request for Services. Respondent shall note any exceptions to the RFS in its cover letter.
 - c. An acknowledgement that the Respondent has read the Standard Contract. Respondent shall note any exceptions to the Standard Contract in its cover letter.
 - d. A specific statement regarding compliance with the minimum requirements identified in Item 4 of this Request for Services to include identification of registration, number of years of experience and where obtained (as supported by the resume section of Attachment C), as well as the date of the MCCPO certification. (A copy of the MCCPO certification should be attached to the cover letter).
 - e. A description of the Respondent's organization and its history.
 - f. The signature of an individual authorized to negotiate and execute the Contract for Project Management Services, in the form that is attached to the RFS, on behalf of the Respondent.
 - g. The name, title, address, e-mail and telephone number of the contact person who can respond to requests for additional information.
 2. Selection Criteria: The response shall address the Respondent's ability to meet the "Selection Criteria" Section including submittal of additional information as needed. The total length of the Response (including Attachment C only but excluding Attachments A, B and D) may not exceed twenty (20) single-sided numbered pages with a minimum acceptable font size of "12 pt" for all text.

Respondents may supplement this proposal with graphic materials and photographs that best demonstrate its project management capabilities of the team proposed for this project. Limit this additional information to a maximum of 3 - 8½"x 11" pages, double-sided.

7. Payment Schedule and Fee Explanation:

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

8. Other Provisions

A. Public Record

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

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

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

C. Communications with the Owner

The Owner's Procurement Officer for this Request for Services is:

Peter Gray, MCCPO, School Procurement Officer
Natick Public Schools
13 East Central Street
Natick, MA 01760
Phone: 508-647-6491 Fax: 508-647-6506
Email: pgray@natickps.org

Respondents that intend to submit a response are prohibited from contacting any of the Owner's staff other than the Procurement Officer. An exception to this rule applies to Respondents that currently do business with the Owner, but any contact made with persons other than the Procurement Officer must be limited to that business, and must not relate to this RFS. In addition, such respondents shall not discuss this RFS with any of the Owner's consultants, legal counsel or other advisors. ***FAILURE TO OBSERVE THIS RULE MAY BE GROUNDS FOR DISQUALIFICATION.***

D. Costs

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

E. Withdrawn/Irrevocability of Responses

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

F. Rejection of Responses, Modification of RFS

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

G. Subcontracting and Joint Ventures

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

H. Validity of Response

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

FURTHER INFORMATION

None

ATTACHMENTS:

Attachment A: Statement of Interest

Attachment B: Contract for Owner's Project Management Services

Attachment C: OPM Application Form - May 2008

Attachment D: Required Certifications

