

ATTACHMENT A

Documentation required for Massachusetts School Building Authority (the “MSBA”) approval process

Attachment A consists of two parts:

- **Part 1: Template Narrative of the Procurement and Selection Process for the Owner to Complete**

The information contained in the narrative should be detailed and clearly explain the procurement process and the selection process. The information provided should be supported by the documentation detailed in the Confirmation of Required Information list, which is referenced below as Part 2 of Attachment A. **Please note: This is a standard MSBA form that should only be changed for formatting purposes.**

The narrative must be signed by the Procurement Administrator and Chief Executive Officer (the “CEO”), on behalf of the Owner. The Procurement Administrator and the CEO must certify that a qualifications-based selection process was used, state that the Owner recommends the selected respondent as the Owner’s Project Manager (“OPM”), and state that the Owner is seeking the MSBA’s approval of the OPM. A copy of the MSBA standard Contract for Project Management Services signed only by the selected respondent shall be included in the Owner’s narrative. **The District should not sign this contract until the MSBA OPM Review Panel has approved the Owner’s selection.**

- **Part 2: List of Required Information for the Owner to Complete**

The Owner should provide the information requested in the first column of the confirmation list either in the text of the narrative or as an Exhibit, as specified in the chart. The individual designated as a Massachusetts Certified Public Purchasing Official for **Design and Construction Contracting** in the Massachusetts Certified Public Purchasing Official Program as administered by the Inspector General of the Commonwealth of Massachusetts should initial the second column of the confirmation list to confirm that the required information is being submitted and submit the OPM Procurement Certification (Exhibit F).

*****All of the information described in Attachment A, including the Exhibits, must be submitted to the MSBA no later than the due date provided by the MSBA to provide the OPM Review Panel with sufficient time to review the materials. Attachment A and other submission requirements can be found on the MSBA’s website: <http://www.massschoolbuildings.org/building/team/opm>.**

ATTACHMENT A - Part 1

**Please note: All bracketed information in the narrative should be filled in or deleted*

Narrative of the Selection Process

Formation of the Selection Committee:

A Selection Committee was formed by the Tri-County Regional Vocational Technical School District School Building Committee to prepare a Request for Services (“RFS”) for an OPM. The RFS is attached as Exhibit A.

The Selection Committee included the following members:

Name	Title	Description of related experience
Brian Muschnick	Chairman	Business Owner and School Committee Chairman
Jonathan Dowse	Member	Business Owner and School Committee Representative from Sherborn
Brendan Bowen	Member	Architectural candidate and Former Graduate of Tri-County Vocational
Stanley Widak	Member	Construction Experience and School Committee Rep from Plainville

Procurement administrator: Daniel B. Haynes, School Business Administrator, MCPPO Certificate Date 3/31/2020. The procurement administrator is a non-voting member of the Selection Committee.

**A copy of the current MCPPO certification must be attached if the procurement administrator is different than the “SBC member who is MCPPO certified” in the MSBA-approved School Building Committee form that was provided by the District during the Eligibility Period. If the MCPPO certification is expired, please provide proof of registration in an upcoming MCPPO class.*

Issuing the Request for Services:

On May 5, 2021, the School Building Committee and newly appointed Selection Committee reviewed the draft RFS document. The School Building Committee approved the draft RFS and authorized the Selection Committee to advertise the RFS, once approved by the MSBA, for an OPM. The **certified** vote approving the draft RFS and authorizing the Selection Committee to issue the RFS, once approved by the MSBA, is attached as Exhibit B.

On May 31, 2021, the Tri-County Regional Vocational Technical School District advertised an RFS for an OPM for a school construction project in the Central Register and local newspapers, as required by law. The advertisement appeared in the Milford Daily News and the Sun Chronicle on May 31 and in the Central Register on June 2, 2021. Copies of the Advertisement are attached as Exhibit C. An informational meeting and site inspection was held on June 7, 2021 and fifteen (15) interested parties attended. Questions were not received from the interested parties.

Review of Responses Received:

Thirty-two (32) potential respondents requested the RFS including:

Firm Name	
1	APTIM
2	ARCADIS US
3	ATLANTIC CONSTRUCTION & MGMT INC
4	BLUE HOUSE PROPERTY MANAGEMENT INC
5	CBI CONSULTING INC
6	CBRE DEVELOPMENT & PROJECT MGMT
7	CHA CONSULTING INC
8	COLLIERS PROJECT LEADERS
9	COMPASS PROJECT MANAGEMENT INC
10	CONSTRUCTION MONITORING SERVICES, INC
11	D.G. RANIERI REAL ESTATE
12	DELTEK INC
13	DINISCO DESIGN
14	DLR GROUP
15	DORE & WHITTIER
16	FINEGOLD ALEXANDER ARCHITECTS
17	HILL INTERNATIONAL INC
18	HMFH ARCHITECTS
19	KAESTLE BOOS ASSOCIATES INC
20	LAMOUREUX PAGANO ASSOCIATES
21	LEFTFIELD
22	NITSCH ENGINEERING
23	P3 PROJECT PLANNING PROFESSIONALS
24	PCA 360
25	PINCK-CO
26	PMA CONSULTANTS
27	POMROY ASSOCIATES LLC
28	R.J. KENNEY ASSOCIATES INC
29	SKANSKA INTEGRATED SOLUTIONS
30	SMMA
31	STV INC
32	TERVA CORPORATION
33	THE LIRO GROUP

Thirteen (13) respondents submitted responses by the due date of June 16, 2021 as follows:

Firm Name

1	ARCADIS US
2	ATLANTIC CONSTRUCTION & MGMT INC
3	CHA CONSULTING INC
4	COLLIERS PROJECT LEADERS
5	COMPASS PROJECT MANAGEMENT INC
6	CONSTRUCTION MONITORING SERVICES, INC
7	DORE & WHITTIER
8	HILL INTERNATIONAL INC
9	LEFTFIELD
10	P3 PROJECT PLANNING PROFESSIONALS
11	PCA 360
12	PMA CONSULTANTS
13	SKANSKA INTEGRATED SOLUTIONS

The Selection Committee members each received copies of the responses that were received. The Selection Committee determined which responses comply with the minimum requirements set forth in M.G.L. c.149 §44A½ for an “owner’s project manager” and 963 CMR 2.00 *et seq.*

The Selection Committee then ranked the group of respondents that met the minimum requirements. They ranked this group based on the selection criteria listed in the RFS as described below.

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, DOE 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. point value 7.5)
 - b) Satisfactory working relationship with designers, contractors, Owner, the MSBA and local officials. (Max. point value 7.5)
- 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. point value 10)

- 3) Thorough knowledge of Commonwealth construction procurement laws, regulations, policies and procedures, as amended by the 2004 Construction Reform laws, including knowledge and experience with CM at Risk Procurement(Max. point value 10)
- 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 300,000 square feet or renovation of 285,000 square feet; proposed project management systems; effective information management; and examples of problem-solving approaches to resolving issues that impact time and cost. (Max. point value 10)
- 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. point value 10)
- 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. point value 10)
- 7) Identify the Respondent's current and projected workload for projects estimated to cost in excess of \$1.5 million. (Max. point value 5)
- 8) Familiarity with Northeast Collaborative for High Performance Schools criteria or US Green Building's Council's LEED for Schools Rating System. Demonstrated experience working on high performance green buildings (if any), green building rating system used (e.g., NE-CHPS or LEEDS-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. point value 5)
- 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. point value 10)
- 10) Knowledge of the purpose and practices of the services of Building Commissioning Consultants. (Max. point value 5)
- 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. point value 10)

The Selection Committee ranked the respondents as follows:

Firm Name	Cumulative Average Score (highest to lowest)
1. Skanska	98.5
2. Dore & Whittier	98.0
3. Colliers	93.0
4. Hill International	90.0
5. Compass	88.5
6. CHA Consulting	85.5
7. PMA Consultants	82.5
8. PCA 360	76.0
9. Atlantic	73.5
10. CMS	71.0
11. P3	70.0
12. Leftfield	68.5

The Selection Committee short-listed the following respondents:

Firm Name	Cumulative Average Score (highest to lowest)
1. Skanska	98.5
2. Dore & Whittier	98.0
3. Colliers	93.0
4. Hill International	90.0

The Selection Committee did conduct interviews of the short-listed respondents.

Interviews:

Four (4) respondents were interviewed and the following questions were provided to the Respondents prior to the interview.

Interview Questions:

1. Can you speak to a time where you needed to get time sensitive information from a consultant or authority that was not very responsive, what did you do?
2. Can you speak to a last minute project change you have encountered (change order, discovered existing conditions, etc.) and how you were able to incorporate the changes and maintain project success?

3. Our District is made up of 11 unique towns with varying financial concerns and median incomes. How would you guide the Committee with communications and marketing of the preferred project option to ultimately obtain a community-wide vote in favor of the project?
4. Considering the volume of input that will play a role early on in this project, can you identify how you will be able to help Tri-County track and prioritize the input in order to establish the project goals? Once project goals are established, in what way will you ensure that these project goals are sustained throughout the project?
5. Based on your team's time commitments outlined in the response to RFS, can you elaborate on who the primary contact(s) will be, at what points in the process they are anticipated to be the point of contact, and how the filtering of information to/from the point of contact will be disseminated throughout the project team?
6. Can you identify a project with extensive ADA/MAAB accessibility upgrades required and what steps you were able to take to manage the process to success?
7. How would you handle the swing space issue during the renovation of a Vocational School?

The Selection Committee used the following scoring system in assessing the interviewees, which was in accordance with the process outlined in the Owner's OPM RFS.

TRI-COUNTY REGIONAL VOCATIONAL TECHNICAL SCHOOL DISTRICT		
OPM SELECTION INTERVIEW SCORING TEMPLATE		
	OPM	Notes
CATEGORY 1: KEY PERSONNEL		
Key personnel: Did the Respondent 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.		
Evaluation Criteria: Highly Advantageous (5 Points)		
Key personnel assigned to the Tri-County building project are an excellent match based on our expected needs.		
Evaluation Criteria: Advantageous (1-4 Points)		
Key personnel assigned to the Tri-County building project are a good match based on our expected needs.		
Evaluation Criteria: Least Advantageous (0 Points)		
Key personnel assigned to the Tri-County building project are a poor match based on our expected needs.		
CATEGORY 2: PAST EXPERIENCE WITH SIMILAR SIZED PROJECTS		

Documented performance on previous projects , 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.		
Evaluation Criteria: Highly Advantageous (5 Points)		
Documented past experience with similar sized projects in a school district environment and specific relevant experience with vocational school projects.		
Evaluation Criteria: Advantageous (1-4 Points)		
Some past experience with similar sized projects in a school district environment and some specific relevant experience with vocational school projects.		
Evaluation Criteria: Least Advantageous (0 Points)		
Limited past experience with similar sized projects in a school district environment and minimal specific relevant experience with vocational school projects.		
Category 3: Quality of References		
References will be evaluated to identify the ability and quality of previous work on school building projects with similar size and scope.		
Reference Criteria:		
1. Communication		
2. Budget Control		
3. Document Quality		
4. Schedule Control		
5. Construction Control		
6. Other Comments		
Evaluation Criteria: Highly Advantageous (5 Points)		
Excellent grades from references for the criteria above and enthusiastic comments from contacted individuals.		
Evaluation Criteria: Advantageous (1-4 Points)		
Excellent or good grades from references for the criteria above and overall positive comments from contacted individuals.		
Evaluation Criteria: Least Advantageous (0 Points)		
Good or poor grades from references for the criteria above and overall negative comments from contacted individuals.		
Category 4: Quality of Interview		

<p>Interviews will be conducted with firms that meet the minimum requirements set forth in the RFS submissions, at the sole discretion of the OPM Selection Committee. The quality of the interviewee's response to the questions posed by the OPM Selection Committee will be scored in accordance with the following criteria:</p>		
<p>Evaluation Criteria: Highly Advantageous (5 Points)</p>		
<p>Interviewee possessed excellent communication skills and provided answers in an organized and succinct presentation.</p>		
<p>Evaluation Criteria: Advantageous (1-4 Points)</p>		
<p>Interviewee possessed good communication skills and provided some answers in a organized and succinct presentation.</p>		
<p>Evaluation Criteria: Least Advantageous (0 Points)</p>		
<p>Interviewee possessed poor communication skills and did not provide answers in an organized and succinct presentation.</p>		
<p>Additional Qualitative factors derived from firm Interviews:</p>		
<p>1. Rate Overall presentation/communication skills</p>		
<p>(Zero to 5 Points)</p>		
<p>2. Ability of firm to understand the needs of Tri-County Voke.</p>		
<p>(Zero to 5 Points)</p>		
<p>3. Firm deemed to be the best match for our building project</p>		
<p>(Zero to 5 Points)</p>		
<p>TOTAL POINTS</p>		<p>0</p>
<p>Comments:</p>		
<p>Firm Recommendation:</p>		

The Selection Committee did not factor in the respondent's original scores with the interview scores, which was in accordance with the process outlined in the Owner's OPM RFS.

The Selection Committee felt strongly that the Respondent's original score should not affect the interview scores. The Selection Committee concluded that all of the short-listed candidates were qualified to perform the role as OPM for the building project, and the interview process alone would be the most important methodology in bringing forward the candidate determined to be the best match for the School District.

Below are narratives of each interview that the Selection Committee conducted.

Narrative about the interview of Dore and Whittier:

Interview Questions:

1. Can you speak to a time where you needed to get time sensitive information from a consultant or authority that was not very responsive, what did you do?

The Respondent spoke about a specific example involving two sinks during a complex renovation project. Dore & Whittier adopted a team-based approach, organizing a time-sensitive meeting with key stakeholders at the MSBA to move the process forward.

The Selection Committee felt the Respondent highlighted the need to work together to achieve results and the answer displayed an understanding of Dore & Whittier's knowledge of vocational school building projects.

2. Can you speak to a last minute project change you have encountered (change order, discovered existing conditions, etc.) and how you were able to incorporate the changes and maintain project success?

Dore & Whittier gave an example from the Andover School project whereby sinks and toilets were not functioning on the third floor due to a water pressure issue. Once again a team-based approach was adopted to determine the most cost effective solution.

The answer highlighted the need to get everyone in the room to work collaboratively through an issue.

3. Our District is made up of 11 unique towns with varying financial concerns and median incomes. How would you guide the Committee with communications and marketing of the preferred project option to ultimately obtain a community-wide vote in favor of the project?

The Respondent identified this question as one of the most important of the seven posed. Dore & Whittier utilizes Charlie Lyons as an outside consultant. Charlie is considered by many to be an expert in the vocational education field. Charlie talked about the need to engage Town Administrators/Managers, Local Finance Committee officials and legislators early in the process. He also spoke about highlighting the success of Tri-County graduates to engage community members.

Many of the Selection Committee members also felt this was one, if not, the most important interview question. The Selection Committee was overwhelmingly impressed by the depth of the answer, and the Selection Committee recognized immediately the impact Charlie Lyons will have on obtaining the votes necessary to move to the construction phase of the project.

4. Considering the volume of input that will play a role early on in this project, can you identify how you will be able to help Tri-County track and prioritize the input in order to establish the project goals? Once project goals are established, in what way will you ensure that these project goals are sustained throughout the project?

Christina Dell Angelo, Project Manager – Process, spoke about the importance of goal setting to steer the project. The overarching project goals, and review of those goals at different milestones, will help to keep the project on task and will act as a rudder to keep moving the project in the right direction.

The Selection Committee was impressed with the team-based approach Dore & Whittier displayed during the interview process. Christina was well-spoken and displayed the confidence necessary to help manage the Tri-County building project.

5. Based on your team's time commitments outlined in the response to RFS, can you elaborate on who the primary contact(s) will be, at what points in the process they are anticipated to be the point of contact, and how the filtering of information to/from the point of contact will be disseminated throughout the project team?

Firm Partners, Mike Burton and Trip Elmore will be the primary contacts for the Tri-County building project. The organization chart included in the interview presentation helped to highlight how information will be disseminated among and throughout the project team.

The Selection Committee members discussed Dore & Whittier's enthusiasm for the Tri-County project and the energy the team brought to the interview process.

6. Can you identify a project with extensive ADA/MAAB accessibility upgrades required and what steps you were able to take to manage the process to success?

The Respondent provided an overview of the cost/benefit of handicap ramp and railings at Blue Hills Vocational. The Blue Hills project had extensive ADA/MAAB compliance issues and the handicap ramp and railings example displayed appropriate steps used in managing the upgrade when considering a cost/benefit analysis.

Terry Hartford did an excellent job in presenting the facts and solution to the ADA compliance issue at Blue Hills. Once again another member of the team participated in the interview process and spoke with confidence about a successful solution in a similar type project.

7. How would you handle the swing space issue during the renovation of a Vocational School?

Dore & Whittier discussed some of the lessons learned about swing space during the Blue Hills Vocational renovation project:

- Cannot teach in rooms under construction
- Shift work will present challenges
- Must think "outside the box"
- Always look for opportunities and find possibilities
- Construction phase must be efficient and effective

The Respondent discussed a phasing diagram using an overhead pictorial of Tri-County Vocational.

The Selection Committee appreciated the honest sharing of lessons learned regarding the unique swing space issues encountered in the renovation of a vocational school. Dore & Whittier have the capacity and capabilities to work through some of the more nuanced issues prevalent in a vocational school renovation.

Narrative Summary from interview of Dore and Whittier:

The Selection Committee shared feedback on the Dore & Whittier interview before conducting the next interview. Dore & Whittier displayed numerous strengths throughout the interview, including staying within our stipulated time constraint, yet answering the questions posed in a thoughtful and comprehensive manner. The Selection Committee appreciated that the Respondent continually asked if there were any questions throughout the interview, creating an interview that was interactive and informative. The interviewee brought seven members of the team to the interview and all participated when appropriate. The Selection Committee felt confident that Dore & Whittier understood the unique challenges of vocational school building projects, both in terms of community engagement and educational swing space concerns. Dore & Whittier drew parallels to other relevant school construction projects, and it was noted that most of the OPM work completed by the firm is within the school environment. Selection Committee member Dan Haynes shared the results of Dore & Whittier's external reference checks. Mr. Haynes indicated that the three reference checks provided Dore & Whittier with excellent grades in all five categories of the matrix. The additional comments received as part of the reference checks included, "If you can get them, get them" and "the District had high expectations of the OPM and Dore & Whittier exceeded those expectations."

Narrative about the interview of Hill International:

Interview Questions:

1. Can you speak to a time where you needed to get time sensitive information from a consultant or authority that was not very responsive, what did you do?

Hill International used four examples to illustrate interview question number 1. All projects discussed had unforeseen issues. A different member of the Hill International team outlined the issue and eventual solution for each example.

One of the Selection Committee members thought the proposed solutions worked around the problem, rather than directly addressing and correcting the problem.

2. Can you speak to a last minute project change you have encountered (change order, discovered existing conditions, etc.) and how you were able to incorporate the changes and maintain project success?

The Respondent discussed two examples regarding last minute project changes. In one example unforeseen discovered debris was re-purposed into landscape berms and in another lava rock was unearthed and the solution proposed by Hill International reduced the change order by 500K.

Both examples provided insight into potential unforeseen project conditions and Hill International's ability to manage the conditions and maintain project success.

3. Our District is made up of 11 unique towns with varying financial concerns and median incomes. How would you guide the Committee with communications and marketing of the preferred project option to ultimately obtain a community-wide vote in favor of the project?

Hill International discussed specific ways to engage with community partners, including steps to develop and execute a marketing plan for Community Outreach. The Respondent also discussed the use of the District website and social media page as way to keep the public informed of project milestones.

The Selection Committee felt that Hill International did a good job of discussing the need to engage the community early in the process and the need to continue that engagement throughout feasibility. Providing a voice to the community could be a way to encourage participation and create a sense of ownership in the project.

4. Considering the volume of input that will play a role early on in this project, can you identify how you will be able to help Tri-County track and prioritize the input in order to establish the project goals? Once project goals are established, in what way will you ensure that these project goals are sustained throughout the project?

Hill International discussed a Project Charter as a means to develop project goals and provide the community with a voice in setting priorities. The Project Charter helps set the guardrails for the project and helps tie project priorities to the characteristics of a successful project.

Most of the Selection Committee liked the idea of developing a Project Charter as a way to create community engagement. At least one member was skeptical about the response from the community in a vocational district and thought the concept was more relevant to a comprehensive local school building project.

5. Based on your team's time commitments outlined in the response to RFS, can you elaborate on who the primary contact(s) will be, at what points in the process they are anticipated to be the point of contact, and how the filtering of information to/from the point of contact will be disseminated throughout the project team?

Hill International displayed a team commitment chart illustrating six members of the team and an estimate of their time allotment for Tri-County during feasibility, design and construction. The respondent discussed the collaborative environment within the firm.

The Selection Committee agreed with team-based approach discussed in the illustration. It was not clear who would be responsible for the marketing strategies discussed in interview question #3.

6. Can you identify a project with extensive ADA/MAAB accessibility upgrades required and what steps you were able to take to manage the process to success?

The Respondent discussed the non-ADA compliant doorways at Tri-County Vocational, observed during the walk-through, and demonstrated how a similar instance of noncompliance was remedied during the Braintree East Middle School Addition renovation.

The Selection Committee appreciated the relevance of the example as it is applicable to our own non-ADA compliance issue.

7. How would you handle the swing space issue during the renovation of a Vocational School?

Hill International spoke of the issues encountered with swing space during the Southeastern Vocational renovation project. The respondent outlined the project phasing plan used as part of the Southeastern Vocational project. They also outlined the need for additional shifts in the evening and increased construction activity during the summer months.

The Selection Committee recognized that Hill International has had experience with the swing space issue in a vocational setting. The phasing, additional shifts and increased summer construction were communicated by all the interviewee's.

Narrative Summary from interview of Hill International:

The Selection Committee shared feedback on the Hill International interview before meeting with the next candidate. Hill International displayed the interview questions and shared relevant experience from previous projects managed to answer the posed questions. All members of the Selection Committee felt that Peter Martini, Principal-in-Charge was somewhat out of sync, and appeared to not have prior knowledge of their own presentation. There were also a few instances where the interaction between Mr. Martini and Julie Leduc, Project Manager was not on point, leaving Selection Committee members wondering about how prepared the Respondent was for the interview. The Hill International team does possess vocational school renovation experience and has worked with Tri-County as an OPM to complete an accelerated repair project. Selection Committee Member Brendan Bowen shared that Hill International received a good, rather than excellent, score with respect to communication from one of the external reference checks. The Selection Committee scored Hill International lower than Dore & Whittier based on the quality of the interview and external reference checks.

Narrative about the interview of Skanska:

Interview Questions:

1. Can you speak to a time where you needed to get time sensitive information from a consultant or authority that was not very responsive, what did you do?

Skanska provided an example involving a new Superintendent who had never created an Educational Plan as part of the MSBA submission process. Skanska directed the new Superintendent through the process and became a partner for this deliverable. The Respondent distributed the Minuteman Vocational Education Plan to the Selection Committee as a handout and example of the work performed.

The Selection Committee shared that the example provided was unique and deviated from the more traditional responses received for this question from other Interviewee's. The Education Plan handout provided additional insight to the Selection Committee with respect to the required deliverables.

2. Can you speak to a last minute project change you have encountered (change order, discovered existing conditions, etc.) and how you were able to incorporate the changes and maintain project success?

Skanska described how Hurricane Sandy affected the Winthrop School building project. The Respondent detailed how FEMA changed the methodology for calculating Flood Plains after Hurricane Sandy, and this change occurred after voters had approved the project based on FEMA preliminary maps. New FEMA guidance put the planned building 2-3 feet below the flood plain. Skanska managed a confirmation survey for the first-floor elevation to maintain project success.

The Selection Committee appreciated the excellent presentation of a unique last minute project change that included collaboration with a large Federal Agency to obtain an acceptable solution.

3. Our District is made up of 11 unique towns with varying financial concerns and median incomes. How would you guide the Committee with communications and marketing of the preferred project option to ultimately obtain a community-wide vote in favor of the project?

The Respondent communicated their experience with Minuteman Vocational which included 16 member communities. Skanska indicated that getting to a yes vote starts on day one and includes a Community Communications Plan, transparency, a school project website, a frequently asked questions document, and other District marketing activities. The answer to question #3 also included a presentation on a proposed school project timeline and decision making chart, a narrative about managing the construction budget and a look at the informative brochure that Minuteman Vocational created.

The Selection Committee indicated that the answer to question #3 was comprehensive and informative. However, the Selection Committee also thought the answer provided too much information beyond the scope of the question and served to explain more about the MSBA process than an illustration of the how Skanska would help obtain the votes necessary in our 11 member School District.

4. Considering the volume of input that will play a role early on in this project, can you identify how you will be able to help Tri-County track and prioritize the input in order to establish the project goals? Once project goals are established, in what way will you ensure that these project goals are sustained throughout the project?

Skanska incorporated how the Educational Program becomes an integral part of establishing and sustaining project goals, and how the eventual design will support the Educational Program. Project goals will be defined, tracked and reviewed for sustainability and constructability throughout the process.

Once again the Selection Committee thought the answer provided an educational and informative explanation of the process, but did not address Tri-County's role in goal setting and how those goals would be sustained throughout the project.

5. Based on your team's time commitments outlined in the response to RFS, can you elaborate on who the primary contact(s) will be, at what points in the process they are anticipated to be the point of contact, and how the filtering of information to/from the point of contact will be disseminated throughout the project team?

Skanska indicated that Mary Ann Williams, Project Director, would be the point of contact throughout the project. Skanska also introduced a flowchart with respect to a Communication Strategy that described communication to the MSBA, communication to the design team and the scheduling of subcommittee meetings.

The Selection Committee was very impressed with the credentials and competency of Ms. Williams. The Communication Strategy presented was far more detailed and comprehensive than those presented by other OPM firms during the interview process.

6. Can you identify a project with extensive ADA/MAAB accessibility upgrades required and what steps you were able to take to manage the process to success?

Skanska described the building survey for ADA compliance completed at Lowell High School. The steps taken by Skanska included identifying deficiencies and proposed corrections, a cost/benefit analysis regarding the best solutions, and the methodology to track ADA/MAAB accessibility requirements.

The Selection Committee discussed the financial relevance of the answer in terms of the need to identify solutions and make decisions using a cost/benefit analysis. The answer demonstrated the depth of knowledge and experience of Skanska in the role as an OPM.

7. How would you handle the swing space issue during the renovation of a Vocational School?

Skanska provided a detail answer, highlighting a coordination and alignment of renovation and educational plan goals. The presentation included a well-prepared infographic showing the implementation of a phased occupied construction plan. The phased occupied construction goals include continuity of education, separation of construction, and safety for all.

The Selection Committee thought the swing space answer appropriately incorporated School scheduling and calendar concerns as well as a discussion on the importance of maintaining the integrity of education plan goals.

Narrative Summary from interview of Skanska:

The Selection Committee shared feedback on the Skanska interview before meeting with the next candidate. All Selection Committee Members were impressed by the professional interview and presentation skills displayed by Skanska. The Skanska team had excellent vocational school renovation/construction experience and Megan O’Connell added significant value with her sustainability expertise. The firm has extensive additional resources which would benefit the Tri-County project. The drawbacks identified in the interview included too much emphasis on the MSBA process without building a connection to the needs of Tri-County. One member intimated that he was unsure what type of role Tri-County would have during the Feasibility phase of the project, and further questioned how our voice/concerns would be incorporated into the process. Selection Committee member Dan Haynes shared the results of Skanska’s external reference checks. Mr. Haynes indicated that the three reference checks provided Skanska with excellent grades in all five categories of the matrix. The additional comments received as part of the reference checks included, “Skanska is the best at what they do and they bring enormous resources to a project” and “Skanska was an integral part of the project and had a great understanding of vocational schools.” The Selection Committee scored Skanska above Hill International, but slightly below Dore & Whittier based on the quality of the interview and external reference checks.

Narrative about the interview of Colliers International:

Interview Questions:

1. Can you speak to a time where you needed to get time sensitive information from a consultant or authority that was not very responsive, what did you do?

Colliers described a situation involving National Grid and bringing power to a recently constructed school facility. Colliers leveraged resources within the team to help resolve the issue in a timely manner. The Respondent indicated that it is critical for all parties to understand their role to limit and

address unexpected issues on a project. Within the Colliers team Alan Minkus, Project Director handles the strategic concerns of as project while Tim Alex, Project Manager handles the tactical issues.

The Selection Committee appreciated the straight forward manner in which Colliers resolved the National Grid issue. The Selection Committee also discussed the realistic and honest response regarding the need to plan ahead to avoid unexpected issues, and to plan for delays in any project.

2. Can you speak to a last minute project change you have encountered (change order, discovered existing conditions, etc.) and how you were able to incorporate the changes and maintain project success?

Colliers communicated a construction problem at Cape Cod Vocational involving Verizon and an issue surrounding the pulling of cable. As a result of COVID-19 supply chain issues Verizon did not have the cable necessary to complete the task. Colliers was able to establish a unique working relationship between Verizon and a local cable company to secure the needed cable. The Interviewee reiterated the need to be prepared and be proactive to maintain project success.

The Selection Committee communicated that none of the other interviewee's honed in on the importance of planning to help navigate project changes and issues and maintain project success. Once again a realistic and commonsensical approach to managing a project.

3. Our District is made up of 11 unique towns with varying financial concerns and median incomes. How would you guide the Committee with communications and marketing of the preferred project option to ultimately obtain a community-wide vote in favor of the project?

Colliers stressed the need to collaborate with town financial leaders and incorporate these leaders as part of the public presentation process to secure local buy-in of the project. Colliers would also help develop a Community Outreach Plan detailing project goals developed from public forum visioning sessions. The use of Political Action Committees, get out the vote campaign, and addressing negative comments from the public early on, was also discussed.

The Selection Committee recognized the strong plan Colliers presented to work with our 11 member communities. The marketing plan involved a good listening and response strategy as well a thoughtful presentation of the involvement of community leaders and various stakeholders.

4. Considering the volume of input that will play a role early on in this project, can you identify how you will be able to help Tri-County track and prioritize the input in order to establish the project goals? Once project goals are established, in what way will you ensure that these project goals are sustained throughout the project?

Tim Alex, Project Manager, communicated the importance of developing a plan early in the feasibility process to establish project goals and tell the story. This process will include:

- Visioning sessions with stakeholders centered around the educational plan
- Round table discussions with community leaders
- Project estimates will made at critical phases
- Schematic design will drive project goals
- Continued effective communication of goals throughout feasibility

The Selection Committee thought Colliers did a good job of affirming the multiplicity and importance of establishing and sharing project goals to a myriad of critical stakeholders. The approach communicated seemed more aligned with the needs of Tri-County and the demographics in the 11 communities.

5. Based on your team's time commitments outlined in the response to RFS, can you elaborate on who the primary contact(s) will be, at what points in the process they are anticipated to be the point of contact, and how the filtering of information to/from the point of contact will be disseminated throughout the project team?

Colliers presented an anticipated capacity chart illustrating the team members and the current active projects. The chart showed the percentage each member will be providing services amongst all Collier's active projects, including Tri-County. Tim Alix, Senior Project Manager, will be the point person for the Tri-County project.

The Selection Committee found the chart to be helpful in illustrating the team's overall time commitments when considering active projects managed by Colliers.

6. Can you identify a project with extensive ADA/MAAB accessibility upgrades required and what steps you were able to take to manage the process to success?

Colliers discussed the inclusion of a Limited-Use-Limited-Application (LULA) elevator at the Bristol County Vocational project. Colliers consulted with the local building inspector and an accessibility expert at DESE to determine the appropriate needs of the District. The interviewee communicated the importance of regular interaction with local and State officials and the need to have them visit the site when necessary.

The Selection Committee agreed that consulting with local building officials will create a shared interest in our project and a shared sense of responsibility. Colliers did a good job of collaborating with appropriate officials to help manage project success.

7. How would you handle the swing space issue during the renovation of a Vocational School?

Colliers communicated the need to have a plan in place to help facilitate the least amount of disruption and enhance safety during construction. The plan discussed included the need to tie the school schedule to phasing, use of additional space as swing space, and the generating increased workflow during school vacations and throughout the summer.

The Selection Committee noted that the answer provided to this question mirrored the response of the other interviewee's. It was noted that all of the OPM's interviewed have had past experience with swing space issues in a vocational school.

Narrative Summary from interview of Colliers:

The Selection Committee shared feedback on the Colliers interview. All Selection Committee Members were impressed by the professional interview and presentation prepared by Colliers. It was noted that Colliers did not provide the interview questions and answers as part of their electronic presentation, as the other interviewee's did. It was further noted that it was not a requirement of the presentation as set forth by the

Selection Committee and Colliers was adequately prepared to answer the interview questions. The Colliers team possess extensive experience in providing OPM services in Massachusetts and relevant experience with vocational school projects. The Selection Committee determined that the interview was personable and engaging, and the Colliers Team was able to create a connection with the Tri-County members. Selection Committee Member Brendan Bowen shared that Colliers received excellent scores on the external reference checks. Any additional comments made through the external reference check process were positive and referenced only typical building project issues.

After the interviews, the Selection Committee ranked the four short-listed respondents as follows:

Firm Name	Cumulative Average Score (highest to lowest)
1. Dore & Whittier	33.5
2. Colliers International	31.0
3. Skanska	29.5
4. Hill International	26.5

Reference Checks:

The Selection Committee conducted three reference checks for each short-listed candidate in accordance with the process outlined in the Owner’s OPM RFS, and as summarized in the OPM Reference Checks Matrix (attached as Exhibit E).

Final Ranking of all Interviewees:

The Selection Committee ranked Dore & Whittier first based on the quality of the interview as documented in the narrative, and excellent external reference checks. The Selection Committee determined that the addition of Charlie Lyons as an outside consultant will provide a significant advantage in obtaining a community-wide vote in favor of the preferred option. The Selection Committee also felt strongly that Dore & Whittier projected significant enthusiasm for our project and demonstrated an understanding of the Tri-County needs as well as an exemplary understanding of the OPM process for Massachusetts School Building Projects.

The Selection Committee ranked Colliers second based on the quality of the interview as documented in the narrative, and excellent external reference checks. Colliers is a larger OPM firm with the skills and capacity to provide OPM services to Tri-County. The Colliers team did not demonstrate the enthusiasm conveyed by Dore & Whittier during the interview. External reference checks also did not provide enthusiastic additional commentary on the OPM services performed.

The Selection Committee ranked Skanska third based on the quality of the interview as documented in the narrative, and excellent external reference checks. The Selection Committee was impressed by the depth of expertise and the excellent interview presentation. Skanska received enthusiastic external reference checks from the three individuals contacted. The Selection Committee felt that Skanska failed to make a good connection with the Committee during the interview and largely communicated the MSBA process rather than identifying Tri-County specific needs and our role in the feasibility study.

The Selection Committee ranked Hill International fourth based on the quality of the interview as documented in the narrative, and external reference checks. Hill International, like all interviewees, possess the knowledge and skills necessary to perform the OPM duties. The Selection Committee did not feel the interview presentation was well prepared in certain sections and the members of the Hill International team seemed out of sync at certain intervals.


Conclusion Statement:

Dore & Whittier and Tri-County Regional Vocational Technical School District have completed negotiations and Dore & Whittier has signed the MSBA standard Contract for Project Management Services for a Design/Bid/Build or Construction Manager at Risk project, without modifications to its terms and conditions. The contract as signed only by Dore & Whittier is attached as Exhibit G.

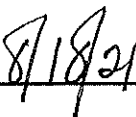
Pursuant to section 3.2 of the Contract between the OPM and Tri-County Regional Vocational Technical School District, the Eligible Applicant for Tri-County Regional Vocational Technical School District has designated Karen Maguire Superintendent-Director as the individual who shall have the authority to act on behalf of the Owner under this Contract and who shall be responsible for the day-to-day communication between the Owner and the OPM.

Based on the information as stated above, the undersigned hereby certify that: (1) all required local approvals in connection with the RFS have been obtained, (2) the Owner utilized a qualifications-based selection process, (3) the Owner followed the procurement process that was set forth in the RFS that was issued by the Owner, including the process for scoring and reference checks, (4) the final ranking of respondents accurately reflects the scores received by the respondents, and (5) the scoring sheets used in the selection process are true, complete and accurate. The Owner recommends the selection of Dore & Whittier as the most qualified respondent to provide OPM Services for the proposed Tri-County Regional Vocational Technical High School project. The Owner requests that the MSBA approve its selection as required by 963 CMR 2.11(2).

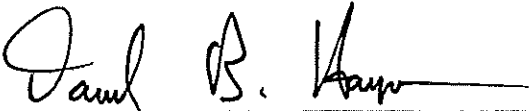
**Please print the name of the Chief Executive Officer and Procurement Administrator below his/her signature.*



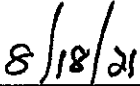
Chief Executive Officer



Dated



Procurement Administrator (MCPPO Certified)



Dated

Exhibits

- A. RFS including any addenda and questions and answers.
- B. School Building Committee (or other authorized body) authorization of membership of the Selection Committee, approval of the RFS, and authorization for the Selection Committee to advertise the RFS.
- C. Copy of advertisement in the Central Register and additional publications, including name and date of publication.
- D. Copy of the selected respondent's proposal, including organizational chart.
- E. OPM Reference Checks Matrix.
- F. OPM Procurement Certification.
- G. Original copy of the MSBA standard Contract for Project Management Services signed only by the selected respondent. The Owner should not sign this contract until the MSBA OPM Review Panel has approved the Owner's selection.

ATTACHMENT A - Part 2

Confirmation of Required Information

The Procurement Administrator should use this list to ensure that the Owner has included all of the required information in its Narrative and procurement package that it is providing to the MSBA. The Procurement Administrator should review the requirements listed in column one and should confirm that the requirements have been included in the District's submission by initialing in column three. Please note that all information is required.

District:	Tri-County Regional Vocational Technical School District
School:	Tri-County Regional Vocational Technical High School
Procurement Administrator:	Daniel B. Haynes
Date RFS issued:	June 2, 2021
Respondent Selected:	Dore & Whittier

Documentation/Information	Provide in the Narrative or as an Attachment/ Exhibit	Included (Please Handwrite Initials Here)
A completed Narrative providing <u>all</u> of the required detail specified in the template narrative.	<i>In Narrative</i>	OK
A list of Selection Committee members, including their titles and background.	<i>In Narrative</i>	OK
The name and title of the full-time employee of the Owner designated to be the Procurement Administrator, including the MCPPO Certification date.	<i>In Narrative</i>	OK
MCPPO Certification where required. <i>*A copy of the certification is required if the Procurement Administrator is different than the "SBC member who is MCPPO certified" in the MSBA-approved School Building Committee form that was provided by the District during the Eligibility Period. If the MCPPO certification is expired, please provide proof of registration in an upcoming MCPPO class.</i>	<i>Attachment</i>	N/A
Copy of Procurement Documents including the RFS, any addenda, and any questions and answers.	<i>Exhibit A</i>	OK
School Building Committee (or other authorized body) authorization of Selection Committee membership, approval of RFS, and authorization to advertise the RFS.	<i>Exhibit B</i>	OK
Copy of advertisement in the Central Register and public notice including name and date of publication.	<i>Exhibit C</i>	OK
Informational Meeting and Site Inspection held. (<i>Body of Narrative</i>)	<i>In Narrative</i>	OK
How many qualification statements were received and from whom. (<i>Body of Narrative</i>)	<i>In Narrative</i>	OK
Copy of the proposal submitted by the selected Owner's Project Manager, including the respondent's organizational chart.	<i>Exhibit D</i>	OK
Interview questions, explanation of how information was recorded during the interviews, the results of the interviews, and how the interviews result were factored into the selection process. <i>Only required if interviews were conducted.</i>	<i>In Narrative</i>	OK
OPM Reference Checks Matrix	<i>Exhibit E</i>	OK

OPM Procurement Certification (Form signed by MCPPO individual certifying that the district followed the appropriate procurement procedures)	<i>Exhibit F</i>	OK
MSBA standard Contract for Project Management Services signed only by selected OPM.	<i>Exhibit G</i>	OK
Additional information: <i>Please list any additional information that is being provided.</i>	<i>Attachment</i>	N/A

