



Town of Reading Meeting Posting with Agenda

2018-07-16 LAG

Board - Committee - Commission - Council:

Permanent Building Committee

Killam School Building Committee

Date: 2023-07-17

Time: 6:00 PM

Building: Reading Town Hall

Location: Select Board Meeting Room

Address: 16 Lowell Street

Agenda:

Purpose: General Business

Meeting Called By: Chair Pat Tompkins

Notices and agendas are to be posted 48 hours in advance of the meetings excluding Saturdays, Sundays and Legal Holidays. Please keep in mind the Town Clerk's hours of operation and make necessary arrangements to be sure your posting is made in an adequate amount of time. A listing of topics that the chair reasonably anticipates will be discussed at the meeting must be on the agenda.

All Meeting Postings must be submitted in typed format; handwritten notices will not be accepted.

Topics of Discussion:

This meeting will be held in-person in the Town Hall Select Board Meeting Room and remotely viz Zoom.

Join Zoom Meeting

<https://us06web.zoom.us/j/82276711562>

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AGENDA:

1. Call to order
2. Vote to Organize Committee and Select a Chair and Vice-Chair
3. Update on MSBA process for the Killam School
4. Introduction of OPM
5. Discussion on Designer Selection Process
6. Future meeting agenda items
7. Approve prior meeting minutes

This Agenda has been prepared in advance and represents a listing of topics that the chair reasonably anticipates will be discussed at the meeting. However the agenda does not necessarily include all matters which may be taken up at this meeting.

ATTACHMENT A - Part 1

Narrative of the Selection Process

Formation of the Selection Committee:

A meeting was held by the J. Warren Killam Elementary School Building Committee on March 20, 2023 to discuss the preparation of the Request for Services (“RFS”) for an OPM. During this meeting, the School Building Committee discussed the proposed RFS Schedule and reviewed a draft of the RFS. The RFS is attached as Exhibit A.

The School Building Committee decided to have all voting members of the School Building Committee be part of the Selection Committee, which included the following members:

Name	Title	Description of related experience
Karen Herrick	Select Board Vice-Chair	Ms. Herrick is a realtor and has over 20 years of municipal volunteering experience, including two terms on the Select Board and 20 years in Town Meeting
Carla Nazarro	School Committee Vice-Chair	Ms. Nazarro is serving her second term on the School Committee and has significant construction experience, including the Big Dig
Sarah McLaughlin	School Committee	Ms. McLaughlin is serving her first term on the School Committee and has a Master of Public Health degree from Boston University
John Coote	Permanent Building Committee	Mr. Coote is a retired structural engineer and has significant construction experience
Nancy Twomey	Permanent Building Committee	Ms. Twomey is a licensed professional architect and practices in the Town of Reading
Pat Tompkins	Permanent Building Committee	Mr. Tompkins is a construction professional and has over 20 years of experience with construction projects
Greg Stepler	Permanent Building Committee	Mr. Stepler is a licensed civil engineer and has significant construction experience in the private sector through Turner Construction
Kirk McCormick	Permanent Building Committee	Mr. McCormick is an attorney that specializes in Construction Law, and is experienced in government contracting
Fidel Maltez	Town Manager	Mr. Maltez is a Civil Engineer and has over 15 years of construction experience. Prior to being Town Manager, Mr. Maltez was Commissioner of Public Works in Chelsea
Joe Huggins	Facilities Director	Mr. Huggins has over 30 years of experience in Facilities Management and has been a part of several construction projects in Reading. Mr. Huggins is MCPPO certified Mr. Huggins works for both the School District and the Town. Mr.

		Huggins and the Facilities Department report to both the Town Manager and the Superintendent.
Jayne Wellman	Director of Operations	Ms. Wellman is Reading's Procurement Administrator and is MCPPO certified. Ms. Wellman is Town employee working at Town Hall and reports to the Assistant Town Manager.

Procurement administrator: Jayne Wellman, Director of Operations, MCPPO Training Date: December 31, 2020. The procurement administrator was a non-voting member of the Selection Committee. Ms. Wellman assumed the position of Procurement Administrator after the departure of our Procurement Officer, Allison Jenkins who left to be the Chief Procurement Officer for the City of Everett. Ms. Jenkins left employment with the Town on April 13, 2023. Ms. Jenkins oversaw posting of the RFS and the responses were due on May 3, 2023.

Issuing the Request for Services:

On March 20, 2023, during a posted public meeting, televised on local access television (RCTV) the Town Manager presented a draft of the RFS to the School Building Committee. The Committee discussed the draft RFS and spent significant time discussing the schedule of dates inside the RFS. The School Building Committee approved the RFS and authorized the Town Manager to issue the RFS. While the RFS was reviewed, by the Killam School Building Committee, there was no formal vote taken to approve the RFS. This comment was provided by Town Counsel: The Town of Reading Designer Selection Procedures does not require that a vote of the Approving Body be taken to undertake these procedural steps. The Chief Procurement Officer (the Town Manager) or his designee may perform these tasks absent a vote. Town Counsel has provided a letter to the MSBA on this matter. The approved meeting minutes for the March 20, 2023 meeting have been provided to the MSBA.

On April 5, 2023 the Town of Reading advertised an RFS for an OPM for a school construction project in the Central Register and the Daily Times Chronicle as required by law. Copies of the Advertisement (with the name of the publisher visible) are attached as Exhibit C. An informational meeting and site inspection was held on April 18, 2023 at 11:00 AM and eight (8) interested parties attended. During the walkthrough, interested parties requested several reports, which were published as Addenda 1 posted on April 20, 2023. Interested parties were asked to submit all questions in writing. The questions received from the interested parties were summarized and answered through Addenda 2, published on April 27, 2023.

Review of Responses Received:

Thirty (30) potential respondents requested the RFS including:

Firm Name	
1	Anser Advisory
2	Arrowstreet
3	Atane Consulting
4	Atlantic Const. & Mgmt., Inc.
5	CHA Consulting, Inc.
6	Colliers Project Leaders
7	Commodore Builders
8	Construct Connect

9	CREF
10	Deltek
11	Dodge
12	Dodge Data & Analytics
13	e.Republic
14	Gienapp Architects, LLC
15	Hill International
16	IMS
17	Insurcomm Inc
18	LeftField, LLC
19	Meander Studio
20	onvia
21	PMA Consultants
22	Prime Vendor Inc.
23	Projectdog
24	PWXPress
25	QMC
26	Sika
27	SMMA
28	Studio G Architects
29	TERVA Corporation
30	Turner & Townsend Heery

Six (6) respondents submitted responses by the due date of May 3, 2023 at 2:00 PM as follows:

Firm Name
1. Anser Advisory
2. Colliers
3. CREF
4. Hill International
5. Leftfield
6. TERVA

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) 20 Points: Past performance of the Respondent, if any, with regard to public, private, Department of Education funded and MSBA-funded school projects across the Commonwealth, as evidenced by:
 - a) 10 Points: 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;
 - b) 10 Points: Satisfactory working relationship with designers, contractors, Owner, the MSBA and local officials.
- 2) 5 Points: 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.
- 3) 10 Points: Thorough knowledge of Commonwealth construction procurement laws, regulations, policies and procedures, as amended by the 2004 Construction Reform laws.
- 4) 10 Points: 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 **125,000** square feet or renovation of **58,000** square feet; proposed project management systems; effective information management; and examples of problem-solving approaches to resolving issues that impact time and cost.
- 5) 15 Points: 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.
- 6) 5 Points: 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.
- 7) 10 Points: Identify the Respondent's current and projected workload for projects estimated to cost in excess of \$1.5 million.
- 8) 5 Points: Familiarity with Northeast Collaborative for High Performance Schools criteria or US Green Building Council's LEED for Schools Rating System. Demonstrated experience working on high performance green buildings (if any), green building rating system used (e.g., NE-CHPS or LEED-S), life cycle cost analysis and recommendations to Owners about building materials, finishes etc., ability to assist in grant applications for funding and track Owner documentation for NE-CHPS or LEED-S prerequisites.
- 9) 5 Points: 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.

10) 5 Points: Knowledge of the purpose and practices of the services of Building Commissioning Consultants.

11) 10 Points: Financial Stability: Provide current balance sheet and income statement as evidence of the Respondent's financial stability and capacity to support the proposed contract.

The Selection Committee ranked the respondents as follows:

Firm Name	Cumulative Average Score (highest to lowest)
1. Colliers	93
2. TERVA	88
3. Hill International	88
4. Anser	87
5. Leftfield	77
6. CREF	55

The Selection Committee short-listed the following respondents:

Firm Name	Cumulative Average Score (highest to lowest)
1. Colliers	93
2. TERVA	88
3. Hill International	88
4. Anser	87

The School Building Committee voted to have four voting members of the School Building Committee interview the four short-listed respondents. This vote was taken at a publicly advertised meeting, on May 15, 2023 in the Select Board Room at Reading Town Hall, that was televised on Reading Community Television (RCTV).

The four members of the School Building Committee that conducted the interviews of the four short-listed respondents are listed in the table below.

Name	Title	Description of related experience
Karen Herrick	Select Board Vice-Chair	Ms. Herrick is a realtor has over 20 years of municipal volunteering experience including two terms on the Select Board and 20 years in Town Meeting
Carla Nazarro	School Committee Vice-Chair	Ms. Nazarro is serving her second term in the School Committee and has significant construction experience, including the Big Dig.

John Coote	Permanent Building Committee	Mr. Coote is a retired structural engineer and has significant construction experience.
Nancy Twomey	Permanent Building Committee	Ms. Twomey is a licensed professional Architect and practices in the Town of Reading.

Interviews:

Four (4) respondents were interviewed on May 17, 2023, starting at 9 AM. The interviews were open to the public, on local access television (RCTV), and the interviews were recorded. The following questions were asked:

1. To the extent you understand our project at this point, do you prefer Design/Bid/Build or Construction Manager at Risk procurement methods? (Nancy)
 - 1.2. Is one or another more advantageous for a project like ours?
 - 1.3. Is there a trigger or attribute of projects that you think makes one path or the other more clear or advantageous?
2. Please talk about your philosophy and approach to managing the interaction and roles of the four different parties: Town, OPM, Architect and Contractor/CMR. (John) Examples include:
 - 2.2. Design layout and decisions
 - 2.3. Construction sequencing
 - 2.4. Construction phasing
3. Describe your approach to communication with the Community, particularly as it relates to potential buy-in for a debt-exclusion vote. (Karen)
4. How do you manage cost estimating and budget where the Project Budget is locked in with MSBA a Schematic Design, which may be many months before the project goes to bid? Do you do cost estimating in-house or with a consultant? And if so, who? (Carla)
5. How do you perform technical reviews before bidding to manage and limit change order exposure? Is this done in-house or with a consultant? (Nancy)
6. It is recognized that the production of building materials, particularly cement and steel uses a large percentage of total carbon energy in the world, what is your experience, if any, of minimizing such energy use in buildings such as the Killam School. Do you think the Town of Reading should be concerned with these matters? (John)
7. How do you manage input from the District? Of course the educational and design process tends to get the attention, but what about the input from Facilities and Maintenance, departments or teachers, etc. How would you envision that process? (Carla)
8. Based on past projects, either yours or others, what do you think are the top 2-3 pitfalls to avoid? (Carla)
9. How many people in your office are going to be involved in the project? Is there a point person assigned to our project? (Karen)
10. Can you review/summarize for us the project costs that will not be eligible for MSBA reimbursement? Is there anything on our site that might have an adverse effect on our reimbursement amount? (Nancy)
11. What is your procedure to ensure that commissioning visits take place and that building systems are fully functional at the time of opening? (Karen)

- 11.2. Tell us about how do you manage and perform the Closeout procedure? How do you assure getting close-out materials?
- 11.3. What is your procedure to ensure that District staff receive adequate training on building controls, lighting controls, etc.?

The four members of the School Building Committee finished the interviews, and each completed an assessment of the interviewees; the assessment was based on the 11 questions asked, with a possible score of 100 points. The School Building Committee had a publicly advertised meeting on May 22, 2023, where the four members of the School Building Committee provided feedback to the larger committee. At the meeting on May 22, 2023, the School Building Committee heard the feedback from the interviews and made a short-list of three firms, which was in accordance with the process outlined in the Owner's OPM RFS.

The School Building 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. At the meeting of May 22, 2023 the four members of the School Building Committee reviewed the interview process with the entire School Building Committee. The four members conducting interviews assessed each firm based on the responses to their questions using the scoring format below. Several other members viewed the interviews through the recording. The School Building Committee had an in-depth discussion on the interviews and the firms before voting a short-list of the three firms to move on to contract negotiations. During this meeting, the School Building Committee also reviewed references for each firm.

Question	MAX SCORE
1. To the extent you understand our project at this point, do you prefer Design/Bid/Build or Construction Manager at Risk procurement methods? (Nancy)	10
2. Please talk about your philosophy and approach to managing the interaction and roles of the four different parties: Town, OPM, Architect and Contractor/CMR. (John) Examples include:	10
3. Describe your approach to communication with the Community, particularly as it relates to potential buy-in for a debt-exclusion vote. (Karen)	10
4. How do you manage cost estimating and budget where the Project Budget is locked in with MSBA a Schematic Design, which may be many months before the project goes to bid? Do you do cost estimating in-house or with a consultant? And if so, who? (Carla)	10
5. How do you perform technical reviews before bidding to manage and limit change order exposure? Is this done in-house or with a consultant? (Nancy)	10
6. It is recognized that the production of building materials, particularly cement and steel uses a large percentage of total carbon energy in the world, what is your experience, if any, of minimizing such energy use in buildings such as the Killam School. Do you think the Town of Reading should be concerned with these matters? (John)	10
7. How do you manage input from the District? Of course the educational and design process tends to get the attention, but what about the input from Facilities and Maintenance, departments or teachers, etc. How would you envision that process? (Carla)	10
8. Based on past projects, either yours or others, what do you think are the top 2-3 pitfalls to avoid? (Carla)	10
9. How many people in your office are going to be involved in the project? Is there a point person assigned to our project? (Karen)	10
10. Can you review/summarize for us the project costs that will not be eligible for MSBA reimbursement? Is there anything on our site that might have an adverse effect on our reimbursement amount? (Nancy)	5
11. What is your procedure to ensure that commissioning visits take place and that building systems are fully functional at the time of opening? (Karen)	5
TOTAL SCORE	100

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

TERVA Corporation

1. To the extent you understand our project at this point, do you prefer Design/Bid/Build or Construction Manager at Risk procurement methods? (Nancy)
 - 1.2. Is one or another more advantageous for a project like ours?
 - 1.3. Is there a trigger or attribute of projects that you think makes one path or the other more clear or advantageous?

Response: The firm indicated they would use Design/Bid/Build. Separate bid packages could yield better prices for things like concrete and steel. The firm would control and work with the general contractor to ensure that the town is getting value for its money. Typically, 149a delivery method is reserved for complicated projects with unforeseen conditions.

2. Please talk about your philosophy and approach to managing the interaction and roles of the four different parties: Town, OPM, Architect and Contractor/CMR. (John) Examples include:
 - 2.2. Design layout and decisions
 - 2.3. Construction sequencing
 - 2.4. Construction phasing

Response: The firm prides themselves on getting the right information at the right time to make the right decisions. They phase the job by working on many elements at the same time. They work with the District and design team to put together a package that looks at the overall picture. They are proactive, as there is no time to be reactive in this industry, which goes hand-in-hand with being collaborative. They promise to always advocate for the Town. They look for everything to ensure the design meets the current and future program needs, and eligibility with the MSBA. They have worked with and have positive relationships with many contractors in the industry.

3. Describe your approach to communication with the Community, particularly as it relates to potential buy-in for a debt-exclusion vote. (Karen)

Response: The firm felt that all information needs to come out and be as transparent as possible. They want the negative things to come out early so that they are aware of what the issues are. They will set up a website, which will provide all information as it becomes available. There will be a social media and website driven campaign. The Town will be able to review information before it is posted to ensure its accuracy. There will be robust public outreach campaigns to conduct forums with the architect and committee members, so people can see what they are doing as they are doing it. An email address will be set up as a way for people in town to ask questions and leave opinions. Answers to frequently asked questions will be published on the website.

4. How do you manage cost estimating and budget where the Project Budget is locked in with MSBA a Schematic Design, which may be many months before the project goes to bid? Do you do cost estimating in-house or with a consultant? And if so, who? (Carla)

Response: The firm works with PMNC, a Massachusetts based company that has worked on MSBA projects. Cost estimators consider prices and products and build-in some contingencies. There are not many surprises

after cost reconciliations. They understand how the building is being built schematically to understand how it is being priced. They review those during design development to ensure they are on track with the schematic budget. Though they cannot control the market, they can control the building and design, and utilize tools, such as bid alternates, to have things that can be cut back if needed.

5. How do you perform technical reviews before bidding to manage and limit change order exposure? Is this done in-house or with a consultant? (Nancy)

Response: The firm performs technical reviews during planning reviews. They have architecture and engineering groups on staff, so they can rely on their own resources.

6. It is recognized that the production of building materials, particularly cement and steel uses a large percentage of total carbon energy in the world, what is your experience, if any, of minimizing such energy use in buildings such as the Killam School. Do you think the Town of Reading should be concerned with these matters? (John)

Response: Before going out to bid, the firm makes sure that local vendors can support this. They try to procure recycled steel and are cognizant of ways to cut down carbon on both cement and steel.

7. How do you manage input from the District? Of course the educational and design process tends to get the attention, but what about the input from Facilities and Maintenance, departments or teachers, etc. How would you envision that process. (Carla)

Response: The firm will have a long period of visioning sessions on the education side. They will interview all departments on the school side, Facilities, Administration, Transportation, etc. They may ask questions that they have not received input on. Communication will be open, and they will look to get information, especially at the beginning.

8. Based on past project, either yours or others, what do you think are the top 2-3 pitfalls to avoid? (Carla)

Response: The firm believes in getting the right information and making the right decisions to ensure not having to go back and ask for more money. Outreach and buy-in of the school district, town leadership, and the whole community is vital to getting the right information.

9. How many people in your office are going to be involved in the project? Is there a point person assigned to our project? (Karen)

Response: Those who presented are the team and contacts from the start of the project to the finish, should this firm be selected.

Time did not allow for the following questions to be asked/answered:

10. Can you review/summarize for us the project costs that will not be eligible for MSBA reimbursement? Is there anything on our site that might have an adverse effect on our reimbursement amount? (Nancy)

11. What is your procedure to ensure that commissioning visits take place and that building systems are fully functional at the time of opening? (Karen)
- 11.2. Tell us about how do you manage and perform the Closeout procedure? How do you assure getting close-out materials?
- 11.3. What is your procedure to ensure that District staff receive adequate training on building controls, lighting controls, etc.?

Hill International

1. To the extent you understand our project at this point, do you prefer Design/Bid/Build or Construction Manager at Risk procurement methods? (Nancy)
- 1.2. Is one or another more advantageous for a project like ours?
- 1.3. Is there a trigger or attribute of projects that you think makes one path or the other more clear or advantageous?

Response: For this project, the firm does not foresee any complex issues that would require it to go Construction Management at Risk. The MSBA will ensure that they look through all various options such as renovation, new building, etc. Design/bid/build would lend itself to creating a new building on the current site. This presents to be a simple, phased project and D/B/B will save money.

2. Please talk about your philosophy and approach to managing the interaction and roles of the four different parties: Town, OPM, Architect and Contractor/CMR. (John) Examples include:
 - 2.2. Design layout and decisions
 - 2.3. Construction sequencing
 - 2.4. Construction phasing

Response: The firm has worked with a variety of architectural firms and contractors in the Commonwealth and has a familiarity and working relationship with them. The team presenting is the team that would work on this project. They communicate daily, and very well with one another, and communicate regularly with Committee Chairs on other projects. They work alongside engineers, architects, and contractors. When faced with challenges, they work together to present multiple ways to solve them and make a collective decision with the district.

3. Describe your approach to communication with the Community, particularly as it relates to potential buy-in for a debt-exclusion vote. (Karen)

Response: The firm would ensure to engage the community early to make sure the community feels like it is part of the project, and a decision maker in the project. They also try to engage high school students, who will be of voting age when the time comes to vote on this project. Students can steer their peers, parents, and community.

4. How do you manage cost estimating and budget where the Project Budget is locked in with MSBA a Schematic Design, which may be many months before the project goes to bid? Do you do cost estimating in-house or with a consultant? And if so, who? (Carla)

Response: The firm utilizes PMNC as their consultant. PMNC is known throughout the Commonwealth for their expertise and will estimate the schematic design, which will include construction costs. There should be a robust funding agreement with a robust design. This phase can be managed to stay within budget. Design will be fleshed out before the schematic design.

5. How do you perform technical reviews before bidding to manage and limit change order exposure? Is this done in-house or with a consultant? (Nancy)

Response: This is done in-house. There are a lot of previous General Contractors and site managers on staff who are well-versed and understand the process. Design review is done at every stage.

6. It is recognized that the production of building materials, particularly cement and steel uses a large percentage of total carbon energy in the world, what is your experience, if any, of minimizing such energy use in buildings such as the Killam School. Do you think the Town of Reading should be concerned with these matters? (John)

Response: The firm feels there is a place for sustainability. The MSBA requires you to consider sustainable materials and design.

7. How do you manage input from the District? Of course the educational and design process tends to get the attention, but what about the input from Facilities and Maintenance, departments or teachers, etc. How would you envision that process. (Carla)

Response: There will be programming meetings, meetings with the architect, input from school administration, teachers, town officials, and facilities. All of those requirements will be incorporated into the design documents. That information is conveyed to the architect. Communication is a key component.

8. Based on past project, either yours or others, what do you think are the top 2-3 pitfalls to avoid? (Carla)

Response: The firm provided an example from a previous project where the community planned to move forward with a district-wide elementary school without first getting buy-in from the community. The plan failed Town Meeting vote. The firm emphasized the need to communicate early, often, and continuously.

9. How many people in your office are going to be involved in the project? Is there a point person assigned to our project? (Karen)

Response: Introductions to the team members were made during the opening presentation.

10. Can you review/summarize for us the project costs that will not be eligible for MSBA reimbursement? Is there anything on our site that might have an adverse effect on our reimbursement amount? (Nancy)

Response: The firm also included GEI, a leader in environmental development because they wanted to understand the Killam site and soil conditions. The MSBA only reimburses up to a certain percent.

Preliminarily, there did not seem to be anything on the site to trigger other requirements. Furniture and fixtures are not reimbursable by the MSBA. Though the MSBA has been raising reimbursement rates to keep up with market conditions.

11. What is your procedure to ensure that commissioning visits take place and that building systems are fully functional at the time of opening? (Karen)
- 11.2. Tell us about how do you manage and perform the Closeout procedure? How do you assure getting close-out materials?
- 11.3. What is your procedure to ensure that District staff receive adequate training on building controls, lighting controls, etc.?

Response: MSBA will assign a commissioning agent. The firm will work with that commissioning agent and will make sure they have a clear understanding of what the expectations are for this project. The firm will ensure that all different departments are engaged, including DPW, Fire, and Police. The firm will solicit input from the commissioning agent at all stages of the design. As construction gets underway, visits are scheduled so the commissioning agent can see as much as possible.

Colliers

1. To the extent you understand our project at this point, do you prefer Design/Bid/Build or Construction Manager at Risk procurement methods? (Nancy)
- 1.2. Is one or another more advantageous for a project like ours?
- 1.3. Is there a trigger or attribute of projects that you think makes one path or the other more clear or advantageous?

Response: The firm provided an overview of the site and their recommendation for Design/Bid/Build during their presentation.

2. Please talk about your philosophy and approach to managing the interaction and roles of the four different parties: Town, OPM, Architect and Contractor/CMR. (John) Examples include:
 - 2.2. Design layout and decisions
 - 2.3. Construction sequencing
 - 2.4. Construction phasing

Response: The firm explained that there is the district and the OPM. There are two elements to the district side: the community, and the management team. As the OPM the firm is an extension of, and advocate for, the management team, they will provide all the information and make recommendations and present back to the Town to make the decisions. The OPM Firm's team will manage each of those parts.

3. Describe your approach to communication with the Community, particularly as it relates to potential buy-in for a debt-exclusion vote. (Karen)

Response: The firm emphasized community outreach. They involve the marketing department and business development team with the public relations piece. They are used to a lot of meetings and ensure that they hear what the questions are. They work with digital media and post videos of projects on a website.

4. How do you manage cost estimating and budget where the Project Budget is locked in with MSBA a Schematic Design, which may be many months before the project goes to bid? Do you do cost estimating in-house or with a consultant? And if so, who? (Carla)

Response: The firm uses various outsourced estimators. They usually wait to get a designer on board to ensure they are working with the same people. One of the team members formerly worked as an estimator. While they use outsourced estimators, there are also in-house experts. They make sure to get everything into the budget to maximize the MSBA reimbursement.

5. How do you perform technical reviews before bidding to manage and limit change order exposure? Is this done in-house or with a consultant? (Nancy)

Response: That process is done in-house. The firm does design reviews incrementally and makes sure all those elements important to the Town are being documented. The firm works as the link between the design team and construction operations.

6. It is recognized that the production of building materials, particularly cement and steel uses a large percentage of total carbon energy in the world, what is your experience, if any, of minimizing such energy use in buildings such as the Killam School. Do you think the Town of Reading should be concerned with these matters? (John)

Response: Carbon-neutral/net-zero are priorities with costs associated with them. The firm will work to identify those priorities early. There are creative ways to minimize carbon and steel, such as incorporating timber into the structure, using energy efficiencies, building a tight building envelope, using solar panels and using certain materials in HVAC.

7. How do you manage input from the District? Of course the educational and design process tends to get the attention, but what about the input from Facilities and Maintenance, departments or teachers, etc. How would you envision that process. (Carla)

Response: The firm speaks with teachers and students, as they are the ones using the building, as well as parents, the community at large, and Facilities to find out the best transformation. As OPM, they identify all the stakeholders, and use a group technique, with cross sectional groups, hosting multiple meetings, and ask directed questions to garner feedback. All the data gathered is used as a tool to help the town make decisions going forward.

8. Based on past project, either yours or others, what do you think are the top 2-3 pitfalls to avoid? (Carla)

Response: The firm feels the three pitfalls to be mindful of are: 1) having realistic budget expectations – understanding what things cost, and what elements are wants versus needs; 2) timely decision making – understanding who needs to be in the room when decisions are made; and 3) listening – making sure that everybody's voice has been heard and making sure that what they heard is what gets built.

9. How many people in your office are going to be involved in the project? Is there a point person assigned to our project? (Karen)

Response: Mike Carroll will be the Project Director and John Bates will be the Project Manager from beginning to end. There will be other people who will be an integral part of the team at different times throughout the project.

Time did not allow for the following questions to be asked/answered:

10. Can you review/summarize for us the project costs that will not be eligible for MSBA reimbursement? Is there anything on our site that might have an adverse effect on our reimbursement amount? (Nancy)
11. What is your procedure to ensure that commissioning visits take place and that building systems are fully functional at the time of opening? (Karen)
- 11.2. Tell us about how do you manage and perform the Closeout procedure? How do you assure getting close-out materials?
- 11.3. What is your procedure to ensure that District staff receive adequate training on building controls, lighting controls, etc.?

Answer Advisory

1. To the extent you understand our project at this point, do you prefer Design/Bid/Build or Construction Manager at Risk procurement methods? (Nancy)
 - 1.2. Is one or another more advantageous for a project like ours?
 - 1.3. Is there a trigger or attribute of projects that you think makes one path or the other more clear or advantageous?

Response: The firm has extensive background in both DBB and CMAR. One of their roles is to assist the district in choosing, they have tools to bring before the Town, and will give the pros and cons of each. It is a project-specific decision, and there are many things that weigh into that decision and is based on risk. DBB might be good because the proposal is to build on a clean portion of the site.

2. Please talk about your philosophy and approach to managing the interaction and roles of the four different parties: Town, OPM, Architect and Contractor/CMR. (John) Examples include:
 - 2.2. Design layout and decisions
 - 2.3. Construction sequencing
 - 2.4. Construction phasing

Response: The key to this is communication. It is important to make sure everyone is copied on information who should be and ensure the appropriate people from schools and town are involved. It is about the relationship between all parties, and it is their job to make sure all parties are working together.

3. Describe your approach to communication with the Community, particularly as it relates to potential buy-in for a debt-exclusion vote. (Karen)

Response: Community involvement is needed up front in a project. The Town has already done a great job of getting information out. Transparency is going to be necessary throughout the process. You need to inform the community as well as gather its feedback, so when it comes time for the debt exclusion vote, people will have felt heard. The firm uses opportunities and events in the community to inform people, such as displaying renderings in Town Hall or the Library, having a presence at parent-teacher nights, conducting community surveys, and hosting visioning sessions at the schools and with the district.

4. How do you manage cost estimating and budget where the Project Budget is locked in with MSBA a Schematic Design, which may be many months before the project goes to bid? Do you do cost estimating in-house or with a consultant? And if so, who? (Carla)

Response; The firm hires an outsourced estimator right away, and the architect is required to have a cost estimator. The firm does have in-house estimating resources that understand escalation, market conditions, etc., and use outside estimators in conjunction with in-house capabilities. The estimator they have chosen for this project, Pete Timothy, has a lot of experience with schools.

5. How do you perform technical reviews before bidding to manage and limit change order exposure? Is this done in-house or with a consultant? (Nancy)

Response: Depending on the project, the firm might bring in structural engineers if it is a complicated structure and will bring in a peer review if needed. Most of it is done in-house. The firm has a checklist and years of knowledge of how to do planning reviews. When the commissioning agent comes on-board, they have a list as well. The firm maintains lists of comments and makes sure the architect has responded to them.

6. It is recognized that the production of building materials, particularly cement and steel uses a large percentage of total carbon energy in the world, what is your experience, if any, of minimizing such energy use in buildings such as the Killam School. Do you think the Town of Reading should be concerned with these matters? (John)

Response: The firm said it is a balance to find the most cost-effective way to build, but also consider how to ensure the building meets code. The firm is investigating different construction methods, including timber.

7. How do you manage input from the District? Of course the educational and design process tends to get the attention, but what about the input from Facilities and Maintenance, departments or teachers, etc. How would you envision that process. (Carla)

Response: The firm sets up the project team. The designer produces a work plan that includes various decisions that need to be made, and they will discuss when the district wants to be part of those decisions. The firm has processes and will have meetings with the school building committee to flesh out what is important to whom.

8. Based on past project, either yours or others, what do you think are the top 2-3 pitfalls to avoid? (Carla)
[The firm emphasized focusing on setting a realistic schedule that works for the community, the contractor, and is achievable; setting a realistic budget, and communicating with the community about MSBA eligible reimbursement costs; and quality, ensuring the right materials are used.]

9. How many people in your office are going to be involved in the project? Is there a point person assigned to our project? (Karen)

Response: Deborah Marai is the Project Director and leads a dedicated project team. There is a team and others who will work on the project.

10. Can you review/summarize for us the project costs that will not be eligible for MSBA reimbursement? Is there anything on our site that might have an adverse effect on our reimbursement amount? (Nancy)

Response: Non-reimbursable elements include: swing space, some construction materials, outdoor fields, specialty rooms such as auditoriums, and larger-than-specified rooms. There may be items that district wants that are not covered.

11. What is your procedure to ensure that commissioning visits take place and that building systems are fully functional at the time of opening? (Karen)

- 11.2. Tell us about how do you manage and perform the Closeout procedure? How do you assure getting close-out materials?
- 11.3. What is your procedure to ensure that District staff receive adequate training on building controls, lighting controls, etc.?

Response: The firm works closely with the architect on the specifications for close out. At the construction kick-off meeting with contractors, they talk about close-out. The Commissioning Agent is involved with the process. The commissioning period continues for ten months after construction.

After the interviews, and on the May 22, 2023 meeting the School Building Committee ranked the three short-listed respondents as follows:

Firm Name	Cumulative Average Score (highest to lowest)
1. TERVA	89
2. Colliers	87
3. Anser	80
4. Hill International	71

Reference Checks:

The Selection Committee conducted three (3) 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 School Building Committee ranked TERVA first based on:

- Technical expertise and experience with public buildings
- Capable team, every important member of the team came to the interview
- School Building Committee felt that this firm would give the Killam School Building undivided attention
- It was very clear, which employee on the firm would play each role and who would be the point of contact to the Town
- The team was dynamic, thoughtful and worked well together. It was a technically impressive group.
- Answers to questions were comprehensive and well thought out. They worked well as a team answering question within their areas of expertise despite their ranking in the firm
- The interview committee had confidence in ALL members of this team
- TERVA was ranked first by unanimous vote

The School Building Committee ranked Colliers second based on:

- Technical expertise and experience with public buildings
- Capable team, every important member of the team came to the interview
- School Building Committee felt that this firm would do a great job with the Killam School Building

- We appreciated that this group had subject matter experts in Health and Wellness and Sustainability on the team
- This team was very competent and presented well

The School Building Committee ranked Anser third based on:

- Technical expertise and experience with public buildings
- Capable team, specially several of the members who answered the questions
- School Building Committee felt that this firm would do a great job with the Killam School Building project
- The interview committee felt that there was one very strong and capable member of this team. While the others seemed competent, we were looking for a team with more depth

The School Building Committee ranked Hill International fourth based on:

- Technical expertise and experience with public buildings
- Capable team, it was very evident that the team members had significant experience.
- The interview team felt the firm was very qualified, and it currently had a large amount of projects.

Following the ranking of the four short-listed firms, the Town of Reading proceeded to engage the first ranked firm, TERVA, in contract negotiations. After negotiations, two OPM firms raised concerns regarding the accuracy of TERVA's response to the Request for Services. Prior to the MSBA completing its review of the Town's OPM narrative, TERVA opted to withdraw its proposal.

The Town of Reading convened a meeting of the Killam School Building Committee on June 21, 2023 at 6:00PM in a publicly advertised meeting that was televised on Reading's local cable channel. The Town Manager and Killam School Building Committee Vice-Chair updated the committee on the process. The Killam School Building Committee voted to engage the second ranked firm, Colliers, in negotiations for OPM services for the Killam School building process.

Following the meeting, the Town of Reading engaged the second ranked firm in contract negotiations and came to terms.

Conclusion Statement:

Colliers and The Town of Reading have completed negotiations and Colliers Project Leaders USA/NE, LLC 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 Colliers Project Leaders USA/NE, LLC is attached as Exhibit G.

Pursuant to section 3.2 of the Contract between the OPM and the Town of Reading the Eligible Applicant for the Town of Reading has designated Fidel A. Maltez, Town Manager, 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 Colliers as the most qualified respondent to provide OPM Services for the proposed J. Warren Killam Elementary School Building 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.*

Fidel Maltez		7/6/2023
Chief Executive Officer		Dated
Jayne Wellman		7/6/2023
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:	Town of Reading
School:	J. Warren Killam Elementary School
Procurement Administrator:	Jayne Wellman
Date RFS issued:	April 5, 2023
Respondent Selected:	Colliers

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>	
A list of Selection Committee members, including their titles and background.	<i>In Narrative</i>	
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>	
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>	
Copy of Procurement Documents including the RFS, any addenda, and any questions and answers.	<i>Exhibit A</i>	
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>	
Copy of advertisement in the Central Register and public notice including name and date of publication.	<i>Exhibit C</i>	
Informational Meeting and Site Inspection held. <i>(Body of Narrative)</i>	<i>In Narrative</i>	
How many qualification statements were received and from whom. <i>(Body of Narrative)</i>	<i>In Narrative</i>	
Copy of the proposal submitted by the selected Owner's Project Manager, including the respondent's organizational chart.	<i>Exhibit D</i>	
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>	
OPM Reference Checks Matrix	<i>Exhibit E</i>	

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



Project Leaders

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J.W. KILLAM
Elementary School

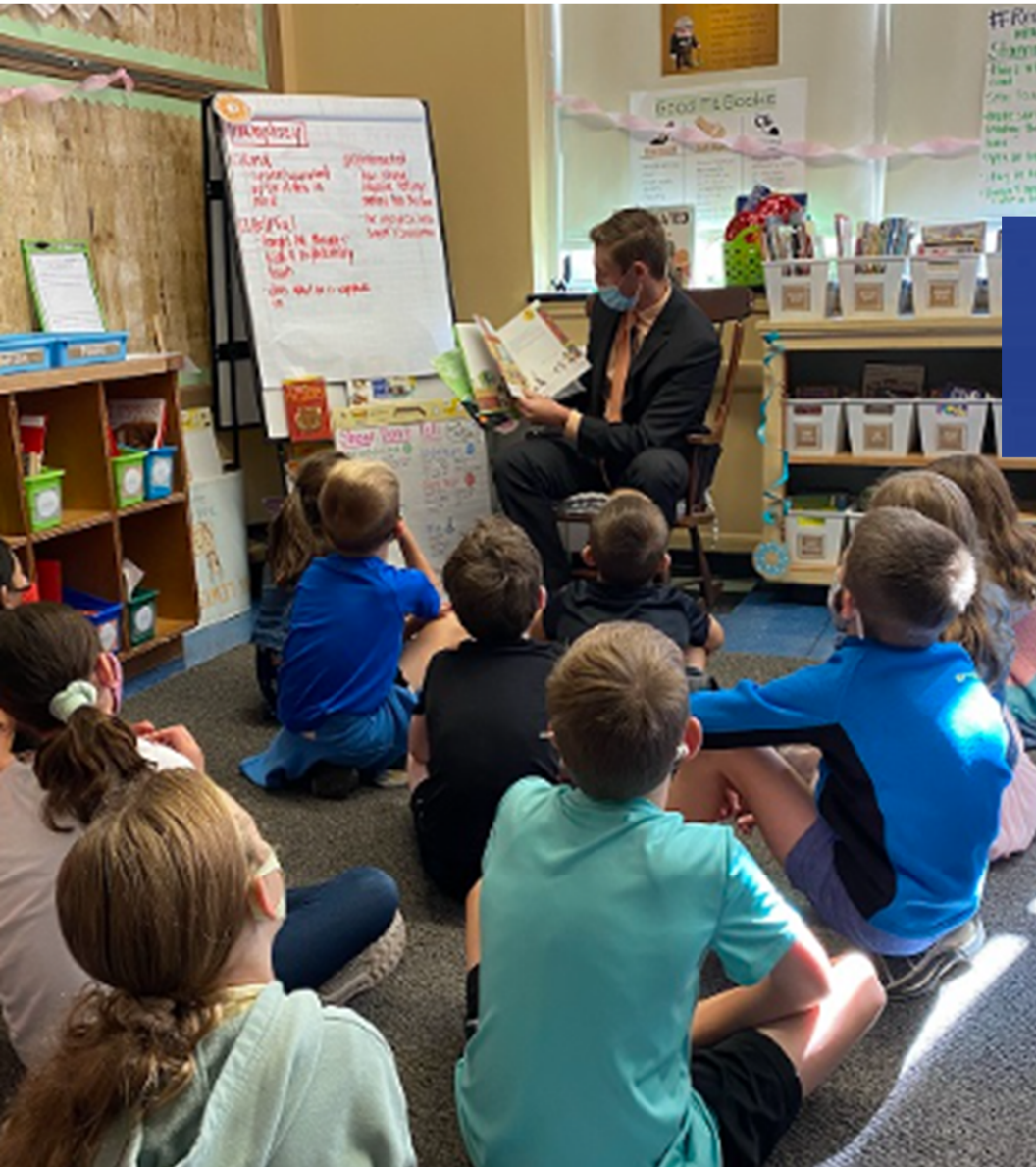
Reading J. Warren Killam Elementary School

Owner's Project Management

May 17, 2023

Prepared by: Colliers Project Leaders

Accelerating success.



Agenda

- 1 Introductions
- 2 Elementary School / MSBA Experience
- 3 Project Approach
- 4 Roadmap to Success
- 5 Q&A

Introductions

Key Personnel



DEREK OSTERMAN
Executive Sponsor



TERESA WILSON
Subject Matter Expert



MIKE CARROLL
Project Director



THAO NGUYEN
Financial Monitoring &
Reporting



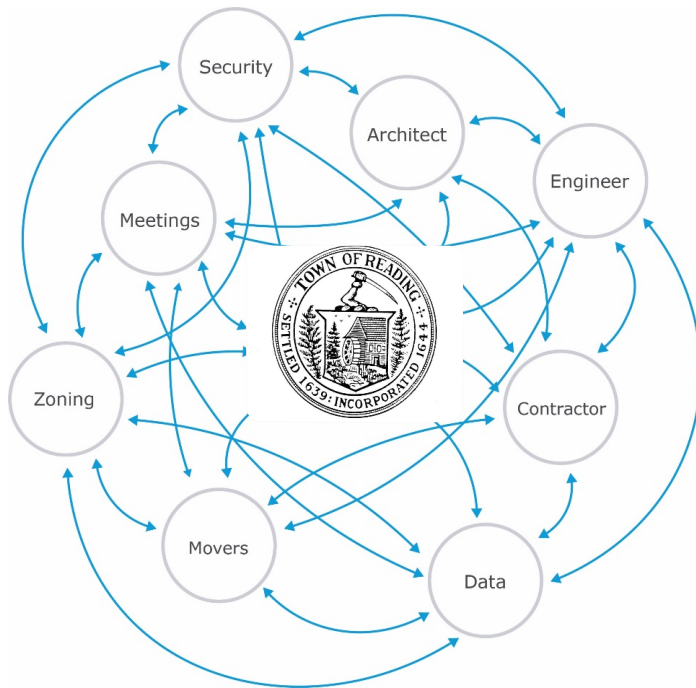
JOHN BATES
Project Manager



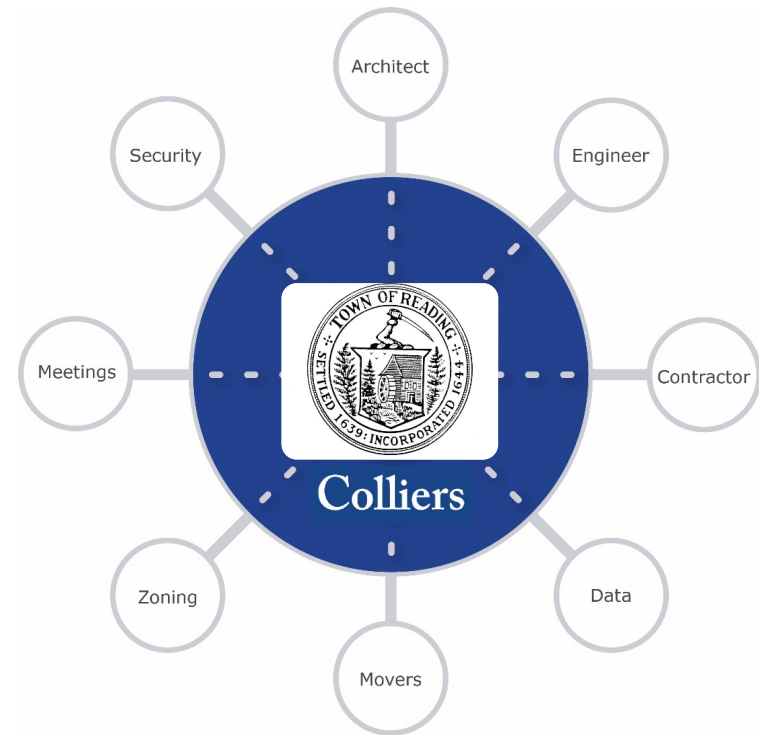
SARAH MASTON
MEP Support

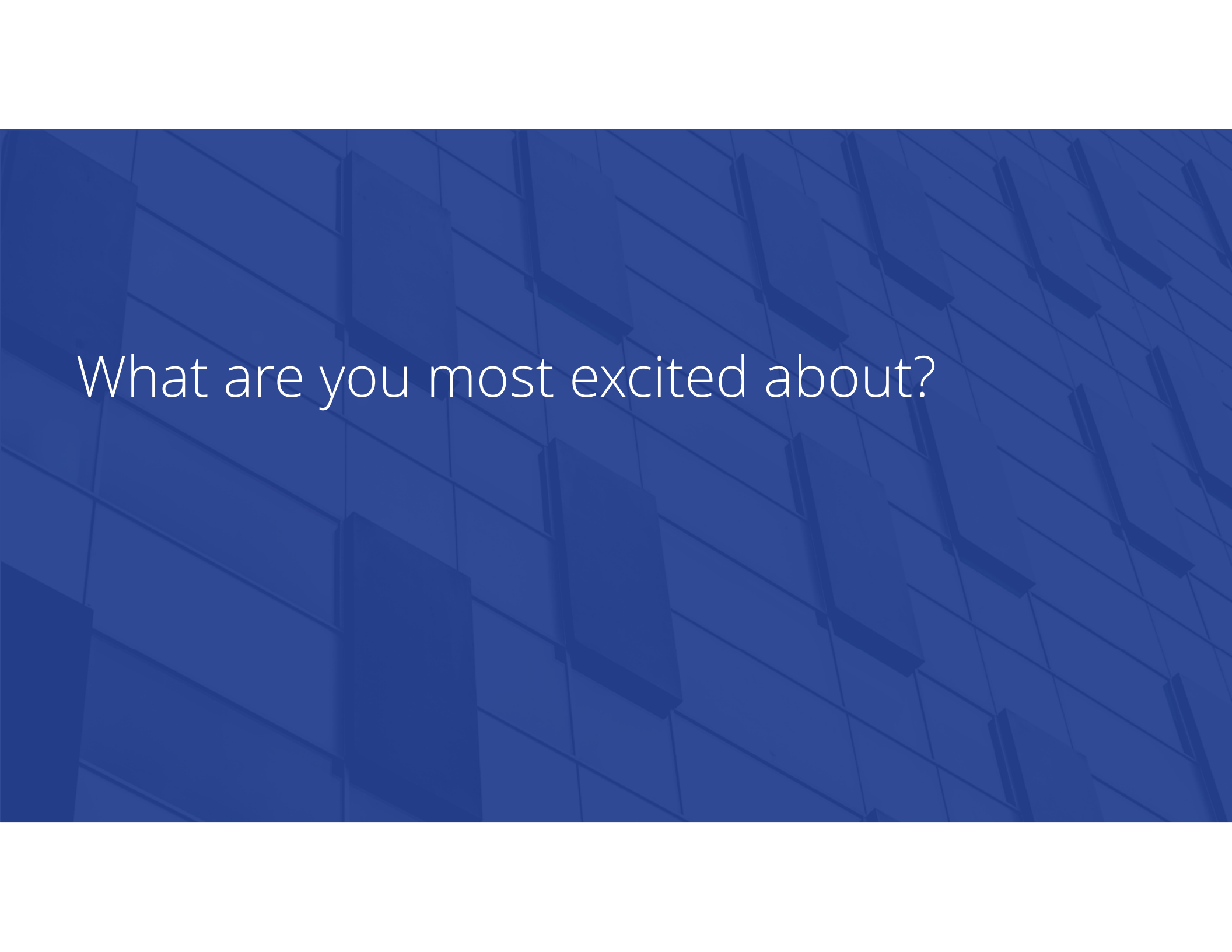
Value of Colliers

Without Colliers



With Colliers





What are you most excited about?

Similar Experience

Crocker Elementary School



Lexington Children's Place - School Committee Representative for Permanent Building Committee



Our Approach Project Understanding

- 21st Century Teaching and Learning
- Overcrowding
- Re - Districting
- Health & Safety and Accessibility
- Tight Site
- Phased Construction



Community Outreach



COMMUNICATIONS



COMMUNITY FORUM



PROJECT VISIONING



SOCIAL MEDIA

On January 24, 2023, the Whitman Middle School Building Committee voted to submit Option 9b as the Preferred Solution. This will continue to be developed and refined through the Schematic Design phase. Option 9b received the highest total score and will be the best option to fulfill the priorities of the Educational Program and Statement of Interest. <https://wmsproject.org/>



Justin Evans, John Galvin and 55 others 52 comments

Like Comment Send

Official Website

WHITMAN
MIDDLE
SCHOOL
PROJECT

About The Project



Project Background

At their Board of Directors meeting on April 2021, the Massachusetts School Building



Schedule

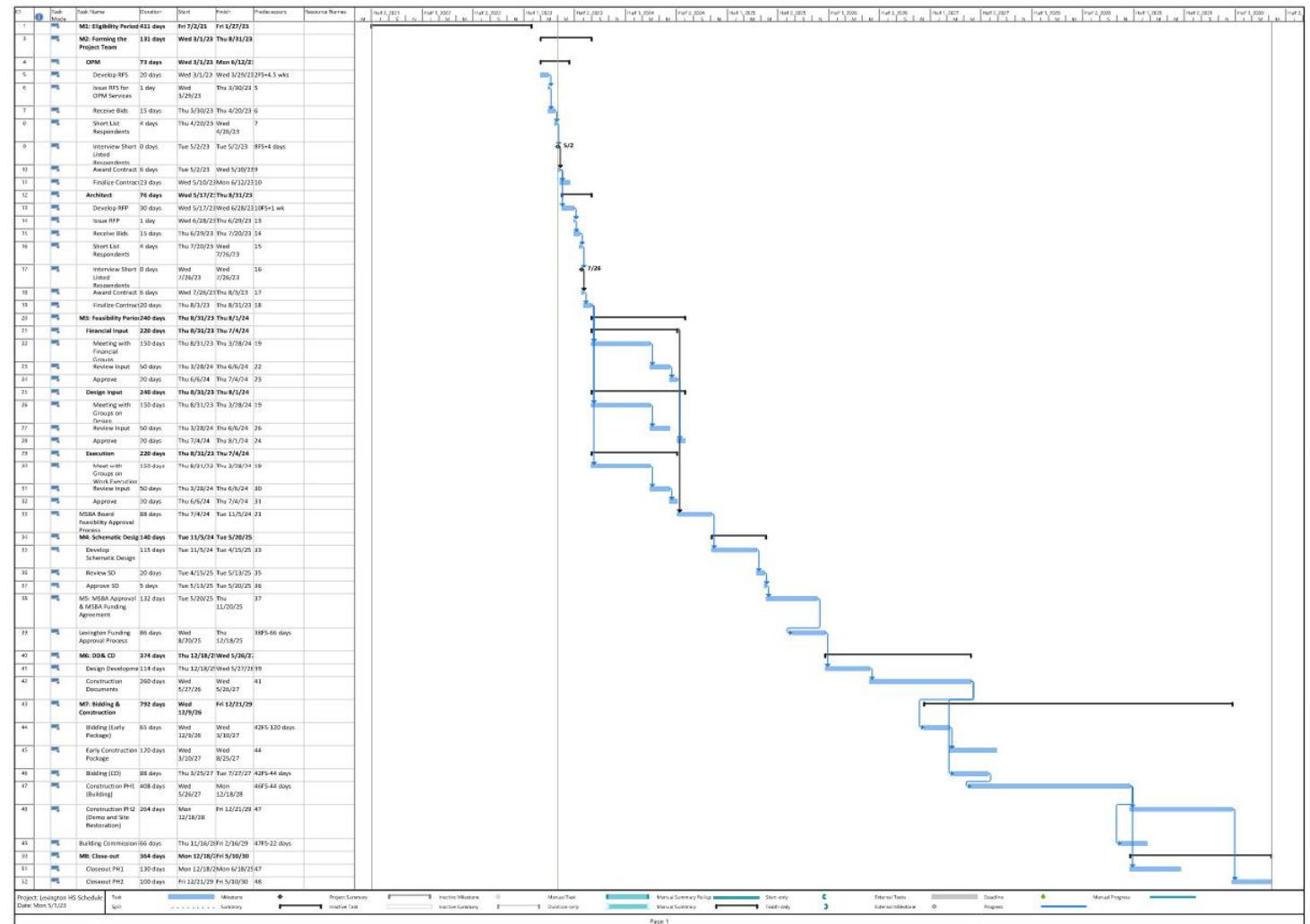
Pre-Planning Meetings

Integrating Stakeholders to the Master Schedule

Transparent Communication – Setting Appropriate Expectations

Managing and Forecasting Risk

Adapting to Changes



J.W. Killam Elementary School– Decision Tools – Choosing by Advantages

Evaluation: Review Configurations of Project Expansion

Date: 03/09/23

Evaluators: FR, PP, JS, TW

Choosing By Advantages



Underline the least preferred Attribute and it scores 0



Place blue box around most important advantage



Factor (Element used to compare alternatives)		Criteria (Standard, rule or guideline that each alternative addresses)	Total Weights for this Attribute	Site Option 1 New Construction		Site Option 2 Renovate Buildings		Site Option 3 New and Renovated Construction				
					Score		Score		Score			
1	Universal Design	Criteria: What information is required to meet the standards? Fewest level changes with stairs, ramps, elevators	60	Attribute or Rating for how each Alternative meets Criteria: New: 2 stairs, 1 elevator Advantage: What makes this Attribute better than other Attributes? Design to current code	60	Attribute or Rating for how each Alternative meets Criteria: Existing: 1 switchback stair, 1 triple run stair, 1 elevator Advantage: What makes this Attribute better than other Attributes?	0	Attribute or Rating for how each Alternative meets Criteria: Existing / New : 2 stairs, 1 elevator Advantage: What makes this Attribute better than other Attributes? Renovations required to existing stairs	40			
2	Optimized for Expansion	Criteria: What information is required to meet the standards? Ability to expand on multiple sides of building	80	Attribute or Rating for how each Alternative meets Criteria: Expansion along 1 side of building (15 ft back) Advantage: What makes this Attribute better than other Attributes?	0	Attribute or Rating for how each Alternative meets Criteria: Expansion along 1 side of building (25 ft back) Advantage: What makes this Attribute better than other Attributes? Expansion 1 side	80	Attribute or Rating for how each Alternative meets Criteria: Expansion along 2 side of building (25 ft back) Advantage: What makes this Attribute better than other Attributes? Expansion 2 side	40			
3	Visual Control of Entry	Criteria: What information is required to meet the standards? Ability to see all public entries from reception	100	Attribute or Rating for how each Alternative meets Criteria: Central location for Reception with clear visual of 2 public entry points Advantage: What makes this Attribute better than other Attributes? Best Visual access 2 entries	100	Attribute or Rating for how each Alternative meets Criteria: Location for Reception does not have visual of 1 of 2 public entry points Advantage: What makes this Attribute better than other Attributes?	0	Attribute or Rating for how each Alternative meets Criteria: Location for Reception has visual of 2 public entry points, one is limited view Advantage: What makes this Attribute better than other Attributes? Easier coordination in plenum for all infrastructure needs	80			
4	Daylighting, Ventilation & Connection to Outdoors	Criteria: What information is required to meet the standards? Largest ratio of perimeter to program space with windows & age of windows	50	Attribute or Rating for how each Alternative meets Criteria: Most perimeter to program space, all new windows Advantage: What makes this Attribute better than other Attributes? Largest ratio perimeter to windows	50	Attribute or Rating for how each Alternative meets Criteria: Existing windows well sized, may not be suitable to new program uses Advantage: What makes this Attribute better than other Attributes?	0	Attribute or Rating for how each Alternative meets Criteria: 2nd most perimeter to program space, Combination of new and existing windows Advantage: What makes this Attribute better than other Attributes? Second largest ratio perimeter to building	40			
TOTAL SCORE (Importance of Advantages IoA)			290	New Construction		210	Renovate Buildings		80	New and Renovated Construction		200

Costs Reviewed after Advantage Scores Reviewed

J.W. Killam Elementary School– Decision Tools – Evaluation Matrix

Real time survey of options and criteria, preferred option approved unanimously and used for MSBA FS/SD submission

Evaluation Matrix			Conceptual Options						
Updated: 11/16/2014 <i>working draft</i>			MSBA Required	Renovation	Addition/Renovation		New Construction Options		
Evaluation Criteria			Base Repair Code Renovation	A.1	B.1	B.2	C.1	C.2	C.3
Priority	Construction Duration	Value/ Weight	multiple years	44 months	44 months	44 months	30 months	30 months	30 months
1	Educational Opportunities Program Accommodation Compliance with Vision	1	doesn't address educational deficiencies	difficult to fully accommodate Ed Plan; limited integration, limited flexibility	difficult to fully accommodate Ed Plan; limited flexibility	better integration of CTE & academic spaces	good Ed Plan conformance; some expansion potential	best Ed Plan configuration; some flexibility and expansion potential	best Ed Plan configuration; some flexibility; limited expansion potential
2	Project Cost Construction Cost	1	\$	\$123 - \$125 M \$96.0 M	\$142 - \$144 M \$110.6 M	\$141 - \$143 M \$110.1 M	\$143 - \$146 M \$115.6 M	\$140 - \$143 M \$113.1 M	\$142 - \$144 M \$114.5 M
3	Impact on Students, Staff & Enrollment Disruption, Phasing Construction Duration	1		phased construction adjacent to occupancy; long construction schedule; requires significant modulars	phased construction adjacent to occupancy; long construction schedule; requires some modulars	phased construction adjacent to occupancy; long construction schedule; requires significant modulars	minimal impact to teaching and learning; shortest building construction schedule; some traffic disruption	minimal impact to teaching and learning; shortest building construction schedule; some traffic disruption; relocation of bus parking	minimal impact to teaching and learning; shortest building construction schedule; disruption to some athletic events
4	Reimbursable Costs Operating Costs Temporary Costs Cost Certainty/Predictability	1		high temporary (non- reimbursable) costs for phasing, moving, storage, etc. more probability of unknowns	significant temporary (non- reimbursable) costs for phasing, moving, storage, etc. some probability of unknowns	high temporary (non- reimbursable) costs for phasing, moving, storage, etc. most probability of unknowns	all new construction & MEP systems; best thermal envelope = lower operating costs; temporary parking required	all new construction & MEP systems; best thermal envelope = lower operating costs; temporary parking required	all new construction & MEP systems; best thermal envelope = lower operating costs; busing for athletic events
5	Safety/Access Control Traffic Impacts Vehicle & Pedestrian Circulation	1		phased construction adjacent to occupancy; long construction schedule; requires significant modulars	phased construction adjacent to occupancy; long construction schedule; requires some modulars	phased construction adjacent to occupancy; long construction schedule; requires significant modulars	minimal impact to teaching and learning; shortest building construction schedule; some traffic disruption	minimal impact to teaching and learning; shortest building construction schedule; some traffic disruption; relocation of bus parking	minimal impact to teaching and learning; shortest building construction schedule; disruption to some athletic events
6	Contextual Fit Aesthetics Flexibility Potential for Expansion	1		Building remains as is; New exterior skin = new look; limited internal flexibility; some expansion potential	Building location remains, new main entry and facade; New exterior skin = new look; some internal flexibility; limited expansion potential	Building location remains, new main entry and facade; New exterior skin = new look; some internal flexibility; some expansion potential	good entrance location; sits low on site, close to highway; limited expansion potential	good site position; flexible layout; good potential for expansion	long entrance drive; close to abutters; flexible layout; good potential for expansion
7	Impact on Abutters Environmental Impacts	1		minimal disruption to abutters with internal construction activity; re-uses most of existing structure	minimal disruption to abutters with internal construction activity; re-uses most of existing structure	minimal disruption to abutters with internal construction activity; re-uses some of existing structure	close to highway, close to wetlands, limited septic options	somewhat close to Oak Street	very close to abutters on Oak Street
Totals				17	20	18	26	31	26

1 negative/ least advantageous

2

3 neutral

4

5 positive / most advantageous

Financial Controls Managing Risk

- Your Guide & Advocate Through MSBA process
- Schedule Management
- Establish Realistic Budgets – MSBA Form 3011
- Maximize Reimbursement
- Project Scope and Budget Agreement With MSBA

City of Gardner
Waterford Street Elementary School Project

School Building Committee Reviewed on:

2/11/2019

Total Project Budget: All costs associated with the project are subject to 963 CMR 2.16(5)		Estimated Budget	Scope Items Excluded from the Estimated Basis of Maximum Facilities Grant or Otherwise Ineligible	Estimated Basis of Maximum Total Facilities Grant ¹	Estimated Maximum Total Facilities Grant ¹
60	INTERIORS				
61	Interior Construction	\$0,545,360	\$0		
62	Staircases	\$386,189	\$0		
63	Interior Finishes	\$3,567,082	\$0		
64	SERVICES				
65	Conveying Systems	\$160,000	\$0		
66	Plumbing	\$1,894,763	\$0		
67	HVAC	\$5,130,040	\$0		
68	Fire Protection	\$655,880	\$0		
69	Electrical	\$4,490,121	\$0		
70	EQUIPMENT & FURNISHINGS				
71	Equipment	\$352,770	\$0		
72	Furnishings	\$171,541	\$0		
73	SPECIAL CONSTRUCTION & DEMOLITION				
74	Special Construction	\$0	\$0		
75	Existing Building Demolition	\$0	\$0		
76	In-Bldg Hazardous Material Abatement	\$0	\$0		
77	Asbestos Conf Floor Mat Abatement	\$0	\$0		
78	Other Hazardous Material Abatement	\$0	\$0		
79	OUTSIDE SITEWORK				
80	Site Preparation	\$1,872,456	\$0		
81	Site Improvements	\$3,811,283	\$0		
82	Site Civil / Mechanical Utilities	\$1,082,400	\$0		
83	Site Electrical Utilities	\$500,000	\$0		
84	Other Site Construction	\$0	\$0		
85	Scope Excluded Site Cost		\$4,740,369		
86	Construction Trades Subtotal	\$49,533,934			
87	Contingencies (Design and Pricing)	\$5,944,072	\$569,624		
88	DMAT Sub-Contractor Bonds	\$570,550	\$55,473		
89	DMAT Insurance	\$367,835	\$33,200		
90	DMAT General Conditions	\$4,049,894	\$392,300		
91	DMAT Overhead & Profit	\$1,900,550	\$182,228		
92	GMP Insurance	\$0	\$0		
93	GMP Fee	\$0	\$0		
94	GMP Contingency	\$0	\$0		
95	Location to Meet Point of Construction	\$2,371,629	\$227,910		
96	Overall Excluded Construction Cost		\$10,460,914		
97	Construction Budget	\$66,262,478	\$16,717,395	\$48,535,083	\$48,483,113
98	Alternates				
99	Ineligible Work Included in the Base Project	\$0	\$0	\$0	
100	Alternates Included in the Total Project Budget	\$0	\$0	\$0	
101	Alternates Excluded from the Total Project Budget	\$0	\$0	\$0	
102	Subtotal to be Included in Total Project Budget	\$0	\$0	\$0	\$0
103	Miscellaneous Project Costs				
104	Utility Company Fees	\$100,000	\$0	\$100,000	
105	Testing Services	\$100,000	\$0	\$100,000	
106	Storage Space / Modules	\$0	\$0	\$0	
107	Other Project Costs (Mailing & Moving)	\$40,000	\$0	\$40,000	
108	Misc. Project Costs Subtotal	\$240,000	\$0	\$240,000	\$200,184
109	Furnishings and Equipment				
110	Furniture, Fixtures and Equipment	\$1,250,000	\$140,000	\$1,110,000	
111	Technology	\$1,250,000	\$140,000	\$1,110,000	
112	FF&E Subtotal	\$2,500,000	\$280,000	\$2,220,000	\$1,851,792
113					
114	Soft Costs that exceed 20% of Construction Cost		\$0		
115	Project Budget	\$77,971,363	\$17,317,395	\$60,653,968	\$59,914,756
116	Board Authorization		80.00 Reimbursement Rate Before Incentive Points		
117	Design Enrollment	925	3.41 Total Incentive Points		
118	Total Building Gross Floor Area (GSF)	145,751	83.41% MSBA Reimbursement Rate		
119	Total Project Budget (excluding Contingencies)	\$77,971,363			
120	Scope Items Excluded or Otherwise Ineligible	\$17,317,395			
121	Third Party Funding (Ineligible)	\$0			
122	Estimated Basis of Maximum Total Facilities Grant ¹	\$60,653,968			
123	Reimbursement Rate	83.41%			
124	Est. Max. Total Facilities Grant (before recovery) ¹	\$60,591,475			
125	Cost Recovery ²	\$0			
126	Estimated Maximum Total Facilities Grant ¹	\$60,591,475			
127	Construction Contingency ³	\$3,898,478			
128	Ineligible Construction Contingency ³	\$3,245,953			
129	"Potentially Eligible" Construction Contingency ³	\$652,525			
130	Owner's Contingency ³	\$2,728,935			
131	Ineligible Owner's Contingency ³	\$2,701,646			
132	"Potentially Eligible" Owner's Contingency ³	\$27,289			
133	Total Potentially Eligible Contingency ³	\$679,814			
134	Reimbursement Rate	83.41%			
135	Potential Additional Contingency Grant Funds ³	\$567,033			
136	Maximum Total Facilities Grant	\$61,158,508			
137	Total Project Budget	\$84,598,778			

NOTES

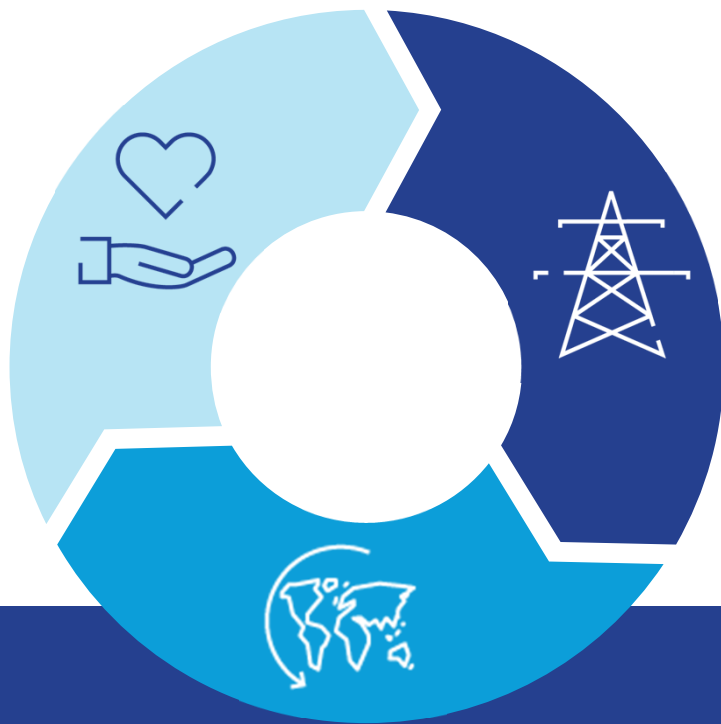
This template was prepared by the MSBA as a tool to assist Districts and consultants in understanding MSBA policies and practices regarding potential impact on the MSBA's calculation of a potential Basis of Total Facilities Grant and potential Total Maximum Facilities Grant. This template does not contain a final, exhaustive list of all evaluations which the MSBA may use in determining whether items are eligible for reimbursement by the MSBA. The MSBA will perform an independent analysis based on a review of information and estimates provided by the District for the proposed school project that may or may not agree with the estimates generated by the District using this template.

1. Does not include any potentially eligible contingency funds and is subject to review and audit by the MSBA.

2. The proposed demolition of the _____ School is expected to result in the MSBA recovering a portion of state funds previously paid to the District for the _____ project at the existing facilities completed in _____. The MSBA will perform an independent analysis based on a review of information and estimates provided by the District for the proposed school project that may or may not agree with the estimated cost recovery generated by the District and its consultants using this template.

3. Pursuant to Section 3.20 of the Project Funding Agreement and the applicable policies and guidelines of the Authority, any project costs associated with the reallocation or transfer of funds from either the Owner's contingency or the Construction contingency to other budget line items shall be subject to review by the Authority to determine whether any such costs are eligible for reimbursement by the Authority. All costs are subject to review and audit by the MSBA.

Innovation Sustainability



Health & Wellness Planning

- Increase Productivity
- Reduce Absenteeism
- Minimize Sickness & Disease
- Ensure Health Equity
- Select Healthy Building Materials & Furniture
- Reduce Harmful Chemicals
- Improve Ventilation

Resilience Strategies

- Focus on Insurability
- Mitigate Storm Severity / Frequency
- Evaluate Business Continuity Risks
- Prepare for Sea Level Rise
- Plan for Supply Chain Disruption & Utility Grid Failure
- Enhance Technology Infrastructure

Energy & Carbon Targets

- Prioritize Efficient Buildings
- Promote Net Zero
- Regulate Carbon
- Reduce Greenhouse Gas Emissions
- Track Embodied Carbon
- Manage Global Warming Potential (GWP)
- Optimize for a Circular Economy



4.5M+
GSF Sustainable
Space



200+
LEED Certified
Buildings



15+
Net Zero / Living
Building Challenge
Certified

Diversity, Equity, & Inclusion

- Colliers DEI Committee
 - *Strengthens our business*
 - *Enriches our culture*
 - *Deepens relationships among our teams & staff*
- Recruitment
- Training
- Internal Organizations





Project Leaders

Thank you!



Town of Reading Meeting Minutes

Board - Committee - Commission - Council:

Permanent Building Committee

Killam School Building Committee

Date: 2023-06-21

Time: 6:00 PM

Building: Virtual

Location: Zoom

Address:

Session: Open Session

Purpose: General Business

Version: Draft

Attendees: **Members - Present:**

Vice Chair Carla Nazzaro, John Coote, Karen Gately Herrick, Kirk McCormick, Ed Ross, Greg Stepler, Nancy Twomey

Members - Not Present:

Chair Pat Tompkins, Sarah McLaughlin

Others Present:

Town Manager Fidel Maltez, Facilities Director Joe Huggins, Business Administrator Jayne Wellman, Town Accountant Sharon Angstrom, Mark Dockser, Craig DiCarlo

Minutes Respectfully Submitted By: Jacquelyn LaVerde

Topics of Discussion:

This meeting was held remotely via Zoom.

Call to Order:

Vice Chair Carla Nazzaro called the meeting to order at 6:02 pm.

Roll call attendance: Kirk McCormick, Greg Stepler, Nancy Twomey, John Coote, Karen Gately Herrick, Ed Ross, Carla Nazzaro.

Not present: Sarah McLaughlin and Chair Pat Tompkins.

Discussion and Update on Owner's Project Manager:

Carla Nazzaro explained that while negotiating with TERVA, two other firms contacted Town Manager Fidel Maltez and the MSBA, indicating that TERVA could have better represented their work. As a result, TERVA has withdrawn from the process.

Mr. Maltez noted that TERVA made some errors in their process, though not related to Reading. He stated that after he spoke with the MSBA and to Town Counsel, the Town and TERVA amicably parted ways. MSBA asked Mr. Maltez to convene the Killam School Building Committee as quickly as possible to decide on how to move forward and still make it on the July 10th MSBA meeting agenda.

The Committee discussed the second ranked firm, Colliers Project Leaders. Nancy Twomey recalled concerns the Committee had with not knowing who the construction manager would be. Mr. Maltez stated that he, Facilities Director Joe Huggins, and Business Administrator Jayne Wellman spoke with Colliers earlier today, and they clarified that Mike Carroll would be the Project Director and would see the project throughout the design, construction, and close out phases. When Colliers was not selected at first, the Construction Manager they had planned on was assigned to another project. They are in the process of lining up

another individual, and Mr. Huggins stated that Colliers said that they could meet with the prospective Project Manager, and if that person is not a good fit, they will make a change.

Following discussion, members of the Committee agreed that while disappointed to not be working with TERVA, they were still comfortable and excited to be working with Colliers.

Vote to Direct Town Manager to Execute Contract with OPM:

On a motion by Karen Gately Herrick, seconded by Ed Ross, the Killam School Building Committee voted 7-0-0 to direct the Town Manager to execute a contract with Colliers Projects Managers.

Roll call vote: Kirk McCormick – Yes, Greg Stepler – Yes, Nancy Twomey – Yes, John Coote – Yes, Karen Gately Herrick – Yes, Ed Ross – Yes, Carla Nazzaro – Yes.

Approve Minutes from Previous Meeting:

On a motion by Nancy Twomey, seconded by Kirk McCormick, the Killam School Building Committee voted 7-0-0 to approve the meeting minutes of May 22, 2023, as amended.

Roll call vote: Kirk McCormick – Yes, Nancy Twomey – Yes, John Coote – Yes, Karen Gately Herrick – Yes, Ed Ross – Yes, Carla Nazzaro – Yes, Greg Stepler – Yes.

On a motion by Ed Ross, seconded by Carla Nazzaro, the Killam School Building Committee voted 7-0-0 to adjourn at 6:24 pm.

Roll call vote: Kirk McCormick – Yes, Greg Stepler – Yes, Nancy Twomey – Yes, John Coote – Yes, Karen Gately Herrick – Yes, Ed Ross – Yes, Carla Nazzaro – Yes.