

Selection and Assignment of Owner's Project Managers **Green Repair Program**

Background

On June 16, 2010, in response to a Request for Qualifications (RFQ), the MSBA received responses from 21 firms that were interested in participating in the MSBA's Green Repair Program as Owner's Project Managers. Of these 21, the MSBA invited seven firms that had not previously appeared before the MSBA's OPM Review Panel to make a presentation to the Panel on July 12, 2010. Based on a review of each response and the Panel presentations, the MSBA pre-qualified 20 firms to be OPMs for the Green Repair Program.

As noted in the RFQ, there is no guarantee that an Owner's Project Manager pre-qualified by the MSBA for the Green Repair Program will be selected for a project. Also, this pre-qualification of Owner's Project Managers is solely for the purposes of the Green Repair Program, and pre-qualification for the Green Repair Program has no bearing on the selection of an Owner's Project Manager for projects that are not part of the Green Repair Program.

For each Green Repair project approved by the MSBA, Districts will select from a list of potential Owner's Project Managers tendered by the MSBA. The District shall evaluate the Owner's Project Managers using the same evaluation criteria set forth in the RFQ, and it may add selection criteria reasonably related to the particular project, subject to the approval of the MSBA. If necessitated by schedule, scope of work or capacity issues, the MSBA reserves the right to assign an Owner's Project Manager from the pre-qualified list without a District selection process.

As discussed in more detail below, the Owner's Project Manager selected for a project and approved by the MSBA will enter into a contract with the city, town or regional school district, using the MSBA's Green Repair Program Contract for Project Management Services, a copy of which was available on the MSBA's website.

MSBA Assignment Process

MSBA staff shall prepare a prioritized listing of all School Districts that are ready to select an Owner's Project Manager for a Green Repair project. The MSBA then will review each District's specific project scope, estimated construction budget and timeline and then select a list of potential Owner's Project Managers from the list of pre-qualified applicants for the District selection process.

The MSBA has established the list of pre-qualified applicants in a random order as follows:

- PMA Construction Services
- Vertex Construction Services, Inc.
- RFWalsh Collaborative Partners
- Skanska USA Building Inc.
- Daedalus Projects Incorporated
- Diversified Project Management
- Compass Project Management

- KVAssociates, Inc.
- Atlantic Construction & Management, Inc.
- Municipal Building Consultants, Inc.
- STV Construction, Inc.
- NETCO Construction Project Managers, Inc.
- Knight, Bagge, & Anderson, Inc.
- P3 Project Planning Professionals
- URS Corporation
- Strategic Buildings Solutions, LLC.
- Potomac Capital Advisors
- Pinck & Co.
- Bargmann, Hendrie + Archtype, Inc.
- Maguire Group

When determining which firms to tender to the School District, the MSBA will begin at the top of this list and select applicants to tender to the district based on the complexity of the project's scope, the estimated costs of the project, the number of schools involved and/or the geographical location of the project.

The MSBA will strive to select a minimum of three firms for each District selection process, and before tendering a particular firm to a District, the MSBA will review each firm's application to confirm that:

- a. The Firm is independent of the Project and is not participating in any other role or function related to the Project;
- b. The Firm's experience as submitted in its application is well suited to the specific scope of work as defined by the District; and
- c. The Firm has adequate resources and capacity to accomplish the work based on their current workload, geographic location, and the number of assignments received as part of the MSBA Green Repair Program.

If the MSBA determines that a firm does not satisfy all of the above objectives for a particular Project, the MSBA will not select that firm for the Project and will proceed to the next firm on the pre-qualified list until it finds a firm that satisfies each of these objectives for that Project. The passed-over firm will be considered for the next Green Repair Project, and the MSBA will perform the same analysis to determine whether it meets the above objectives.

District selection process

The District must complete the following selection process in two weeks.

1) The District shall assemble a selection committee, which shall include, at a minimum, one member designated by the school committee, the superintendent of schools or his/her designee, and the chief executive officer of the city or town or his/her designee.

2) The District shall submit to the MSBA the selection criteria it will use to perform its selection. See attached Selection Criteria Form. The District ***must*** utilize the following selection criteria in its selection, at a minimum, but it may utilize all of the criteria established in the RFQ and may add additional criteria that are relevant to the specific project scope, subject to approval by the MSBA.

- a. Prior similar experience
- b. Personnel qualifications and key personnel assigned to the work
- c. Current workload and capacity

If the District would like to utilize evaluation criteria in addition to those set forth in the RFQ, such proposed additional criteria must be set forth in the Selection Criteria Form and approved by the MSBA before the District begins its review of the applications.

3) Upon receipt and acceptance of the District's Selection Criteria Form, the MSBA Green Repair Project Manager shall forward a list of pre-qualified Owner's Project Managers to the District and a copy of their applications.

4) The District shall review each of the applications received from the MSBA. After review of the applications, the District may opt to conduct interviews, provided the interviews are complete within the 2-week timeframe. If the District decides to conduct interviews, it must notify the MSBA of the date and time and submit the interview questions for acceptance by the MSBA. The MSBA may choose to participate in the interview process.

5) The District shall select an Owner's Project Manager in accordance with the approved selection criteria. The District then shall prepare the OPM Record of Selection form and submit the signed selection form to the MSBA for its consideration. After accepting the selection of an Owner's Project Manager, the MSBA will complete the OPM Record of Selection form and forward it to the District.

6) Upon receipt of the MSBA's acceptance of the OPM Record of Selection form, the District shall negotiate the fee with the selected Owner's Project Manager and execute the Green Repair Program Contract for Project Manager Services. Prior to execution of the Green Repair Program Contract for Project Management Services with the School District, the selected Owner's Project Manager shall submit to the School District a certificate of insurance that meets the requirements set forth in the Green Repair Program Contract for Project Management Services. The District shall forward a copy of the executed Contract to the MSBA.

Standard letters, contracts and deliverables

- 1) MSBA e-mail notification to District of OPM selection applications
- 2) District Selection Criteria form
- 3) Record of Selection and MSBA Acceptance of Selection form
- 4) Green Repair Program Contract for Project Management Services
(http://www.massschoolbuildings.org/program_ektid652.aspx)
- 5) District Transmittal of executed Contract for Owner's Project Management Services, project schedule, and work plan

[Letterhead of City/Town/Regional School District]

Selection Criteria Form
Owner's Project Manager
Green Repair Program

1) District Selection Committee

In accordance with "Selection and Assignment of Owner's Project Managers – Green Repair Program," assembled for your review and approval is the membership of the Selection Committee for (NAME OF DISTRICT). Committee Members include the following:

(Please provide name, title, address and phone number of each member.)

Designation	Name and Title	E-Mail Address and Phone Number
School Committee Member*		
Superintendent of schools or his/her designee*		
Local Chief Executive Officer or his/her designee*		
Other members (Please add lines, if necessary, to indicate additional members of selection committee)		

*Required members

2) District Selection Criteria

In accordance with "Selection and Assignment of Owner's Project Manager – Green Repair Program," assembled for your review and approval is the Selection Criteria that the District intends to use (as noted by a check below) for selecting an Owner's Project Manager from the applicants pre-selected through the Green Repair Program for (NAME OF SCHOOL). Selection Criteria include the following:

a.) Selection Criteria	Criteria selected
Prior Similar Experience	X
Personnel Qualifications	X
Current Workload and Capacity	X

Experience with Stretch Energy Code	
Knowledge of Energy Efficiency Programs	
Knowledge of Construction Procurement Law	
Additional Criteria	

(Bold selection criteria must be utilized by the District in its evaluation.)

b) Description of rating system to be used for the Selection Criteria:

(NOTE: The MSBA recommends use of a numerical rating rather than least/advantageous and highly advantageous.)

3) District Interviews

If the District chooses to conduct interviews after review of the applications, the District will notify the MSBA of the time and submit the interview questions for acceptance by the MSBA. The MSBA may choose to participate in the interview process.

The (NAME OF DISTRICT) recommends as outlined in steps 1 and 2 above the District Selection Committee Members and the Selection Criteria and agrees to notify the MSBA before conducting interviews, if any.

Sincerely,

By: _____
Authorized signature for District

Title: _____

Date: _____

Accepted by MSBA Date

[Letterhead of City/Town/Regional School District]

Record of Selection Form
Owner’s Project Manager
Green Repair Program

1) District Selection

In accordance with “Selection and Assignment of Owner’s Project Managers – Green Repair Program,” assembled for your review are the evaluation results of the District using the Selection Criteria approved by the MSBA for selecting an Owner’s Project Manager from the applicants pre-selected through the Green Repair Program for (NAME OF SCHOOL). The results from the evaluation of received responses are as follows:

(Please add columns, if necessary, dependent upon the number of responses received from the MSBA for evaluation.)

a.) Selection Criteria	Criteria selected	Owner’s Project Manager:	Owner’s Project Manager:	Owner’s Project Manager:
Prior Similar Experience	X			
Personnel Qualifications	X			
Current Workload and Capacity	X			
Experience with Stretch Energy Code				
Knowledge of Energy Efficiency Programs				
Knowledge of Construction Procurement Law				
Additional Criteria				
Total				

(Bold selection criteria must be utilized by the District in its evaluation.)

b) Description of rating system used for the Selection Criteria:

(NOTE: The MSBA recommends use of a numerical rating rather than least/advantageous and highly advantageous.)

The District shall evaluate the Owner’s Project Managers using the rating system described by the District and accepted by the MSBA on the “Selection Criteria Form – Owner’s Project Manager – Green Repair Program.”

Upon completion of its review of received responses, the (NAME OF DISTRICT) selects Owner’s Project Manager: _____. The District hereby designates (NAME(S)), as the individual(s) who shall have the authority to act on behalf of the District under the Contract and who shall be responsible for the day-to-day communication between the District and the Owner’s Project Manager. The District shall execute the Authority’s Standard Contract for Project Management Services for Green Repair Program with the Owner’s Project Manager without modification to its terms and conditions.

Sincerely,

By: _____
Authorized signature for District

Title: _____

Date: _____

Accepted by MSBA Date

Note to District:

The Authority’s approval is further subject to the execution of a contract between the District and the Owner’s Project Manager in a form that is satisfactory to the Authority, utilizing any standard contracts, forms, and provisions that the Authority may require. At your earliest convenience, please forward a copy of the fully executed contract between the District and the Owner’s Project Manager to Jennifer Connarton at 40 Broad Street (Suite 500), Boston, MA 02109.

In accordance with paragraph 8.1.3 of the Contract for Project Management Services for the Green Repair Program, Green Repair Owner’s Project Managers will be required to enter basic project status data into the MSBA online OPM Report System. Immediately upon execution of the Contract for Project Management Services between the District and the Owner’s Project Manager, the Owner’s Project Manager should obtain the District’s authorization to access the OPM Report System and provide a faxed copy of the completed “System User” access form to William Cross (617-720-5260 or 617-720-8460) at the MSBA. The “System User” access form can be found under “System User Guides & Access Request Forms” through the “Policies & Guidelines” tab on the MSBA website, www.massschoolbuildings.org. In addition, please advise the Owner’s Project Manager to mail all of its required monthly reports to Jennifer Connarton.