Town of Brookline

John R. Pierce School

Contract for Designer Services

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CONTRACT FOR DESIGNER SERVICES
(BASE CONTRACT FOR DESIGN BID BUILD OR CM at RISK PROJECT)

This Contract is made as of this ____ day of _____ in the year 2021 between the
(day) (month) (year)

Town of Brookline, 333 Washington Street
(Owner) (street)

Brookline, Massachusetts, 02445
(City) (State) (Zip Code)

hereinafter called "the Owner" and Miller Dyer Spears, Inc.
(Designer)

99 Chauncy Street, 8th Floor, Boston, MA, 02111
(street) (city) (State) (Zip Code)

hereinafter called the "Designer" for the Designer to provide the designer services required to complete the Basic and Extra Services described herein at John R. Pierce School, 50 School Street, Brookline, MA and as further defined in Attachment B – RFS dated October 7, 2020; RFS addenda 1 & 2; Miller Dyer Spears, Inc. proposal application dated November 4, 2020; MSBA DSP interview topics dated December 2, 2020; Miller Dyer Spears, Inc. MSBA DSP presentation dated December 15, 2020
(name/description of Project)

The Designer is authorized to perform the services required by this Contract through the Feasibility Study Phase and, pending receipt of a written Approval to proceed from the Owner, through the Schematic Design Phase. At the Owner's option, the Designer may be authorized to perform services for subsequent design phases and/or the Construction Phases and Completion Phase, at which time a mutually agreed upon amendment to this Contract will be executed between the Owner and the Designer. If the Owner elects to construct the Project using the CM at Risk ("CM-R") construction delivery method pursuant to M.G.L. c. 149A, this Contract shall be amended using the Authority's Standard Amendment for CM-R, as it may be amended from time to time by the Authority. If the Owner elects to construct the Project using the Design-Bid-Build ("DBB") construction delivery method pursuant to M.G.L. c. 149, this Contract shall be amended using the Authority's Standard Amendment for DBB, as it may be amended from time to time by the Authority.

For the performance of the services required under this Contract for the Feasibility Study Phase and the Schematic Design Phase, and excluding those services specified under Articles 7.5, 7.6, 7.7, 7.8, 7.9, 7.10, and 8.3, the Designer shall be compensated by the Owner for Basic Services in accordance with the Payment Schedule included as Attachment A & A1.

Designer's Project Architect/Engineer: Will Spears, Principal-In-Charge/Design Principal

The Subconsultants to provide services, either as Basic or Extra Services, to the Designer under this contract may include the following, as identified on the RFS:

	Name of Firm	Name of Principal	MBE/ WBE
Architecture	Miller Dyer Spears Inc.	Will Spears	WBE
Associated Architect	Sasaki	Vinicius Gorgati	
Educational Programming	New Vista Design	David Stephen	
Civil Engineering	Sasaki Architects, PC	Zachary Chrisco	
Landscape Architecture	Sasaki Architects, PC	Kate Tooke	
Structural Engineering	Souza True & Partners, Inc.	Jerome A. Yurkoski	
Fire Protection Engineering	Garcia, Galuska & DeSousa, Inc.	Christopher Garcia	
Plumbing Engineering	Garcia, Galuska & DeSousa, Inc.	Christopher Garcia	
HVAC Engineering	Garcia, Galuska & DeSousa, Inc.	Dominick Puniello	

Electrical/Lighting/	Garcia, Galuska & DeSousa, Inc.	Carlos DeSousa	
Data/Communications	Garcia, Galuska & DeSousa, Inc.	David Pereira	
Environmental Permitting	Sasaki Architects, PC	Kevin Hebard	
Geotechnical Engineering	Lahlaf Geotechnical Consulting, Inc.	Abdelmadjid Lahlaf	MBE
Geoenvironmental Engineering	PEER Consultants, PC	David Gorden	MBE/WBE
Hazardous Materials	PEER Consultants, PC	John M. Corliss	MBE/WBE
Cost Estimating	A.M. Fogarty	Pete Timothy	
Kitchen/Food Service Consultant	Crabtree McGrath Associates, Inc.	John Sousa	
Laboratory Consultant	Miller Dyer Spears Inc.	Kate Wonkka	WBE
Acoustical Consultant	Acentech, Inc.	Ioana Pieleanu	
Specifications Consultant	Miller Dyer Spears Inc.	Tim Teabo	WBE
Library/Media	Miller Dyer Spears Inc.	Amy MacKrell	WBE
Technology Consultant/Audio Visual Consultant	DGI Communications (DBA ACT Associates)	Peter Thompson	
Theatrical Consultant	Port Lighting Systems	Ronald Kuszmar II	
Sustainable/Green Design/ Renewable Energy Consultant	Sasaki Architects, PC	Tamar Warburg	
Code Consultant	Hastings Consulting, Inc.	Kevin Hastings	
Accessibility Consultant	Miller Dyer Spears Inc.	Kate Wonkka	WBE
Traffic Consultant	Vanasse & Associates, Inc.	Scott Thornton	
Furniture, Fixtures & Equipment Consultant	Point Line Space, Inc.	Peter S. Constable	
Site Surveying	Feldman	Kevin Arsenault	
Security Consultant	Pamela Perini	Pamela Perini	WBE
Hardware Consultant	Campbell-McCabe Worldwide LLC	Michael Bartoloni	WBE
Historical Consultant	Building Conservation Associates, Inc.	Lisa Howe	

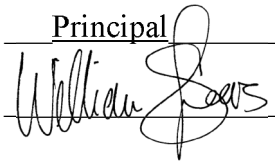
IN WITNESS WHEREOF, the parties hereto have caused this instrument to be executed in triplicate under seal as of the date set forth above.

DESIGNER

By: 12 January 2021

Name: William C. Spears

Title: Principal

Date: 

TOWN OF BROOKLINE

By executing this Agreement, the undersigned authorized signatory of Owner, who incurs no personal liability by reason of the execution hereof or anything herein contained, hereby certifies under penalties of perjury that this Contract is executed in accordance with a prior approval of the Town of Brookline.

By: _____

Name: _____

Title: _____

Date: _____

Approved as to Form:

By: _____

Name: _____

Title: _____

Date: _____

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ARTICLE 1: DEFINITIONS

All terms that this Contract defines may be used with or without initial capital letters. Other terms, abbreviations and references are defined as they appear herein. Words and abbreviations that are not defined in the Contract Documents but which have recognized technical or trade meanings are used in accordance with those meanings.

APPLICABLE LAWS – All applicable laws, statutes, ordinances, by-laws, codes, rules and regulations, of the Commonwealth of Massachusetts, its political subdivisions, and the Federal Government applicable to the Project.

APPROVAL -- A written communication from the Owner approving the work of the current Phase, as identified on Attachment A, or authorizing the Designer to proceed to the next Phase or approving the scope and compensation for either Extra Services or Reimbursable Expenses.

AUTHORITY – Massachusetts School Building Authority or its authorized representative, created by St. 2004, c. 208.

BASIC SERVICES – The scope of services to be provided by the Designer under this Contract, unless the Contract is otherwise terminated pursuant to Article 12, as described in Article 7 of this Contract, and as it may be amended pursuant to Article 18.4.

CERTIFICATE OF FINAL COMPLETION – The form prescribed by the Authority which contains the certification of the Designer, OPM and the Owner that the Project has reached Final Completion.

CERTIFICATE OF SUBSTANTIAL COMPLETION – The certificate prepared by the Designer and approved by the Owner to the effect that the Work has reached Substantial Completion.

CHANGE ORDER – A written instrument prepared by the Designer and signed by the Owner, Owner's Project Manager, Contractor or CM at Risk, and Designer, stating their agreement on a change in the Construction Contract Documents, including, but not limited to, a change in the Contract Sum and/or Contract Time, and/or any other specification in the Construction Contract Documents.

COMMISSIONING CONSULTANT – A person or firm engaged by the Authority to provide building commissioning services, including advisory services during design and construction.

CONSTRUCTION CONTRACT DOCUMENTS – The Construction Contract Documents consist of the Owner-Contractor or Owner-CM at Risk Agreement, Advertisement, Instructions to Bidders, Bidding Documents, Contract Forms, Conditions of the Contract, Drawings, Plans, Technical Specifications, all addenda issued prior to execution of the Construction Contract, and other documents approved after execution of the Owner-Contractor or Owner-CM at Risk Agreement relating thereto.

CONSTRUCTION MANAGEMENT AT RISK or CONSTRUCTION MANAGEMENT AT RISK SERVICES or CONSTRUCTION MANAGEMENT AT RISK DELIVERY METHOD or CM at RISK DELIVERY METHOD - a construction method described in

M.G.L. c. 149A wherein a Construction Management at Risk firm provides a range of preconstruction services and construction management services which may include cost estimation and consultation regarding the design of the building project, the preparation and coordination of bid packages, scheduling, cost control, and value engineering, acting as the general contractor during the construction, detailing the Trade Contractor scope of work, holding the trade contracts and other subcontracts, prequalifying and evaluating Trade Contractors and subcontractors, and providing management and construction services, all at a Guaranteed Maximum Price, which shall represent the maximum amount to be paid by the public agency for the building project, including the cost of the work, the general conditions and the fee payable to the Construction Management at Risk Firm.

CONSTRUCTION MANAGER AT RISK, CONSTRUCTION MANAGEMENT at RISK FIRM or CM at RISK – the individual, corporation, partnership, sole proprietorship, joint stock company, joint venture or other entity with whom the Owner has contracted pursuant to M.G.L. c. 149A, §§ 6 & 7, to provide Construction Management at Risk Services.

CONTRACT – This Contract, inclusive of all Attachments, between the Owner and the Designer; all written amendments to this Contract; and all Approvals issued pursuant to this Contract.

CONTRACTOR OR GENERAL CONTRACTOR – The person or firm with whom the Owner has contracted pursuant to M.G.L. c. 149, §§ 44A-44M to perform the construction for this Project.

CONTRACTOR APPLICATION AND CERTIFICATE FOR PAYMENT – The form prescribed by the Owner which contains the Contractor's or CM at Risk's application or requisition for periodic or final payment for Work performed in accordance with the Construction Contract Documents and the Designer's certificate for payment as approved by the OPM and the Owner.

DESIGNER – The individual, corporation, partnership, sole proprietorship, joint stock company, joint venture or other entity identified as such on page one of this Contract performing architecture, landscape architecture, and/or engineering services under this Contract and which meets the qualifications set forth in M.G.L. c. 7C § 44.

DESIGNER SERVICES – The services to be performed by the Designer and its Subconsultants under this Contract including developing and providing all data, designs, drawings, specifications and estimates required for the Project.

DISTRICT – see "OWNER."

EXTRA SERVICES – Services requested by the Owner to be performed by the Designer but which are additional (or "extra") to the services performed as Basic Services.

FEASIBILITY STUDY AGREEMENT – The agreement between the Owner and the Authority that sets forth the terms and conditions pursuant to which the Authority will collaborate with the

Owner in conducting a feasibility study, which agreement shall include the budget, scope and schedule for the feasibility study.

FEE FOR BASIC SERVICES – The fee to be paid to the Designer for satisfactorily performing the Basic Services required under this Contract, exclusive of the compensation to which the Designer may be entitled pursuant to Articles 8 (Extra Services) and 9 (Reimbursable Expenses).

FINAL COMPLETION – The Work has been completed in accordance with the Construction Contract Documents and the educational specifications, schematic plans and drawings and the Project Funding Agreement approved by the Authority.

FINAL DESIGN PROGRAM – A description of the programmatic, functional, spatial, and environmental requirements of the Project in written and graphic form indicating the scope of work and design requirements of the Project.

GENERAL LAWS – The Massachusetts General Laws as amended, including any rules, regulations and administrative procedures implementing said laws.

GUARANTEED MAXIMUM PRICE or GMP - The agreed total dollar amount for the Construction Management at Risk services, including the cost of the Work, the general conditions and the fees charged by the Construction Management at Risk firm.

GUIDELINES AND STANDARDS – Documents published by the Authority including regulations and procedures that supplement the tasks of Designers contracting with Owners for projects receiving any funding from the Authority, as they may be amended from time to time by the Authority.

MATERIALS – The designs, drawings, project manual specifications, and other materials prepared by the Designer as defined in Article 16.1.

MBE/WBE – A minority-owned business (MBE) or a women-owned business (WBE) certified by the Supplier Diversity Office (SDO).

NOTICE TO PROCEED – The written communication issued by the Owner to the Contractor or CM at Risk authorizing him to proceed with the construction contract and establishing the date for commencement of the contract time.

OWNER – The entity identified as such on page one of this Contract, or its authorized representative, that is the owner of the property that is the site of the Project, or has or will have exclusive control over the site for at least the duration of the useful life of the school facility that is the subject of the Project, and is responsible for administering this Contract.

OWNER-CONTRACTOR AGREEMENT or OWNER – GENERAL CONTRACTOR AGREEMENT – The contract between the Owner and one or more General Contractors and/or goods or services providers for construction of a whole or part of the Project, including approved change orders.

OWNER-CM at RISK AGREEMENT – The contract between the Owner and the CM at Risk, including, but not limited to, the GMP Amendment, for the provision of Construction Management at Risk Services for the Project**.**

OWNER'S PROJECT MANAGER or OPM – The individual, corporation, partnership, sole proprietorship, joint stock company, joint venture or other entity with whom the Owner has contracted to perform the Project Management Services for this Project, and who meets the qualifications of M.G.L. c. 149, § 44A ½ and has been approved by the Authority.

PHASE – A distinct portion of the work of this Contract and its associated duration, as identified on Attachment A. Prior Approval to proceed for each Phase is required from the Owner.

PRINCIPALS – The owner(s) and/or officer(s) of the Designer or Subconsultant who are in responsible charge of the Project.

PROJECT – All work that pertains to the study, planning, programming, design, construction, reconstruction, installation, demolition, maintenance and repair, if any, as described in the Project Scope and Budget Agreement and Project Funding Agreement.

PROJECT ARCHITECT AND/OR PROJECT ENGINEER – The individual designated by the Designer as its Project Architect or Project Engineer. Such Project Architect or Project Engineer shall be a registered architect, engineer or landscape architect as required by the Request For Designer Services, shall be the person who shall oversee the performance of all services provided on the Project and shall be certified in the Massachusetts Certified Public Purchasing Official Program as administered by the Inspector General of the Commonwealth of Massachusetts.

PROJECT CONSTRUCTION BUDGET – That portion of the Total Project Budget that enumerates the cost of constructing the Project inclusive of all designed construction, demolition, and renovation work, all supportive and preparatory construction work required for the Project, the General Contractor or the CM at Risk and all subcontractors, suppliers, materials, equipment, general conditions, insurance, overhead and profit and all other expenditures that are ordinarily considered as construction cost allocations. The Project Construction Budget includes the design contingency, bidding contingency, and price escalation contingency, as appropriate to the phase of the Project.

PROJECT FUNDING AGREEMENT – the Project Funding Agreement described in the 963 CMR 2.02 and executed by the Authority and the Owner.

PROJECT SCHEDULE – A complete list of all activities, time and sequence required to complete the Project, as defined in the Project Scope and Budget Agreement or Project Funding Agreement.

PROJECT SCOPE AND BUDGET AGREEMENT – the Agreement described in 963 CMR 2.10(10) and executed by the Authority and the Owner.

RECORD DRAWINGS – The drawings prepared by the Designer and its Subconsultants pursuant to Article 7.10.5 of this Contract which incorporate the design changes made during the construction period and which incorporate information on the marked-up prints, as-built drawings and other data furnished by the General Contractor or CM at Risk and any subcontractors.

REIMBURSABLE EXPENSES – Costs and expenses incurred by the Designer that are reimbursable pursuant to the provisions of Article 9 of this Contract.

REQUEST FOR DESIGNER SERVICES or RFS – The written document appended hereto as Attachment B specifying various requirements including the project goals and general scope, project site, scope of services, submission requirements, schedule, and construction budget.

STANDARD OF CARE – The generally accepted professional standard of care ordinarily used by design professionals performing a similar scope of services in the same geographic area on projects of comparable size and complexity.

SUBCONSULTANT – The Subconsultants listed on page 1 of this Contract, together with any additional Subconsultants engaged by the Designer from time to time, which shall be an individual, company, firm, or business having a direct contractual relationship with the Designer, who provides services on the Project.

SUBCONTRACTOR – The person or entity having a direct contractual relationship with the Contractor, or CM at Risk who has the contract to perform the construction of the Project, except as otherwise specifically provided or required herein or by law. Subcontractor when used also means "Trade Contractor" except when otherwise specified.

SUBSTANTIAL COMPLETION – The Work, as evidenced by the Certificate of Substantial Completion, is fully complete or substantially complete so that the value of the Work remaining to be done is, in the estimate of the Owner, less than one percent of the original contract price, or (2) the Contractor substantially completes the work and the Owner takes possession for occupancy, whichever occurs first.

TOTAL PROJECT BUDGET – A complete and full enumeration of all costs of the Project, as defined in the Project Scope and Budget Agreement or Project Funding Agreement.

TRADE CONTRACTOR – a subcontractor having a direct contractual relationship with a Contractor or CM at Risk to perform one or more so-called sub-bid classes of work listed in M.G.L. c.149, §44F, and any other sub-bid classes of work selected by the Owner for the Project in accordance with the provisions of either M.G.L. 149, §44F(1)(a) or M.G.L. c. 149A, §8(a).

WORK – The entire construction required to be furnished under the Construction Contract Documents. Work includes performing and furnishing any and all services, obligations, duties, responsibilities, labor, materials, equipment, temporary facilities, and incidentals necessary to complete the construction assigned to, or undertaken by the Contractor or the CM at Risk pursuant to the Construction Contract Documents.

ARTICLE 2: RELATIONSHIP OF THE PARTIES

2.1 The Owner's Project Manager shall act as an independent contractor of the Owner in providing certain project management services required for the Project required for the project except where the OPM is an existing public employee of the Owner as described in M.G.L. c. 149, § 149A1/2.

2.2 The Designer is solely responsible for providing the design for the Project and for performing in accordance with this Contract.

2.3 The Contractor or CM at Risk, as the case may be, shall be solely responsible for construction means, methods, techniques, sequences and procedures, the Contractor's or CM at Risk's schedules, and for safety precautions and programs in connection with the Project and for performing in accordance with the Owner-Contractor or Owner - CM at Risk Agreement. The Designer shall be responsible for the Designer's negligent acts or omissions but shall not have control over or charge of acts or omissions of the Contractor or CM at Risk, Subcontractors, or the agents or employees of the Contractor or CM at Risk or Subcontractors, the Owner's Project Manager, the Authority or its Commissioning Consultant or other technical consultants.

2.4 Nothing in this Contract shall be construed as an assumption by the Designer of the responsibilities or duties of the Contractor or CM at Risk or the Owner's Project Manager. It is the intention of the parties that the Designer's services shall be rendered in a manner compatible with and in coordination with the services provided by the Owner's Project Manager and the Commissioning Consultant. It is not intended that the services of the Designer and the Owner's Project Manager or the Commissioning Consultant be competitive or duplicative, but rather complementary. The Designer shall be entitled to rely upon the Owner's Project Manager, Commissioning Consultant and Contractor or CM at Risk for the proper performance of their obligations pursuant to their respective contracts with the Owner.

ARTICLE 3: RESPONSIBILITIES OF THE OWNER

3.1 The Owner shall have the right to approve the Designer's work.

3.2 The Owner shall designate an individual who shall have the authority to act on behalf of the Owner under this Contract and who shall be responsible for day-to-day communication between the Owner and the Designer.

3.3 Upon satisfactory completion of services performed, the Owner shall make payments to the Designer as provided in Articles 6, 7, 8 and 9, 10 and 11.

3.4 To the extent such data is available, the Owner shall furnish to the Designer existing surveys of the site, building plans, borings, test pits, structural, mechanical, chemical or other test data, tests for air and water pollution and for hazardous materials, photographs, reports and utility information. The Designer shall be entitled to reasonably rely upon the sufficiency

and accuracy of the information furnished to the Designer under this Article 3.4 and under Article 4.11, provided that the Designer shall coordinate its services with the services of the Owner's consultants and shall notify the Owner in writing of any deficiencies in such data of which the Designer becomes aware.

3.5 Except as otherwise provided in this Contract, or when direct communications have been specially authorized, the Owner shall endeavor to communicate with the Contractor or CM at Risk and the Designer's consultants through the Designer about matters arising out of or relating to the Construction Contract Documents. The Owner shall promptly notify the Designer of any direct communications that may affect the Designer's services.

3.6 The Owner shall provide the Designer access to the Project site prior to commencement of the Work and shall obligate the Contractor or CM at Risk to provide the Designer access to the Work wherever it is in preparation or progress.

3.7 If the Owner requests the Designer to execute any certificates that are not readily available as of the effective date of this Contract, the proposed language of such certificates shall be submitted to the Designer for review at least 14 days prior to the requested dates of execution. The Designer shall not be required to execute certificates or consents that would require knowledge, services or responsibilities beyond the scope of this Contract.

3.8 The Owner shall deliver to the Designer in a timely manner written copies of all Approvals required by this Contract. If Approval is withheld, the Owner shall notify the Designer in a timely manner in writing why such Approval is being withheld.

3.9 The Owner shall not unreasonably withhold, delay, condition, or deny any approval, acceptance, or consent required under this Contract, including any Approval.

ARTICLE 4: RESPONSIBILITIES OF THE DESIGNER

4.1 The Designer shall perform the Designer Services in accordance with the requirements of this Contract, and in accordance with the Standard of Care. The Designer shall exercise due care and diligence in the rendition of all services under this Contract in accordance with such professional standards and shall exercise the Standard of Care to provide the services required under this Contract in conformity with all Applicable Laws.

4.2 The Designer shall be responsible for the Designer Services including any changes to such Services that may be required in accordance with this Contract. The Designer shall furnish appropriate competent professional services for each of the Phases in accordance with the Standard of Care. Any changes, corrections, additions or deletions requested by the Owner and the Authority shall be incorporated into the design of the Project unless detailed objections thereto are issued in writing by the Designer, subject to Article 8.2.2. Nothing herein shall be construed as an assumption by the Owner or the Authority of the responsibilities or duties of the Designer.

4.3 The Designer Services shall be performed as expeditiously as is consistent with orderly progress of the work, consistent with the agreed upon project design schedule as established under Article 7.4.2 and as it may thereafter be amended by the parties from

time to time. In the event of delays due to causes outside of the Designer's control, the project design schedule may be extended as necessary, and Designer's compensation may be equitably adjusted pursuant to Article 6.6 to the extent that Designer incurs additional direct costs caused by the delay. Time is of the essence for the duration of this Contract.

4.4 The Designer shall provide the scope of services required by this Contract, as described in more detail in the RFS and Attachment A.

4.5 The Designer shall comply with the terms and conditions of all project agreements executed between the Owner and the Authority and any and all administrative directives issued by the Authority, now in effect or hereafter promulgated during the term of this Contract, without any additional compensation, that are applicable to Designer's Services under this Contract and that have been provided or are readily available to Designer prior to such Services being performed. The Owner shall reasonably compensate the Designer for complying with any term or condition of a project agreement executed between the Owner and the Authority or any administrative directive issued by the Authority, that was not provided to or was not readily available to the Designer prior to such Services being performed and that materially impacts the Designer's scope or other aspect of its Services, Fee, schedule, or any obligations and responsibilities under this Contract.

4.6 The Designer acknowledges the importance that the Owner attributes to the abilities and qualifications of the key members of the Designer's team, including Subconsultants, and the continuity of key members' participation in the services to be provided under this Contract. This Contract has been entered into in reliance on the Designer's representation that the individuals, consultants, assignments and responsibilities will be maintained throughout the duration of this engagement. No substitution or replacement of individuals or change in the Subconsultants, listed on pages 1-2 of this Contract, shall take place without the prior written approval of the Owner and the Authority, except when necessitated by causes beyond the Designer's control (such causes shall include if an individual leaves or is no longer associated with the Designer's firm). If the Designer proposes to replace one of the members of the Designer's team, the Designer shall propose a person or consultant with qualifications at least equal to the person or firm the Designer proposes to replace. The Owner and the Authority shall have the right to approve any substitution or replacement or change in status for the persons or Subconsultants listed on page 1-2 of this Contract and such approval shall not be unreasonably withheld. At the request of the Owner, the Designer shall consult with the Owner to resolve any situation in which the Owner determines that a member of the Designer's team is failing to perform services in an acceptable manner to the Owner. The Owner shall have the right to direct the removal of any such person or consultant. The Owner shall work in good faith with the Designer to resolve any material problems identified by the Owner in writing regarding performance of the Designer's obligations under this Contract. No act or omission of the Owner or the Authority made or permitted under this Article shall relieve the Designer of its responsibility for the performance of the services specified in this Contract.

4.7 The Designer shall compile and distribute a job directory which includes all names, addresses, phone and fax numbers, and e-mail addresses of the representatives of the Designer and their Subconsultants. This shall be distributed upon commencement of the services, and shall be updated and redistributed as project participants and/or contact information change.

4.8 The Designer shall employ at all times adequate professional and support personnel with requisite expertise and adequate numbers to assure the complete, timely performance of the obligations of the Designer. The Designer shall acquaint its employees and Subconsultants with all provisions of the General Laws governing public construction projects, including but not limited to M.G.L. c. 149, M.G.L. 149A, and M.G.L. c. 30, that are relevant to the performance of Designer's obligations under this Contract. When directed by the Owner, the Designer shall fully cooperate with the Owner in obtaining the Criminal Offender Record Information (CORI) of the Designer and its employees and of any Subconsultants and their employees in accordance with the provisions of M.G.L. c. 71, § 38R, M.G.L. c. 6, §§ 167-178B (the so-called CORI Law), any other applicable law, and District policy. All contracts between the Designer and each Subconsultant shall include appropriate provisions requiring the Subconsultant to fully cooperate with the Owner in obtaining the Criminal Offender Record Information (CORI) of the Subconsultant and its employees as aforesaid.

4.9 The Designer shall be and shall remain liable to the Owner for all damages incurred by the Owner as a result of the failure of the Designer or its Subconsultants to perform in conformance with the terms and conditions of this Contract.

4.10 Design Within the Project Construction Budget

4.10.1 The Designer shall prepare cost estimates for the Project as described in Article 7 of this Contract or at more frequent intervals as required in the RFS. Unless otherwise specified in the RFS, the cost estimates shall be considered Basic Services and the Designer is not eligible for any additional compensation for preparing the same. The format for cost estimates shall be in accordance with the requirements of the Authority.

4.10.2 The Designer shall produce a design for the Project meeting the requirements of the scope of work described in the RFS to be constructed within the Project Construction Budget, provided that the Designer shall be permitted to recommend to the Owner such adjustments to the Project's design, consistent with the Project Funding Agreement, as the Designer reasonably believes may be required to adhere to the Project Construction Budget. In the event the Designer's cost estimate for the Project (as reconciled in accordance with the provisions of this Contract) exceeds the Project Construction Budget, the Owner may require the Designer to revise the design, drawings and specifications to keep the cost estimate for the Project within the Project Construction Budget. The Designer shall not be entitled to extra compensation for making such revisions to contain costs within the Project Construction Budget.

4.10.3 In a Project constructed pursuant to M.G.L. c. 149, §§ 44A-M, if the Project Construction Budget is exceeded by the lowest bona fide, responsible bid by any amount, the Owner shall direct the Designer to review and compare the Project Construction Budget with the bids received to identify the variances. Upon completion of this review and submission of the Designer's report to the Owner and Authority, the Owner shall, with the approval of the Authority:

(a) direct the Designer to revise the Final Design Program, Project scope and quality as required to reduce the estimated construction costs to be within the Project Construction Budget, in accordance with Article 4.10.5 of this Contract; or

(b) give written approval to the Designer of an increase in the Project Construction Budget; or

(c) authorize rebidding of the Project within a reasonable time; or

(d) terminate this Contract in accordance with Article 12.3; or

(e) implement any other mutually accepted alternative that the Owner and the Designer may agree on.

4.10.4 In a Project constructed pursuant to M.G.L. c. 149A, the Designer shall be responsible for managing the design of the Project to stay within the Project Construction Budget. If the GMP proposal submitted by the CM at Risk exceeds the Project Construction Budget, the Designer shall review and compare the Project Construction Budget with the GMP proposal submitted by the CM at Risk to identify the variances. Upon completion of this review, if directed by the Owner, the Designer shall assist the Owner in negotiating a GMP within the Project Construction Budget in accordance with Article 7.7.9. If a GMP cannot be successfully negotiated between the Owner and the CM at Risk within the Project Construction Budget, the Owner shall, with the approval of the Authority:

(a) direct the Designer to participate with the Owner, OPM, and CM at Risk in design reviews and revise the design, including appropriate revisions to drawings and specifications, as necessary in order to reach an agreement on a GMP within the Project Construction Budget; in accordance with Article 4.10.5; or

(b) give written approval to the Designer of an increase in the Project Construction Budget and resume negotiating a GMP with the CM at Risk; or

(c) terminate this Contract in accordance with Article 12.3; or

(d) implement any other mutually accepted alternative that the Owner and the Designer may agree on.

4.10.5 (a) If the Owner chooses to proceed under Article 4.10.3(a) or 4.10.4(a), the Designer and its Subconsultants, without receiving additional compensation, except if fewer than three bona fide, responsible bids were received (in the case of a Project constructed pursuant to M.G.L. c. 149, §§ 44A-44M) or (in the case of a Project constructed pursuant to G.L. c. 149A) if fewer than three bona fide responsible Trade Contractor or so-called non-trade contractor bids for each category of work were received, or if 4.10.5(b) and/or (c) applies, shall cooperate in revising the designs, drawings and specifications as may be required to reduce or modify the quality or scope or both, of the Project so that they will comply with the Project Construction

Budget as approved at the conclusion of the Construction Documents Phase or as amended. Any changes to the educational program or the approved space summary shall be subject to the written approval of the Authority. Upon completion of these revisions, the Designer shall also be required to produce a revised cost estimate demonstrating that the estimated cost of the Project does not exceed the Project Construction Budget. Revising the designs, drawings, and specifications and updating the cost estimate shall be the sole obligation on the part of the Designer with respect to 4.10.3(a) or 4.10.4(a); (b) If the Owner elects to proceed with revisions that significantly increase the complexity either of the Construction Contract Documents themselves or the Construction Administration Phase services that the Designer will have to provide, then the Designer shall be entitled to an equitable adjustment in its Fee to reflect the impact on its services; (c) If the bid or proposal referenced in 4.10.3 or 4.10.4 above was submitted on a date that is more than three (3) months after approval of the Construction Contract Documents then such revisions shall be Extra Services.

4.10.6 The Designer must receive written approval of the Owner and the Authority before the Project Construction Budget shall be considered amended.

4.11 Additional Tests and Surveys: The Designer shall be responsible for reviewing the surveys, investigations, testing and reports completed by the Owner and as provided under Article 3.4, and determining the types of additional or expanded surveys, investigations, or testing required for the Project. Such services shall be provided by qualified specialty Subconsultants as necessary. Both the types of services and the Subconsultants shall be approved by the Owner. In the event that the Designer employs the services of a Subconsultant to provide such services, the Designer shall employ such Subconsultants who have the professional liability insurance coverage described in paragraph 15.8.1 covering such services, to the extent that such insurance coverage is generally available to Subconsultants. The Designer shall, upon the Owner's written request, assign to the Owner the Designer's contractual right to pursue a claim against such Subconsultants. Such services shall be paid for as provided in Article 8 – Extra Services unless such services are specifically included as Basic Services in the RFS. Such services may include but need not be limited to:

4.11.1 Site surveys;

4.11.2 Structural tests and materials tests;

4.11.3 Geotechnical and geoenvironmental investigations and reports, including existing buildings hazardous material reports, boring tests, test pits, observation wells, testing and chemical analysis of site substrate conditions;

4.11.4 Traffic studies.

ARTICLE 5: SUBCONSULTANTS

5.1 The Designer may engage Subconsultants, subject to the prior written approval of the Owner and subject to Article 9.3, in order to perform services under this Contract. If Subconsultants are engaged, the person responsible for, and in control of, the Subconsultant

services to be provided must be professionally registered or licensed in Massachusetts in the necessary disciplines for the services if such registration or licensing is required under the applicable General Laws. The engagement of Subconsultants shall not in any way relieve the Designer from its duties and responsibilities for its work, including, without limitation, coordinating all Designer Services furnished under this Contract by the Subconsultants.

5.2 Upon request, the Designer shall provide the Owner with copies of its agreements with Subconsultants, including any amendments thereto and copies of the Subconsultant's applicable certificates of insurance.

5.3 No substitution of Subconsultants and no use of additional Subconsultants or assignment of services shall be made without prior written approval of the Owner, which approval shall not be unreasonably withheld.

ARTICLE 6: COMPENSATION

6.1 For the satisfactory performance of all services required pursuant to this Contract, excluding those services specified under Articles 8 and 9, the Designer shall be compensated by the Owner in the amounts specified in Attachment A as that Fee may be amended by written amendment to this Contract.

6.2 When the Designer receives payment from the Owner, the Designer shall promptly make payment to each Subconsultant whose work was included in the work for which such payment was received unless payment has been theretofore made. The Owner shall have the contractual right to investigate any breach of performance of a Subconsultant and to initiate corrective measures it determines are necessary and in the best interest of the Owner. All contracts between the Designer and its Subconsultants shall include a provision in which the Owner's rights to initiate corrective action shall be stipulated.

6.3 Payment Schedule

6.3.1 Payments for Basic Services shall be made monthly and, where applicable, shall be in proportion to services performed within each Phase. The amount of fees attributable to each Phase shall be as set out in the schedule in Attachment A. Payment for approved Reimbursable Expenses and/or Extra Services shall be made monthly upon receipt of an approved invoice from the Designer.

6.3.2 The Owner shall make payments to the Designer within 30 days of the Owner's approval of an invoice from the Designer. The Owner's payment for any services provided under this Contract shall not be construed to operate as a waiver of any rights under the Contract or any cause of action arising out of performance of the Contract. The Owner shall not withhold payments to offset costs alleged to have been incurred by the Owner on account of allegedly negligent acts, errors or omissions unless the Designer agrees or has been found liable for specific amounts in a binding agreement or court judgment, or unless the Designer fails to maintain the professional liability insurance required under paragraphs 15.7.1 and 15.7.2. The Owner may withhold approval of invoice items the Owner reasonably believes have not been performed in accordance with this Contract, including adjustments to payment amounts in instances where required submittals to the Authority may be found to be

missing or incomplete. If Owner and Designer continue to disagree, the disagreement shall be immediately submitted to mediation in accordance with paragraph 18.5(b).

6.4 Installment Payments During Construction

6.4.1 During the construction Phase, the Designer shall be paid the Fee for Basic Services stipulated in Attachment A.

6.4.2 Payments to the Designer during the construction Phase shall be made in equal monthly installments for the duration of the construction Phase. The amount of each payment shall be determined by dividing 95% of the fee for Construction Phase/Final Completion as stipulated in Attachment A by the number of months between the Notice to Proceed and the scheduled issuance of the Certificate of Substantial Completion as indicated in the Project Schedule as approved by the Owner. The Designer shall be entitled to Extra Services in accordance with Article 8.3 should the Project be delayed beyond the 60-day period described in Article 8.3 for reasons beyond the control of the Designer.

6.5 Final Installment: The Designer shall be paid the unpaid balance of the fee for Construction Phase/Final Completion as stipulated in Attachment A (as that fee may be amended), upon compliance with the following requirements:

6.5.1 Approval of the Certificate of Final Completion of construction (such Certificate to be in the form developed by the Authority). In cases where a Certificate of Partial Release of Retainage is approved, the Designer shall be paid up to an amount commensurate with the percent of retainage released until a Certificate of Final Completion is approved; and

6.5.2 Delivery by the Designer to the Owner of the Record Drawings required by this Contract; and

6.5.3 Verification of payment to MBE/WBE Subconsultants or Subconsultants identified on Attachment C and as required by Article 17.4; and

6.5.4 A written evaluation of the General Contractor or CM at Risk by the Designer from which the Owner shall be able to complete its submission of the Contractor Evaluations as required by M.G.L. c.149 § 44D(7).

6.5.5 In the event that the Designer is unable to comply with items 6.5.1 and 6.5.2 above due to reasons beyond the Designer's control, as determined by the Owner, Final Installment shall not be unreasonably withheld or delayed beyond 60 days after the date of Substantial Completion, provided that the Designer has complied with all other requirements.

6.6 Substantial Change

6.6.1 If there is a substantial change in the services described in the RFS to be provided by the Designer under this Contract, the Designer and the Owner will mutually agree to a

written amendment describing the services and an amended Fee for Basic Services to reflect the change and reasonable cost of such change. Such changes shall be designated on Attachment F and shall be executed by the Designer and the Owner.

6.6.2 Should the Designer and the Owner be unable to negotiate a mutually acceptable amendment to the Fee for Basic Services when there has been a substantial change in the specified services, the Owner shall unilaterally and promptly determine, in good faith and supported by a written explanation in sufficient detail, a reasonable maximum dollar amount for the services as amended and process payments to the Designer subject to said maximum amount, until an amendment to the Fee for Basic Services for such change is set by later agreement between the parties, provided, that the Designer's acceptance of such payments shall not be considered a waiver by the Designer of its right to pursue a claim for additional compensation related to the change in services, and provided that such disagreement shall be immediately submitted to mediation in accordance with paragraph 18.5(b). In no event shall the Designer stop work under this Contract due to a disagreement with the Owner regarding an amendment in the Designer's Fee for Basic Services, provided that the Owner complies with its payment obligations under this Article 6.6.

6.6.3 Notwithstanding the foregoing, the amendment to this Agreement described in paragraph 7.4.8 shall be negotiated and executed by both parties prior to the start of the subsequent Phase.

ARTICLE 7: BASIC SERVICES

7.1 The Designer shall discuss with the Owner and the Authority the requirements for each Phase before beginning work on that Phase.

7.2 The Owner and the Authority will promptly review and approve the Designer's submittals. Upon completion of its review, the Owner shall promptly and in writing:

(a) approve the submittal as made; or

(b) approve that part of the submittal that is acceptable and reject the remainder; or

(c) reject the submittal; or

(d) require the Designer to submit additional information or details in support of its submittal.

7.2.1 The description of Designer Services required during the various Phases as described in the RFS and hereinafter may include specification of the number of submittals the Designer will be required to make and estimates of the approximate number of meetings that the Designer will be required to prepare for and attend during each Phase.

7.2.2 As a part of Basic Services, the Designer shall provide six copies of each submittal to the Owner; two copies of each submittal to the Authority, and, if the Owner elects to proceed with the CM at Risk construction delivery method, one copy of each

submittal to the CM at Risk. Drawings submitted to the Authority shall be reproduced at half full size. A graphic scale shall be placed upon all such drawings prior to construction documents phase submittals. If the Designer is required to make submittals in excess of the number specified or if the Designer is required to prepare for and attend meetings in excess of the number specified for a Phase, the Designer shall be entitled to compensation for Extra Services, provided, however, that the Designer shall not be entitled to such compensation if and to the extent the Owner or the Authority shall have reasonably determined that the additional submittals or the additional meetings were required due to either the Designer's lack of preparation, or other fault due to deficiencies or omissions in documents prepared by the Designer.

7.2.3 All document submittals shall be in the form of neatly bound printed material, and delivered to the location or locations as indicated by the Owner and Authority. One or more document submittal components may be submitted in an approved electronic format, subject to specific authorization by the Owner and/or Authority.

7.2.4 Electronic Submittals: In addition to all other submittals called for by this Article 7 and elsewhere in the Contract, including but not limited to hard copies and reproducibles of all submittals, the Designer shall submit two (2) electronic copies on compact disks for all required submissions of Deliverables called for by this Contract ("Electronic Submittals"). All Electronic Submittals shall be deemed to be Materials that are subject to all provisions of Article 16. The Electronic Submittals shall be provided on CD electronic format as approved by the Owner and Authority and as follows:

(a) All drawings shall be provided in standard AutoCAD software (release number and version to be established at time of contract execution) or in a compatible electronic CADD (.dxf) format or other industry-standard format as approved by the Owner and acceptable to the Authority. Electronic file naming convention shall be acceptable to the Owner and the Authority.

(b) All other documents shall be provided in pdf format, Microsoft Word, Excel, Project, or PowerPoint, as applicable to the particular submittal.

(c) All submittals shall be labeled identifying project name and number, file name, drawing title, software and release, and layering system.

(d) The Owner reserves the right to require the Designer to provide all electronic media as may be required at any time during the duration of this Contract due to technology upgrades and/or changes to the electronic systems used by the Owner or Authority, provided that if such requirement demands that the Designer purchase new software or train existing employees for the application of media or software such costs shall be a Reimbursable Expense but only to the extent that such purchase of

new software or training of existing employees is unique or exclusive to the particular requirements of the Owner or the Authority for this particular Project.

(e) The Designer's compliance with the terms of this Article shall be performed as part of the Basic Services under the Contract, and the Designer shall not receive any additional compensation for providing the Electronic Submittals, (including but not limited to conversions or copies of software), except as specified herein. The Designer shall not be responsible for any use of Electronic Submittals on hardware or software for which it was not intended. Creation of a Building Information Model is excluded from the definition of Electronic Submittals; if the Owner requests the Designer to create such a Model, the parties shall execute a separate agreement and Designer shall receive Extra Services for its creation.

7.2.5 In reviewing and preparing all documents for evaluation as part of the Feasibility Study and/or any other design phase for which the Designer may be authorized, the Designer shall determine gross area and net areas in the following manner in order to maintain uniformity in computation and consistency of both gross and net square foot areas of buildings:

Gross Area: The area included within the outside faces of the exterior walls for all stories. Custodial areas such as janitor closets, building maintenance and building employees' locker rooms, circulation areas such as corridors, lobbies, stairs, and elevators, and mechanical areas such as those designated to house mechanical and electrical equipment, utility services, and non-private toilets shall be considered as part of the gross area, but not part of the net area.

Net Areas: In general, those areas which have a specific assignment and functional program use as determined by the facility, including, but not limited to, areas such as cafeterias, auditoriums, libraries, administrative and classrooms. These shall be measured from the inside finish of permanent outside walls to the inside finish of corridor walls, and to the inside finish of intermediate partitions.

7.3 Feasibility Study Phase:

7.3.1 The Designer shall familiarize itself with the Authority's Guidelines and Standards for feasibility studies that further specify the work to be performed by the Designer during this Phase and shall perform its Feasibility Study Phase services in accordance with such Guidelines and Standards and the provisions of this Contract. The Designer shall meet with the Owner to arrive at a mutual understanding of the requirements of the Feasibility Study. The Designer shall submit a proposed work plan including anticipated tasks and submittals.

7.3.2 The Owner is required to ascertain the Authority's input and approval throughout the study process; therefore, the Designer shall develop and prepare the documentation required by the Feasibility Study to assist the Owner in securing the Authority's concurrence and/or approval at the following milestones before proceeding to the next milestone (Note that some of the approvals to move to the next milestone require a vote of the Authority's Board of Directors):

(a) Preliminary design program;

(b) Budget Statement for Educational Objectives, as defined by 963 CMR 2.02;

(c) Development of alternatives to be studied;

(d) Preliminary evaluation of alternatives;

(e) Final Evaluation of Alternatives;

(f) Recommendation to the Authority's Board of Directors of the preferred alternative that will be advanced to schematic design.

7.3.3 The Designer shall cooperate with the Owner and the Authority to define and develop a few reasonable, educationally sound, cost effective, and practical solutions for the Owner and Authority's evaluation that satisfy the Owner's educational program requirements that were provided by the Owner to the Designer. The alternatives considered shall address the following as a minimum:

(a) Analysis of school district student school assignment practices and available space in other schools in the district; and

(b) Tuition agreements with adjacent school districts (per M.G.L. c.70B §8); and

(c) Rental or acquisition of existing buildings that could be made available for school use. (per M.G.L. c.70B §8); and

(d) Renovation and/or addition to existing building(s) and related facilities or fields, if appropriate to the Project; and

(e) No-build or status quo option, to be used as a benchmark for comparative analysis of all other alternatives; and

(f) In some cases, it may also be appropriate to consider construction of new building and the evaluation of potential locations.

7.3.4 Feasibility Study submittals shall be provided pursuant to Article 7.2.2 and shall be subject to the written Approval of the Owner.

7.3.5 The Designer shall present and explain the Feasibility Study to the Owner and the Authority and at a local public meeting, if any such meeting is scheduled, or in conference.

7.3.6 The Designer shall meet with the Owner every other week during this Phase.

7.4 Schematic Design Phase

7.4.1 Upon receipt of an Approval to proceed to Schematic Design Phase, the Designer shall meet with the Owner to arrive at a mutual understanding of the requirements of the Final Design Program approved in writing by the Owner and the Authority.

7.4.2 The Designer shall submit a proposed design work plan pursuant to this Contract including anticipated tasks and submittals. The Designer shall also submit to the Owner a proposed schedule consistent with any Project Schedule included in the RFS (Attachment B) modified as required by any subsequent schedule changes or delays outside of Designer's control. The schedule shall contain dates for submittals, deliverables, actions, milestones, design workshops, meetings and the critical path through all design service activities. It shall include time for the Owner's and the Authority's review and approval of submittals and for necessary submissions for permits in connection with the Project. The work plan shall also include a work plan schedule of values consistent with Attachment A, which shall be the basis for which payments of the Fee for Basic Services within each Phase shall be made. The work plan schedule of values shall identify deliverables within each Phase and percentages of the phase fee payable upon completion of such deliverable. When approved by the Owner as provided in Article 7.4.8, the work plan schedule of values shall govern the timing of payments of the Fee for Basic Services upon completion of deliverables within each Phase and as each Phase progresses.

7.4.3 The Designer shall: Prepare a preliminary evaluation of the Recommended Preferred Solution from the Feasibility Study, the Final Design Program, and Proposed Total Project Budget; collect and study all available drawings, reports, maintenance reports, and other existing data pertaining to the Project; conduct a thorough on-site review of conditions relating to the Project; assure that the "Recommended Preferred Solution" complies with all applicable codes and regulations, including any special design standards supplied by the Authority and its Commissioning Consultant; and meet with local building officials to identify and confirm applicable standards, codes and any project specific criteria.

7.4.4 The Designer shall develop the Recommended Preferred Solution to a full schematic design level. Schematic design level documentation shall be based on the Final Design Program, shall incorporate Owner and Authority comments and shall include each of the following, to the extent applicable to the Recommended Preferred Solution:

(a) Traffic Analysis - analyze the impact of anticipated vehicular and pedestrian traffic, including impacts to existing infrastructure, to determine efficient and safe site access.

(b) Environmental and Existing Building Assessment – Provide additional site and building assessments as may be required to quantify presence of unsuitable materials and scope of possible remediation efforts.

(c) Geotechnical and Geoenvironmental Analysis – Provide additional geotechnical analysis as may be required to describe soil conditions, remediation requirements and appropriate foundation.

(d) Program Analysis - a space measurement analysis for the design which shall verify that the sum of all program floor areas plus all other floor areas equal the gross floor area of the Final Design Program.

(e) Code Analysis – Determine the impact of all applicable federal, state, regional and local codes, regulations and ordinances, including a listing of permitting and other regulatory filing requirements.

(f) Utility Analysis – Determine the availability and capacity of all required building utilities. Provide soils analysis and preliminary design for on-site septic/sewage treatment facilities, if required.

(g) Massing Study – an analysis of the building's integration into its surroundings and neighborhood with drawings, models, or photographs.

(h) MA-CHPS or LEED-S Scorecard – Pursuant to the Authority's Sustainable Building Design Guidelines complete a MA-CHPS or LEED-S for Schools Scorecard and describe sustainable design features and each high performance green school prerequisite and credit included in the proposed design and a plan for implementation or inclusion of any appropriate public utility energy conservation design programs.

(i) Accessibility - an analysis of the design's compliance with the Americans with Disabilities Act (ADA) and the Massachusetts Architectural Access Board requirements (MAAB).

(j) Building Systems Descriptions – Describe in narrative and on schematic plans basic information relative to:

1. Building Structure - a written narrative of the design approach to the structural systems including discussion of the feasible options for foundations and superstructure as well as treatment of special situations such as unusual soils conditions or long spans.

2. Plumbing and HVAC - written narratives of the basic systems and proposed fuel source(s) and a preliminary life cycle cost analysis pursuant to the criteria of M.G.L. c. 149 § 44(m). Provide schematic plans indicating basic distribution concepts and the location of major equipment items such as boilers, water heaters, cooling towers, chillers, air handling units, heat recovery units, exhaust stacks, and special systems (e.g. fume exhausts).

3. Fire Protection - written narratives of the basic systems and design criteria. Provide schematic plans indicating basic distribution concepts and the

location of major equipment items such as fire pumps, standpipes, and fire department connections.

4. Electrical (including power, lighting, communications, fire alarm, video/CATV, security/surveillance) - written narratives of the proposed electrical and communications systems resources, needs, and proposed scope. Provide schematic plans indicating basic distribution concepts and the location of major equipment items such as switchgear, standby generator, and control centers/panels.

5. Information Technology - written narratives of the proposed information technology system resources, needs, and proposed scope. Provide schematic plans indicating basic distribution concepts, and location of major equipment items such as switches and hubs.

(k) Outline specifications in accordance with applicable CSI Divisions that clearly define the scope of construction, identify the sub-trades pursuant to M.G.L. c. 149 § 44F, establish the quality of materials, finishes, products, equipment and workmanship, and the special or unique conditions of construction.

(l) Project Schedule - Provide a reasonable level of design-related input to the OPM such that the OPM can prepare a draft schedule for the proposed project for the Owner in the form of a graphic representation (Gantt Chart) of the duration of all tasks, activities and phases of the design and construction processes against the progression of time up to a proposed occupancy date. Dependencies between activities and tasks will be delineated. Individual tasks and activities will be rolled up to the major project milestones. Provide input to the OPM regarding priority actions and activities that may have a major impact on the schedule. The OPM, not the Designer, is responsible for preparing and maintaining the draft and updated project schedule document, except as it pertains to the project design schedule developed under Article 7.4.2.

(m) Construction cost estimate - in Uniformat II Level 3 format with aggregated unit rates and quantities supporting each item. If independent cost estimates are prepared for the Owner by the OPM in this or subsequent phases, then the Designer shall work with the OPM to resolve such any differences in a cost reconciliation process and shall involve any relevant parties in such process.

(n) Siting analysis, including content, traffic and access, topographic and utilities recognition.

(o) Site Development Plan – Site plan shall be at a minimum scale of 1 inch equals 40 feet and include property lines with bearings and distances, building setbacks, site acreage, wetlands information, proposed and existing topography, proposed and existing buildings and site features, floor and roof

elevations for all buildings, proposed and existing utilities and utility connections, and emergency equipment access.

(p) Schematic Building Floor Plans of all floors and roof at a minimum scale of 1/16" =1'-0" showing all elements of the building including overall dimensions, gross square footage of each floor and net square footage of each space, response to functional requirements of program, major and minor access, circulation, and room data sheets.

(q) Schematic Exterior Building Elevations for all sides and orientations indicating all exterior finishes and fenestration.

7.4.5 Schematic design phase drawings, specifications, construction cost estimates and other submittals shall be subject to the written Approval of the Owner, which Approval shall not be unreasonably delayed, withheld, conditioned, or denied. Unless a lesser number is requested by the Owner, the Designer shall submit to the Owner for approval six (6) copies of schematic design drawings, specifications, cost estimates, and other submittals. Two (2) additional copies shall be submitted to the Authority by the Designer.

7.4.6 The Designer shall present and explain the Schematic Design to the Owner, the OPM and the Authority and at a local public meeting, if any such meeting is scheduled, or in conference.

7.4.7 The Designer shall meet with the Owner every other week during the Schematic Design Phase.

7.4.8 Prior to the issuance of an Approval to proceed to the Design Development Phase, the Designer and the Owner shall meet to finalize the design work plan, project schedule, and schedule of values described in Article 7.4.2, and they shall if necessary execute an amendment to the Contract to include all required modifications to govern the subsequent phases of the Designer's services.

7.4.9 <u>Construction Delivery Method Evaluation and Selection</u>

(a) The Designer shall assist the Owner in determining the appropriate construction delivery methodology for the Proposed Project. In providing such assistance, the Designer, in conjunction with the Owner's Project Manager, shall advise the Owner on the relative advantages and disadvantages associated with each of the construction delivery methods provided in M.G.L. Chapters 149 and 149A. The decision to pursue a particular construction delivery method shall be within the sole discretion of the Owner, subject to the approval of the Inspector General as provided in M.G.L. c. 149A, §4. The services provided by the Designer in assisting and advising the Owner in its determination of the appropriate construction delivery methodology shall be included in Basic Services.

(b) If the Owner elects to construct the Project using the CM at Risk construction delivery method pursuant to M.G.L. c. 149A, and has obtained the approval of the Office of the Inspector General to do so, with the Approval of the Owner, this Contract shall be amended using the Authority's Standard Amendment for CM-R which includes Articles 7.5 through 7.10. If the Owner elects to construct the Project using the Design-Bid-Build ("DBB") construction delivery method pursuant to M.G.L. c. 149, with the Approval of the Owner, this Contract shall be amended using the Authority's Standard Amendment for DBB, which includes Articles 7.5 through 7.9.

7.5 INTENTIONALLY OMITTED

7.6 INTENTIONALLY OMITTED

7.7 INTENTIONALLY OMITTED

7.8 INTENTIONALLY OMITTED

7.9 INTENTIONALLY OMITTED

7.10 INTENTIONALLY OMITTED

ARTICLE 8: EXTRA SERVICES

8.1 General

8.1.1 Extra Services are those services requested by the Owner to be performed by the Designer but which are additional (or "extra") to the services performed as Basic Services. Such services are not included in the Fee for Basic Services and shall be invoiced and paid for separately. Extra services shall not be deemed authorized until a written Approval is received from the Owner, which Approvals shall not be unreasonably delayed, withheld, denied, or conditioned.

8.1.2 The proposed cost, scope and schedule of all Extra Services shall be presented and approved by the Owner in writing prior to the performance of any Extra Services.

8.1.3 Cost proposals for Extra Services shall be computed in accordance with Attachment A.

8.2 Unless specifically stated elsewhere and only with the prior written Approval of the Owner, the Designer shall perform any of the following services as Extra Services:

8.2.1 preparing measured drawings and detailed construction investigations documentation for existing buildings when such documentation does not exist;

8.2.2 substantially revising previously approved reports, drawings, specifications or other documents to address changes authorized or requested by the Owner, including substantial changes in its size, quality, complexity, design, Budget, and/or bidding method or bid packages, and changes in Applicable Laws;

(a) Notwithstanding the provisions of 8.2.2, revisions prepared by the Designer to keep construction costs within the Project Budget that are required pursuant to

Article 4.10 of this Contract to be without additional compensation, or to correct incorrect items for which the Designer has responsibility, shall not be Extra Services;

8.2.3 preparing documents for bidding alternates requested by the Owner, except for a reasonable number and extent of alternates to keep construction costs within the Project Budget which shall be Basic Services;

8.2.4 revising Construction Contract Documents which have been initially submitted and approved in their final and complete form, if general bids (Chapter 149) or subcontractor bids (Chapter 149 or 149A) for work required thereunder are not advertised based on such Construction Contract Documents within four months after initial submission;

8.2.5 services in connection with rebidding if the need to rebid is not attributable to the Designer;

8.2.6 attending meetings with the Owner, Owner's Project Manager, the Authority, Department of Labor and Workforce Development, the Office of Attorney General, the Office of the Inspector General, or the CM at Risk (if the project is constructed pursuant to M.G.L. c. 149A) in matters of dispute if attendance is required by the Owner, provided such dispute did not arise due to the fault of the Designer;

8.2.7 furnishing other services in excess of Basic Services made necessary by the default or failure of performance of the General Contractor or CM at Risk or Subcontractors;

8.2.8 providing consultation with respect to replacement of work damaged by fire or other casualty during construction;

8.2.9 preparing change orders and supporting data in accordance with Article 10, or modifying the Construction Documents in response to an unreasonable amount of substitutions proposed by the Contractor or CM at Risk, or responding to unreasonable and excessive requests for information (RFIs) by the Contractor or CM at Risk, where such information is available from a careful study and review of the Construction Documents;

8.2.10 assisting the Owner in litigation or claims arising out of the Owner-Contractor Agreement or Owner-CM at Risk Agreement, provided such litigation or claims did not arise due to the fault of the Designer;

8.2.11 performing services during a construction period extended beyond the additional 60 calendar day period, specified in Article 8.3;

8.2.12 performing professional services which are not otherwise required under this Contract as Basic Services;

8.2.13 providing services in connection with partial completion or partial systems completion inspections at the time of Substantial Completion of the Work or of a

project construction phase and/or separate bidding package due to delay by the Contractor or CM at Risk in completing the Work on schedule;

8.2.14 providing services in connection with Contractor, CM at Risk or Bidder disputes or questions arising out of the bidding process, unless such protest is a result of an act or omission of the Designer. Such services include research and preparation for and appearance at bid protest hearing and similar proceedings.

8.3 Construction Phase Services Provided after the Original Construction Completion Date

8.3.1 If construction of the Work, or of a project construction phase and/or separate bidding package has not reached substantial completion within the original construction period (as set forth in the Owner-Contractor or Owner-CM at Risk Agreement and as agreed to by the Designer), there shall be added to said construction period a period of sixty (60) calendar days, during which period the Designer shall continue to provide construction phase services for which no extra compensation shall be paid for the services described in Article 7.9 and 7.10.1 through 7.10.4 in a CM at Risk Project or for the services described in Articles 7.8 and 7.9.1 through 7.9.4 in a DBB Project.

8.3.2 If construction has not reached Substantial Completion after the 60 additional calendar days, the Designer shall thereafter be entitled to Extra Services compensation for providing the services described in Articles 7.10.3 (which are fully defined under Article 7.9.2) and 7.10.4 in a CM at Risk Project or for the services described in Articles 7.9.3 (which are fully defined under Article 7.8.2) and 7.9.4 in a DBB Project. The Designer may also be entitled to Extra Services compensation for tasks performed beyond the added sixty (60) calendar days period for tasks related to Article 7.9.1 (d) through (i) in a CM at Risk Project or 7.8.1(d) through (i) in a DBB Project. In any event, the Designer is required to identify and present the anticipated Extra Services contemplated under Article 8.3.2 in accordance with Article 8.1. In no event shall the Designer be entitled to any additional compensation on account of an extended construction period if and to the extent that a binding agreement or decision that results from a dispute resolution proceeding determines that the Designer's acts or inactions caused the construction period to be extended.

8.4 In the event of an emergency the Designer may proceed to perform Extra Services as required to meet the emergency after obtaining the verbal approval of the Owner. The Designer shall provide a written report to the Owner, as soon after the emergency arises as possible, and such report shall describe the emergency and the Extra Services that were performed.

8.5 Invoices for Extra Services shall be accompanied by a breakdown listing the name, payroll title, date, number of hours by day, hourly rate and extended amount, per specified task of Extra Services performed. Hourly rates shall be in accordance with the Hourly Rate Schedule in Attachment A.

ARTICLE 9: REIMBURSABLE EXPENSES

9.1 For coordination and responsibility for the services, materials and costs described in 9.1.1 through 9.1.6, the Designer shall be reimbursed its actual costs and those of its Subconsultants, supported by invoices or receipts, plus 10%. The following are reimbursable expenses, when authorized by the Owner:

9.1.1 The actual cost to the Designer for Subconsultants and for additional tests under 4.11 provided, however, that reimbursement for such costs shall not be made unless the rates of compensation, the total estimated cost of the services and the scope of work for said services shall have been previously approved in writing by the Owner.

9.1.2 The cost of printing more than nine (9) sets of design submittals for a CM at Risk project, or more than eight (8) sets of design submittals for a project pursuant to G.L.c. 149, or more than two electronic versions thereof per design submission deliverable phase or sub-phase.

9.1.3 The cost of printing the bid documents and the related copying, postage, and handling services during a prequalification or bid period.

9.1.4 The cost of reproducing the mylar reproducibles of the construction drawings for use by the General Contractor or CM at Risk in preparing the record drawings.

9.1.5 Out of pocket expenses paid by the Designer such as filing fees, testing, and permit fees if such fees would be normally paid by the Owner.

9.1.6 Renderings, models, mock-ups, photographs and any other presentation materials.

9.1.7 Other expenses deemed necessary or appropriate by the Owner in writing.

9.2 Non-Reimbursable Expenses: The Owner shall not reimburse the Designer or its Subconsultants for travel expenses, sustenance, telephone, copying, facsimiles, electronic mails, postage and delivery expenses or cost estimating, unless specifically required elsewhere in this Contract.

9.3 The Designer shall not be entitled to compensation under this Article for the services of Subconsultants hired to perform Basic Services under this Contract.

ARTICLE 10: COMPENSATION AND RESPONSIBILITY FOR CHANGE ORDERS

10.1 The Designer shall be entitled to Extra Services compensation for preparing Change Orders initiated by the Owner except as provided in Article 10.3.

10.2 The Designer shall not be entitled to Extra Services compensation for preparing Change Orders to adjust the scope of construction work which arises from existing conditions for which unit prices have been specified in the Construction Contract Documents.

10.3 The Designer shall not be entitled to Extra Services compensation for preparing Change Orders necessary to address errors or omissions by the Designer.

10.4 Change Orders for which the Designer is not entitled to compensation are to be referred to as "no fee change orders."

10.5 The fact that the Designer is not entitled to compensation for preparing a Change Order shall not limit any legal remedies which the Owner may have for recovering its additional costs necessitated by the Change Order.

ARTICLE 11: RELEASE AND DISCHARGE

11.1 The acceptance by the Designer of the last payment under the provisions of Article 6.5 or Article 12 in the event of termination of the Contract, shall in each instance, operate as and be a release to the Owner and the Authority and their employees and officers, from all claims of the Designer and its Subconsultants for payment for services performed and/or furnished, except for those written claims submitted by the Designer to the Owner with, or prior to, the last invoice.

ARTICLE 12: ASSIGNMENT, SUSPENSION, TERMINATION, NO AWARD

12.1 Assignment:

12.1.1 The Designer shall not assign or transfer any part of its services or obligations under this Contract (other than as specified in this Article 12), without the prior written approval of the Owner and the Authority. Likewise, any successor to the Designer must first be approved by the Owner and the Authority before performing any services under this Contract. Such written consent shall not in any way relieve the Designer or its assignee from its responsibilities under this Contract. The Owner shall not assign this Contract without the written consent of the Designer.

12.2 Suspension:

12.2.1 The Owner may, at any time, effective upon fifteen (15) business days written notice to the Designer, suspend this Contract. If the Owner provides such written notice, the Designer shall be compensated for Services satisfactorily performed in accordance with the Contract terms prior to the effective date of such suspension; invoices for such Services shall be properly submitted, but may be submitted after the date of such notice up to the effective date of suspension.

12.2.2 If a written notice of suspension issued pursuant to sub-paragraph 12.2.1 lasts for more than 90 consecutive calendar days, the Designer may, upon resumption of the Contract, be entitled to additional compensation for actual costs incurred due to such suspension provided that the suspension was not attributable to the Designer's fault.

12.3 Termination:

12.3.1 (a) By written notice to the Designer, the Owner may terminate this Contract effective on five (5) calendar days notice without cause. All compensation and reimbursement due to the Designer in accordance with the Contract terms, for services satisfactorily performed up to the date of termination, including proportionate payment for portions of the services started but incomplete at the time of termination, shall be paid to the Designer, provided no payment shall be made for services not yet performed or for

anticipated profit on unperformed services. (b) Owner may terminate this Contract effective on five (5) calendar days notice for cause, and no further payment shall be due to the Designer to the extent the Owner can reasonably identify damages in specific amounts for which the Designer is liable under this Contract; Owner shall pay other amounts otherwise due and owing to the Designer.

12.4 Suspension or Termination by Designer: By written notice to the Owner and the Authority, the Designer may suspend or terminate (at Designer's sole option) this Contract:

12.4.1 if the Owner, within thirty (30) days following written notice from the Designer of any material default by the Owner under the Contract (including failure to pay in accordance with the Contract), shall have failed to cure such default; or

12.4.2 if, after the Designer has performed all services required during any Phase prior to construction and at least three (3) months have elapsed without receipt by the Designer of Approval to proceed with the next Phase of the Project, provided the delay was not the fault of the Designer. This provision shall not apply to a Designer who has received a notice of suspension pursuant to 12.2.

12.4.3 Upon a proper termination by the Designer, the Designer shall be compensated as provided in 12.3.1 above regarding termination without cause.

12.5 No Award of Owner-Contractor Agreement: If the Project is constructed pursuant to M.G.L. c. 149, §§ 44A-44M, the Owner-Contractor Agreement is not awarded by the Owner within one hundred twenty (120) days after the receipt of general bids for the Project and the bids have not been rejected and the Project has not been suspended, the Designer shall be paid through the Bidding Phase as if a contract for construction were awarded according to the payment schedule provided in Attachment A. This Article 12.5 does not apply, however, if the Designer has been directed to perform design revisions pursuant to 4.10.2, for the purposes of bringing the design of the Project within the Project Construction Budget.

ARTICLE 13: NOTICES

13.1 Any notices required or permitted to be given hereunder shall be given in writing and shall be delivered (a) in person (b) by certified mail, postage prepaid, return receipt requested (c) by facsimile or (d) by a commercial overnight courier that guarantees next day delivery and provides a receipt, and such notices shall be addressed as follows:

If to_[_____]_;

If to_[_____]__;

If to_[_____]___;

or to such other address as the Owner, Authority and Designer may from time to time specify in writing. Any notice shall be effective only upon delivery, which for any notice given by facsimile shall mean notice that has been received by the party to whom it is sent as evidenced by confirmation slip that bears the time and date of request.

ARTICLE 14: INDEMNIFICATION

14.1 For claims arising out or relating to negligent errors and omissions in the performance of professional services rendered by the Designer, to the fullest extent permitted by law, the Designer shall indemnify and hold harmless the Owner and its officers and employees from and against all claims, damages, liabilities, injuries, costs, fees, expenses, or losses, including, without limitation, reasonable attorney's fees and costs of investigation and litigation, whatsoever which may be incurred by the Owner to the extent caused by the negligence of, or the breach of this Contract by, the Designer or a person employed by the Designer, or Subconsultant for whom the Designer is responsible under this Contract.

14.2 For all other claims, to the fullest extent permitted by law, Designer shall defend, indemnify and hold harmless the Owner and the Authority and their officers and employees from and against all claims, damages, liabilities, injuries, costs, fees, expenses, or losses, including, without limitation, reasonable attorney's fees and costs of investigation and litigation, whatsoever which may be incurred by the Owner or the Authority to the extent they result from the performance of its services provided that such claims, damages, liabilities, injuries, costs, fees, expenses, or losses are attributable to bodily injury or death or injury to or destruction of tangible property and are caused by an act or omission of the Designer or a person or Subconsultant for whom the Designer is responsible under this Contract.

ARTICLE 15: INSURANCE

15.1 The Designer shall obtain and maintain at its sole expense all insurance required by law and as may be required by the Owner and by the Authority under the terms of this Contract. The insurance required hereunder shall be provided at the sole expense of the Designer or its Subconsultant, as the case may be, and shall be in full force and effect for the full term of the Contract between the Owner and the Designer or for such longer period as required under this Contract.

15.2 All policies shall be issued by companies lawfully authorized to write that type of insurance under the laws of the Commonwealth of Massachusetts with a financial strength rating of "A" or better as assigned by A.M. Best Company, or an equivalent rating assigned by a similar rating agency acceptable to the Owner and the Authority.

15.3 The Designer, and any of its Subconsultants, shall submit to the Owner originals of the required certificates of insurance simultaneously with the execution of this Contract. Certificates of insurance evidencing the coverage required hereunder, together with evidence that all premiums for such insurance have been fully paid, shall be filed with the Owner and shall be made available to the Authority upon request. Certificates shall show each type of insurance, insurance company, policy number, amount of insurance, deductibles/self-insured retentions, and policy effective and expiration dates. The Designer shall submit updated certificates to the Owner prior to the expiration of any of the policies referenced in the certificates so that the Owner shall at all times possess certificates indicating current coverage and said certificates shall be made available to the Authority

upon request. Failure by the Designer to obtain and maintain the insurance required by this Article, to obtain all policy renewals, or to provide the respective insurance certificates as required shall constitute a material breach of the Contract and shall be just cause for termination of the services of the Designer under this Contract.

15.4 Termination, cancellation, or modification or reduction of coverage or limits by endorsement of any insurance required by this Contract, whether by the insurer or the insured, shall not be valid unless written notice thereof is given to the Owner and the Authority at least thirty days prior to the effective date thereof, which shall be expressed in said notice.

15.5 The Designer or its Subconsultant, as the case may be, is responsible for the payment of any and all deductibles under all of the insurance required below. Neither the Owner nor the Authority shall be responsible for the payment of deductibles, self-insured retentions or any portion thereof.

15.6 Workers' Compensation, Commercial General Liability, Automobile Liability, and Valuable Papers

15.6.1 The Designer shall purchase and maintain at its own expense during the life of this Contract, or such other time period as provided herein, the following types and amounts of insurance, at a minimum:

(a) Workers' Compensation Insurance in accordance with General Laws Chapter 152. The policy shall be endorsed to waive the insurer's rights of subrogation against the Owner and the Authority.

(b) Commercial General Liability Insurance (including Premises/Operations; Products/Completed Operations; Contractual; Independent Contractors; Broad Form Property Damage; and Personal Injury) with a minimum limit of $1,000,000 per occurrence, $2,000,000 aggregate. The Designer shall maintain such insurance in full force and effect for a minimum period of one year after final payment and shall continue to provide evidence of such coverage to the Owner and the Authority. The Owner and the Authority shall be included as an additional insured in this policy. The policy shall be endorsed to waive the insurer's rights of subrogation against the Owner and the Authority.

(c) Automobile Liability Insurance (including owned, non-owned and hired vehicles) at limits of not less than $1,000,000 combined single limit per accident.

(d) Valuable Papers insurance in an amount sufficient to assure the restoration of any plans, drawings, computations, field notes, or other similar data relating to the work covered by the Agreement between the Owner and the Designer in the event of loss or destruction while in the custody of the Designer until the final fee payment is made or all data is turned over to the Owner, and this

coverage shall include coverage for relevant electronic media, including, but not limited to, documents stored in computer-aided design drafting (CADD) systems.

15.7 Professional Liability

15.7.1 The Designer shall maintain professional liability insurance covering negligent errors and omissions and negligent acts of the Designer and of any person or entity for whose performance the Designer is legally liable at all times while services are being performed under this Contract and for a period of six years thereafter (as calculated in accordance with the terms below in this 15.7.2). The minimum amount of such insurance shall be $2,000,000 per claim/$2,000,000 annual aggregate.

15.7.2 If the policy is in a "claims made" format, it shall include a retroactive date that is no later than the effective date of this Contract, and an extended reporting period of at least six years after the earlier of: (1) the date of official acceptance of the completed Project by the Owner; (2) the date of the opening of the Project to public use; (3) the date of the acceptance by the general contractor or the CM at Risk of a final pay estimate prepared by the Owner pursuant to M.G.L. chapter 30; or (4) the date of substantial completion of the Owner-Contractor Agreement or Owner-CM at Risk Agreement and the taking of possession of the Project for occupancy by the Owner, which requirement can be met by providing renewal certificates of professional liability insurance to the Owner as evidence that this coverage is being maintained.

15.8 Subconsultants

15.8.1 The Designer shall require by contractual obligation, and shall exercise due diligence to enforce, that any professional engineering or landscape architecture Subconsultant hired in connection with the services to be provided under this Contract shall, unless otherwise agreed in writing by the Owner, obtain and maintain all insurance required by law and as may be required by the Owner under the terms of this Contract, except that the limit of Subconsultant's professional liability insurance shall be not less than $2,000,000 per claim/$2,000,000 annual aggregate.

15.8.2 All professional liability policies obtained by Subconsultants shall be issued by companies lawfully authorized to write that type of insurance under the laws of the Commonwealth of Massachusetts with a financial strength rating of "A" or better as assigned by A.M. Best Company, or an equivalent rating assigned by a similar rating agency acceptable to the Owner and the Authority.

15.8.3 If the Subconsultant's insurance policy is in a "claims made" format, it shall include a retroactive date that is no later than the effective date of its contract with the Designer, and an extended reporting period of at least six years after the earlier of: (1) the date of official acceptance of the completed Project by the Owner; (2) the date of the opening of the Project to public use; (3) the date of the acceptance by the General Contractor or CM at Risk of a final pay estimate prepared by the Owner pursuant to M.G.L. chapter 30; or (4) the date of substantial completion of the

Owner-General Contractor Agreement or the Owner-CM at Risk Agreement and the taking of possession of the Project for occupancy by the Owner, which requirement can be met by providing renewal certificates of professional liability insurance to the Owner as evidence that this coverage is being maintained.

15.8.4 Other nonprofessional Subconsultants shall be required to maintain insurance in the types and amounts that they routinely carry in the course of their practice.

15.9 Liability of the Designer

Insufficient insurance shall not release the Designer from any liability for breach of its obligations under this Contract. Without limitation, the Designer shall bear the risk of any loss if its valuable papers insurance coverage is insufficient to cover the loss of any work covered by this Contract.

15.10 Asbestos and Hazardous Materials

15.10.1 Unless otherwise provided in the RFS, the Designer shall have no responsibility for the discovery, presence, handling, removal or disposal of or for the exposure of persons to oil or hazardous materials in any form at the Project, including but not limited to asbestos-containing materials or other hazardous materials, as defined in MGL c.21E §2.

15.10.2 In the event that the Designer employs the services of a sub-consultant to provide services related to either the testing for asbestos-containing materials or oil or hazardous materials or related to the specification of methods and procedures for the removal or remediation of such asbestos-containing materials or oil or hazardous materials, the Designer shall employ such Subconsultants who have liability insurance coverage covering such services, to the extent that such insurance coverage is generally available to Subconsultants. Upon the Owner's written request, the Designer shall assign to the Owner the Designer's contractual right to pursue a claim against such Subconsultants. Such services shall be paid for as provided in Article 9 - Reimbursable Expenses unless such services are specifically included as Basic Services in the RFS.

ARTICLE 16: OWNERSHIP OF DOCUMENTS

16.1 Unless provided otherwise by law, ownership and possession of all information, data, reports, studies, designs, drawings, specifications, materials, computer programs, documents, models, inventions, equipment, and any other documentation, product of tangible materials to the extent authored or prepared, in whole or in part, by the Designer pursuant to this Contract (collectively, the "Materials"), other than the Designer's administrative communications, records, and files relating to this Contract, shall be the sole property of, and shall vest in, the Owner and the Authority as "works made for hire" or otherwise, provided that the Owner complies with its payment obligations under this

Contract. The Owner and the Authority will own the exclusive rights, worldwide and royalty-free, to and in all Materials prepared and produced by the Designer pursuant to this Contract, including, but not limited to, United States and International patents, copyrights, trade secrets, know-how and any other intellectual property rights, and the Owner and the Authority shall have the exclusive, unlimited and unrestricted right, worldwide and royalty-free, to publish, reproduce, distribute, transmit and publicly display all Materials prepared by the Designer. The Owner and the Authority shall provide appropriate credit to the Designer, in terms agreed upon by the Design, in any publicity about or plaque at the Project. The Designer shall have a license to publish and publicly display all Materials prepared by the Designer in its normal marketing and related professional and academic activities. The Designer shall have a license to use the typical or standard details and all other replicable elements of the Materials for this Project on other future projects. At the completion or termination of the Designer's services required pursuant to this Contract, copies of all original Materials shall be promptly turned over to the Owner and the Authority.

16.2 The Owner and the Authority agree to waive any and all claims against the Designer and, to the fullest extent permitted by law, to jointly and severally defend, indemnify and hold the Designer harmless from and against any and all claims, losses, liabilities and damages incurred by the Owner or asserted by any other entity or individual arising out of or resulting from any use of the Materials on other projects, modifications of the Materials made by the Owner or others and used on this Project, or any reuse or modification of the Materials or any of Designer's designs, drawings and specifications. The Authority shall be a party to this Contract solely for the purposes of enforcing its rights and obligations under this Article 16.

ARTICLE 17: STATUTORY REQUIREMENTS

17.1 Agent for Service of Process: If the Designer's principal place of business is outside of the Commonwealth of Massachusetts, the Designer shall appoint an agent for the service of process as provided in M.G.L. c.227, §5. The power of attorney reflecting such appointment shall be filed with the Secretary of State as provided in M.G.L. c.227, §5. Copies of the power shall be provided to the Owner. There shall be no lapse in such agency for as long as the Designer may have potential liability.

17.2 Truth-in-Negotiations Certificate (M.G.L. c.7C, §51)

17.2.1 If the Designer's fee has been negotiated, the Designer must file a truth-in-negotiations certificate prior to execution of this Contract by the Owner. The certificate shall contain the following certifications:

(a) that wage rates and other costs used to support the Designer's compensation are accurate, complete, and current at the time of contracting; and

(b) that the Contract price and any additions to the Contract may be adjusted within one year of completion of the Contract to exclude any significant

amounts if the Owner determines that the fee was increased by such amounts due to inaccurate, incomplete or noncurrent wage rates or other costs.

17.3 Certification Pursuant to M.G.L. c.7C §51 (d): In accordance with M.G.L. c.7C §51(d), the person signing this contract certifies, as a duly authorized signatory of the Designer, that the Designer has not given, offered or agreed to give any person, corporation, or other entity any gift, contribution or offer of employment as an inducement for, or in connection with, the award of this Contract; no Consultant to or Subconsultant for the Designer has given, offered or agreed to give any gift, contribution or offer of employment to the Designer, or to any other person, corporation, or entity as an inducement for, or in connection with, the award to the Designer or Subconsultant of a contract by the Designer; and no person, corporation or other entity, other than a bona fide full-time employee of the Designer, has been retained or hired by the Designer to solicit for or in any way assist the Designer in obtaining this Contract upon an agreement or understanding that such person, corporation or other entity be paid a fee or other consideration contingent upon the award of this Contract.

17.4 Minority-Owned and Woman-Owned Business Participation: Pursuant to M.G.L. c. 7C, § 6, the Designer shall subcontract with minority-owned business enterprises (MBE) and women-owned business enterprises (WBE), as certified by the Supplier Diversity Office, 1 Ashburton Place, Room 1017, Boston, MA 02108; such participation goals shall be based on the listed services defined and required in the RFS. If the Designer is an SDO-certified MBE or WBE, the Designer must bring a reasonable amount of program participation goals for minority-owned businesses and women-owned businesses that hold the certification which is not held by the prime Designer on the project.

17.4.1 The Designer shall complete and submit at the time of contract execution a completed Participation Schedule which is attached to this contract as Attachment C in order to be in compliance with Article 17.4 above.

17.5 Accounting Requirements: The Designer shall cause to be maintained complete, accurate and detailed records of all time devoted to the Project by the Designer and each Subconsultant employed by the Designer. The Owner, the Authority, and the Commonwealth's Inspector General may at all reasonable times audit such records that directly pertain to this Contract. On a Contract where the Fee for Basic Services exceeds $100,000 the Designer shall comply with M.G.L. c.30 §39R which requires the Designer to:

17.5.1 Maintain accurate and detailed accounts for a six-year period after the final payment;

17.5.2 File with the Owner annual audited financial statements or statements from their accountants that their reviews are consistent with state laws.

17.5.3 File with the Owner a statement of management on internal accounting controls on its letterhead as prescribed in Attachment D and a statement from an independent certified public accountant (CPA) on its letterhead as prescribed in Attachment E to this Contract.

17.6 Revenue Enforcement and Protection Program (REAP): Pursuant to M.G.L. c. 62C §49A, the undersigned certifies under the penalties of perjury that to the best of his/her knowledge and belief that the firm and/or individuals in the firm are in compliance with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

17.7 Interest of Designer: The Designer hereby certifies that it is in compliance with the provisions of M.G.L. c. 268A whenever applicable. The Designer covenants that 1) neither he/she nor any member of the Designer firm presently has any financial interest and shall not acquire any such interest direct or indirect, which would conflict in any manner or degree with the services required to be performed under this Contract or which would violate M.G.L. Chapter 268A, as amended from time-to-time; 2) in the performance of this Contract, no person having any such interest shall be employed by the Designer; and 3) no partner or employee of the Designer firm is related by blood or marriage to any officer, official, or employee of the Owner.

17.8 Equal Opportunity: The Designer shall not discriminate in employment against any person on the basis of race, color, religion, national origin, sex, sexual orientation, age, genetics, ancestry, disability, marital status, veteran status, membership in the armed forces, presence of children or political beliefs. Each shall comply with all provisions of Title VII of the Civil Rights Act of 1964 and MGL c.151B.

17.9 Certification of Non-Collusion: The signatory certifies under penalties of perjury that the Designer's proposal has been made in and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

ARTICLE 18: MISCELLANEOUS

18.1 Governing Law: This Contract shall be governed by the laws of the Commonwealth of Massachusetts.

18.2 Venue: Any suit by either party arising under this Contract shall be brought only in the Superior Court in the county where the Project is located. The parties hereto waive any argument that this venue is improper or that the forum is inconvenient.

18.3 Non-Waiver: Neither the Owner's review, approval, or acceptance of, nor payment for any of the services furnished under this Contract shall be construed to operate as a waiver of any rights under the Contract or any cause of action arising out of the performance of the Contract.

18.4 Entire Agreement: This Contract represents the entire and integrated agreement between the Owner and the Designer and, except as otherwise provided herein, supersedes all prior negotiations, representations or agreements, either written or oral. This Contract may be amended only by written agreement signed by both the Owner and the Designer, and approved by the Authority, which approval shall not unreasonably be delayed, denied, conditioned, or withheld.

18.5 Dispute Resolution: If a dispute arises between the parties related to this Contract, the parties agree to use the following procedures to resolve the dispute: (a) Negotiation. A meeting shall be held between representatives of the parties with decision-making authority regarding the dispute to attempt in good faith to negotiate a resolution of the dispute; such meeting shall be held within fourteen calendar days of a party's written request for such a meeting; (b) Mediation. If the parties fail to negotiate a resolution of the dispute, they shall submit the dispute to mediation as a condition precedent to litigation and shall bear equally the costs of the mediation. The parties shall jointly appoint a mutually acceptable mediator; they shall seek assistance from an independent third party in such appointment if they have been unable to agree upon such appointment within 30 days of the meeting just noted in (a) above; (c) Litigation. If the parties fail to resolve the dispute through mediation, then either party may file suit in accordance with Article 18.2; and (d) This Article of dispute resolution provisions shall survive termination of this Contract.

18.6 Waiver of Subrogation: (a) To the extent damages are covered by property insurance, the Owner and the Designer waive all rights against each other and against the General Contractor or CM at Risk, Subcontractors, consultants, agents, and employees of the other for damages caused by fire or other causes of loss, except such rights as they may have to the proceeds of such insurance as set forth in the Owner-Contractor Agreement or Owner CM at Risk Agreement. The Owner shall require of the General Contractor or CM at Risk, Subcontractors, Owner's Project Manager, consultants, Subconsultants, and agents and employees, by appropriate agreements, written where legally required for validity, similar waivers each in favor of other parties enumerated herein. The policies shall provide such waivers of subrogation by endorsement or otherwise. A waiver of subrogation shall be effective as to a person or entity even though that person or entity would otherwise have a duty of indemnification, contractual or otherwise, did not pay the insurance premium directly or indirectly, and whether or not the person or entity had an insurable interest in the property damaged. (b) Nothing in this Contract shall create a contractual relationship with or create a cause of action in favor of a third party against the Owner or the Designer.

ATTACHMENT A

PAYMENT SCHEDULE

Payments shall be made in accordance with the provisions outlined in the Contract and with the following schedule:

Basic Services

Feasibility Study Phase $408,215

Schematic Design Phase $658,976

Design Development Phase .....

Construction Documents Phase .....

Early Bid Packages…….

Bidding Phase.....

Construction Administration Phase .....

Completion Phase .....

Reimbursable Services [Allowance]……...…$227,275

TOTAL $1,294,466

Extra Services

Extra Services provided pursuant to Article 8 shall be compensated as determined by the Owner (a) by a lump sum fee agreed upon in advance in writing by the Owner and the Designer, or (b) on an hourly basis in accordance with the lesser of $150 per hour or the rate schedule set forth below for time expended, or (c) on an hourly basis in accordance with the lesser of $150 per hour or a multiple of 2.5 times the direct personnel expense (without benefits) of the Designers or Subconsultants personnel including principals.

Negotiated Lump Sum

Pierce School
updated 01.06.21

	Arch MDS	Arch Sasaki	Sustain Sasaki	Landscape Sasaki	Civil Sasaki	Struct S&T	MEPFP/data GGD	Program NewVista	Acoust Acentech	Food Serv. Crabtree	Cost Fogarty	Theater Port Light	Code Hastings	Security Perini	AV ACT	Survey Feldman	Geotech Lahalaf	HazMat PEER	Historical BCA	Envelope RDH	Traffic Vanasse	FF&E Point Line	Tech GGD	**TOTAL**	
Feas.	192,446	80,869	15,000	20,000	10,000	24,600	28,500	19,200		2,400	8,700	3,500	3,000											408,215	
SD	275,194	99,130	30,000	50,000	15,000	31,400	116,500		5,000	2,400	13,250		2,500	7,000	3,601							3,000	5,000	658,975	
Total Base Fee	**467,640**	**180,000**	**45,000**	**70,000**	**25,000**	**56,000**	**145,000**	**19,200**	**5,000**	**4,800**	**21,950**	**3,500**	**5,500**	**7,000**	**3,601**	-	-	-	-	-	-	3,000	5,000	**1,067,191**	
	43.82%	16.87%	4.22%	6.56%	2.34%	5.25%	13.59%	1.80%	0.47%	0.45%	2.06%	0.33%	0.52%	0.66%	0.34%										
		64.90%																							
Reimbursables FS																35300	38,155		7,500	32,500	16,000			129,455	
Reimbursables SD									5,000									72,820	12,000	8,000				97,820	
Total FS-SD Reimbursables									5,000						-	**35,300**	**38,155**	**72,820**	**19,500**	**40,500**	**16,000**	**-**		**227,275**	
Total Base Fee with Reimbursables and Additional Services																									
	467,640	**180,000**	**45,000**	**70,000**	**25,000**	**56,000**	**145,000**	**19,200**	**10,000**	**4,800**	**21,950**	**3,500**	**5,500**	**7,000**	**3,601**	**35,300**	**38,155**	**72,820**	**19,500**	**40,500**	**16,000**	**3,000**	**5,000**	**1,294,466**	
SOMWBA with Additional Services																									
MBE Participation																	38,155	72,820						110,975	8.57%
WBE Participation	467,640													7,000										474,640	36.67%
																								585,615	45.24%

MDS | architecture planning interiors

Preliminary Design Program (PDP) - Responsibility Matrix- Based on MSBA Guidelines Module 3 1/5/2021

Tab	Title	Responsibility	Comment
	Table of Contents	MDS	
3.1.1	**Introduction**		
3.1.1.1	A brief summary of the facility deficiencies	MDS	
3.1.1.2	The date of the invitation	Leftfield/TOB	
3.1.1.3	The agreed-upon design enrollment	Leftfield/TOB	
3.1.1.4	A brief narrative summary of the Capital Budget Statement	Leftfield/TOB	
3.1.1.5	Preliminary Estimates PDP Submission Summary	AM Fogarty/Leftfield	
3.1.1.6	Project Directory	Leftfield	
3.1.1.7	Project Schedule	Leftfield	
3.1.2	**Educational Program**		
	• Grade and school configuration policies;	TOB	
	• Class size policies;	TOB	
	• School scheduling method;	TOB	
	• Teaching methodology and structure (e.g., academies, departments, houses, teams, etc.);	TOB	
	• Teacher planning and room assignment policies;	TOB	
	• Pre-kindergarten (SPED only, tuition programs, locations, full day, haLeftfield day	TOB	
	• Kindergarten (full day, haLeftfield day, locations);	TOB	
	• Lunch programs (number of servings, district kitchen, full service kitchens, warming kitchens, etc.);	TOB	
	• Technology instruction policies and program requirements (labs, in-classroom, media center, required infrastructure, etc.);	TOB	
	• Art programs (in-classroom, specialized area);	TOB	
	• Music/Performing Arts programs (in-classroom, specialized area);	TOB	
	• Physical Education programs;	TOB	
	• Special Education programs (in-house, collaborative, facility restrictions);	TOB	
	• Vocational Education programs;	TOB	
	• Transportation policies;	TOB	
	• Functional and spatial relationships;	TOB/MDS/Sasaki	
	• Key programmatic adjacencies; and	TOB/MDS/Sasaki	
	• Security and visual access requirements.	TOB/Pam Perini	
	• Medical Emergency Response Plan	TOB	

Tab	Title	Responsibility	Comment
3.1.2.1	**Community Outreach, Visioning, and Programming**		
	• Kick-Off Meeting with Educational Leadership	New Vista/Sasaki/MDS/Leftfield	
	• Educational Visioning Workshop One	New Vista/Sasaki/MDS/Leftfield	
	• Educational Visioning Workshop Two	New Vista/Sasaki/MDS/Leftfield	
	• Educational Visioning Workshop Three	New Vista/Sasaki/MDS/Leftfield	
	• (1) Community/Neighbor Listening Meeting	New Vista/Sasaki/MDS/Leftfield	
	• (1) Online Community Survey	Sasaki/MDS/Leftfield	
	• (1) Sustainability Workshop	Sasaki/MDS/Leftfield	
3.1.3	**Initial Space Summary**		
3.1.3.0	Intro	MDS	
3.1.3.1	Initial Space Summaries	MDS	
3.1.3.2	Existing Floor Plans	MDS	
3.1.3.3	Narrative descriptions of variance between the District's proposed program/educational spaces and the MSBA guidelines	MDS	
3.1.3.4	Programming Diagrams	MDS	

Tab	Title	Responsibility	Comment
3.1.4	**Evaluation of Existing Conditions**		
3.1.4.0	Intro	MDS	
3.1.4.2	Zoning letter from the Town of Brookline - Determination that the District has legal title to the property, Determination of any development restrictions	Leftfield/TOB	
3.1.4.1	Legal Title to Property - Property Record Card	Sasaki/LF	
3.1.4.3	Determination of any historic registrations and/or potential local and/or state interest/requirements regarding historic preservatio	BCA	
3.1.4.4	Existing Building Code Report	Kevin Sullivan	Narrative only
3.1.4.5	Accessibility Report and Floor Plans	MDS	Narrative only
3.1.4.6	Existing Structural Conditions Report	STP	Narrative only
3.1.4.7	Preliminary Geotechnical Evaluation and schedule for soils exploration	Lahlaf	Narrative only
3.1.4.8	Phase 1 Environmental Site Assessment	PEER	Extra Services per contract
3.1.4.9	Hazardous Materials Survey	PEER	Extra Services per contract
3.1.4.10	Engineering Narratives		
3.1.4.10.1	HVAC - Heating, Ventilation and Air Conditioning Existing Conditions Report	GGD	Narrative only & LEED input
3.1.4.10.2	Electrical and Lighting Existing Conditions Systems Report	GGD	Narrative only & LEED input
3.1.4.10.3	Technology and AV Existing Conditions Systems Reports	GGD/ACT	Narrative only & LEED input
3.1.4.10.4	Plumbing Existing Conditions Systems Report	GGD	Narrative only & LEED input
3.1.4.10.5	Fire Protection Existing Conditions Systems Report	GGD	Narrative only & LEED input
3.1.4.11	Architectural Existing Conditions Narratives		
3.1.4.11.1	Theatrical Systems Report	Port Lighting	Narrative only
3.1.4.11.2	Building Enclosure Feasibility Study	RDH	Narrative only
	As-built Plans	MDS	Extra Services per contract
3.1.4.11.3	Exterior Elevations	MDS	"
3.1.4.11.4	Existing Building Sections	MDS	"
3.1.4.11.5	Foodservice Narrative Report	Crabtree McGrath	Narrative only
3.1.4.12	Recommendations for further study	MDS/Sasaki	
3.1.5	**Site Development Requirements**		
3.1.5.1	Existing Site Assessment Memorandum	Sasaki	Narrative only
3.1.5.2	Landscape Existing Conditions Assessment	Sasaki	Narrative only
3.1.5.3	Preliminary Traffic Assessment	Vanasse	Extra Services per contract (Note: Modeling only. Actual counts restricted by remote/hybrid learning and other Town Covid impacts)

Tab	Title	Responsibility	Comment
3.1.6	**Preliminary Evaluation of Alternatives**		
	• Analysis of school district student school assignment practices and available space in other schools in the district;	Leftfield/TOB	
	• Tuition agreements with adjacent school districts (per MGL c.70B §8);	Leftfield/TOB	
	• Rental or acquisition of existing buildings that could be made available for school use	Leftfield/TOB	
	• Code Upgrade Option that includes repair of systems and/or scope required for purposes of code compliance; with no modification of existing spaces or their function	MDS/Sasaki	Narrative only
	• Renovation(s) and/or addition(s) of varying degrees to the existing building(s);	MDS/Sasaki	Narrative only
	• Construction of new building and the evaluation of potential locations.	MDS/Sasaki	Narrative only
	SBC Meeting Minutes and Meeting Information	Leftfield	
	Preliminary Estimates PDP Submission	AM Fogarty	
3.1.7	**Local Actions and Approvals**		
3.1.7.1	Facilities Overview	MDS	
3.1.7.2	Meeting Minutes and Meeting Information	Leftfield	
3.1.7.3	Certified copy of Minutes of the School Building Committee ("SBC") meeting(s) where	Leftfield	
3.1.7.4	Signed Local Actions and Approvals Certification on District letterhead	Leftfield	
Appendices			
1	Pierce School Statement of Interest	Leftfield/TOB	Confirm from RFS
2	MSBA Board Action Letter	Leftfield/TOB	
3	Design Enrollment Certification	Leftfield/TOB	Confirm from RFS
Other			
	Communication and Document Control Protocol	Leftfield	
	Copy of executed OPM Contract forwarded to MSBA	Leftfield	
	Copy of executed Designer Contract forwarded to MSBA	Leftfield	
	Work Plan approved by School Building Committee ("SBC")	MDS/Leftfield	
	Kick-Off Meeting with MSBA	MDS/Sasaki/Leftfield	
	Processed Budget Revision Request to align ProPay Budget Line Items to executed OPM	Leftfield	
	Reviewed Project Advisories	MDS/Sasaki/Leftfield	
	SBC Vote to approve Preliminary Design Program ("PDP") Submittal and Local Actions and Approval Certification signed.	Leftfield	
	PDP submitted to the MSBA	Leftfield w/ MDS	

MDS | architecture planning interiors

Preferred Schematic Report (PSR) - Responsibility Matrix- Based on MSBA Guidelines Module 3 1/5/2021

Tab	Title	Responsibility	Comment
	Table of Contents	MDS	
3.3.1	**Introduction**		
	Overview of the Process	Leftfield	
	Summary of the Updated Project Schedule	Leftfield	
	Summary of the Final Evaluation of Existing Conditions	MDS/Sasaki	Narrative
	Summary of the Final Evaluation of Alternatives	Leftfield/MDS/Sasaki	Narrative
	Summary of the Districts Preferred Solution	Leftfield/MDS/Sasaki	Narrative
3.3.1.1	Updated Project Schedule	Leftfield	
3.3.1.2	Copy of the MSBA PDP review and corresponding District Response	Leftfield/MDS	
3.3.1.3	Supplemental Educational Program Review comments and Corresponding District Response	Leftfield	
3.3.1.4	**Community Outreach**		
	• (1) Community/Neighbor Forum (after options developed)	Sasaki/MDS/Leftfield	
	• (1) Sustainability Meeting	Sasaki/MDS/Leftfield	
	• (1) Programming Touchpoint	Sasaki/MDS/Leftfield	
	• (1) Faculty Meeting	Sasaki/MDS/Leftfield	
3.3.2	**Evaluation of Existing Conditions**		
3.3.2.1	Existing Conditions Update Summary (incl. revised narratives, if necessary)	MDS/Sasaki	
3.3.2.2	Site Survey	Feldman	
3.3.2.3	Geotechnical Report	Lahlaf	Including preliminary borings
3.3.2.4	MHC Project Notification Form	MDS/BCA	
3.3.2.5	Recommendations for further study	MDS	

Tab	Title	Responsibility	Comment
3.3.3	**Final Evaluation of Alternatives**		
3.3.3.1	Option Plans, site plans, and Axon Views (narratives and plans)	MDS/Sasaki	
3.3.3.1.0	Space Summaries (updated, if necessary)	MDS	
3.3.3.1.1	Reno/Add	MDS/Sasaki	
3.3.3.1.2	New	MDS/Sasaki	
3.3.3.1.3	Third Option	MDS/Sasaki	
3.3.3.2	Options Decision Matrix	MDS/Sasaki	
3.3.3.3	Evaluation of Potential Impact - Phasing Diagram	MDS/Sasaki	
3.3.3.4	Outline of Structural Systems- Structural Narrative	STP	
3.3.3.5	Method of Obtaining Utilities - Civil Narrative	Sasaki	
3.3.3.6	Narrative of Major Building Systems- MEP/FP/Tel/Data Narratives	GGD	
3.3.3.7	Project Budget and Construction Cost Estimates	Leftfield/AM Fogarty	
3.3.3.7.1	Designer's Cost Estimate	AM/Fogarty	
3.3.3.7.2	Summary of Preliminary Design Pricing (Table 1)	MDS	
3.3.3.8	Permitting Requirements	MDS/Sasaki	Sasaki - Site related
3.3.3.9	Proposed Design and Construction Schedule	Leftfield	

Tab	Title	Responsibility	Comment
3.3.4	**Preferred Solution**		One option only
	Summary of Districts Preferred Solution	MDS/Sasaki/Leftfield	
	o Site Impacts	Sasaki	
	o Phasing	MDS/Sasaki/Leftfield	Sasaki - Site related
	o Summary of Key Components of the District's Educational Program	MDS	
	o Key Educational Adjacencies of Programmatic Spaces	MDS	
	o Sustainabilty Summary	Sasaki	
3.3.4.1	Educational Program (Redline and Clean Copies)	Leftfield/TOB	
3.3.4.2	Updated Space Summary	MDS	
3.3.4.3	Variations from the Initial Space Summary	MDS	
3.3.4.4	Sustainability Scorecard	Sasaki	
3.3.4.5	Sustainability Goals Letter	Sasaki	
3.3.4.6	Preferred Option Floor Plans	MDS	
3.3.4.7	Preferred Option Site Plan	Sasaki	
3.3.4.8	Overview of the Total Project Budget and Local Funding	Leftfield	
	o Estimated total construction cost;	AM Fogarty	
	o Estimated total project cost;	Leftfield	
	o Estimated funding capacity;	TOB	
	o List of other municipal projects currently planned or in progress;	TOB	
	o District's not-to-exceed Total Project Budget;	TOB	
	o Brief description of the local process for authorization and funding of the proposed project; and	TOB	
	o Estimated impact to local property tax, if applicable.	TOB	
3.3.4.9	Preferred Option Phasing Plans	MDS/Sasaki/Leftfield	
3.3.4.10	Updated Project Schedule	Leftfield	
3.3.4.11	District's Transition Plan	TOB	
3.3.5	**Local Actions and Approvals**		
3.3.5.1	A list of local meeting dates, including description of items presented and where those mateirals may be viewed. See minutes for attendance.	Leftfield	
3.3.5.2	Meeting Minutes and Meeting Information	Leftfield	
3.3.5.3	Signed Local Actions and Approval Certification on District Letterhead	Leftfield/TOB	
Appendices			
1	11x17 Preferred Option Conceptual Plans, Site Plan, Sections, 3D Renderings	MDS/Sasaki	
2	District statement on funding capacity	Leftfield/TOB	

Tab	Title	Responsibility	Comment
Other			
	Communication and Document Control Protocol	Leftfield	
	District Response to PDP review comments submitted to MSBA	Leftfield w/ MDS	
	Changes/Updates to Previously Submitted Materials, if required	Leftfield w/ MDS	
	School Committee Vote to approve Grade Reconfiguration and/or Districting and Grade Reconfiguration and Districting Approval Certification signed (if applicable)	Leftfield	
	SBC Vote to approve Preferred Schematic Report ("PSR") Submittal and Local Actions and Approval Certification signed.	Leftfield	
	PSR submitted to the MSBA	Leftfield w/ MDS	
	District Response to PSR review comments submitted to MSBA	Leftfield w/ MDS	
	FAS presentation materials	Leftfield/MDS/Sasaki	
	Facilities Assessment Subcommittee ("FAS") Meeting	Leftfield/MDS/Sasaki	
	District Response to FAS comments submitted to MSBA	Leftfield w/ MDS	
	Updates to SBC submitted to MSBA (if applicable)	Leftfield w/ MDS	
	Updates to OPM and Designer Org Charts submitted to MSBA (if applicable	Leftfield	
	Copies of executed OPM and Designer Contract amendments (if applicable) submitted to the MSBA	Leftfield	
	ProPay Budget Revision Request(s) submitted to MSBA (if applicable)	Leftfield	
	Work plan updated and approved by SBC (if applicable)	Leftfield/ MDS	
	Preferred Schematic Conference Call	Leftfield/ MDS/Sasaki	
	MSBA Board Approval to Proceed into Schematic Design	MSBA	
	MSBA Board Action Letter denoting approval of authorization to proceed to schematic design	MSBA	

MDS architecture planning interiors

Schematic Design (SD) - Responsibility Matrix - Based on MSBA Guidelines Module 4 1/5/2021

Tab	Title	Responsibility	Comment
4.1.1	**DESE Submittal**		
4.1.1.1	Cover letter	Leftfield	
4.1.1.2	Special education delivery methodology	Leftfield/TOB	
4.1.1.3	Signed Educational Space Summary	MDS	
4.1.1.4	Narrative of Space Summary	MDS	Narrative only
4.1.1.5	Floor Plans	MDS	
4.1.1.6	Adjacency Table	MDS	
4.1.2.1	**Community Outreach**		
	• (1) Virtual Reality Engagement	Sasaki/MDS/Leftfield	
	• (1) Faculty Meeting	Sasaki/MDS/Leftfield	
	• (1) Community/Neighbor Meeting	Sasaki/MDS/Leftfield	
4.1.2	**Schematic Design Binder**		
	Table of Contents	MDS	
4.1.2.1	Introduction to the Schematic Design Solution	MDS/Leftfield	Narrative only
4.1.2.1.1	Summary of Approved Solution	MDS/Leftfield	Narrative only
4.1.2.1.2	Overview of Process	Leftfield	
4.1.2.1.3	District's Total Budget	Leftfield	
4.1.2.1.4	Updated project description	MDS	Narrative only
4.1.2.1.4.1	List of alternates	MDS/Leftfield	
4.1.2.1.4.2	Construction methodology	Leftfield	
4.1.2.1.5	Visual Aids	MDS/Sasaki	
4.1.2.1.6	MSBA PSR review and District response	MDS/Leftfield	
4.1.2.1.6.1	PSR review	Leftfield	
4.1.2.1.6.1	District response to PSR review	MDS/Leftfield	
4.1.2.2	Final Design Program		
4.1.2.2.1	General and specific architectural characteristics	MDS/Sasaki	Narrative only
4.1.2.2.2	Educational space summary	MDS	
4.1.2.2.2.1	Modifcations from Approved PSR Scheme	MDS	
4.1.2.2.3	Program narrative	MDS	Narrative only
4.1.2.2.4	Instructional Technology	GGD/ACT	Narrative only
4.1.2.2.5	Functional relationships and critical adjacencies	MDS/Sasaki	Narrative only
4.1.2.2.6	Security and visual access requirements	MDS/Pam Perini	Narrative only
4.1.2.2.7	Site development requirements	Sasaki	Narrative only
4.1.2.2.8	Desired visual or aesthetic focal point or features of school	MDS/Sasaki	

Tab	Title	Responsibility	Comment
4.1.2.3	Traffic Analysis	Vanasse	
4.1.2.4	Environmental and existing building assessment	PEER	
4.1.2.5	Geotechnical and geo-environmental analysis	Lahlaf/PEER	
4.1.2.6	Code analysis	Kevin Sullivan	
4.1.2.7	Utility Analysis	Sasaki	
4.1.2.8	Massing Study	MDS/Sasaki	
4.1.2.9	Narrative of building systems		
4.1.2.9.1	Civil narrative	Sasaki	Narrative only, including permitting
4.1.2.9.2	Structural narrative	STP	Narrative only
4.1.2.9.3	Plumbing narrative and LCCA	GGD	Narrative only & LEED input
4.1.2.9.4	FP narrative	GGD	Narrative only
4.1.2.9.5	Mechanical narrative and LCCA	GGD	Narrative only & LEED input
4.1.2.9.6	Electrical narrative	GGD	Narrative only
4.1.2.9.7	IT narrative	GGD	Narrative only
4.1.2.9.8	Acoustic narrative	Acentech	Narrative only
4.1.2.9.9	Theater narrative	Port Lighting	Narrative only
4.1.2.9.10	AV narrative	ACT	Narrative only
4.1.2.9.11	Food Service narrative	Crabtree McGrath	Narrative only
4.1.2.10	Sustainable Design documents		
4.1.2.10.1	Completed scorecard	Sasaki	
4.1.2.10.2	Signed letter	Sasaki	
4.1.2.11	ADA/ MAAB compliance	MDS	Narrative only
4.1.2.12	Room Data Sheets	MDS	
4.1.2.13	Proposed Construction Methodology	Leftfield	
4.1.2.14	District's anticipated reimbursement rate	Leftfield	
4.1.2.15	Total Project Budget		
4.1.2.15.1	Total Project Budget spreadsheet	Leftfield	
4.1.2.15.2	Value Engineering Scope Reduction Spreadsheet	MDS/Leftfield	
4.1.2.16	Designer's construction cost estimate	AM Fogarty	
	• FFE Budget Spreadsheet	PLS	
	• Technology Budget Spreadsheet	GGD	
	• AV Budget Spreadsheet	ACT	
	• Theatrical Budget Spreadsheet	Port Lighting	
4.1.2.17	OPM's cost estimate	Leftfield/???	
	• Cost Comparison Spreadsheet - Designer vs. OPM estimators	Leftfield	
	• Cost Reconciliation	MDS/AM Fogarty/Leftfield/???	??? - Leftfield Estimator
	• Value Engineering Spreadsheet	MDS/AM Fogarty/Leftfield/???	??? - Leftfield Estimator
	• Cost Comparison Spreadsheet - PSR to SD	Leftfield	

Tab	Title	Responsibility	Comment
4.1.2.18	Updated project work plan		
4.1.2.18.1	Updated directory	Leftfield	
4.1.2.18.2	Roles and responsibilities	Leftfield	
4.1.2.18.3	Communications and Document control procedures	Leftfield	
4.1.2.18.4	Designer's work plan	MDS	
4.1.2.18.5	Project schedule	Leftfield	
4.1.2.19	Local actions and approvals		
4.1.3	**Schematic Design Project Manual**		
4.1.3.1	Outline Specifications	MDS	
4.1.3.2	Proprietary Items	MDS/Leftfield	
4.1.4	**Schematic Design Drawings**	MDS/Sasaki	
Appendix			
1:	Confidential Security Narrative	Pam Perini	

Tab	Title	Responsibility	Comment
Other			
	Schematic Design Limited to Preferred Option only		
	Site Boundary Survey	Feldman	NIC; Deferred post Town Mtg approval
	Communication and Document Control Protocol	Leftfield	
	Updated Work Plan approved by School Building Committee ("SBC")	MDS/Leftfield	
	Reviewed Project Advisories	MDS/Sasaki/Leftfield	
	Evaluation of Construction Delivery Method complete and District selected to proceed through Traditional Design-Bid-Build or CM at Risk construction delivery method	Leftfield/MDS	
	District Response to PSR review comments submitted to MSBA	Leftfield/MDS	
	Changes/Updates to Previously Submitted Materials, if required	Leftfield/MDS	
	Confirmed all DESE Submittal components align	MDS	
	Schematic Design Submittal Notification email sent to MSBA assigned project coordinator	Leftfield	
	SBC Reviewed and voted to approve submittal of the Total Project Budget to the MSBA	Leftfield/TOB	
	SBC Vote to approve Schematic Design ("SD") Submittal and Local Actions and Approval Certification signed.	Leftfield/TOB	
	Schematic Design Submittal submitted to the MSBA	Leftfield w/ MDS	
	District Response to Schematic Design review comments submitted to MSBA	MDS/Leftfield	
	Vote Language submitted to MSBA for review	Leftfield	
	Updates to SBC submitted to MSBA (if applicable)	Leftfield	
	Updates to OPM and Designer Organization Charts submitted to MSBA (if applicable)	Leftfield	
	Copies of executed OPM and Designer Contract amendments (if applicable) submitted to the MSBA	Leftfield	
	ProPay Budget Revision Request(s) submitted to MSBA (if applicable)	Leftfield	
	Work plan updated and approved by SBC	Leftfield	
	Project Scope and Budget Conference Complete	MDS/Sasaki/Leftfield	
	District understands and agrees with Total Project Budget Template	Leftfield/MSBA	
	MSBA Board Approval	MSBA	
	MSBA Board Action Letter denoting approval of proposed project	MSBA	
	Debt Service and Tax Impact Narrative and Spreadsheets	Leftfield/TOB	

ATTACHMENT B

1- RFS dated October 7, 2020

2- RFS Attachment A - Statement of Interest

3- RFS Project Schedule

4- RFS Student Enrollment Letter

5- RFS addendum 1 & 2 incorporated by reference only

6- Miller Dyer Spears proposal/application dated November 4, 2020

   a. Non-Collusion Affidavit

   b. Affidavit of Compliance

   c. Affidavit of Prevailing Wage Compliance

   d. Certification of Tax Compliance

   e. Certificate of Non-Discrimination

   f. Certificate of Insurance

7- MSBA DSP interview topics dated December 15, 2020

8- Miller Dyer Spears MSBA DSP presentation dated December 15, 2020

9- MSBA MOD 3 Guidelines

10- MSBA MOD 4 Guidelines

REQUEST FOR DESIGNER SERVICES (RFS)

The Town of Brookline
Brookline Public Schools

John Pierce School Feasibility Study

October 7, 2020

Invitation: The Town of Brookline ("Owner"), acting through the Brookline School Building Committee is seeking the services of a qualified "Designer" within the meaning of M.G.L. Chapter 7C, Section 44 to provide professional design and construction administration services for the John R. Pierce School in Brookline, Massachusetts. Selection of a Designer will be made by the Designer Selection Panel of the Massachusetts School Building Authority ("MSBA") in accordance with the MSBA's Designer Selection Procedures.

The Owner is seeking design services to conduct a Feasibility Study, which will include the development and evaluation of potential alternative solutions and continue through the Schematic Design Phase of the preferred alternative initially. Subject to the approval of a Project by the MSBA and further subject to adequate funding authorized by the Owner, the contract between the Owner and the Designer may be amended to include continued designer services through design development, construction contract documents, bidding, award of construction contract(s), construction administration, final closeout and warranty period of the potential Project. A potential Project may include a renovation of the existing school, a renovation of and addition to the existing school and/or new construction.

The estimated construction budget for a potential Project may range from $94,000,000 to $118,000,000 depending upon the solution that is agreed upon by the Owner and the MSBA and that is ultimately approved by a vote of the MSBA's Board of Directors. The Fee for Basic Services will be negotiated.

The Commonwealth's Affirmative Marketing Program (AMP) established under M.G.L. Chapter 7C, §6, and Governors' Executive Orders helps ensure that minority owned business enterprises (MBE) and women owned businesses (WBE) certified by the Massachusetts Supplier Diversity Office (SDO) have opportunities to participate on DCAMM and other public construction and design projects across the Commonwealth. DCAMM and the SDO announced a series of AMP program changes that will be in effect for state funded municipal projects advertised on or after July 1, 2020.

Applicants should subcontract with MBE and WBE, as certified by the SDO. The AMP project specific goals should be set separately, with distinct participation goals set for MBE firm participation and WBE firm participation. Districts should set the project specific MBE and WBE goals prior to advertising for design services and the individual MBE and WBE goals should clearly be set forth in this RFS. This enables participation goals for an individual project to be specifically tailored to the particular project prior to procurement and ensures the goals more accurately reflect the availability of contractors or design professionals.

The MBE and WBE must be selected from those categories of work identified in Item F of this RFS or be assigned to tasks required under Basic Services as specifically set forth in the Contract for Designer Services as amended. Applicants are strongly encouraged to utilize multiple disciplines and firms to meet their separate

MBE and WBE participation goals. Consultants to the prime Designer can team within their disciplines in order to meet the separate MBE and WBE participation goals but must state this relationship on the organizational chart (Section 6 of the application form). Applications from MBE and WBE firms as prime designers are encouraged. Where the prime Designer is an SDO certified MBE or WBE, the Designer must bring a reasonable amount of participation by a firm or firms that hold the certification which is not held by the prime Designer on the project.

MBE and WBE Participation Goals for the Designer Services Contract:

1. **MBE Participation Goals: 5.1%**

2. **WBE Participation Goals: 10%**

For additional information on Designer qualifications see Sections E. and F. in this RFS.

A. Background:

John Pierce School Background

Located in the heart of Brookline Village, the John R. Pierce School is named after John Pierce, noted pastor of the Walnut Street church during the mid-19th century. The original four-classroom Pierce School was built in 1854. This original structure is still used as part of the John R. Pierce School's historic building, and remains the oldest school building in Brookline and one of the oldest still in use in Massachusetts. In 1904, an addition was built onto the original building, expanding the school by eight classrooms, creating what is now known as the Pierce Historic Building. These 12 classrooms continue to serve the school today as early elementary and middle school classrooms.

In 1974 the Town of Brookline finished construction of the Pierce Main Building. Considered a model example of the open-space design popular in the 1970s it consists of three wings or units. The building is centered around a two-story library or resource center, which encourages collaborative teaching and has proven to be an effective learning environment for an innovative and challenging academic program. However, the design, material used, space, and layout have proved to be challenging acoustically, to maintain, and in terms of accessibility.

The Historic Building is still occupied today and has a long history of being maintained with the latest major projects being brick repointing in 2016, roof replacement and repairs in EPDM in 2002 and the slate shingles in 2014. In the early 1990s, the Main Building roof had many leaks and repair and replacement of EPDM roofing was completed in 1993. This building has been maintained with minor repairs being completed as needed, but the majority of systems and fixtures are from the original 1974 structure. The 1970s design was opened well before the current educational program delivery and ADA laws and regulations were in place.

The school consists of two buildings with a total combined square footage of 198,000 gsf and was originally designed as a three section per grade building in what has large open floor design component to it and has evolved into serving four and five sections per grade in 2019-2020. The new John R. Pierce School will be a four section Pre-K to Grade 8 school, to relieve overcrowding challenges and to replace or renovate obsolete buildings.

Site

Per the Town Assessor's map, both buildings, Pierce Historical (1854) and Pierce Main Building (1974), are on the same parcel of land totaling 138,055 SF. The playground, owned and operated by the Town of Brookline Parks & Open Space division, is located across the street and students access the playground via a footbridge. The footbridge is only accessible by stairs, so it does not meet current ADA standards. The playground was renovated in 2016 and consists of 67,665 SF of dedicated (little league field, basketball court, playground areas) and passive (natural grass and trees) play space.

The John R. Pierce School currently serves 842 students in grades K-8.The MSBA and the Town of Brookline's agreed upon design enrollment for the John R. Pierce School is 725 students to serve grades K-8. Additional information on the enrollment for this feasibility study can be found in the MSBA enrollment letter dated March 21, 2020, herein attached as Attachment G.

B. Project Goals and General Scope:

On or about April 6, 2018, the Owner submitted a Statement of Interest (Attachment A) to the MSBA for the John R. Pierce School. The MSBA is an independent public authority that administers and funds a program for grants to eligible cities, towns, and regional school districts for school construction and renovation projects. The MSBA's grant program is discretionary, and no city, town, or regional school district has any entitlement to any funds from the MSBA. At the April 15, 2020, Board of Directors meeting, the MSBA Board voted to issue an invitation to the Owner to conduct a feasibility study for this Statement of Interest to identify and study possible solutions and, through a collaborative process with the MSBA, reach a mutually agreed upon solution. The MSBA has not approved a Project and the results of this feasibility study may or may not result in a Project approved by the MSBA.

It is anticipated that the feasibility study will review the problems identified in the Statement of Interest at the John R. Pierce School.

The Feasibility Study shall include a study of all alternatives and contain all information required by 963 CMR 2.10(8) and any other applicable rules, regulations, policies, guidelines and directives of the Authority, including, but not limited to, a final design program, space summary, budget statement for educational objectives, and a proposed total project budget. The Schematic Design shall include the information required by the Authority's Feasibility Study Guidelines, including, but not limited to, a site development plan, environmental assessment, geotechnical assessment, geotechnical analysis, code analysis, utility analysis, schematic building floor plans, schematic exterior building elevations, narrative building systems descriptions, Northeast Collaborative for High Performance Schools (NE–CHPS) or US Green Building Council's LEED v4 scorecard, outline specifications, cost estimates, project schedule and proposed total project budget.

Project objectives under consideration by the Owner include:

- Analysis of potential solutions and how said solutions will operate/function with the entire site campus;
- As a component of potential addition/renovation or full renovation options, the Designer will be required to participate in the feasibility process and analysis of determining swing space [modular trailers] for said solutions;
- Identification of ADA and MAAB issues within the existing facility as part of the code upgrade and renovation options;
- Identification of community concerns that may impact study options;
- Building systems that meet and potentially exceed the energy efficiency requirements of the state and various options for life-cycle costs as they relate to the efficiency of building methods and

systems. Examine options of energy and functional efficiencies in order to maximize building performance while limiting operational expenses for the life of the building;

- Life cycle costs of operating the school as it relates to future operational budgets and for evaluation purposes as various options shall be considered;
- The Town is interested in achieving a level of energy efficiency and performance to receive 2% of additional reimbursement. That said, it is the intent for this project to exceed the level of energy efficiency required in the current Massachusetts (base) energy code by 20%, using the LEED v4 Energy/Atmosphere ("EA") "Optimize Energy Performance" credit submittal or the NE-CHPS "Energy Efficiency" credit submittal to demonstrate said performance.
- Chapter 149A - CM-at-Risk may be considered; if this method is selected, the designer's ability to provide early release bidding packages such as utility infrastructure and superstructure scopes of work for a potential fast track project;
- The designer's ability to adhere to a strict balance of design and construction budget expectations during all phases of the project;
- Identification of alternative sites; for each site identified, the designer shall include a Phase 1 Initial Site Assessment conforming to 310 CMR 40.00 and performed by a licensed site professional;
- Identification of specific milestone requirements and/or constraints of the District – e.g. Town votes, swing space, occupancy issues/concerns;
- Analysis of geotechnical and geoenvironmental conditions, including recommendations for a cost-effective soil management plan;
- Brookline's Town Meeting typically convenes in May and again in November. **However, it shall be understood that the overall Feasibility – Schematic Design Study schedule is based on a May 2022, Brookline Town Meeting.**
- Assistance with and attendance at public forums and other similar public outreach meetings presenting the project; options and preferred solution.
- Technology and FF+E consultants as provided through the Designer [or provided in-house directly by the Designer] shall:
    - Develop a list of all anticipated FF+E items and provide an estimated cost for said items; and,
    - Develop the anticipated technology system infrastructure and loose technology that would be procured as part of the preferred solution. In addition, provide an estimate for said technology scope.
- Fossil Fuel Free Design and Construction.

C. Scope of Services:

The required scope of services is set forth in the MSBA's standard Contract for Designer Services (Contract), a copy of which is attached hereto and incorporated herein by reference. If the Owner decides to proceed with the Project beyond the Schematic Design Phase and when the project delivery method is decided (Design/Bid/Build or Construction Manager at Risk), the Contract will be amended accordingly. Copies of Designer Services Contract Amendments for Design/Bid/Build and Construction Manager at Risk are also attached hereto and incorporated herein by reference. Unless specifically excluded, the Designer's Basic Services consist of the tasks described in the Contract for Designer Services as amended and this RFS including all investigative work (to the extent provided for in the Contract), feasibility study, schematic design, and, at the Owner's option, design work, preparation of construction documents, bidding period administration, construction administration, and other related work reasonably inferred in the opinion of the Owner and the Authority as being necessary to meet the project's stated scope and goals.

This RFS will be appended to and become part of the Contract for Designer Services. Any Designer selected as a result of this RFS will be required to execute the Contract for Designer Services and applicable amendment that are attached hereto.

Basic Services include, but are not limited to, verification of existing record information including building dimensions, details and general existing conditions, cost estimating, architecture, civil, sanitary, mechanical, electrical, plumbing, fire protection, structural, site planning and landscape architecture, basic environmental permitting, graphics, lighting design, acoustics, data and communication, educational consultants, any specialty consultants for sustainable design (LEED-S/NE-CHPS), laboratory, library/media center and kitchen space, code consultants, accessibility, energy evaluations, detailed cost estimates; preparation of construction documents; bidding and administering the Construction Contract Documents and other design and consulting services incidental and required to fulfill the project goals. Please refer to the Contract and amendments for a complete summary of Basic Services.

Extra and reimbursable expenses are defined in Articles 8 and 9 of the Contract in Attachment B.

D. Project Schedule:

Work under this RFS is divided into the Project Phases as listed in Article 7 of the Contract as amended and as may be augmented in this RFS. Each Project Phase will consist of one or more required submissions, and may include site visits, meetings with the Owner, Owner's Project Manager, the Authority and others, and other tasks as described.

The milestone dates listed below are estimates only. Actual dates may vary depending upon the agreed upon solution, the extent of required document revisions, the time required for regulatory approvals, and the construction contractor's performance. Such variances will not, in and of themselves, constitute a justification for an increased Fee for Basic Services.

Milestone	**Projected Date**
Designer Contract Executed	01/12/2021
MSBA Board of Directors Meeting – Preferred Schematic Report Approval	10/27/2021
MSBA Board of Directors Meeting - Project Scope and Budget Approval	04/13/2022
Feasibility Study Agreement expiration	10/15/2022
Local Project Funding Authorization	05/31/2022
Construction Start	05/01/2023
Substantial Completion of Construction	06/30/2025
Move-In	09/01/2025

E. Minimum qualifications:

Selection will be made by the MSBA Designer Selection Panel in accordance with the Authority's Designer Selection Procedures, attached hereto as Attachment E. The Respondent must certify in its cover letter that it meets the following minimum requirements. Any Respondent that fails to include such certification in its response, demonstrating that these criteria have been met, will be rejected without further consideration. To be eligible for selection, the Designer must meet **all** of the following qualifications.

1. Be a qualified Designer within the meaning of M.G.L. Chapter 7C, Section 44, employing a Massachusetts registered ***architect*** responsible for and being in control of the services to be provided pursuant to the Contract.

2. The Massachusetts registered ***architect*** responsible for and in control of the services to be provided has successfully completed the Massachusetts Certified Public Purchasing Official Program ("MCPPO") seminar "Certification for School Project Designers and Owner's Project Managers" as administered by the Office of the Inspector General of the Commonwealth of Massachusetts, and must maintain certification by completing the "Recertification for School Project Designers and Owner's Project Managers" seminar every three years thereafter. Proof of recertification or registration in the next recertification seminar for which space is available must be provided.

3. Applicants shall subcontract with MBEs and WBEs, as certified by the SDO. Applicants must include a reasonable representation of both MBE and WBE firms that meet or exceed the MBE and WBE participation goals established by the District for this Project.

F. Selection Criteria:

In evaluating proposals, the Owner and Designer Selection Panel will consider the members of the proposed design team. Identify those member(s) of the proposed design team who will be responsible for the following categories of work: (Firm's name, individual's name and professional registration or license number, as applicable, must be listed in the application for each category of work, as well as whether the firm is SDO certified as an MBE and/or WBE).

1. ***Architecture***
2. ***Educational Programming***
3. ***Civil Engineering***
4. ***Landscape Architecture***
5. ***Structural Engineering***
6. ***Fire Protection Engineering***
7. ***Plumbing Engineering***
8. ***HVAC Engineering***
9. ***Electrical/Lighting***
10. ***Data/Communications***
11. ***Environmental Permitting***
12. ***Geotechnical Engineering***
13. ***Geoenvironmental Engineering***
14. ***Hazardous Materials***
15. ***Cost Estimating***
16. ***Kitchen/Food Service Consultant***
17. ***Laboratory Consultant***
18. ***Acoustical Consultant***
19. ***Specifications Consultant***
20. ***Library/Media***
21. ***Technology Consultant/Audio Visual Consultant***
22. ***Theatrical Consultant***

23. Sustainable/Green Design/Renewable Energy Consultant
24. Code Consultant
25. Accessibility Consultant
26. Traffic Consultant
27. Furniture, Fixtures and Equipment Consultant
28. Site Surveying
29. Security Consultant
30. Hardware Consultant
31. Historical Consultant

**** N.B. –**

Applicants must address each category of work listed above in their application whether it is to be performed by in-house staff or by sub-consultant(s).

The members of the team for each of the categories of work listed above must be identified including the firm's name, individual's name and professional registration or license number, as applicable, as well as whether the firm is SDO certified as an MBE and/or WBE.

Failure to address <u>each</u> category may result in the elimination of the applicant from consideration on this project.

Applicants should not list any consultants other than those for the categories of work listed above.

The minority and women-owned business enterprises must be selected to perform services addressing the categories of work listed above or be assigned to tasks required under Basic Services as specifically set forth in the Contract for Designer Services as amended. Consultants other than those proposed for the categories of work listed above or required to perform Basic Services may not be used for purposes of meeting M/WBE requirements. Applicants are strongly encouraged to utilize multiple disciplines and firms to meet their MBE/WBE goals. Consultants to the prime Designer can team within their disciplines in order to meet the MBE/WBE goals but must state this relationship on the organizational chart (Section 6 of the application form).

The Owner and Designer Selection Panel will consider the following additional criteria in evaluating proposals:

1. Prior similar experience best illustrating current qualifications for the specific project.
2. Past performance of the firm, if any with regard to public, private, DOE-funded, and MSBA funded projects across the Commonwealth, with respect to:
    a. Quality of project design.
    b. Quality, clarity, completeness and accuracy of plans and contract documents.
    c. Ability to meet established program requirements within allotted budget.
    d. Ability to meet schedules including submission of design and contract documents, processing of shop drawings, contractor requisitions and change orders.
    e. Coordination and management of consultants.
    f. Working relationship with contractors, subcontractors, local awarding authority and MSBA staff and local officials.
3. Current workload and ability to undertake the contract based on the number and scope of projects for which the firm is currently under contract.
4. The identity and qualifications of the consultants who will work on the project.
5. The financial stability of the firm.
6. The qualifications of the personnel to be assigned to the project.
7. Geographical proximity of the firm to the project site or willingness of the firm to make site visits and attend local meetings as required by the client.

8. Additional criteria that the MSBA Designer Selection Panel considers relevant to the project.

G. Proposal requirements

Persons or firms interested in applying must meet the following requirements:

1. **Applicants must have an up-to-date Master File Brochure on file at the Massachusetts School Building Authority.**

2. Applications shall be on "Standard Designer Application Form for Municipalities and Public Agencies not within DSB Jurisdiction (Updated July 2016)" as developed by the Designer Selection Board of the Commonwealth of Massachusetts. **Applications (one original, twenty (20) hard copies, and two (2) digital copies in PDF format on separate flash drives) must be received on or before Wednesday, November 4, 2020, 2:00 PM.** Applications must be completed using no smaller than the same font size as in the application (10 font Arial Narrow). Applications should be printed double-sided and spiral bound on the left short edge, landscape orientation, in order that the pages lie and remain flat when opened. Applications should not be provided with acetate covers.

3. Applications must be accompanied by a concise cover letter that is a maximum of two pages in length. A copy of the cover letter should be attached to each copy of the application. The cover letter must include the certifications as noted in Section E of this RFS. (A copy of the MCPPO certification should be attached to the cover letter as well as any SDO letters.)

4. Applicants may supplement this proposal with graphic materials and photographs that best demonstrate design capabilities of the team proposed for this project **subject to the page limitations as set forth in the Standard Designer Application Form**. **Electronic links to supplemental information are prohibited.**

5. Proposals shall be addressed to:

   Town of Brookline
   c/o Jen Carlson
   Leftfield, LLC
   800 Hingham St
   Office 101AN
   Rockland MA 02370

6. Proposals must be clearly identified by marking the package or envelope with the following:

   Designer Qualifications for the:

   John R. Pierce School Feasibility Study
   Town of Brookline

7. All questions regarding this RFS should be addressed exclusively in writing, via email, to:

   Jen Carlson
   Project Manager
   Leftfield, LLC
   jcarlson@leftfieldpm.com

   By 5:00pm, on Monday, October 26, 2020. Phone calls will not be accepted.

H. Pre-Proposal Meeting

All interested parties should attend a briefing session at John R. Pierce School, 50 School Street, Brookline MA 02446; scheduled for October 20, 2020 at 03:30 PM. Please be advised social distancing will be required and all attendees will be required to provide their own Personal Protective Equipment (PPE). Each firm should only send one member of their team to the walkthrough, the Town of Brookline reserves the right to limit number of attendees per firm if number of attendees is above this limit. Depending on level of interest and how many people can be accommodated, there may be a second session on October 21, 2020 at 3:30 PM at the sole discretion of the Town of Brookline. Any questions received will be answered in writing, said questions and responses will be shared with all Respondents.

I. Withdrawal

Applicants may withdraw an application as long as the written request to withdraw is received by the Owner prior to the time and date of the proposal opening.

J. Public Record

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

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

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

L. Rejection of Responses, Modification of RFS

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

ATTACHMENTS:

Attachment A: Statement of Interest for the John R. Pierce School

Attachment B: Contract for Designer Services - Base Contract for Design Bid Build or CM-at-Risk Project
https://www.massschoolbuildings.org/sites/default/files/edit-contentfiles/Building_With_Us/Project_Team/Designer/DSP_Base_Contract_2020-1.pdf

Designer Services Contract Amendment for Design/Bid/Build
https://www.massschoolbuildings.org/sites/default/files/edit-

contentfiles/Documents/Contracts_Procurement_Forms/Designer/Designer_Contract_Amendment_DBB_2_25_11.pdf

Designer Services Contract Amendment for CM-at-Risk
https://www.massschoolbuildings.org/sites/default/files/edit-contentfiles/Documents/Contracts_Procurement_Forms/Designer/Designer_Contract_Amendment_CM-R_2_25_11.pdf

Attachment C: Standard Designer Application Form for Municipalities and Public Agencies not within DSB Jurisdiction (Updated July 2016)
(https://www.mass.gov/files/citiestownsapplication2016_1.doc)

Attachment D: Affidavit of Non-Collusion
Affidavit of Compliance
Affidavit of Prevailing Wage Compliance
Affidavit of Tax Compliance

Attachment E: MSBA's Designer Selection Panel's Procedures

Attachment F: John R. Pierce School Designer Procurement Schedule
John R. Pierce Floor Plans

Attachment G: MSBA enrollment certification letter dated March 21, 2020

End of Request for Designer Service

Attachment A

Statement of Interest for the John R. Pierce School

Massachusetts School Building Authority

Next Steps to Finalize Submission of your FY 2018 Statement of Interest

Thank you for submitting your FY 2018 Statement of Interest (SOI) to the MSBA electronically. **Please note, the District's submission is not yet complete**. The District is required to mail all required supporting documentation, which is described below.

VOTES: Each SOI must be submitted with the proper vote documentation. This means that (1) the required governing bodies have voted to submit each SOI, (2) the specific vote language required by the MSBA has been used, and (3) the District has submitted a record of the vote in the format required by the MSBA.

- **School Committee Vote:** Submittal of all SOIs must be approved by a vote of the School Committee.
  - For documentation of the vote of the School Committee, Minutes of the School Committee meeting at which the vote was taken must be submitted with the original signature of the Committee Chairperson. The Minutes must contain the actual text of the vote taken which should be substantially the same as the MSBA's SOI vote language.
- **Municipal Body Vote:** SOIs that are submitted by cities and towns must be approved by a vote of the appropriate municipal body (e.g., City Council/ Aldermen/Board of Selectmen) in addition to a vote of the School Committee.
  - Regional School Districts do not need to submit a vote of the municipal body.
  - For the vote of the municipal governing body, a copy of the text of the vote, which shall be substantially the same as the MSBA's SOI vote language, must be submitted with a certification of the City/Town Clerk that the vote was taken and duly recorded, and the date of the vote must be provided.

ADDITIONAL DOCUMENTATION FOR SOI PRIORITIES #1 AND #3: If a District selects Priority #1 and/or Priority #3, the District is required to submit additional documentation with its SOI.

- If a District selects Priority #1, Replacement or renovation of a building which is structurally unsound or otherwise in a condition seriously jeopardizing the health and safety of the school children, where no alternative exists, the MSBA requires a hard copy of the engineering or other report detailing the nature and severity of the problem and a written professional opinion of how imminent the system failure is likely to manifest itself. The District also must submit photographs of the problematic building area or system to the MSBA.
- If a District selects Priority #3, Prevention of a loss of accreditation, the SOI will not be considered complete unless and until a summary of the accreditation report focused on the deficiency as stated in this SOI is provided.

ADDITIONAL INFORMATION: In addition to the information required above, the District may also provide any reports, pictures, or other information they feel will give the MSBA a better understanding of the issues identified at a facility.

If you have any questions about the SOI process please contact the MSBA at 617-720-4466 or SOI@massschoolbuildings.org.

Massachusetts School Building Authority

School District Brookline

District Contact Andrew Bott TEL: (617) 730-2401

Name of School Pierce

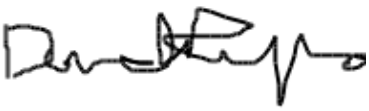
Submission Date 4/6/2018

SOI CERTIFICATION

To be eligible to submit a Statement of Interest (SOI), a district must certify the following:

- The district hereby acknowledges and agrees that this SOI is NOT an application for funding and that submission of this SOI in no way commits the MSBA to accept an application, approve an application, provide a grant or any other type of funding, or places any other obligation on the MSBA.
- The district hereby acknowledges that no district shall have any entitlement to funds from the MSBA, pursuant to M.G.L. c. 70B or the provisions of 963 CMR 2.00.
- The district hereby acknowledges that the provisions of 963 CMR 2.00 shall apply to the district and all projects for which the district is seeking and/or receiving funds for any portion of a municipally-owned or regionally-owned school facility from the MSBA pursuant to M.G.L. c. 70B.
- The district hereby acknowledges that this SOI is for one existing municipally-owned or regionally-owned public school facility in the district that is currently used or will be used to educate public PreK-12 students and that the facility for which the SOI is being submitted does not serve a solely early childhood or Pre-K student population.
- After the district completes and submits this SOI electronically, the district must mail hard copies of the required documentation described under the "Vote" tab, on or before the deadline.
- The district will schedule and hold a meeting at which the School Committee will vote, using the specific language contained in the "Vote" tab, to authorize the submission of this SOI. This is required for cities, towns, and regional school districts.
- Prior to the submission of the SOI, the district will schedule and hold a meeting at which the City Council/Board of Aldermen or Board of Selectmen/equivalent governing body will vote, using the specific language contained in the "Vote" tab, to authorize the submission of this SOI. This is not required for regional school districts.
- On or before the SOI deadline, the district will submit the minutes of the meeting at which the School Committee votes to authorize the Superintendent to submit this SOI. The District will use the MSBA's vote template and the vote will specifically reference the school and the priorities for which the SOI is being submitted. The minutes will be signed by the School Committee Chair. This is required for cities, towns, and regional school districts.
- The district has arranged with the City/Town Clerk to certify the vote of the City Council/Board of Aldermen or Board of Selectmen/equivalent governing body to authorize the Superintendent to submit this SOI. The district will use the MSBA's vote template and submit the full text of this vote, which will specifically reference the school and the priorities for which the SOI is being submitted, to the MSBA on or before the SOI deadline. This is not required for regional school districts.
- The district hereby acknowledges that this SOI submission will not be complete until the MSBA has received all of the required vote documentation in a format acceptable to the MSBA. If Priority 1 is selected, your SOI will not be considered complete unless and until you provide the required engineering (or other) report, a professional opinion regarding the problem, and photographs of the problematic area or system. If Priority 3 is selected, your SOI will not be considered complete unless and until you provide a summary of the accreditation report focused on the deficiency as stated in this SOI.

LOCAL CHIEF EXECUTIVE OFFICER/DISTRICT SUPERINTENDENT/SCHOOL COMMITTEE CHAIR
(E.g., Mayor, Town Manager, Board of Selectmen)

Chief Executive Officer *	**School Committee Chair**	**Superintendent of Schools**
Neil Wishinsky	David Pollak	Andrew Bott
Chair, Board of Selectmen		
		
(signature)	(signature)	(signature)
Date	Date	Date
4/6/2018 4:59:49 PM	4/6/2018 4:24:04 PM	4/6/2018 4:19:17 PM

* Local chief executive officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated to the chief executive office under the provisions of a local charter. Please note, in districts where the Superintendent is also the Local Chief Executive Officer, it is required for the same person to sign the Statement of Interest Certifications twice.

Massachusetts School Building Authority

School District Brookline

District Contact Andrew Bott TEL: (617) 730-2401

Name of School Pierce

Submission Date 4/6/2018

Note

The following Priorities have been included in the Statement of Interest:

1. ☐ Replacement or renovation of a building which is structurally unsound or otherwise in a condition seriously jeopardizing the health and safety of school children, where no alternative exists.
2. ☒ Elimination of existing severe overcrowding.
3. ☐ Prevention of the loss of accreditation.
4. ☒ Prevention of severe overcrowding expected to result from increased enrollments.
5. ☒ Replacement, renovation or modernization of school facility systems, such as roofs, windows, boilers, heating and ventilation systems, to increase energy conservation and decrease energy related costs in a school facility.
6. ☐ Short term enrollment growth.
7. ☒ Replacement of or addition to obsolete buildings in order to provide for a full range of programs consistent with state and approved local requirements.
8. ☐ Transition from court-ordered and approved racial balance school districts to walk-to, so-called, or other school districts.

SOI Vote Requirement

☒ I acknowledge that I have reviewed the MSBA's vote requirements for submitting an SOI which are set forth in the Vote Tab of this SOI. I understand that the MSBA requires votes from specific parties/governing bodies, in a specific format using the language provided by the MSBA. Further, I understand that the MSBA requires certified and signed vote documentation to be submitted with the SOI. I acknowledge that my SOI will not be considered complete and, therefore, will not be reviewed by the MSBA unless the required accompanying vote documentation is submitted to the satisfaction of the MSBA.

Potential Project Scope: Renovation/ Addition

Is this SOI the District Priority SOI? NO

School name of the District Priority SOI: 2018 Edward Devotion

Is this part of a larger facilities plan? YES

If "YES", please provide the following:

Facilities Plan Date: 2/11/2009

Planning Firm: MGT America

Please provide a brief summary of the plan including its goals and how the school facility that is the subject of this SOI fits into that plan:

The Public Schools of Brookline utilize eight buildings and a three-building high school campus, all owned by the Town of Brookline, to serve 7,876 students from pre-kindergarten through grade 12 in FY18. In addition to buildings owned by the Town, the district also leases space for pre-kindergarten classrooms and for overflow classroom and gymnasium space for one of our schools due to overcrowding. The school district's facilities master plan includes a comprehensive assessment of all existing facilities, consideration of district-wide educational programs (both general and special education), a demographic analysis, and a redistricting consideration/recommendation. Proposals within this plan include recommendations for improvements at selected facilities (for example, at Runkle, Devotion, Heath and Pierce Schools). The master plan also includes both short and long-term options and is consistent with local design traditions while meeting 21st century programmatic and educational needs. The plan includes a projected schedule for implementation consistent with capital budget projections/options. The Committee on Brookline School Population and Capital Exploration (B-SPACE), authorized and created by the Brookline School Committee in the spring of 2013, made recommendations to the School Committee to 1) maintain the present K-8 and 9-12 educational program configuration and 2) build capacity through a strategy of "Expand in Place." The Brookline School Committee voted in September 2013 to recommend that "Expand in Place" actions should include a renovation/expansion to the Devotion School to create a 5-section per grade structure and a renovation/expansion to the Driscoll School to create a 4-section per grade class structure. With the much anticipated new five (5) section Devotion school coming online in 2018, the current population overcrowding in the north Brookline Schools, and the antiquated open floor plan design of much of the Pierce School, Pierce is badly in need of a renovation and addition.

Please provide the current student to teacher ratios at the school facility that is the subject of this SOI: 11 students per teacher

Please provide the originally planned student to teacher ratios at the school facility that is the subject of this SOI: 10 students per teacher

Does the District have a Master Educational Plan that includes facility goals for this building and all school buildings in District? YES

If "YES", please provide the author and date of the District's Master Educational Plan.

Upon request, we can email a PDF of the Facilities Master Plan created by MGT America, Inc in 2009.

Is there overcrowding at the school facility? YES

If "YES", please describe in detail, including specific examples of the overcrowding.

The Pierce student population does not fit in the existing buildings, known as Pierce Primary (1970) and the Pierce Historical Building (1854). The districts rents 4 classrooms and a Special Education space from an abutting private property and rents space to send the Grade 8 students down the street for physical education class at the local Teen Center. The Pierce enrollment in FY05 was 548 students and has grown to 859 students in FY18. This 311 student increase is nearly a 57% increase in population for the school facilities.

Has the district had any recent teacher layoffs or reductions? NO

If "YES", how many teaching positions were affected? 0
At which schools in the district?
Please describe the types of teacher positions that were eliminated (e.g., art, math, science, physical education, etc.).

Has the district had any recent staff layoffs or reductions? NO

If "YES", how many staff positions were affected? 0
At which schools in the district?
Please describe the types of staff positions that were eliminated (e.g., guidance, administrative, maintenance, etc.).

Please provide a description of the program modifications as a consequence of these teacher and/or staff

reductions, including the impact on district class sizes and curriculum.

"Does Not Apply"

Please provide a description of the local budget approval process for a potential capital project with theMSBA. Include schedule information (i.e. Town Meeting dates, city council/town council meetings dates, regional school committee meeting dates). Provide, if applicable, the District's most recent budget approval process that resulted in a budget reduction and the impact of the reduction to the school district (staff reductions, discontinued programs, consolidation of facilities).

FY2018 Budget Development Process Calendar September 2016 Finance Subcommittee Meeting: Review and Approve Budget Development Calendar September 2016 Presentation of Budget Development Calendar (1st reading) October 2016 School Committee vote on Budget Development Calendar (2nd reading) November 2016nance Subcommittee vote: Budget Guidelines Final Draft November 2016 Presentation of Budget Guidelines and Directives to School Committee (1st reading) December 2016 School Committee vote on Budget Guidelines/Directives (2nd reading) December 2016 - February 2014 Ongoing review of budget drafts January 2017 Leadership Team Options Review February 2017 Presentation of Superintendent's Budget Message to the School Committee. On or before February 15, 2017, submission to the Board of Selectmen and Advisory Committee. February 2017 Submission of detailed Superintendent's Budget to the School Committee, with copies to the Board of Selectmen and Advisory committee. March 2017 Budget Presentation to the School Committee March 2017 Public Hearing on the budget. April 2017 School Committe vote on the budget April - May 2017 Advisory Committee review and comment May 2017 Spring Town Meeting - Vote on Budget May - September 2017 Ongoing discussion of long-term budget priorities. May - September 2017 In consultation with the Capital Projects Subcommittee, develop a priority list for capital; review CIP proposals for FY 2018-2023 Town CIP

General Description

BRIEF BUILDING HISTORY: Please provide a detailed description of when the original building was built, and the date(s) and project scopes(s) of any additions and renovations (maximum of 5000 characters).

Located in the heart of Brookline Village, the Pierce School is named after John Pierce, noted pastor of the Walnut Street church during the mid 19th century. The original four-classroom Pierce School was built in 1854. This original structure is still used as part of Pierce's historic building and remains the oldest school building in Brookline and one of the oldest still in use in Massachusetts. In 1904, an addition was built onto the original building, expanding the school by eight classrooms and creating what is now known as the Pierce Historic Building. These 12 classrooms continue to serve the school today as early elementary and middle school classrooms.

In 1974 the Town of Brookline finished construction of the Pierce Main Building. Considered a model example of the open-space design popular in the 1970s it consists of three wings or units. The building is centered around a two-story library or resource center, which encourages collaborative teaching and which has proven to be an effective learning environment for an innovative and challenging academic program. However the design, material used, space, and layout have proved to be challenging acoustically, to maintain, and in terms of accessibility.

The Historic Building is still occupied today and has a long history of being maintained with the latest major projects being brick repointing in 2016, roof replacement and repairs in (EPDM) in 2002 and the slate shingles in 2014. In the early 1990s, the Main Building roof had many leaks and repair and replacement of EPDM roofing was completed in 1993. This building has been maintained with minor repairs being completed as needed, but the majority of systems and fixtures are from the original 1974 structure. The 1970s design was opened well before the current educational program delivery and ADA laws and regulations were in place.

TOTAL BUILDING SQUARE FOOTAGE: Please provide the original building square footage PLUS the square footage of any additions.

198000

SITE DESCRIPTION: Please provide a detailed description of the current site and any known existing conditions that would impact a potential project at the site. Please note whether there are any other buildings, public or private, that share this current site with the school facility. What is the use(s) of this building(s)? (maximum of 5000 characters).

Per the Town Assessor's map, both buildings, Pierce Historical (1854) and Pierce Main Building (1974), are on the same parcel of land totaling 138,055 SF. The playground, owned and operated by the Town of Brookline Parks & Open Space division, is located across the street and students access the playground via a footbridge. The footbridge is only accessible only by stairs so it does not meet current ADA standards. The playground was renovated in 2016 and consists of 67,665 SF of dedicated (baseball field, basketball court, playground areas) and passive (natural grass and trees) play space.

ADDRESS OF FACILITY: Please type address, including number, street name and city/town, if available, or describe the location of the site. (Maximum of 300 characters)

Main Building - 50 School Street, Brookline MA
Historical Building - 32 Pierce Street, Brookline, MA

BUILDING ENVELOPE: Please provide a detailed description of the building envelope, types of construction materials used, and any known problems or existing conditions (maximum of 5000 characters).

The envelope of both owned buildings is a brick and masonry exterior. The roof on the main building is Carlisle and the historical building has combination of Carlisle (EPDM) and slate shingles. The windows are single pane steel. Doors are steel, and some are steel and glass.

Has there been a Major Repair or Replacement of the EXTERIOR WALLS? YES
Year of Last Major Repair or Replacement:(YYYY) 2016
Description of Last Major Repair or Replacement:
100% brick repointing on the Pierce Historic Building

Roof Section A
Is the District seeking replacement of the Roof Section? YES
Area of Section (square feet) 52230
Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)
The type of roof is EPDM on the main building and a combonation of EPDM and slate shingles the Historical building.
Age of Section (number of years since the Roof was installed or replaced) 25
Description of repairs, if applicable, in the last three years. Include year of repair:
The roof on the main building is 25 years old. The slate roof on the Historical Building was replaced in 2014 and the EPDM roof 2002.

Window Section A
Is the District seeking replacement of the Windows Section? YES
Windows in Section (count) 726
Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))
Single pane, many in the main building are not operable by design.
Age of Section (number of years since the Windows were installed or replaced) 44
Description of repairs, if applicable, in the last three years. Include year of repair:
Most original at the main building, some repairs made since 1974.

The Pierce Historical building had all 104 windows replaced in 2012.

MECHANICAL and ELECTRICAL SYSTEMS: Please provide a detailed description of the current mechanical and electrical systems and any known problems or existing conditions (maximum of 5000 characters).

The cast iron HB Smith boilers were rebuilt and changed over from steam to hot water, and new burners were installed, in about 1998. Additional jockey condensing boilers were added about 4 years ago. The Director of Public Buildings for the Town of Brookline has assessed the system and deems it to be in good shape for its age, however, the system would need significant upgrades or a full replacement in the Pierce were built and designed to hold 5 sections per grade.

The entire HVAC system serving both schools, including controls, was replaced entirely in 2004. AC was added to the A wing as well. This was a $2million project.

In the Pierce Main building, the entire electrical system (panels, disconnects) were all replaced and new service was installed. New transformer was installed and the generator was replaced. All aforementioned work was done in 2014. The main power for the Pierce Historical building comes from the Pierce Main building; the electrical panels at the primary were updated about 9 years ago.

The plumbing system and bathrooms are in need of an upgrade to meet the needs of the student population and current ADA codes.

Boiler Section 1
Is the District seeking replacement of the Boiler? YES

Is there more than one boiler room in the School? YES
What percentage of the School is heated by the Boiler? 100
Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)
Dual fuel system predominantly uses natural gas, oil back up
Age of Boiler (number of years since the Boiler was installed or replaced) 20
Description of repairs, if applicable, in the last three years. Include year of repair:
Original (1974) cast Iron HB Smith Boilers were rebuilt in 1998 and the system was changed from steam to hot water. Additional condensing boiler added for efficiency purposes.

Has there been a Major Repair or Replacement of the HVAC SYSTEM? NO
Year of Last Major Repair or Replacement:(YYYY) 2004
Description of Last Major Repair or Replacement:
Both buildings received an entirely new HVAC system including controls. Air conditioning was added to the A wing of the 1974 building. This was a $2 million dollar project.

Has there been a Major Repair or Replacement of the ELECTRICAL SERVICES AND DISTRIBUTION SYSTEM? NO
Year of Last Major Repair or Replacement:(YYYY) 2014
Description of Last Major Repair or Replacement:
New panels, new disconnects, new service and new transformer installed and the emergency generator was replaced.

BUILDING INTERIOR: Please provide a detailed description of the current building interior including a description of the flooring systems, finishes, ceilings, lighting, etc. (maximum of 5000 characters).

The main building interior is a combination of brick and concrete block masonry work. The flooring is largely carpet over the concrete, with some areas having other flooring systems (VCT, rubber flooring, and wood gym floor.) There is some wood in the ceiling and, by design, exposed concrete and HVAC pipes as well.

PROGRAMS and OPERATIONS: Please provide a detailed description of the current grade structure and programs offered and indicate whether there are program components that cannot be offered due to facility constraints, operational constraints, etc. (maximum of 5000 characters).

The John Pierce School is a neighborhood K - 8 elementary school located in Brookline Village that serves 859 students. Community, equity, and achievement are the guiding principles that give Pierce its unique, close-knit and cooperative spirit.

Diversity is a hallmark of the Pierce School community with students from more than 40 different countries, 32% of students having a language other than English as their first language, 11% of learners receiving special education services, and 34.5% of students considered to be high needs. 24 different languages are spoken by Pierce students and there are 86 students enrolled in Pierce's Native Language Support Program for Mandarin speakers. Like all Brookline schools, Pierce participates in the Metropolitan Council for Educational Opportunity (METCO) program.

Pierce provides a full range of program offerings K through 8th grade including core academic programming for all students in Math, English Language Arts, Science, Social Studies, and World Language.

In addition to core academic programming, all students take music classes twice each week, gym class twice each week and visual arts once each week. Pierce offers a full range of special education services for students as needed. Pierce serves special education students within the regular education classroom through our inclusion model. When needed, our teachers provide additional adult support within the classroom and in small intervention groups outside of the regular education classroom.

Pierce also provides robust after school and extended day activities five days a week organized by teachers, our PTO and

through a partnership with the Pierce Extended Day Program. Typically the building is in use throughout the afternoon and into the evening.

The overcrowding and limitations of the physical plant significantly impact the educational program of the school and the schedule of classes and services to students. The learning day has to be scheduled based on traffic patterns in the school because hallways and passageways are insufficient to handle the student body. Students need to take core academic classes, physical education and health classes in outlying buildings that are rented from local businesses. The time of day classes need to be scheduled, the size of classes, and transitions are all negatively affected by the student enrollment which has grown by 58% in just over 10 years. Because the building was created before special education and ADA laws were put into effect, areas in the building are inaccessible to certain students.

EDUCATIONAL SPACES: Please provide a detailed description of the Educational Spaces within the facility, a description of the number and sizes (in square feet) of classrooms, a description of science rooms/labs including ages and most recent updates, a description of the cafeteria, gym and/or auditorium and a description of the media center/library (maximum of 5000 characters).

The Pierce School operates 41 sections of students K-8. 20 of those 41 classrooms are under 850 square feet. Another 12 classrooms are an open space design, and 4 classrooms share two oversized rooms. See the Pierce School Space Summary that will be mailed on 4/6/18 as part of the supporting materials.

Non-traditional spaces are being used as classrooms and small group instruction areas. The 12 classes that are open space design do not have four walls, which impacts the educational program and learning environment. No kindergarten classrooms meet current MSBA standards. One of the two science labs is woefully undersized at 777 square feet, limiting class size and activities. The majority of bathrooms in the 1974 building are not ADA compliant. The nurse’s office is undersized and has an inadequate bathroom resulting in little to no privacy for those students in need of medical treatment.

The cafeteria needs to have five lunch periods because it is short 259 seats needed to serve the student body in 3 lunch periods. There is not adequate space for physical education classes because the gym is about 3,975 SF and should be nearly 6,000 SF for a K-8 building of this size, per MSBA guidelines. We would like to stop renting gym and classroom space and have all educational programs and services delivered on school property.

CAPACITY and UTILIZATION: Please provide the original design capacity and a detailed description of the current capacity and utilization of the school facility. If the school is overcrowded, please describe steps taken by the administration to address capacity issues. Please also describe in detail any spaces that have been converted from their intended use to be used as classroom space (maximum of 5000 characters).

The school spans three buildings - the Historic Building, the Main Building, and a rented space in a nearby privately owned building. The Main building appears to have been designed for 3 sections per grade, however with the open space, design it is not clear if kindergarten was intended to be included or not. In round numbers the space was likely intended for 525 students to 585 students. At 859 students, Pierce is far beyond its planned capacity, as evidenced by the need to rent classroom and gym space in FY18. The rented spaces serve as four middle school classrooms and a special education small group learning space. The school is also renting space at the local non-profit Brookline Teen Center for 8th grade physical education classes.

MAINTENANCE and CAPITAL REPAIR: Please provide a detailed description of the district’s current maintenance practices, its capital repair program, and the maintenance program in place at the facility that is the subject of this SOI. Please include specific examples of capital repair projects undertaken in the past, including any override or debt exclusion votes that were necessary (maximum of 5000 characters).

Repairs and maintenance in all Brookline schools, including the Pierce School, is managed under the direction of the Director of Public Buildings for the Town of Brookline. In FY18 the maintenance and repair budget for school buildings is $1,367,855 including testing, preventative maintenance, ordinary maintenance and repairs with specific line items per

building. Capital repairs are based on a six-year cycle. In the Main Building, the majority of systems and fixtures are from the original 1974 structure. Past maintenance projects have included new roofing, windows, burners, new fire alarm systems, modification to sprinkler systems, IT infrastructure, temperature control systems, cafeteria and ADA improvements, as well as electrical upgrades.

Priority 2

Question 1: Please describe the existing conditions that constitute severe overcrowding.

The Pierce educational program does not fit in the existing Pierce buildings, so the District rents five classrooms from a commercial property owner and additional space for physical education and health education classes from the private, local, non-profit Brookline Teen Center. All rental classroom space is below current MSBA size standards.

Since 2005, the district has experienced a 41% increase in K-8 enrollment. The K-8 enrollment for 2004-05 was 3,887 students and for 2017-18 it is 5,482 students. The Pierce School is above the district average for that time period" in 2004-05 it had 548 students and for 2017-18 it has 859 students, a 311 student, or 56.8%, increase in enrollment. Non-traditional spaces are being used as classrooms. 20 of the 41 classrooms are under 850 square feet and limit class size and activities offered. Another twelve of the 41 classrooms take place in the open floor design and do not have four walls. No kindergarten classrooms meet current MSBA standards. One of the two science labs is woefully undersized at 777 square feet, limiting class size and activities.

The cafeteria currently serves five lunches on a rolling basis beginning at 10:30 a.m. To meet state guidelines of 3 lunch periods per day, the cafeteria would have to be expanded by 259 seats and the food preparation and serving areas would have to be expanded, as well. The nurse's office is undersized, not ADA compliant, and has an inadequate bathroom resulting in little to no privacy for those students in need of medical treatment.
There is not adequate space for physical education class as the gym is about 3,975 SF and should be about 6,000 SF for a K-8 building of this size. The majority of bathrooms in the 1974 building are not ADA compliant.

Priority 2

Question 2: Please describe the measures the School District has taken to mitigate the problem(s) described above.

In an effort to keep class sizes in the range of the district's giudelines, we have rented the third floor of a nearby commercial property and had the landlord create four (4) additional classroom spaces for middle school regular education and one (1) special education classroom. In order to schedule and meet the requirements of physical education in the undersized facilities available, gym space began being rented from the local, non-profit Teen Center in FY18. The rental gym is off campus and results in lost learning time during transition to and from campus.

The open space design of Pierce School was intended to provide plenty of space between class sections. However, as the population has grown walls were added to spaces in "C Wing" to meet small group and special education needs. Over time, furniture has been used to create makeshift walls to create a subtle boundary for classroom space. These makeshift and temporary boundaries do not limit the sound that resonates throughout “Unit A” the largest open layout area that houses 12 classrooms and the library media center thus making hearing and teaching challenging.

Priority 2

Question 3: Please provide a detailed explanation of the impact of the problem described in this priority on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.

In addition to the need to rent classroom and gym space, the open space design of Pierce was intended to provide plenty of space between class sections to diffuse background noise from detracting from the delivery of the curriculum. However, as the population has grown, and as class size and the number of sections have increased, that buffer space between classrooms has decreased. Overcrowding the open space layout has created unique challenges that affect learning. Acoustically it is difficult for teachers' voices to project and for students to hear each other and the teacher. Classes easily distract one another as they border one another with no permanent walls and as they pass by in close proximity to each other.
The building was designed before ADA laws and codes and special education requirements existed, therefore some of the areas of the physical plant are difficult to access and there are makeshift areas to provide specialized services. The, nursing and health care space meet neither current ADA nor size standards for the existing student population.

Please also provide the following:

Cafeteria Seating Capacity: 200

Number of lunch seatings per day: 5

Are modular units currently present on-site and being used for classroom space?: NO

If "YES", indicate the number of years that the modular units have been in use:

Number of Modular Units:

Classroom count in Modular Units:

Seating Capacity of Modular classrooms:

What was the original anticipated useful life in years of the modular units when they were installed?:

Have non-traditional classroom spaces been converted to be used for classroom space?: YES

If "YES", indicate the number of non-traditional classroom spaces in use: 6

Please provide a description of each non-traditional classroom space, its originally-intended use and how it is currently used (maximum of 1000 characters).:

The Multipurpose room was rehabbed and upgraded with retractable bleachers to can accommodate a modified physical education class and assemblies. The District rents the third floor of a commercial building that was converted into four regular education classrooms and one special education classroom.

Please explain any recent changes to the district's educational program, school assignment polices, grade configurations, class size policy, school closures, changes in administrative space, or any other changes that impact the district's enrollment capacity (maximum of 5000 characters).:

The Devotion School is currently undergoing a major renovation and expansion. During the period of construction, Devotion School students are housed in temporary buildings. The temporary building for students in grades K-4 has classrooms that are smaller than a typical classroom. Therefore, during the construction phase we have had to keep the class size numbers at Devotion low resulting in students (who reside in the Pierce/Devotion buffer) being assigned to the Pierce School. Enrollment projections, however, show that while the re-opening of Devotion could provide some temporary relief to Pierce, it will be limited as Pierce enrollment increases and overcrowded conditions are projected to worsen in the upcoming years.

What are the district's current class size policies (maximum of 500 characters)?:

There is no formal class size policy. The target class size is a maximum of 22 students for grades K-2 and 25 students for

grades 4-8. For practical and safety reasons, class sizes may kept under 20 students in rooms significantly below the MSBA standard class size of 850 - 900 square feet.

Priority 4

Question 1: Please describe the conditions within the community and School District that are expected to result in increased enrollment.

The Public Schools of Brookline have been experiencing K-8 enrollment increases for the past 13 years. During this period, the total K-8 enrollment had grown by 1,595 students, or 41%. Based upon available birth data and other demographic trends, we expect this growth pattern to continue for at least the next four years, resulting in total enrollment growth of approximately 2,007 students, or 51.6% during the 17 year period from FY05 through FY22.

The high cost and limited availability of housing in Brookline has not significantly slowed enrollment growth over the last 12 years. Based on the information available, this growth is expected to continue for the next four years with K-8 district enrollment essentially leveling off between 5,800-5,900 students projected FY23-FY28.

In FY05, Pierce had 548 students enrollment. In FY18, Pierce had 859 students enrolled. That increase of 311 students, or 56.8%, is above the district average. The enrollment is projected to increase until FY22 with 958 students, and then hover around 940 students from FY23 through FY27.

The impact of the district's enrollment growth during the last 13 years has increased demand on our eight K-8 schools buildings significantly. In 2005, we operated with 3,886 students in 196 homerooms. In FY18, we operate with 5,482 students in 268 homerooms. In FY2022, we project that we will need 277 homerooms for our projected K-8 enrollment of 5,894 students. This is an increase of 81 homerooms between 2005 and 2022.

Priority 4

Question 2: Please describe the measures the School District has taken or is planning to take in the immediate future to mitigate the problem(s) described above.

The district has taken the following measures to alleviate the enrollment growth problem:

- Rental of private property for commercial use, converted to classroom use.
- Rental of local private non-profit gym space for physical education class.
- The renovation and expansion of the Devotion School scheduled to open for the 2018-19 school year.
- The use of buffer zones, expanded in 2012, to better manage enrollment growth and balance enrollment across schools.
- The use of the School Committee's Expand in Place program to add more than 70 homeroom sections within our existing buildings.
- Move administrative offices out of school buildings into rental space to maximize the number of classrooms and learning spaces within our schools.
- Building new classrooms and/or expansions and renovations at Heath, Runkle, and Lawrence Schools.

Through these efforts, the Public Schools of Brookline has created an additional 74 homeroom sections within our K-8 building since 2005. Essentially we have added the equivalent of two 4-section schools into our existing schools since 2005 by dividing classrooms; building substandard classrooms out of hallways, libraries, common spaces, and locker rooms; moving early education programs out of schools and into rental spaces; adding modulars; creating additions to schools; undertaking school renovations; and renting classroom space.

Despite all of these measures, the Pierce School remains our largest and most overcrowded school. At this point, even though we anticipate further enrollment growth in our elementary schools, our Expand in Place efforts have reached their end as both our school operations and Town Building Department have utilized every available space to create classrooms and learning spaces.

Priority 4

Question 3: Please provide a detailed explanation of the impact of the problem described in this priority on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.

Crowding from over-enrollment and the design and condition of the physical plant are the two major challenges impacting the educational program of the Pierce School.

The rapid and unceasing growth in the number of students has forced the school to spread its campus across four buildings, two of which are rental space. Both the crowding within the school and the time it takes for young children to travel between buildings negatively impacts time on learning. Because hallways and passageways are insufficient to accommodate the number of students in the school, when Pierce creates its schedule, it must first account for traffic patterns and figuring out which students will move where instead of creating an educational program that prioritizes high quality learning.

Particularly for middle grade students and the youngest students, travel between buildings increases transition time. The gymnasiums are not sufficient to schedule all students for the state required time on learning for physical education. As a result, Pierce has rented space in the local Teen Center resulting in transition times of 20 minutes or more to travel back and forth for physical education and health. In addition, having to use this rental space negatively impacts the scheduling of core academics for our middle grades students forcing them to have all core academic subjects back to back with no breaks three days per week.

Increased enrollment has forced the school to put more classes and students into the “Unit A” section of the Main Building (with the fully open space design). The increased numbers of students and classrooms in Unit A have created more noise and more activity making it difficult for any students with attention challenges or hearing impairments to fully gain access to the curriculum. At this point, some parents are refusing to have their children be in a class that is in Unit A.

The physical plant also negatively impacts the educational program. As a result of the building being built prior to ADA and federal and state special education laws, areas of the building are not accessible to all students. The “Unit C” area which has 2nd grade classrooms is only accessible by stairs. Most bathrooms are not ADA accessible. In addition the nurse and healthcare office is undersized by MSBA standards for a school the size of Pierce, forcing students who become ill to get inadequate service and care.

With a cafeteria that was built to accommodate 200 students, Pierce must schedule 5 lunches beginning at 10:45 and going until just before 1:00 p.m. State guidelines recommend two or three lunches in the middle of the day because the DESE understands that to have lunch too early or too late negatively affects student attention, focus, behavior and learning.

Please also provide the following:

Cafeteria Seating Capacity:	200
Number of lunch seatings per day:	5

Are modular units currently present on-site and being used for classroom space?: NO

If "YES", indicate the number of years that the modular units have been in use:

Number of Modular Units:

Classroom count in Modular Units:

Seating Capacity of Modular classrooms:

What was the original anticipated useful life in years of the modular units when they were installed?:

Have non-traditional classroom spaces been converted to be used for classroom space?: YES

If "YES", indicate the number of non-traditional classroom spaces in use: 1

Please provide a description of each non-traditional classroom space, its originally-intended use and how it is currently used (maximum of 1000 characters).:

The Multipurpose room was rehabbed and upgraded with retractable bleachers to can accommodate a modified physical education class and assemblies. The District rents the third floor of a commercial building that was converted into four regular education classrooms and one special education classroom.

Please explain any recent changes to the district's educational program, school assignment polices, grade configurations, class size policy, school closures, changes in administrative space, or any other changes that impact the district's enrollment capacity (maximum of 5000 characters). :

The Devotion School is currently undergoing a major renovation and expansion. During the period of construction, Devotion School students are housed in temporary buildings. The temporary building for students in grades K-4 has classrooms that are smaller than a typical classroom. Therefore, during the construction phase we have had to keep the class size numbers at Devotion low resulting in students (who reside in the Pierce/Devotion buffer) being assigned to the Pierce School. Enrollment projections, however, show that while the re-opening of Devotion could provide some relief to Pierce, it will be limited as Pierce enrollment increases and overcrowded conditions are projected to worsen in the upcoming years.

What are the district's current class size policies (maximum of 500 characters)?:

There is no formal class size policy. The target class size is a maximum of 22 students for grades K-2, and 25 students for grades 4-8. In FY18, class sizes at Pierce range from 18 to 23 students. For practical and safety reasons, class sizes may kept under 20 students in rooms significantly below the MSBA standard class size of 850 - 900 square feet.

Priority 5

Question 1: Please provide a detailed description of the issues surrounding the school facility systems (e.g., roof, windows, boilers, HVAC system, and/or electrical service and distribution system) that you are indicating require repair or replacement. Please describe all deficiencies to all systems in sufficient detail to explain the problem.

The Pierce School (1974) and Pierce Primary (1854) have both been maintained, but need to be fully upgraded. The plan would include a new addition to make the building a 5-section school and include renovations to the existing electrical, plumbing, alarm, roof, flooring, window, and door systems and updated compliance with ADA codes. The Education Specifications would be very similar to that of the Devotion School, with the addition of three pre-kindergarten classes at the newly expanded and renovated Pierce School.

Priority 5

Question 2: Please describe the measures the district has already taken to mitigate the problem/issues described in Question 1 above.

The Town of Brookline has continuously worked, through upgrades and preventative maintenance, to optimize energy conservation measures that reduce energy consumption within all schools. Actions taken at Pierce School properties include:

- Installation of motion sensors on light switches
- Preventative maintenance on motors, switches
- Univent preventative maintenance twice annually
- Univent modifications for better control and air quality
- Dual burner oil/gas conversion
- Lighting fixture replacement program
- Light ballasts replacement program
- Energy efficient bulb replacement
- Pump maintenance
- Air compressor maintenance
- Temperature control service
- A/C maintenance
- Window shade service and glass repair service
- Replacement of oil tank
- Brick repointing at Pierce Historical (2016)

Each action, some of which are individually small, adds value to our overall goal of continuously reducing energy consumption.

Priority 5

Question 3: Please provide a detailed explanation of the impact of the problem/issues described in Question 1 above on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.

The 20 undersized classrooms, by current MSBA standards, impact the number of students assigned to those spaces and, in some cases, limit the activities that can be provided. The number of ADA obstacles in the building (stairs only access, few and far distance between ADA compliant bathrooms) impact student and staff assignments, as well as the overall planning and inclusiveness for a modern building. In addition, the original construction materials make the bathrooms difficult to clean and unhealthy to use.

Priority 5

Question 4: Please describe how addressing the school facility systems you identified in Question 1 above will extend the useful life of the facility that is the subject of this SOI and how it will improve your district's educational program.

A full renovation and expansion of the Pierce School will extend the useful life of the school, provide relief to all nearby schools that are also experiencing overcrowding, and make the Pierce facility comparable to the new Devotion and other schools that have been renovated in the past 10 years such as the Runkle School. Improving the mechanical systems, as well as the entire physical plant, would ensure that all students have full access to the educational program and that the school could stop making choices between passing time and core academics, or physical education and rental space. Students who need additional academic or emotional support would get services in learning spaces that are compliant with MSBA guidelines instead of being forced to learn in hallways, common areas, and substandard spaces. Of great importance, improving the systems through a renovation and expansion would bring the building into compliance with all ADA and special education accessibility laws and regulations.

Please also provide the following:

Have the systems identified above been examined by an engineer or other trained building professional?:
YES

If "YES", please provide the name of the individual and his/her professional affiliation (maximum of 250 characters):

Charlie Simmons, Director of Public Buildings for the Town of Brookline, Certified Building Official, BS in Mechanical Engineering

The date of the inspection: 9/1/2017

A summary of the findings (maximum of 5000 characters):

The HVAC, mechanical and electrical systems recently replaced and are in good shape for the current open space design. The systems would need to be replaced or added to if the building were to be expanded to hold 45-48 sections of students with traditional classroom walls.

Priority 7

Question 1: Please provide a detailed description of the programs not currently available due to facility constraints, the state or local requirement for such programs, and the facility limitations precluding the programs from being offered.

Nearly all of the classrooms in the Pierce Historical (1854) building are undersized according to current MSBA standards. In "Unit A" of the Main Building (1974), twelve of the classroom sections occur in an open floor design space without four walls. The background noise and easily observable activity of other classes results in distractions during teaching and learning. Due to the need to provide buffering of the growing student population in the district, especially the growing Lawrence, Driscoll and Lincoln populations, the Pierce school needs to be expanded to allow it to accommodate five (5) sections of students in each grade K-8. The renovated and expanded Devotion School is due to open in September 2018; yet it will be faced with the same overcrowding issues if more classrooms are not built in other school zones in town.

The Pierce gymnasium is undersized for the population. Rental of gym space for physical education and health classes began in FY18. The cafeteria is undersized, requiring five lunches, and impacts scheduling at the school day. The program for a 5-section school at Pierce would be very similar to that of the education specifications of the new Devotion School, scheduled to open for the 2018-19 school year.

Priority 7

Question 2: Please describe the measures the district has taken or is planning to take in the immediate future to mitigate the problem(s) described above.

The district is planning to open the newly renovated and expanded Devotion School for the 2018-19 school year with some seating capacity to be partially filled with students residing in buffer zones. The Pierce School Renovation/Addition SOI would then become the top priority and would add classrooms and relieve enrollment pressure on the schools in north Brookline.

The district has been utilizing an Expand-in-Place approach to address enrollment growth by creating additional classroom spaces within our existing buildings. Using this approach, we have added more than 70 classrooms into our existing preK- 8 buildings. The District moved pre-K classrooms out of most of our elementary school into rental properties to create more classroom space for the K-8 program. The District has also converted a variety of smaller spaces previously not used for instruction into small instructional areas. We are leasing spaces both for Pre-K and for K-8 and have moved administrative offices out of school buildings and into short term leased space.

During this time, Brookline has also completed renovation projects at the Heath and Runkle Schools, built classrooms at the Lawrence School, added modular classrooms at Baker School and is rebuilding and expanding Devotion School (anticipated completion in August 2018). We are also renting four classrooms and gym space for the Pierce School. All together our expand in place efforts have added more than the equivalent of two 4-section schools within our existing buildings. However core spaces have not had similar adjustments. At this point both classroom spaces and core spaces are being used beyond capacity.

To manage the unprecedented enrollment and the impact it was having on school assignment, in July 2012 the District expanded the student assignment buffer zones which allows the Superintendent more flexibility in student school assignments. Unfortunately, given that all K-8 schools in Brookline are already at or over capacity, the buffer flexibility has provided only marginal relief to overcrowding.

Within the Pierce building specifically, larger classrooms have been subdivided into smaller classrooms. The cafeteria now has five (5) seatings. Rental spaces are being used for core academic classrooms, special education instruction, and physical education for middle grades students. Offices have been converted to classrooms and storage rooms made into offices.

Priority 7

Question 3: Please provide a detailed explanation of the impact of the problem described in this priority on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.

Non-traditional spaces are being used as classrooms and small group instruction areas. 20 of the 41 classrooms are under 850 square feet and limit class size and activities offered. Another twelve of the 41 classrooms take place in the open floor design and do not have four walls impacting the educational program and learning environment. No kindergarten classrooms meet current MSBA standards. One of the two science labs is woefully undersized at 777 SF, limiting class size and activities. The majority of bathrooms in the 1974 building are not ADA compliant. The nurse's office is undersized, not ADA compliant, and has an inadequate bathroom resulting in little to no privacy for those students in need of medical treatment.

The cafeteria needs to have five lunch periods due to being short 259 seats to fit in 3 lunch periods. There is not adequate space for PE class, the gym is about 3,975 SF and should be about 6,000 SF for a K-8 building of this size per MSBA guidelines. We would like to stop renting gym and classroom space and have all of the programs and services regularly delivered during the school day occur on school property.

The campus is now spread over four buildings increasing transition time and reducing time on learning for students in all grades.

REQUIRED FORM OF VOTE TO SUBMIT AN SOI

REQUIRED VOTES

If the SOI is being submitted by a City or Town, a vote in the following form is required from both the City Council/Board of Aldermen **OR** the Board of Selectmen/equivalent governing body **AND** the School Committee.

If the SOI is being submitted by a regional school district, a vote in the following form is required from the Regional School Committee only. FORM OF VOTE Please use the text below to prepare your City's, Town's or District's required vote(s).

FORM OF VOTE

Please use the text below to prepare your City's, Town's or District's required vote(s).

Resolved: Having convened in an open meeting on _____, prior to the closing date, the _____*[City Council/Board of Aldermen, Board of Selectmen/Equivalent Governing Body/School Committee]* of _____*[City/Town]*, in accordance with its charter, by-laws, and ordinances, has voted to authorize the Superintendent to submit to the Massachusetts School Building Authority the Statement of Interest dated _____ for the _____*[Name of School]* located at _____*[Address]* which describes and explains the following deficiencies and the priority category(s) for which an application may be submitted to the Massachusetts School Building Authority in the future

_____

_____

_____

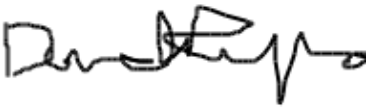
_____

_____

_____; *[Insert a description of the priority(s) checked off on the Statement of Interest Form and a brief description of the deficiency described therein for each priority];* and hereby further specifically acknowledges that by submitting this Statement of Interest Form, the Massachusetts School Building Authority in no way guarantees the acceptance or the approval of an application, the awarding of a grant or any other funding commitment from the Massachusetts School Building Authority, or commits the City/Town/Regional School District to filing an application for funding with the Massachusetts School Building Authority.

CERTIFICATIONS

The undersigned hereby certifies that, to the best of his/her knowledge, information and belief, the statements and information contained in this statement of Interest and attached hereto are true and accurate and that this Statement of Interest has been prepared under the direction of the district school committee and the undersigned is duly authorized to submit this Statement of Interest to the Massachusetts School Building Authority. The undersigned also hereby acknowledges and agrees to provide the Massachusetts School Building Authority, upon request by the Authority, any additional information relating to this Statement of Interest that may be required by the Authority.

Chief Executive Officer *	**School Committee Chair**	**Superintendent of Schools**
Neil Wishinsky	David Pollak	Andrew Bott
Chair, Board of Selectmen		
		
(signature)	(signature)	(signature)
Date	Date	Date
4/6/2018 4:59:49 PM	4/6/2018 4:24:04 PM	4/6/2018 4:19:17 PM

* Local Chief Executive Officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated to the chief executive office under the provisions of a local charter. Please note, in districts where the Superintendent is also the Local Chief Executive Officer, it is required for the same person to sign the Statement of Interest Certifications twice.

Attachment B2

Designer Services Contract Amendment for Design/Bid/Build

https://www.massschoolbuildings.org/sites/default/files/editcontentfiles/Documents/Contracts_Procurement_Forms/Designer/Designer_Contract_Amendment_DBB_2_25_11.pdf

7.5 Design Development Phase

7.5.1 Upon receipt of an Approval to proceed to the Design Development Phase, the Designer shall meet regularly and as necessary with the Owner, the OPM, and the Authority. This shall include meeting at least once every other week with the Owner and the OPM during this Phase.

7.5.2 The Designer shall update and refine items submitted during the Schematic Design Phase, and shall submit to the Owner and the Authority, on or before the date specified in the Project Schedule, and on the basis of the approved Schematic Design Phase Documents, the following deliverables as they are defined in this Article 7.5.2 and as they are further defined in Articles 7.5.3, 7.5.4, 7.5.5, 7.5.6 and 7.5.7:

(a) a list of all filings and permits within Designer's scope of services and professional expertise required to implement the design and a schedule of target dates for the procurement of such permits, which list and schedule shall be regularly updated during the term of this Contract;

(b) information and documentation within the technical expertise of the Designer and that is necessary for the Owner to file local basic zoning and environmental permits. The Designer, as Extra Services, shall provide information and documentation for the Owner to file Environmental Notification Forms, Environmental Impact Reports, and any other filings for permits that must be filed during the design development phase;

(c) soils exploration data, geotechnical and geoenvironmental reports, showing exploratory locations relative to siting of proposed structures;

(d) complete design development drawings; outline specifications indicating any filed sub-bid sections and sub-sub trades based on the cost of the work and other documents necessary to specify the size and character of the Project as to siting, landscape, architectural, structural, fire protection, plumbing, heating, ventilating and air conditioning, electrical, ADA/MAAB, product requirements and other features;

(e) quality control documentation demonstrating, without limitation, coordination of: ceiling clearances, mechanical room size, and shaft sizes; specifications and drawings; filed sub-bid work or sections; scheduling; equipment and power; existing and new construction; and phasing;

(f) design development drawings which the Designer shall submit for review to the local building official;

(g) a life cycle cost analysis to determine which design decisions related to all energy and water consuming devices and overall building operation and maintenance are the most cost effective [M.G.L. c. 149, s. 44M];

(h) a construction cost estimate for the design in Uniformat II Level 3 format, with unit rates and quantities supporting each item and reconciled with the detailed construction cost estimate and any updated cost estimates in accordance with Article 7.5.6. The estimate cost shall be projected, to the mid point of the construction period;

(i) a space measurement analysis for the design verifying that the sum of all program areas in the Project plus all other floor areas in the Project equals the gross floor area of the Project;

(j) a written summary or summaries comparing the project design, as represented in the design development drawings, specifications and cost estimates with the Final Design Program requirements, and explaining any deviations in writing.

7.5.3 Design Development Drawing Requirements: The Design Development drawings shall illustrate and describe the refinement of the design of the Project to a level of detail that is customary and standard, establishing the scope, relationships, forms, size and appearance of the Project by means of plans, sections and elevations, typical construction details, and equipment layouts. Drawings shall delineate locations and elements of Work which may be proposed to be assigned to project construction phases and/or separate bidding packages. Documents shall include, but not be limited to, the following:

(a) Site and utility drawings showing;

1. Existing and proposed contours and locations of the proposed building or addition(s). Show entry level elevation and key exterior grades at perimeter. Indicate all retaining walls. Include benchmarks of site if survey is available.
2. All utilities existing and proposed, indicating location, elevation, composition and size e.g., manholes, sewers, hydrants, light standards. Include work by others, e.g., gas and electric utility providers.
3. Roads, laid out parking areas, walks, recreation areas, terraces and other site improvements.
4. Building locations fixed and referenced from main survey baseline, if available.
5. Plant materials with preliminary schedule.

(b) Building drawings and other graphic and written requirements with floor plans showing: (minimum scale 1/8" = 1'0");

1. building perimeter with exterior wall thicknesses and overall dimensions;
2. structural grid;
3. plan requirements of mechanical and electrical systems;
4. building core; elevators, stairs, shafts, toilet rooms;
5. interior partitions; appropriate thicknesses and dimensions to fix basic organizations; indicate fire separations, ratings;
6. door swings;
7. floor elevations;
8. built-in furniture and equipment; and
9. furniture layout concept drawings.

(c) Roof plans showing;

1. proposed systems type;
2. pitch and drainage patterns;
3. roof drains, gutters and scuppers;
4. skylights, stairs through roof, penthouses, major equipment, chimneys.

(d) Building sections: One transverse and one longitudinal section. Indicate floor to ceiling heights and floor-to-floor heights. Label all spaces;

(e) Building elevations showing;

1. full height elevations including roof structures, e.g., mechanical equipment, chimneys, and penthouses;
2. floor elevations, floor-to-floor heights, and overall height related to benchmarks on site plans;
3. all fenestration;
4. column centerlines;
5. principal finish materials indicating major control and expansion joints, and divisions of materials where required;
6. louver and equipment enclosure systems; and
7. exterior grades and topographical features in context.

(f) Full height wall sections for main elevations and at special conditions. Show foundation and perimeter treatment, wall construction including insulation and supporting structure, fenestration and mechanical penetrations, and floor construction;

(g) Interior elevations: Major spaces, e.g. library, lobby, and all typical spaces, e.g. classrooms;

(h) Reflected ceiling plans: show prototypical structural, fire protection, mechanical and electrical information for classrooms and major spaces, including lighting layouts with ceiling heights and material changes;

(i) Colored interior elevations and perspectives of major and typical spaces

(j) Schedules;

1. finish schedule by room types;
2. door schedule by room;
3. window schedule;
4. equipment schedules, e.g., food service, instructional media.

(k) Structural Concepts;

1. Foundation plan showing sizes and locations of typical components.
2. Framing plans: typical floor framing, roof framing, special framing, show framing at major openings and sizes of members.
3. Column locations.

4. Preliminary details including floor and roof deck, statements as to methods of lateral bracing and how requirements of earthquake code will be met.
5. Details for special and/or incidental structural features, e.g. tunnels, connecting bridges and unique architectural features.
6. Connection to existing buildings at foundation and at key points at existing structure if applicable.

(l) Fire Protection: floor plans indicating wet or dry type systems, hose racks or cabinets and fire department tie-ins. Indicate whether a fire pump will be required and, if so, show location within the building. Show typical sprinkler head layout;

(m) Plumbing and sanitary systems: floor plans indicating locations of all plumbing fixtures and special features, and approximate location and size of all piping systems and principal items of equipment;

(n) Heating, Ventilating and Air Conditioning Systems;

1. Show locations and approximate sizes of piping systems, air handling systems and principal items of equipment such as compressors or cooling towers.
2. Indicate space requirements of major equipment and their location in mechanical rooms and fan rooms. Major shafts.

(o) Electrical Systems;

1. All services including those for special purposes shall be located and indicated.
2. Lighting shall be indicated as to type, location and intensities in foot-candles for each special and typical space.
3. Switchgear and emergency generator.
4. Fire alarm system drawings showing all initiation and signaling devices, control panels, annunciator panels, etc.
5. Security system drawings.
6. Communications drawings showing chases, major equipment locations and any special distribution requirements.
7. CATV/CCTV drawings showing chases, major equipment locations and any special distribution requirements.
8. Information Technology drawings showing chases, major equipment locations and any special distribution requirements.

7.5.4 Other Consultant's Drawings and Other Graphic and Written Requirements: For special consultants, e.g., kitchen, elevator, library, media room, equipment where appropriate, provide drawings that locate and define the scope of the work. Coordinate with other disciplines. Provide cuts of all major pieces of equipment.

7.5.5 Project Manual Requirements (Specifications):

(a) Outline Specifications that are to accompany Design Development Drawings shall be prepared to a level of detail that is standard and customary and shall include,

but not be limited to, a comprehensive description of the Project and the materials proposed for use in the work. No detailed specifications of materials or workmanship procedures need be included; however, the general scope shall be indicated by CSI MasterFormat as applicable to proposed construction.

1. The Design Development Outline Specification shall also include a comprehensive "BASIS OF DESIGN." The "BASIS OF DESIGN" shall be a narrative description of the Project and shall include all applicable architectural, civil, structural, mechanical and electrical programs and/or systems. Identify all proposed filed sub-bid categories.
2. Project Manual shall include a statement to define Work which is proposed to be included in separate construction phases and/or bid packages.

(b) The following is a list of items that shall at a minimum be identified or outlined in this Phase:

1. Site work; clearing, drives, walks, parking areas, fences, excavation, backfill, planting.
2. Footings; on earth, rock, piles, caissons, proposed bearing pressures, boring logs.
3. Foundation walls; type of concrete, reinforcing, type and extent of waterproofing.
4. Footing drains; type, disposal of drainage.
5. Exterior walls: superstructure, type, materials, brick type, alternate cladding, back-up materials, dampproofing material and extent, special features.
6. Roofs; types, vapor barrier, insulation, flashings, all materials.
7. Flashings; general types, all materials, weights, where each type is to be used.
8. Sheet metal; gutters, leaders, others uses, except flashings.
9. Windows; general types, materials, sub-frames, finish, glazing, screens.
10. Doors, exterior and interior; types.
11. Steps, exterior; including platforms and landings' materials.
12. Stairs, interior; including platforms, landings, walls, materials and finishes.
13. Framing; wood, concrete or metal systems in accordance with general design.
14. Partition construction related to room type.
15. Cabinet and casework; types and materials.
16. Food Service Equipment; types and materials.
17. Furring; lathing, plastering, materials and locations.
18. Insulation thermal; types, thicknesses, methods of application and locations.
19. Acoustical treatments; types, thicknesses, methods of application and location.
20. Interior finishes; materials for floors, walls, bases, wainscots, trim, ceilings, ceiling heights.

21. Fire Protection; standpipe systems, sprinkler systems, fire pumps and accessories.
22. Water supply; source; location of main to which connection will be made; type of pipe for service main; load requirements; load factors and pressures.
23. Sanitary sewers; sewage disposal system, pipe and other materials.
24. Storm sewers; storm drainage disposal system (institution or local facility), pipe and other materials.
25. Gas main; material, size, location. Interface with utility company.
26. Plumbing; systems such as wastes, vents, hot water, cold water, gas, air, oxygen, vacuum, main source of supply, materials for each, water heaters, pumps, thermal insulation fixture quality, all special features.
27. Heating, ventilating and air conditioning; type of heating and refrigeration plants, type and capacity of boilers and cooling equipment, fuel, type of burners, fuel storage, heaters, feed water pumps and heaters, thermal insulation, type of heating medium, supply and return piping, radiation, unit heaters, radiant heating, principal air conditioning equipment types, special features, supply, return and exhaust ductwork.
28. Electric work; service connection, location, institution or public utility, overhead or underground, transformers including type and location, types of conduit and wiring, types of fixtures, location of main switchboard, radio, fire alarm, telephone, public address, emergency lighting and wiring, emergency or other generators, special features, including Master TV, information retrieval and/or data processing system.
29. Elevators, dumbwaiters and platform lifts; capacities, speed, travel in feet, landings, operation, controls, platform sizes, machine type and location, car and entrance finishes, signals.
30. Other built-in equipment, types and materials.
31. Special features.

7.5.6 Construction Cost Estimate Requirements – The Designer shall provide a construction cost estimate in Uniformat II Level 3 format with aggregated unit rates and quantities supporting each item referenced in Article 7.5.5(b). The estimate cost shall be projected, to the mid point of the construction period.

(a) The Designer shall review its construction cost estimate in comparison with the detailed construction cost estimate, and any updated cost estimates, provided by the OPM and shall work in good faith and in cooperation and coordination with the OPM to reconcile any differences between the construction cost estimates, to clarify assumptions upon which the cost estimates are based and to address any concerns or questions with the cost estimates that are raised by the Owner, the OPM, or the Authority. If the Designer is unable to reconcile all differences between the two construction cost estimates with the OPM, then the Designer shall provide a detailed explanation of the differences to the Owner. If, in any case, the agreed-upon, reconciled construction cost estimate exceeds the Project

Construction Budget, the Designer shall cooperate with the Owner and the OPM in identifying, specifying and recommending changes in, or additional specification of materials, equipment, component systems and types of construction, or other adjustments in the scope or quality of the Project, including contingencies or alternative bid items, so as to facilitate revision of the design of the Project to reduce the cost of construction so as to comply with the authorized Project Construction Budget.

(b) Cost estimate data shall be organized to identify elements of project work which may be proposed to be advanced under separate construction phases and/or separate bidding packages. When so proposed, estimates shall develop cost data relative to corresponding bidding and work execution dates established in project schedules.

7.5.7 Reports, drawings, specifications, cost estimates and other design development submittals shall be subject to the written approval of the Owner and the Authority. Unless a lesser number is requested by the Owner, the Designer shall submit to the Owner for approval six (6) copies of Design Development drawings, specifications, cost estimates, and other submittals. Two (2) copies shall be submitted to the Authority by the Designer.

7.5.8 The Designer shall present and explain the Design Development submittal to the Owner and the Authority and at a local public meeting scheduled by the Owner, if any such meeting is scheduled or in conference.

7.5.9 The Designer and its Subconsultants shall collaborate with the Authority's Commissioning Consultant to develop design criteria which will support the purposes of building commissioning and energy/resources conservation concepts as commonly understood and as prescribed by the Commissioning Consultant.

7.6 Construction Documents Phase: In addition to the requirements specified in the RFS (Attachment B), upon receipt of an Approval to proceed with the Construction Documents Phase of the Project from the Owner, the Designer shall do the following:

7.6.1 The Designer shall meet regularly and as necessary with the Owner, the Authority, the OPM, and the Commissioning Consultant. This shall include meeting at least twice per month (or more frequently if needed) with the Owner and the OPM during this Phase.

7.6.2 Based on the submittals approved in the Design Development Phase of the Project, the Designer shall update and refine the items previously submitted and shall submit the following on or before the date and time specified in the Project Schedule:

(a) Construction documents progress submittals as follows:

1. a 60% Construction Documents Submittal, with deliverables as defined in Article 7.6.3;

2. a 90% Construction Documents Submittal, with deliverables as defined in Article 7.6.4;

3. a Final Construction Documents Submittal, with deliverables as defined in Article 7.6.5;

4. a Bid Documents Submittal, with deliverables as defined in Article 7.6.6

(b) As a part of each of the submittals required under Articles 7.6.3, 7.6.4, and 7.6.5, an updated work plan and recommended updates for incorporation into the Project Schedule by the OPM;

(c) As a part of each of the submittals required under Articles 7.6.3, 7.6.4, and 7.6.5, a report on the status of environmental, zoning, planning, building code, and ADA/MAAB approvals and permitting processes and a certified list of all required testing and all required permits identified in 7.5.2(a).

(d) All submittals by the Designer shall be subject to the written approval of the Owner, which approval shall not be unreasonably delayed, withheld, conditioned, or denied. Unless a lesser number is requested by the Owner or is specifically provided hereinafter, the Designer shall furnish to the Owner for approval six (6) sets of the drawings, specifications, construction cost estimates and all other submittals. Unless a lesser number is specifically provided hereinafter, the Designer shall furnish two (2) sets of said drawings, specifications, construction cost estimates and all other submittals to the Authority. The Designer shall also furnish to the Owner and the Authority electronic media copies of the foregoing drawings and documents in such form as may be required by the Authority.

7.6.3 60 Percent Construction Documents Submittal:

(a) The Designer shall provide, on or before the date and time specified in the Project Schedule, a 60 % Construction Documents Submittal (60% CD Submittal), which shall include:

1. Construction Documents and other deliverables, as defined in this Article 7.6.3 and as further defined in Articles 7.6.2, 7.6.7, 7.6.8, and 7.6.9, advanced to a level of intermediate (60 percent) completion, and incorporating corrections to indicate compliance with Owner and Authority review comments related to prior submittals.

2. In instances where the Designer takes exception to the Authority's previous review comments on the Design Development submittal, a written statement explaining its position.

3. The Basis of Design that accompanied the Outline Specifications in the Design Development Phase shall be updated and expanded to include all proposed architectural, structural, fire protection, plumbing, mechanical, electrical, civil, and landscape design concepts for the Project.

4. A space summary, in the form and format prescribed by the Authority, that sets forth the current space calculations and totals and certifies that said space calculations and totals are in compliance with those previously authorized by the Authority in the Project Funding Agreement.

5. Keying of graphics shall be sufficient to allow a reviewer to make his or her way through the set.

6. A list of all drawings related to the Project.

7. A materials selection statement identifying typical interior and exterior surfaces and their materials.

8. A color theory statement indicating proposed paint colors and material selections for typical and special spaces and why they have been selected and how these selections relate to surrounding materials and colors.

9. Large scale plans of all mechanical and electrical spaces with major equipment indicated.

10. Project Manual, including all sections to be included in final technical specifications, developed to include a list of all materials in the building with their manufacturers. Identify all specifications sections which need to be filed sub-bid.

11. Identify all proposed bid alternates by inclusion in a project manual section to be titled "Alternates." Alternates shall be listed in sequence as approved by the Owner. Work required under bid alternates shall be described and/or drawn, as appropriate, to clearly define the design criteria and extent of work involved for implementation of the bid alternate. In each instance, the existing conditions and/or new design criteria for base bid work shall also be described and indicated in documents.

12. Code analysis: Provide a building code analysis. Any deviation from methods of compliance described in earlier submittals shall be indicated. Code analysis shall identify its preparer, code edition referenced, and include a comprehensive description of operative building code provisions, with floor plans showing fire separation types, area calculations, egress capacity for exits and exitways, and any special features required to comply.

(b) As a requirement of the 60% CD Submittal, and in accordance with the provisions of this paragraph and Article 7.6.9, the Designer shall provide a construction cost estimate prepared using the Uniformat II Classification to Level 3, the CSI MasterFormat 6-digit format to Level 3 and MGL c.149 §44F (filed sub-bid) format including quantities of all materials and unit prices of labor, equipment, and materials as well as a cost estimate for each item of work, for review by the Owner and the Authority. The Designer shall submit said construction cost estimate separately, as a supplement to the 60% CD Submittal, no later than twenty-one days after the submission of the 60% CD Submittal described in Article 7.6.3(a). The development of said construction cost estimate shall under no circumstances delay the timely submission of the remainder of the 60% CD Submittal.

7.6.4 90 Percent Construction Documents Submittal:

(a) The Designer shall provide, on or before the date and time specified in the Project Schedule, a 90 % Construction Documents Submittal (90% CD Submittal), which shall include:

1. Construction documents and other deliverables as defined in this Article 7.6.4 and as further defined in Articles 7.6.2, 7.6.7, 7.6.8, and 7.6.9, advanced to a level of substantial (90 percent) completion, and incorporating corrections to indicate compliance with Owner and Authority review comments related to prior submittals.

2. A space summary, in the form and format prescribed by the Authority, that sets forth the current space calculations and totals and certifies that said space calculations and totals are in compliance with those authorized by the Authority in the Project Funding Agreement.

3. Interior Materials Color Boards, including samples of principal interior materials, labeled and mounted to indicate locations.

4. Final structural and energy design calculations.

5. A statement confirming that the Owner has been provided with structural design drawings, specifications, and calculations sufficient to enable execution of an independent structural peer review process, as defined in the Massachusetts Building Code, as amended (this requirement is applicable, to satisfy Authority requirements for all school construction projects having a floor area in excess of 10,000 square feet). The Designer shall have advised the Owner of this requirement in writing not less than sixty (60) days prior to delivery of the 90% CD Submittal in order for the Owner to arrange for the services of an Independent Structural Peer Reviewer. Upon reaching 90 percent completion of construction documents, Designer's structural engineering consultant shall have reached a level of 100 percent completion of its construction documents to enable advancement of the independent structural peer review.

6. The Designer and its consultants shall fully cooperate with the Independent Structural Peer Reviewer in the process. The Designer shall obtain a copy of the Independent Structural Engineering Review report and submit same to the Owner and the Authority at the time of completion of the remainder of the construction documents at the level of final completion.

7. In instances where the Designer takes exception to any of the Authority's 60% CD Submittal review comments, a written position statement explaining the Designer's position on its exceptions to said review comments.

7.6.5 Final Construction Documents Submittal:

(a) The Designer shall provide, on or before the date and time specified in the Project Schedule, a Final Construction Documents Submittal, which shall include:

1. construction documents and other deliverables as defined in this Article 7.6.5 and as further defined in Articles 7.6.2, 7.6.7., 7.6.8, and 7.6.9, advanced to a level of final (100 percent) completion, and incorporating corrections to indicate compliance with Owner and Authority review comments related to prior submittals.

2. a final construction cost estimate, in accordance with the provisions of this paragraph and Article 7.6.9, based on 90% Construction Documents, including cost estimates for general conditions, overhead and profit, insurance, bonds, and all other items expressed as percentage rates for design contingencies and construction contingencies and escalation to the bid date; and other mutually agreed upon contingencies. The final construction cost estimate shall be prepared in Uniformat II Elemental Classification to Level 3 (Sections A-G inclusive), the CSI MasterFormat to Level 3 and M.G.L. c.149, §44F (filed sub-bid) format and shall be complete with a single line description for each item with the detailed unit rate or item cost buildup provided in each case.

3. complete construction drawings and specifications, certified by the Designer as having satisfied the firm's quality control review process as previously confirmed with the Owner, in sufficient detail to permit fixed-price bids in open competition for construction of the Project when documents have been approved for issuance for bidding.

4. no later than at the 100% stage of completion of the final drawings and specifications, two sets of the final drawings and specifications that shall be provided to the local building official to be signed and stamped "Approved" by the local building official; two sets of plumbing drawings and specifications that shall be provided to the local plumbing inspector to be signed and stamped "Approved" by the local plumbing inspector; two sets of the fire protection, HVAC, and electrical construction documents that shall be provided to the local fire official to be signed and stamped "Approved" by the local fire official; two sets of the electrical construction documents that shall be provided to the local electrical inspector to be signed and stamped "Approved" by the local electrical inspector. Notwithstanding the foregoing, the Owner acknowledges that building officials, department inspectors, and fire officials have varying policies on approvals and submittal procedures, and the only obligation of the Designer in this regard is to promptly make the submittals described herein and assist the Owner in receiving the approvals to the extent available.

5. at the 100 percent stage of completion of final drawings and specifications, a written summary comparing the final construction drawings and specifications and final estimated construction cost with the Final Design Program requirements and submittals made during the Design Development Phase and

earlier in the Construction Documents Phase, explaining any significant deviations.

6. In instances where the Designer takes exception to any of the Authority's 90% CD Submittal review comments, a written position statement explaining the Designer's position on its exceptions to said review comments.

7. The Independent Structural Engineering Peer Review Report obtained from the Independent Structural Engineering Peer Reviewer referenced in Article 7.6.4(e). The Designer shall include a certification statement from the project structural engineer designer of record to acknowledge receipt of the Report and to indicate response actions pursuant thereto. The Designer shall also forward a copy of said Report to the Building Inspector.

8. A certification that all applicable local, state and utility officials have been contacted by the Designer regarding each utility connection and that the persons responsible for permits or connection approval have agreed to the systems' use.

7.6.6 Bid Documents Submittal:

(a) The Designer shall provide, on or before the date and time specified in the Project Schedule, a Bid Documents Submittal which shall include:

1. Construction documents and other deliverables as defined in this Article 7.6.6 and as further defined in Articles 7.6.2, 7.6.7, and 7.6.8, incorporating corrections to indicate compliance with Owner and Authority review comments related to prior submittals.

2. From the construction drawings and specifications approved by the Owner, incorporating such changes as the Owner or the Authority requires, a set of reproducible black and white drawings and original specifications on high quality white bond paper, single-sided, properly packaged, suitable for reproduction, stamped and signed by all disciplines, that shall be prepared by the Designer and transmitted to the Owner; which documents shall become the property of the Owner as provided under Article 16. Other suitable reproducible media, having the same content shall be substituted, when so directed or authorized by the Owner.

3. Upon receipt of Owner authorization to advance to reproduction the approved documents for distribution to bidders and, upon reproduction thereof, the Designer shall promptly submit complete sets of bid documents to the Owner (two sets) and the Authority (one set - half size for Drawings). Any subsequent addenda shall be promptly submitted to the Owner and the Authority.

7.6.7 Drawing Requirements:

(a) The documents prepared during the Construction Documents Phase shall set forth the requirements for construction of the Project to a level of detail that is customary and standard and shall include, but not be limited to:

1. General information showing drawing index, symbols, abbreviations, notes, locations map.

2. Site drawings shall be complete to define the extent and detail of site work. Show the following:

    a. Layout and location of all proposed work including buildings, structures, retaining walls, parking, walls and all other site improvements, with details.
    b. Existing and proposed grades and contours including floor elevations, existing structures and topography, survey base line, bench marks and boring locations.
    c. Landscaping and planting.
    d. All utility service lines, systems and structures for electricity, gas, oil, water, steam, telephone, CATV, fire alarm, sanitary and storm drainage including size, composition, grades and directions of flow.
    e. Contract Limit Line and Storage Area for construction materials.
    f. All existing foundations, obstructions and other physical characteristics of the site which may affect the construction work.
    g. Site survey.
    h. Cuts of benches, light standards.

3. Demolition drawings and temporary work required.

4. Architectural drawings shall include at a minimum:

    a. Floor plans of each floor, including basement and lofts or attic with room and corridor dimensions, wall thicknesses, column locations, floor elevations, mechanical and electrical openings, door and window designations, partition types, floor materials, built in furniture and equipment, keyed to other architectural drawings. All rooms numbered.
    b. Large scale floor plans where required to illustrate detailed requirements of rooms.
    c. Large scale plans showing key areas e.g. lobby, special spaces. Indicate surface materials. (minimum scale ¼" = 1'- 0")
    d. Roof plans showing openings, drainage, slopes, expansion joints and all projections, including equipment.
    e. Key plans on all floor plans and section drawings, where appropriate.
    f. Building Sections as required to show spatial organization of building but no less than one longitudinal and one transverse.
    g. Building elevations. All building elevations shall be fully developed, and hidden elevations shall be shown. Elevations shall be shown in a sequence as unfolded from a certain point.

h. Full height wall sections indicating dimensions, flashing, anchorage, reinforcing, coursing, cladding, and all other conditions at wall, roof, foundation, interior floors.
i. Exterior details, for roofing, flashing, expansion control and construction joints, waterstops and other details showing all conditions both vertical and horizontal, including schedules.
j. Door, window, entrance, and storefront, schedules, and details.
k. Vertical circulation plans, sections and details including stairs, elevators, conveyors, dumbwaiters.
l. Interior elevations of all significant and typical spaces.
m. Interior details including casework, paneling surfacing and acoustical treatment.
n. Reflected ceiling plans coordinated with fire protection, mechanical and electrical drawings, and ceiling details.
o. Schedules (clearly define new or existing)
    i. Doors
    ii. Equipment, e.g. for services
    iii. Partitions
    iv. Finishes

5. Structural drawings shall indicate the following:

    a. Indicate or refer to location of geotechnical exploration data and reports related thereto.
    b. Foundation plans with bottom grades showing layout of all footings, walls, slabs on grade including reinforcing, grade beams, and columns; include design soil bearing pressures and live loads.
    c. Floor and roof plans of structural systems including framing, grades of finished floors and depressed areas, with locations and dimensions for all openings. Also indicate design floor loads.
    d. Complete foundation wall elevation and typical sections, with reinforcing indicating location, dimensions and grades for all footings, steps and wall openings.
    e. Complete details and sections with dimensions for all construction including expansion and construction joints, reinforcing and other embedded items.
    f. Schedules (with dimensions) for all lintels, beams, joists, and columns.
    g. Unless detailed on the Drawings, the following information shall appear in the general notes: class and 28 day strength of concrete for each portion, structural steel and concrete reinforcing design stresses for each type of structural member, concrete cover for each type of structural member, shrinkage and temperature steel requirements, reinforcing laps for main reinforcing and temperature steel; bendpoint, cutoff, and hook locations for all members, minimum beam and lintel bearing. Reinforcing steel fabrication shall be in accordance with most recent ACI, "Manual of Standard Practice for Detailing Reinforced Concrete." Structural steel fabrication shall be in accordance with the AISC "Manual of Steel Construction."

6. Fire protection drawings shall indicate standpipe systems, sprinkler systems, suppression systems, access panels, fire pumps, accessories, and piping. All piping, equipment, fixtures and devices shall be located and sized. Design criteria shall be provided on the drawings in accordance with NFPA requirements.

    a. Fire protection work, other than site work, shall not be combined on the same sheets with the Plumbing, HVAC, Electrical, or other drawings except with the prior approval of the Owner.

7. Plumbing drawings shall indicate the following:

    a. All work done by the Plumbing Subcontractor, which includes all water, gas, air, vacuum, medical gases, sanitary and storm wastes, and accessories. Include foundation drain lines unless established as the work of the General Contractor and shall not be indicated on the Plumbing Drawings. Site utilities shall be indicated on the utility drawings.
    b. Plumbing work, other than site work, shall not be combined on the same sheets with the Fire Protection, HVAC, Electrical, or other drawings except with the prior approval of the Owner.
    c. Trapping and venting of all plumbing fixtures including floor drains.
    d. Water and gas supply sources, storm and sanitary discharge mains.
    e. All piping shall be carefully sized and all sizes shall be indicated on drawings and riser diagrams. Indicate all directions of flow and pitch on piping.
    f. All accessories, valves, fixtures including all drinking fountains, grease traps for kitchen waste and all necessary panels, identified as to type and size.
    g. All piping and connections required for other trades (e.g., kitchen equipment, HVAC make-up water, etc.).
    h. Acid waste, vents and neutralization systems for laboratories.
    i. Plumbing Legend and/or graphical symbols on the first sheet of the Plumbing Drawings in accordance with the American National Standards Institute (ANSI).
    j. Plumbing riser diagrams for structures two or more stories in height above the ground level.
    k. Domestic water booster pumps, boiler feed water, meter location, hose bibbs, and wall hydrants.
    l. Domestic hot water: storage tanks, piping material, hanger details.
    m. All required access panels shall be indicated.
    n. Backflow preventors and cleanouts. Verify that access and clearance provisions for periodically inspected devices, including backflow prevention, are adequate to satisfy requirements of inspecting agencies.

8. Heating, Ventilating and Air Conditioning Drawings shall indicate the following:

a. HVAC work, other than site work, shall not be combined on the same sheets with Fire Protection, Plumbing, Electrical, or other drawings except with the prior approval of the Owner.
b. All piping and ductwork systems shall be located and sized. All ductwork shall be shown double line.
c. All systems shall be sized at all reductions and riser diagrams of piping and duct systems shall be indicated.
d. All directions of flow and pitch on piping, and direction of flow, volumes for duct systems shall be indicated.
e. All equipment shall have sufficient servicing and/or replacement space indicated on drawings.
f. All equipment, accessories, valves and dampers with all necessary access panels, identified as to type and size. Access panels, where required for access to valves and dampers shall be indicated on drawings.
g. Cooling system pumps, chillers, cooling towers, air handling units, ductwork system and dampers, fan details, temperature control system, air and hydronic balancing equipment, and schedules shall be indicated.
h. Cooling tower design shall be indicated on the drawings showing site location, elevations and floor plan of equipment layout and typical flow diagram as related to the total HVAC system.
i. All fire and smoke dampers, access panels and doors.
j. Mechanical room designs:
    i. Vent pipes for safety valves, relief valves, back pressure valves and tanks shall be extended above flat roofs in accordance with all governing authorities.
    ii. In all designs for boiler and refrigeration plants, include a complete floor plan indicating location of all major mechanical equipment and sufficient service space.
    iii. In designs of new and/or replacement boiler and refrigeration plants, provide a flow diagram detailing steam or hot water distribution systems, return systems, including all existing equipment and their function, as well as any proposed expansions with all necessary instrumentation and controls.

9. Electrical Drawings shall indicate the following:

a. Site utilities shall be indicated on separate electrical site drawings, unless ample space is available on common site for utility drawings.
b. Electrical work, other than site work, shall not be combined on the same sheets with Fire Protection, Plumbing, HVAC, or other drawings except with the prior approval of the Owner.
c. General arrangement: Outline layout of each floor. Typical sections through the structure shall be indicated when necessary to define requirements, floor and ceiling heights, elevations, and type construction, including concrete pads shall be indicated. Indicate interface with other systems. Identify any work by general contractor or other trades.
d. Interior lighting system: Light fixture schedules, circuiting location and mounting heights of all fixtures, receptacle and switch outlets, sizes and

types of all lamps, conduits, all other accessories and riser diagrams shall be indicated on drawings. Indicate details and method of supporting electrical fixtures and conduits. Designer shall specify that all electrical lighting fixtures be supported from the building structure, and shall be independent of ducts, pipes, ceilings and their supporting members. Comply with seismic design criteria.

e. Power system: Locations, types and method of control for all motors, heaters, appliances, controllers, starters, branch circuits, feeder conductors and conduits. Indicate riser diagrams. Show details and indicate method of supporting electrical conduit. For larger projects, thermostats and control wiring are normally covered under the HVAC sub-contract, assure coordination.
f. Fire Alarm, Data, Communications, CATV/CCTV Systems: Locations and types of all devices, outlets and equipment, service connections, wiring diagrams, all other essential details.
g. Services: Location and details of all services, whether overhead or underground, feeder sizes, plans and elevations of switchgear and transformers, metering and service switchboard arrangements, wiring and ground fault diagram and bus ducts.
h. General and sub-stations: Location, size, method of connection and protection of all generators, transformers, exciters, motor generators, switch gear, and associated equipment, current characteristics and equipment capacities. Indicate equipment connections by means of one line and/on wiring diagrams and schedule all major items of equipment and all instruments.
i. Underground work: The size and locations of manholes and types of cables, number, size, and location of ducts, locations, sizes and types of cable supports, fireproofing, duct line profile, and one line diagram of connections. All underground chambers, including manholes and pull-boxes, shall be constructed of cast in place or one piece pre-cast concrete.
j. Pole line work: if required as contract work, indicate location, length, treatment and class of poles, guying, cross arms, insulators, circuiting, transformers, protective and switching devices, lightning arresters, special structures, diagrams, current characteristics and grounding.
k. Exterior lighting: Location, size, and type of transformers, luminary, poles, light standards, cables, ducts, and manholes, details of control equipment and connection diagrams.
l. Emergency system details including transfer switch, type of fuel.
m. One line diagram indicating load KVA, and available short circuit amperes at each transformer, switchboard, distribution panel board, branch circuit panel board, and at major pieces of equipment.
n. Riser diagrams for all systems.

7.6.8 Project Manual Requirements:

(a) The format for the Project Manual, including its technical specifications, shall be in accordance with the current CSI MasterFormat with separate sections for each of class of work required by M.G.L. c. 149 §44F.

(b) The following general information applies to the development of final Specifications:

1. Describe the extent of the work, the materials and workmanship, and include the work under the proper section. If any portion of the work included in a section of the Specifications is to be performed by a trade covered by another section, there shall be clear and distinct cross-referencing between the sections. Merely to state "by others" is not acceptable.
2. For each item of material or equipment, the specifications shall provide for a minimum of three named brands of material or equipment and the words "or equal" or a description of material or equipment which can be met by a minimum of three manufacturers or producers, and the words "or equal." Proprietary products shall not be specified except as provided by M.G.L. c. 30, § 39M; however, when they are specified, proprietary specifications are subject to the "or equal" provisions of M.G.L. c.30, § 39M.
3. Specify materials mined or manufactured in Massachusetts first and the United States of America second whenever possible.
4. Do not use general clauses intended to be all-inclusive in lieu of complete descriptions.
5. Do not duplicate standard requirements that are contained in the contract form.
6. Use consistency throughout. The word "will" shall be used to designate what the Owner, Authority, Owner's Project Manager, Commissioning Consultant, or the Designer can be expected to do, and the word "shall" shall be used to designate what is mandatory for the Contractor or subcontractors to do.
7. Use the same term throughout for the same subject and the term shall be the same as that used on the drawings.
8. Do not use the term "etc."
9. Avoid such terms as "to the satisfaction of the Designer," "as directed by the Designer," "as approved," and "as required".
10. Specify work in appropriate Sections according to local trade jurisdiction.
11. Avoid the use of the following symbols:

Symbol	Use Instead
#	number, no., or pounds
%	percent
"	inch or in.
x	by
'	feet or ft.
o	degree
/	per or at

12. In sections for which filed sub-bids are required, refrain from using such terms as "the Contractor," the "Heating Contractor," or "the Plumbing Contractor," but where necessary for clarity refer to the "HVAC Subcontractor," the "General Contractor" and the like.

13. Do not give numbers both in words and figures. Numbers less than 10 shall be written in words, 10 and higher numbers shall be written in figures. In expressing dimensions, figures such as 2 in., 16 in., 7 ft., 6 in., shall be used.
14. Each filed sub-bid section shall detail all labor and materials required by the particular sub-trade and list, by number, those drawings (and only those drawings) indicating work of that sub-trade. In addition, list drawings indicating work of a particular trade that appears on drawings that are not customarily included in the work of the trade, when applicable.
15. Do not specify that a product or system shall require prequalification or advance approval for use prior to bidding.
16. Established unit price items shall be used for work categories which cannot be ascertained for exact quantities in bid documents (e.g. earthwork removal and/or replacement items). In such cases, the Designer shall establish ranges of quantities with associated unit price values for each range. Unit price values shall be established for added work, for deleted work, for base bid quantities when conditions so-suggest. Unit price values shall be ascertained through consultation with cost estimators, be current, equitable, and well defined as to elements of work, overhead, like issues to be encompassed. Established unit prices shall be published within the applicable technical specification sections, and referenced from general conditions as being operative as the basis for determining values to be used for payment or recovery for change order work.
17. Staging, scaffolding, cutting and patching, refuse collection and disposal, demolition work and cleaning task, allocation policy and proposed language shall be carefully assigned to avoid duplication or omission.
18. A final draft of Project Advertisement, Notice to Bidders, Instructions to Bidders, Contract Forms, General Conditions, Supplementary General Conditions, and other "front end" documents shall be included in the 90% construction documents submittal, along with a final version of all text to appear in Division 1, General Requirements. The Designer may defer insertion of final advertising / bid dates and wage rates, understanding that they are to be established and inserted immediately prior to release of documents for bidding.

7.6.9 Construction Cost Estimate Requirements

The Designer shall provide the construction cost estimates described in Articles 7.6.3 and 7.6.5 in accordance with the following provisions:

(a) The Designer shall review its construction cost estimate in comparison with the detailed construction cost estimate, and any update cost estimates, provided by the OPM and shall work in good faith and in cooperation and coordination with the OPM to reconcile any differences between the cost estimates, to clarify assumptions upon which the cost estimates are based and to address any concerns or questions with the cost estimates that are raised by the Owner, the OPM, or the Authority. If the Designer is unable to reconcile all differences between the two construction cost estimates with the OPM, then the Designer shall provide a detailed explanation of the differences to the Owner and the Authority. If, in any

case, the agreed-upon, reconciled construction cost estimate exceeds the Project Construction Budget, the Designer shall cooperate with the Owner and the OPM in identifying, specifying and recommending changes in materials, equipment, component systems and types of construction, or other adjustments in the scope or materials selections for the Project, including contingencies or alternative bid items, so as to facilitate revision of the design of the Project to reduce the cost of construction so as to comply with the Project Construction Budget.

(b) Cost estimate data shall be organized to identify elements of project work which may be proposed to be advanced under separate construction phases and/or separate bidding packages. When so proposed, estimates shall develop cost data relative to corresponding bidding and work execution dates established in project schedules.

(c) Cost estimates shall be projected to the mid point of the construction period.

(d) The summary sheets shall contain the following:

1. The date that the estimate was prepared. (Value Date).

2. The anticipated bid date.

3. The project and contract number.

4. The title and location of the project.

5. The name of the Designer.

6. The name of the Estimator.

7. The site work cost (including all utilities).

8. The building cost (including fixed equipment).

9. The estimated construction cost of each Phase of the work, totaled.

7.6.10 The Designer shall participate in a final review of the Construction Documents with the Owner, the OPM, and the Commissioning Consultant, and the Designer shall incorporate such changes as are necessary to satisfy the Owner's review comments.

7.7 Bidding Phase

7.7.1 The Designer shall, when authorized by the Owner, prepare for reproduction and distribution the construction bid documents, including advertisements, for receipt of proposals from construction contractors, and for execution of the Owner-Contractor Agreement. The Designer shall prepare all addenda (to include bidder questions and Designer responses), subject to the Approval of the Owner and the Authority. The Designer shall attend the pre-bid conference if one is scheduled, taking note of all questions asked. Relevant questions submitted in writing shall be answered by the

Designer by means of written addenda to the bid documents as required. The Designer shall attend each bid opening and, with the assistance of the Owner's Project Manager, conduct a review of the qualifications of the low filed sub-bidders and general bidder (and of other bidders if necessary) and shall, within five working days of the respective bid opening dates, advise the Owner in writing of the Designer's opinions as to the sub-bidders' bids and as to which general bidder is the responsible and eligible bidder that has submitted the lowest bid.

7.7.2 The Designer shall assist the Owner in the prequalification of prime contractors and subcontractors in the filed sub-bidder or trade contractor scopes of work pursuant to M.G.L. c. 149, §§44D½ and 44D¾ including participation as a member of the Owner's Prequalification Committee.

7.7.3 The Designer shall receive all inquiries relating to the bid documents and, when necessary, answer questions by preparing and issuing written addenda. The Owner shall review and approve all such addenda prior to issuance to bidders.

7.7.4 When sub-bids are required:

(a) Attend sub-bid openings.

(b) Assist in reviewing sub-bids with the Owner for completeness and accuracy.

(c) Assess sub-bid amounts relative to cost estimates.

(d) Assist in checking references of sub-bidders and make written recommendations as to their qualifications, only required for projects in which pre-qualification has not occurred.

(e) Issue a letter of recommendation to Owner upon acceptance of sub-bids, identify any categories to be re-bid and reason(s) therefor.

(f) Prepare and distribute the filed sub-bid tabulation to all prospective bidders. The tabulation shall be reviewed and approved by the Owner prior to its issuance to bidders.

7.7.5 Unless otherwise directed by the Owner, attend and conduct the general bid opening.

7.7.6 Review with the Owner and the Owner's Project Manager general bids for completeness and accuracy.

7.7.7 Review bidder responses for alternates and make written recommendations as to their acceptance.

7.7.8 If the Project has to be re-bid because of a defect in the bid documents prepared by the Designer or in procedures proposed by the Designer, the Designer shall correct the defect and take the necessary actions for re-bidding the Project on proper bid documents without any additional compensation to the Designer.

7.7.9 If within three (3) months after approval of Construction Contract Documents, in final form, the bids of the lowest responsible and eligible bidders or negotiated proposals exceed the approved Project Construction Budget, the provisions of Article 4.10 shall apply.

7.7.10 If the Owner awards a construction contract for an amount that exceeds the amount established in the Project Construction Budget, such an award will not affect the Fee for Basic Services.

7.8 Construction Administration Phase - Obligations During Construction: Following the execution of the Owner-Contractor Agreement, the Designer shall undertake certain of the obligations of administering the Owner-Contractor Agreement on behalf of the Owner, provided that Designer shall not be subject to provisions of the Owner-Contractor Agreement that would have the effect of expanding Designer's responsibilities or liabilities under this Contract without Designer's written consent. Services during this phase include, but are not necessarily limited to:

7.8.1 Upon commencement of construction activities for the Work or early bid packages or at times established in Project schedules, the Designer shall:

(a) Furnish the General Contractor with information for establishing lines and grades and such supplemental drawings as are reasonably needed to implement the intent of the Construction Contract Documents;

(b) With reasonable promptness and in accordance with schedules agreed upon by the Designer and Contractor, observe testing when required under this Contract, and review and act upon samples, schedules, shop drawings and other submissions from the General Contractor;

(c) Prepare, maintain and update logs for all submittals;

(d) Visit the site at intervals appropriate to the stage of construction, weekly or as otherwise agreed to by the parties, and observe the progress of the Work, issue written progress reports, and attend job meetings, and review and respond to meeting minutes prepared by the Owner's Project Manager, and to determine in general if the Work observed is being built in a manner indicating the Work when completed will be in accordance with approved Construction Contract Documents;

(e) Collaborate with the on-site Project Representative of the OPM to identify and monitor issues of concern relative to the progress of the Work, and establish communications processes to help assure that matters of mutual concern are exchanged on a timely basis with one another, the OPM, Commissioning Consultant, and Owner;

(f) On a weekly basis, make specific recommendations on rejection of any Work observed by the Designer that fails to conform to the Construction Contract Documents, and observe corrected Work;

(g) Require each Subconsultant engaged in accordance with Article 5 to make visits weekly or as otherwise agreed to by the parties during the progress of any work to which that Subconsultant 's services relate, and to report upon it in writing to the Designer;

(h) Recommend actions to be taken which may include condemnation or rejection of any work that the Designer determines fails to conform to the Owner-Contractor Agreement;

(i) Review and recommend appropriate action for proposed requests for changes and where required by the Owner, prepare documents associated with requests for a change in any Construction Contract Documents. Compensation for change order work by the Designer shall be determined in accordance with Article 10;

(j) Conduct semi-final and final inspections of the Project and report the results of such inspections in writing to the Owner;

(k) In association with the Commissioning Consultant, review the report by such Commissioning Consultant on the balancing of air and water circulation systems;

(l) In association with the Commissioning Consultant, review the report by such Commissioning Consultant on the setting and adjustment of automatic controls;

(m) In a timely manner, decide all questions regarding interpretation of, or compliance with, the Construction Contract Documents, except as the Owner may in writing otherwise determine;

(n) In association with the Commissioning Consultant, review the recommendations of such Consultant for requirements upon operating and maintenance documents and building user training events and instructional media as established in the Construction Contract Documents; such Consultant or OPM shall coordinate involvement of contracting parties, the Designer, and Owner;

(o) Furnish the Record Drawings as submitted by the General Contractor in accordance with 7.8.3, and other required documents;

(p) Assist the Owner in providing the written Contractor Evaluations required of the Owner pursuant to M.G.L. c.149 §44D(7) at the completion of approximately 50% of the Construction Phase on forms prescribed by M.G.L. c.149 §44D(16);

(q) Perform inspections of the work as necessary to prepare a punch list identifying each incomplete or deficient Work item and performing re-inspections to authorize removal of satisfactorily completed Work items from the punch list, or to determine that the Project is complete. In association with the OPM, a cost shall be assigned to each incomplete or deficient Work item when it has been determined that the Project has reached Substantial Completion; and

(r) Receive from the General Contractor all maintenance and operating manuals, occupancy permits, guarantees and other similar relevant materials.

7.8.2 The Designer shall submit to the Owner's Project Manager within 48 hours all requisitions for payment submitted by the General Contractor in the form required by the Owner. The Designer may establish procedures with the Contractor for advance notification of requisition and/or draft version processing. With respect to each such requisition, the Designer shall certify to the best of its knowledge that the percentage of Work included in the requisition is accurate and that the work performed is in accordance with the Construction Contract Documents. In the event the Designer does not approve the requisition exactly as submitted by the General Contractor, the Designer shall forward it for payment to the Owner's Project Manager dated and signed with corrections and with an accompanying letter of explanation setting forth the Designer's objections and recommended changes. The Designer shall coordinate

the required visits of its own staff and those of its Subconsultants, to the construction site so as to enable it to submit to the Owner's Project Manager the General Contractor's monthly requisition for payment. Timely payments to the Contractor are required by M.G.L. c. 30, § 39K. Therefore, the Designer shall establish procedures to help assure either immediate mail or messenger delivery of the requisition for payment to the Owner's Project Manager, and shall process requisitions for payment within five business days after receipt of the same, provided the Contractor has submitted a full and complete requisition for payment in the correct form.

7.8.3 Prior to issuance of the Certificate of Substantial Completion, the Designer shall obtain from the General Contractor as-built drawings, including drawings showing the actual installation of the site utilities, plumbing, heating, ventilating and electrical work under the Owner-Contractor Agreement, and recording all changes. The Designer shall ascertain that changes authorized by change orders are shown on the General Contractor's as-built drawings, but Designer shall be entitled to rely upon the accuracy and completeness of the Contractor's as-built information, and shall forward such to the Owner as Record Drawings.

7.8.4 Issue the Certificate of Substantial Completion of Construction.

7.8.5 The Designer shall meet with the Owner monthly during this Phase.

7.9 Completion Phase: Upon acceptance of the Certificate of Substantial Completion of Construction by the Owner, the Designer shall thereafter provide the following services:

7.9.1 With respect to a completed Project, preparing a Certificate of Final Completion.

7.9.2 With respect to a punch list, re-inspecting the work up to three times in order to determine that the punch list work is satisfactorily completed.

7.9.3 Reviewing and certifying the Contractor's Application(s) and Certificate(s) for Payment as necessary.

7.9.4 Attending meetings as reasonably necessary in the opinion of the Owner's Project Manager, unless such meetings involve continued discussions of incomplete or deficient work and the Basic Services punch list site visits have been expended. In such instance, the meetings shall be paid for as Extra Services.

7.9.5 Using the as-built information maintained by the General Contractor during construction referred to in Article 7.8.3, and revising the applicable original reproducible drawings and electronic media drawings on the basis of the as-built drawings, provided that Designer shall be entitled to rely upon the accuracy and completeness of the Contractor's as-built information. Upon completion of the required drafting and editing, provide one set of mylar reproducibles, two sets of prints and two (2) electronic version copies to the Owner which shall become the property of the Owner. The cost for printing the mylar reproducibles and two sets of prints are Reimbursable Expenses.

7.9.6 Ten (10) months after the date of substantial completion, performing one (1) site inspection and preparing a list of construction warranty deficiencies. The Designer shall consult with the Commissioning Consultant upon the acceptability of warranty compliance requirements and response actions.

7.9.7 Informing the Owner in writing, through the Owner's Project Manager, of all such warranty deficiencies that should be addressed.

7.9.8 Performing one (1) site inspection within a further sixty (60) days to see that all such warranty deficiencies have been corrected.

7.9.9 Evaluation of Contractor: The Designer shall assist the Owner with providing the written Contractor Evaluations required of the Owner pursuant to M.G.L. c.149 § 44D(7) within 70 days of the date of Substantial Completion for construction, on forms prescribed by M.G.L. c.149 § 44D(16).

7.9.10 Two (2) suitably bound legible copies of all original design and quantity calculations including those pertinent to change orders and shop drawings if applicable shall be furnished by the Designer to the Owner at the conclusion of the Owner-Contractor Agreement.

Attachment B3

Designer Services Contract Amendment for CM-at-Risk

https://www.massschoolbuildings.org/sites/default/files/editcontentfiles/Documents/Contracts_Procurement_Forms/Designer/Designer_Contract_Amendment_CM-R_2_25_11.pdf

7.5 CM at Risk Construction Delivery Method

7.5.1 CM at Risk Prequalification & Selection

(a) The Designer shall participate as a member of the Owner's CM at Risk Prequalification Committee and CM at Risk Selection Committee pursuant to M.G.L. c. 149A, §§ 5 & 6.

(b) The Designer shall, when authorized by the Owner, prepare for reproduction and distribution all project design documents, that are required for the solicitation and receipt of qualifications and proposals from CM at Risk firms pursuant to M.G.L. c. 149A, §§ 5(b) & 6(a). The Designer shall prepare all addenda (to include questions from CM at Risk firms and Designer responses), subject to the approval of the Owner. The Designer shall attend a pre-proposal conference, and existing site and building tour if either or both are to be scheduled, taking note of all questions asked. Relevant questions submitted in writing shall be answered by the Designer in conjunction with the OPM by means of written addenda to the RFQ or RFP described below, as required.

(c) As a member of the Owner's CM at Risk prequalification committee, the Designer shall review and evaluate in conjunction with the Prequalification Committee, the Statements of Qualifications received from CM at Risk firms on the basis of the evaluation criteria established in the RFQ and shall make appropriate recommendations regarding the selection of qualified CM at Risk firms to receive a request for proposals from the Owner in accordance with the provisions of M.G.L. c. 149A, § 5(f).

(d) As a member of the Owner's CM at Risk selection committee, the Designer shall review and evaluate the RFP's received from prequalified CM at Risk firms on the basis of the evaluation criteria included in the RFP. The Designer shall make appropriate recommendations regarding the evaluation and ranking of RFP's and the conducting of interviews, if any, in accordance with the provisions of M.G.L. c. 149A, § 6(d), and the applicable regulations and procedures promulgated by the Inspector General. If the Selection Committee elects to conduct interviews of the CM at Risk firms, the Designer shall participate in conducting interviews.

(e) As member of the Owner's CM at Risk Selection Committee, the Designer shall assist the CM at Risk Selection Committee in non-fee negotiations with the CM at Risk until the Selection Committee has reached an acceptable contract with one of the prequalified CM at Risk firms in accordance with M.G.L. c. 149A § 6(e).

(f) If, at any time, the Owner terminates the Owner-CM at Risk contract, the Designer shall continue to provide the Designer Services required under this Contract with

any substitute CM at Risk procured by the Owner. If, as provided by law, the Owner elects to proceed with the Project pursuant to the provisions of M.G.L. c. 149 (design-bid-build), the Designer may continue to provide Designer Services pursuant to a mutually agreeable amendment to this Contract subject to the approval of the Authority.

7.5.2 Design Review for the CM at Risk Construction Delivery Method

(a) The Designer shall provide Designer Services in a manner consistent with the CM at Risk Delivery Method, as defined herein, in all Phases of the Project and shall work cooperatively with the CM at Risk, as well as the Owner, OPM, Commissioning Consultant and the Authority to achieve timely completion of the Project within the Project Construction Budget.

(b) Upon execution of the Owner-CM at Risk Agreement, the Designer shall:

1. meet with the Owner, the OPM and the CM at Risk to discuss issues and to establish procedures for efficient interaction in a cooperative and mutually supportive manner that will permit all parties to perform their contractual obligations. These procedures shall include, but not be limited to: arrangements for the collaboration and coordination between the Designer and the CM at Risk in the preparation and submission of all design phase documents to the Owner; arrangements for discussions concerning all design phase document submittals among the Owner, OPM, CM at Risk and Designer; and arrangements for frequent and productive interactions between the Owner, OPM, CM at Risk and Designer during all the design phases.

2. provide copies of the schematic design drawings, specifications, cost estimates and other submittals to the CM at Risk, to assist the CM at Risk in fulfilling its responsibilities to the Owner. The Designer shall consult with the CM at Risk and provide the CM at Risk with an opportunity to review and comment upon deliverables developed by the Designer during the Schematic Design Phase.

(c) The Designer shall attend and participate in meetings as necessary with the CM at Risk, the Owner and the OPM to resolve all issues.

(d) The Designer shall consult with the Owner, the OPM, and the CM at Risk regarding the sequence of delivery of design services; the selection of materials, building systems and equipment; alternative solutions recommended by the CM at Risk when design details affect construction feasibility, schedules, cost or quality; other value engineering comments and recommendations made by the CM at Risk; comments and recommendations concerning the design documents with respect to clarity, consistency, constructability,

maintainability/operability and coordination among the trades, coordination between the specifications and drawings, compliance with M.G.L. c. 149A for procurement, installation and construction, and sequence of construction, including recommendations designed to minimize adverse effects of labor or material shortages.

(e) The Designer may be required, as a part of Basic Services if previously agreed with the Owner, to prepare plans and specifications for discrete portions of the Work that can be incorporated into separate bid packages for the various Subcontractors who will construct the Project. Such contracts may be awarded concurrently with other contracts or individually, or at different points in time, which may result in the Designer completing portions of the design after commencement of construction of the Project and/or providing Construction Phase services before completion of all design phase services. The design for each separate bid package shall separately be subject to all requirements applicable to the various phases set forth in this Contract and shall be performed in a manner consistent with the provisions of the Project Funding Agreement, including, but not limited to, the Project Construction Budget and Project Schedule.

(f) The Designer shall consult with the CM at Risk concerning the ordering and delivery of products and assemblies and shall identify and describe any long lead products or assemblies that need to be priced and pre-ordered to meet the Project Schedule.

(g) The Designer shall identify and describe any multiple bid packages or fast-tracked construction that will be used and any separate bid packages that will be required.

7.6 Design Development Phase

7.6.1 The Designer shall provide the CM at Risk with an opportunity to review and comment upon design documents developed by the Designer during the Design Development Phase. The Designer shall work cooperatively with the CM at Risk throughout the Design Development Phase of the Project to obtain the benefit of the knowledge and experience of the CM at Risk with respect to design review, value engineering, constructability analysis, cost estimating, cost control, scheduling, coordination of bid packages, phasing, and other services and, with the approval of the Owner, the Designer shall thereupon incorporate recommended and mutually accepted changes into its design documents.

7.6.2 Upon receipt of an Approval to proceed to the Design Development Phase, the Designer shall meet regularly and as necessary with the Owner, the OPM, the CM at Risk and the Authority. This shall include meeting at least once every other week with the Owner, the OPM and the CM at Risk during this Phase.

7.6.3 Upon receipt of an Approval to proceed to the Design Development Phase, the Designer shall update and refine items submitted during the Schematic Design Phase, and shall submit to the Owner, CM at Risk, and the Authority, on or before the date specified in the Project Schedule, and on the basis of the approved Schematic Design Phase Documents, the following deliverables as they are defined in this Article 7.6.3 and as they are further defined in Articles 7.6.4, 7.6.5, 7.6.6, 7.6.7, and 7.6.8:

(a) a list of all filings and permits within Designer's scope of services and professional expertise required to implement the design and a schedule of target dates for the procurement of such permits, which list and schedule shall be regularly updated during the term of this Contract;

(b) information and documentation within the technical expertise of the Designer and that is necessary for the Owner to file local basic zoning and environmental permits. The Designer, as Extra Services, shall provide information and documentation for the Owner to file Environmental Notification Forms, Environmental Impact Reports, and any other filings for permits that must be filed during the design development phase;

(c) soils exploration data, geotechnical and geoenvironmental reports, showing exploratory locations relative to siting of proposed structures;

(d) complete design development drawings; outline specifications indicating any filed sub-bid sections and sub-sub trades based on the cost of the work and other documents necessary to specify the size and character of the Project as to siting, landscape, architectural, structural, fire protection, plumbing, heating, ventilating and air conditioning, electrical, ADA/MAAB, product requirements, and other features;

(e) quality control documentation demonstrating, without limitation, coordination of: ceiling clearances, mechanical room size, and shaft sizes; specifications and drawings; filed sub-bid work or sections; scheduling; equipment and power; existing and new construction; and phasing;

(f) design development drawings which the Designer shall submit for review to the local building official;

(g) a life cycle cost analysis to determine which design decisions related to all energy and water consuming devices and overall building operation and maintenance are the most cost effective [M.G.L. c. 149, s. 44M];

(h) a construction cost estimate for the design in Uniformat II Level 3 format, with unit rates and quantities supporting each item and reconciled with the detailed construction cost estimate and any updated cost estimates in accordance with Article 7.6.7. The estimate cost shall be projected, to the mid point of the construction period;

(i) a space measurement analysis for the design verifying that the sum of all program areas in the Project plus all other floor areas in the Project equals the gross floor area of the Project;

(j) a written summary or summaries comparing the project design, as represented in the design development drawings, specifications and cost estimates with the Final Design Program requirements, and explaining any deviations in writing.

7.6.4 Design Development Drawing Requirements: The Design Development drawings shall illustrate and describe the refinement of the design of the Project to a level of detail that is customary and standard, establishing the scope, relationships, forms, size and appearance of the Project by means of plans, sections and elevations, typical construction details, and equipment layouts. Drawings shall delineate locations and elements of Work which may be proposed to be assigned to project construction phases and/or separate bidding packages. Documents shall include, but not be limited to, the following:

(a) Site and utility drawings showing;

1. Existing and proposed contours and locations of the proposed building or addition(s). Show entry level elevation and key exterior grades at perimeter. Indicate all retaining walls. Include benchmarks of site if survey is available.
2. All utilities existing and proposed, indicating location, elevation, composition and size e.g., manholes, sewers, hydrants, light standards. Include work by others, e.g., gas and electric utility providers.
3. Roads, laid out parking areas, walks, recreation areas, terraces and other site improvements.
4. Building locations fixed and referenced from main survey baseline, if available.
5. Plant materials with preliminary schedule.

(b) Building drawings and other graphic and written requirements with floor plans showing: (minimum scale 1/8" = 1'0");

1. building perimeter with exterior wall thicknesses and overall dimensions;
2. structural grid;
3. plan requirements of mechanical and electrical systems;
4. building core; elevators, stairs, shafts, toilet rooms;
5. interior partitions; appropriate thicknesses and dimensions to fix basic organizations; indicate fire separations, ratings;
6. door swings;
7. floor elevations;

8. built-in furniture and equipment; and
9. furniture layout concept drawings.

(c) Roof plans showing:

1. proposed systems type;
2. pitch and drainage patterns;
3. roof drains, gutters and scuppers;
4. skylights, stairs through roof, penthouses, major equipment, chimneys.

(d) Building sections: One transverse and one longitudinal section. Indicate floor to ceiling heights and floor-to-floor heights. Label all spaces;

(e) Building elevations showing:

1. full height elevations including roof structures, e.g., mechanical equipment, chimneys, and penthouses;
2. floor elevations, floor-to-floor heights, and overall height related to benchmarks on site plans;
3. all fenestration;
4. column centerlines;
5. principal finish materials indicating major control and expansion joints, and divisions of materials where required;
6. louver and equipment enclosure systems; and
7. exterior grades and topographical features in context.

(f) Full height wall sections for main elevations and at special conditions. Show foundation and perimeter treatment, wall construction including insulation and supporting structure, fenestration and mechanical penetrations, and floor construction;

(g) Interior elevations: Major spaces, e.g. library, lobby; and all typical spaces, e.g. classrooms;

(h) Reflected ceiling plans: show prototypical structural, fire protection, mechanical and electrical information for classrooms and major spaces, including lighting layouts with ceiling heights and material changes;

(i) Colored interior elevations and perspectives of major and typical spaces;

(j) Schedules:

1. finish schedule by room types;
2. door schedule by room;
3. window schedule;

4. equipment schedules, e.g., food service, instructional media.

(k) Structural Concepts:

1. Foundation plan showing sizes and locations of typical components.
2. Framing plans: typical floor framing, roof framing, special framing, show framing at major openings and sizes of members.
3. Column locations.
4. Preliminary details including floor and roof deck, statements as to methods of lateral bracing and how requirements of earthquake code will be met.
5. Details for special and/or incidental structural features, e.g. tunnels, connecting bridges and unique architectural features.
6. Connection to existing buildings at foundation and at key points at existing structure if applicable.

(l) Fire Protection: floor plans indicating wet or dry type systems, hose racks or cabinets and fire department tie-ins. Indicate whether a fire pump will be required and, if so, show location within the building. Show typical sprinkler head layout;

(m) Plumbing and sanitary systems: floor plans indicating locations of all plumbing fixtures and special features, and approximate location and size of all piping systems and principal items of equipment;

(n) Heating, Ventilating and Air Conditioning Systems;

1. Show locations and approximate sizes of piping systems, air handling systems and principal items of equipment such as compressors or cooling towers.
2. Indicate space requirements of major equipment and their location in mechanical rooms and fan rooms. Major shafts.

(o) Electrical Systems;

1. Calculations showing total electrical load.
2. All services including those for special purposes shall be located and indicated.
3. Lighting shall be indicated as to type, location and intensities in foot-candles for each special and typical space.
4. Switchgear and emergency generator.
5. Fire alarm system drawings showing all initiation and signaling devices, control panels, annunciator panels, etc.
6. Security system drawings.
7. Communications drawings showing chases, major equipment locations and any special distribution requirements.

8. CATV/CCTV drawings showing chases, major equipment locations and any special distribution requirements.
9. Information Technology drawings showing chases, major equipment locations and any special distribution requirements.

7.6.5 Other Consultant's Drawings and Other Graphic and Written Requirements: For special consultants, e.g., kitchen, elevator, library, media room, equipment where appropriate, provide drawings that locate and define the scope of the work. Coordinate with other disciplines. Provide cuts of all major pieces of equipment.

7.6.6 Project Manual Requirements (Specifications):

(a) Outline Specifications that are to accompany Design Development Drawings shall be prepared to a level of detail that is standard and customary and shall include, but not be limited to, a comprehensive description of the Project and the materials proposed for use in the work. No detailed specifications of materials or workmanship procedures need be included; however, the general scope shall be indicated by CSI MasterFormat as applicable to proposed construction.

1. The Design Development Outline Specification shall also include a comprehensive "BASIS OF DESIGN." The "BASIS OF DESIGN" shall be a narrative description of the Project and shall include all applicable architectural, civil, structural, mechanical and electrical programs and/or systems. Identify all proposed filed sub-bid categories.
2. Project Manual shall include a statement to define Work which is proposed to be included in separate construction phases and/or bid packages.

(b) The following is a list of items that shall at a minimum be identified or outlined in this Phase.

1. Site work; clearing, drives, walks, parking areas, fences, excavation, backfill, planting.
2. Footings; on earth, rock, piles, caissons, proposed bearing pressures, boring logs.
3. Foundation walls; type of concrete, reinforcing, type and extent of waterproofing.
4. Footing drains; type, disposal of drainage.
5. Exterior walls: superstructure, type, materials, brick type, alternate cladding, back-up materials, dampproofing material and extent, special features.
6. Roofs; types, vapor barrier, insulation, flashings, all materials.
7. Flashings; general types, all materials, weights, where each type is to be used.
8. Sheet metal; gutters, leaders, others uses, except flashings.
9. Windows; general types, materials, sub-frames, finish, glazing, screens.

10. Doors, exterior and interior; types.
11. Steps, exterior; including platforms and landings' materials.
12. Stairs, interior; including platforms, landings, walls, materials and finishes.
13. Framing; wood, concrete or metal systems in accordance with general design.
14. Partition construction related to room type;
15. Cabinet and casework; types and materials.
16. Food Service Equipment; types and materials.
17. Furring; lathing, plastering, materials and locations.
18. Insulation thermal; types, thicknesses, methods of application and locations.
19. Acoustical treatments; types, thicknesses, methods of application and location.
20. Interior finishes; materials for floors, walls, bases, wainscots, trim, ceilings, ceiling heights.
21. Fire Protection; standpipe systems, sprinkler systems, fire pumps and accessories.
22. Water supply; source; location of main to which connection will be made; type of pipe for service main; load requirements; load factors and pressures.
23. Sanitary sewers; sewage disposal system, pipe and other materials.
24. Storm sewers; storm drainage disposal system (institution or local facility), pipe and other materials.
25. Gas main; material, size, location. Interface with utility company.
26. Plumbing; systems such as wastes, vents, hot water, cold water, gas, air, oxygen, vacuum, main source of supply, materials for each, water heaters, pumps, thermal insulation fixture quality, all special features.
27. Heating, ventilating and air conditioning; type of heating and refrigeration plants, type and capacity of boilers and cooling equipment, fuel, type of burners, fuel storage, heaters, feed water pumps and heaters, thermal insulation, type of heating medium, supply and return piping, radiation, unit heaters, radiant heating, principal air conditioning equipment types, special features, supply, return and exhaust ductwork.
28. Electric work; service connection, location, institution or public utility, overhead or underground, transformers including type and location, types of conduit and wiring, types of fixtures, location of main switchboard, radio, fire alarm, telephone, public address, emergency lighting and wiring, emergency or other generators, special features, including Master TV, information retrieval and/or data processing system.

29. Elevators, dumbwaiters and platform lifts; capacities, speed, travel in feet, landings, operation, controls, platform sizes, machine type and location, car and entrance finishes, signals.

30. Other built-in equipment, types and materials.

31. Special features.

7.6.7 Construction Cost Estimate Requirements – The Designer shall provide a construction cost estimate in Uniformat II Level 3 format with aggregated unit rates and quantities supporting each item referenced in Article 7.6.6(b). The estimate cost shall be projected, to the mid point of the construction period.

The Designer shall review its construction cost estimate in comparison with the detailed construction cost estimate, and any updated cost estimates, provided by the CM at Risk and/or OPM and shall work in good faith and in cooperation and coordination with the CM at Risk and/or OPM to reconcile any differences between the construction cost estimates, to clarify assumptions upon which the cost estimates are based and to address any concerns or questions with the cost estimates that are raised by the Owner, the OPM, the CM at Risk, or the Authority. If the Designer is unable to reconcile all differences between the two construction cost estimates with the CM at Risk, then the Designer shall provide a detailed explanation of the differences to the Owner. If, in any case, the agreed-upon, reconciled construction cost estimate exceeds the Project Construction Budget, the Designer shall cooperate with the Owner, the OPM, and the CM at Risk in identifying, specifying and recommending changes in materials, equipment, component systems and types of construction, or other adjustments in the scope or materials selections for the Project, including contingencies or alternative bid items, so as to facilitate revision of the design of the Project to reduce the cost of construction so as to comply with the authorized Project Construction Budget.

Cost estimate data shall be organized to identify elements of project work which may be proposed to be advanced under separate construction phases and/or separate bidding packages. When so proposed, estimates shall develop cost data relative to corresponding bidding and work execution dates established in project schedules.

7.6.8 Reports, drawings, specifications, cost estimates and other design development submittals shall be subject to the written approval of the Owner and the Authority. Unless a lesser number is requested by the Owner, the Designer shall submit to the Owner for approval six (6) copies of Design Development drawings, specifications, cost estimates, and other submittals. Two (2) copies shall be submitted to the Authority by the Designer. The Designer submit to the CM at Risk one copy (1) of Design Development drawings, specifications, cost estimates and other submittals to assist the CM at Risk in fulfilling its responsibilities to the Owner.

7.6.9 The Designer shall present and explain the Design Development submittal to the Owner and the Authority and at a local public meeting scheduled by the Owner, if any such meeting is scheduled or in conference.

7.6.10 The Designer and its Subconsultants shall collaborate with the Authority's Commissioning Consultant to develop design criteria which will support the purposes of building commissioning and energy/resources conservation concepts as commonly understood and as prescribed by the Commissioning Consultant.

7.7 Construction Documents Phase:

In addition to the requirements specified in the RFS (Attachment B), upon receipt of an Approval to proceed with the Construction Documents Phase of the Project from the Owner, the Designer shall do the following:

7.7.1 The Designer shall provide the CM at Risk with an opportunity to review and comment upon design documents developed by the Designer during the Construction Documents Phase. The Designer shall work cooperatively with the CM at Risk throughout the Construction Documents Phase of the Project to obtain the benefit of the knowledge and experience of the CM at Risk with respect to design review, value engineering, constructability analysis, cost estimating, cost control, scheduling, coordination of bid packages, phasing, and other services and, with the approval of the Owner, the Designer shall thereupon incorporate recommended and mutually accepted changes into its design documents.

7.7.2 The Designer shall meet regularly and as necessary with the Owner, the Authority, the OPM, the CM at Risk and the Commissioning Consultant. This shall include meeting with the Owner at least twice per month (or more frequently if needed) during this Phase.

7.7.3 Based on the submittals approved in the Design Development Phase of the Project, the Designer shall update and refine the items previously submitted and shall submit the following to the Owner, the CM at Risk, and the Authority on or before the date and time specified in the Project Schedule:

(a) Construction documents progress submittals as follows:

1. a 60% Construction Documents Submittal, with deliverables as defined in Article 7.7.4;
2. a 90% Construction Documents Submittal, with deliverables as defined in Article 7.7.5;
3. a Final Construction Documents Submittal, with deliverables as defined in Article 7.7.6;
4. a Bid Documents Submittal, with deliverables as defined in Article 7.7.7

(b) As a part of each of the submittals required under Articles 7.7.4, 7.7.5, and 7.7.6, an updated work plan and recommended updates for incorporation into the Project Schedule by the OPM;

(c) As a part of each of the submittals required under Articles 7.7.4, 7.7.5, and 7.7.6, a report on the status of environmental, zoning, planning, building code, and ADA/MAAB approvals and permitting processes and a certified list of all required testing and all required permits identified in 7.6.3 (a).

(d) All submittals by the Designer shall be subject to the written approval of the Owner, which approval shall not be unreasonably delayed, withheld, conditioned, or denied. Unless a lesser number is requested by the Owner or is specifically provided hereinafter, the Designer shall furnish to the Owner for approval six (6) sets of the drawings, specifications, construction cost estimates and all other submittals. Unless a lesser number is specifically provided hereinafter, the Designer shall furnish two (2) sets of said drawings, specifications, construction cost estimates and all other submittals to the Authority and shall furnish one (1) set thereof to the CM at Risk. The Designer shall also furnish to the Owner, the Authority, and the CM at Risk electronic media copies of the foregoing drawings and documents in such form as may be required by the Authority.

7.7.4 The 60 Percent Construction Documents Submittal:

(a) The Designer shall provide, on or before the date and time specified in the Project Schedule, a 60 % Construction Documents Submittal (60% CD Submittal), which shall include:

1. Construction Documents and other deliverables, as defined in this Article 7.7.4 and as further defined in Articles 7.7.3, 7.7.8, 7.7.9, and 7.7.10, advanced to a level of intermediate (60 percent) completion, and incorporating corrections to indicate compliance with Owner and Authority review comments related to prior submittals.

2. In instances where the Designer takes exception to the Authority's previous review comments on the Design Development submittal, a written statement explaining its position.

3. The Basis of Design that accompanied the Outline Specifications in the Design Development Phase shall be updated and expanded to include all proposed architectural, structural, fire protection, plumbing, mechanical, electrical, civil, and landscape design concepts for the Project.

4. A space summary, in the form and format prescribed by the Authority, that sets forth the current space calculations and totals and certifies that said space calculations and totals are in compliance with those previously authorized by the Authority in the Project Funding Agreement.

5. Keying of graphics shall be sufficient to allow a reviewer to make his or her way through the set.

6. A list of all drawings related to the Project.

7. A materials selection statement identifying typical interior and exterior surfaces and their materials.

8. A color theory statement indicating proposed paint colors and material selections for typical and special spaces and why they have been selected and how these selections relate to surrounding materials and colors.

9. Large scale plans of all mechanical and electrical spaces with major equipment indicated.

10. Project Manual, including all sections to be included in final technical specifications, developed to include a list of all materials in the building with their manufacturers. Identify all specifications sections which need to be filed sub-bid.

11. Identify all proposed bid alternates by inclusion in a project manual section to be titled "Alternates." Alternates shall be listed in sequence as approved by the Owner. Work required under bid alternates shall be described and/or drawn, as appropriate, to clearly define the design criteria and extent of work involved for implementation of the bid alternate. In each instance, the existing conditions and/or new design criteria for base bid work shall also be described and indicated in documents.

12. Code analysis: Provide a building code analysis. Any deviation from methods of compliance described in earlier submittals shall be indicated. Code analysis shall identify its preparer, code edition referenced, and include a comprehensive description of operative building code provisions, with floor plans showing fire separation types, area calculations, egress capacity for exits and exitways, and any special features required to comply.

(b) As a requirement of the 60% CD Submittal, and in accordance with the provisions of this paragraph and Article 7.7.10, the Designer shall provide a construction cost estimate prepared using the Uniformat II Classification to Level 3, the CSI MasterFormat 6-digit format to Level 3 and MGL c.149 §44F (filed sub-bid) format including quantities of all materials and unit prices of labor, equipment, and materials as well as a cost estimate for each item of work, for review by the Owner, the CM at Risk and Authority. The Designer shall submit said construction cost estimate separately, as a supplement to the 60% CD

Submittal, no later than twenty-one days after the submission of the 60% CD Submittal described in Article 7.7.4(a). The development of said construction cost estimate shall under no circumstances delay the timely submission of the remainder of the 60% CD Submittal.

7.7.5 The 90 Percent Construction Documents Submittal:

(a) The Designer shall provide, on or before the date and time specified in the Project Schedule, a 90 % Construction Documents Submittal (90% CD Submittal), which shall include:

1. Construction documents and other deliverables as defined in this Article 7.7.5 and as further defined in Articles 7.7.3, 7.7.8, 7.7.9, and 7.7.10, advanced to a level of substantial (90 percent) completion, and incorporating corrections to indicate compliance with Owner and Authority review comments related to prior submittals.

2. A space summary, in the form and format prescribed by the Authority, that sets forth the current space calculations and totals and certifies that said space calculations and totals are in compliance with those authorized by the Authority in the Project Funding Agreement.

3. Interior Materials Color Boards, including samples of principal interior materials, labeled and mounted to indicate locations.

4. Final structural and energy design calculations.

5. A statement confirming that the Owner has been provided with structural design drawings, specifications, and calculations sufficient to enable execution of an independent structural peer review process, as defined in the Massachusetts Building Code, as amended (this requirement is applicable, to satisfy Authority requirements for all school construction projects having a floor area in excess of 10,000 square feet). The Designer shall have advised the Owner of this requirement in writing not less than sixty (60) days prior to delivery of the 90% CD Submittal in order for the Owner to arrange for the services of an Independent Structural Peer Reviewer. Upon reaching 90 percent completion of construction documents, Designer's structural engineering consultant shall have reached a level of 100 percent completion of its construction documents to enable advancement of the independent structural peer review.

6. The Designer and its consultants shall fully cooperate with the Independent Structural Peer Reviewer in the process. The Designer shall obtain a copy of the Independent Structural Engineering Review report and submit same to the

Owner and the Authority at the time of completion of the remainder of the construction documents at the level of final completion.

7. In instances where the Designer takes exception to any of the Authority's 60% CD Submittal review comments, a written position statement explaining the Designer's position on its exceptions to said review comments.

7.7.6 Final Construction Documents Submittal:

(a) The Designer shall provide, on or before the date and time specified in the Project Schedule, a Final Construction Documents Submittal, which shall include:

1. Construction documents and other deliverables as defined in this Article 7.7.6 and as further defined in Articles 7.7.3, 7.7.8, 7.7.9, and 7.7.10, advanced to a level of final (100 percent) completion, and incorporating corrections to indicate compliance with Owner and Authority review comments related to prior submittals.

2. a final construction cost estimate, in accordance with the provisions of this paragraph and Article 7.7.10, based on 90% Construction Documents, including cost estimates for general conditions, overhead and profit, insurance, bonds, and all other items; and allowances expressed as percentage rates for design contingencies and construction contingencies and escalation to the bid date; and other mutually agreed upon contingencies. The final construction cost estimate shall be prepared in Uniformat II Elemental Classification to Level 3 (Sections A-G inclusive), the CSI MasterFormat to Level 3 and M.G.L. c.149, §44F (filed sub-bid) format and shall be complete with a single line description for each item with the detailed unit rate or item cost buildup provided in each case.

3. complete construction drawings and specifications, certified by the Designer as having satisfied the firm's quality control review process as previously confirmed with the Owner, in sufficient detail to permit fixed-price bids in open competition for construction of the Project when documents have been approved for issuance for bidding.

4. no later than at the 100% stage of completion of the final drawings and specifications, two sets of the final drawings and specifications that shall be provided to the local building official to be signed and stamped "Approved" by the local building official; two sets of plumbing drawings and specifications that shall be provided to the local plumbing inspector to be signed and stamped "Approved" by the local plumbing inspector; two sets of the fire protection, HVAC, and electrical construction documents that shall be provided to the local fire official to be signed and stamped "Approved" by the local fire official; two sets of the electrical construction documents that shall

be provided to the local electrical inspector to be signed and stamped "Approved" by the local electrical inspector. Notwithstanding the foregoing, the Owner acknowledges that building officials, department inspectors, and fire officials have varying policies on approvals and submittal procedures, and the only obligation of the Designer in this regard is to promptly make the submittals described herein and assist the Owner or CM at Risk in receiving the approvals to the extent available.

5. at the 100 percent stage of completion of final drawings and specifications, a written summary comparing the final construction drawings and specifications and final estimated construction cost with the Final Design Program requirements and submittals made during the Design Development Phase and earlier in the Construction Documents Phase, explaining any significant deviations.

6. In instances where the Designer takes exception to any of the Authority's 90% CD Submittal review comments, a written position statement explaining the Designer's position on its exceptions to said review comments.

7. The Independent Structural Engineering Peer Review Report obtained from the Independent Structural Engineering Peer Reviewer referenced in Article 7.7.5(a)5. The Designer shall include a certification statement from the project structural engineer designer of record to acknowledge receipt of the Report and to indicate response actions pursuant thereto. The Designer shall also forward a copy of said Report to the Building Inspector

8. A certification that all applicable local, state and utility officials have been contacted by the Designer regarding each utility connection and that the persons responsible for permits or connection approval have agreed to the systems' use.

7.7.7 Bid Documents Submittal:

(a) The Designer shall provide, on or before the date and time specified in the Project Schedule, a Bid Documents Submittal which shall include:

1. Construction documents and other deliverables as defined in this Article 7.7.7 and as further defined in Articles 7.7.3, 7.7.8, and 7.7.9, incorporating corrections to indicate compliance with Owner and Authority review comments related to prior submittals.

2. From the construction drawings and specifications approved by the Owner, incorporating such changes as the Owner or the Authority requires, a set of reproducible black and white drawings and original specifications on high quality white bond paper, single-sided, properly packaged, suitable for

reproduction, stamped and signed by all disciplines, that shall be prepared by the Designer and transmitted to the Owner; which documents shall become the property of the Owner as provided under Article 16. Other suitable reproducible media, having the same content shall be substituted, when so directed or authorized by the Owner.

3. Upon receipt of Owner authorization to advance to reproduction the approved documents for distribution to bidders and, upon reproduction thereof, the Designer shall promptly submit complete sets of bid documents to the Owner (two sets), the CM at Risk (one set) and the Authority (one set - half size for Drawings). Any subsequent addenda shall be promptly submitted to the Owner, the CM at Risk, and the Authority.

7.7.8 Drawing Requirements:

The documents prepared during the Construction Documents Phase shall set forth the requirements for construction of the Project to a level of detail that is customary and standard and shall include, but not be limited to:

(a) General information showing drawing index, symbols, abbreviations, notes, location map.

(b) Site drawings shall be complete to define the extent and detail of site work. Show the following:

1. Layout and location of all proposed work including buildings, structures, retaining walls, parking, walls and all other site improvements, with details.
2. Existing and proposed grades and contours including floor elevations, existing structures and topography, survey base line, bench marks and boring locations.
3. Landscaping and planting.
4. All utility service lines, systems and structures for electricity, gas, oil, water, steam, telephone, CATV, fire alarm, sanitary and storm drainage including size, composition, grades and directions of flow.
5. Contract Limit Line and Storage Area for construction materials.
6. All existing foundations, obstructions and other physical characteristics of the site which may affect the construction work.
7. Site survey.
8. Cuts of benches, light standards.

(c) Demolition drawings and temporary work required.

(d) Architectural drawings shall include at a minimum:

1. Floor plans of each floor, including basement and lofts or attic with room and corridor dimensions, wall thicknesses, column locations, floor elevations, mechanical and electrical openings, door and window designations, partition types, floor materials, built in furniture and equipment, keyed to other architectural drawings. All rooms numbered.
2. Large scale floor plans where required to illustrate detailed requirements of rooms.
3. Large scale plans showing key areas e.g. lobby, special spaces. Indicate surface materials. (minimum scale ¼" = 1'- 0")
4. Roof plans showing openings, drainage, slopes, expansion joints and all projections, including equipment.
5. Key plans on all floor plans and section drawings, where appropriate.
6. Building Sections as required to show spatial organization of building but no less than one longitudinal and one transverse.
7. Building elevations. All building elevations shall be fully developed, and hidden elevations shall be shown. Elevations shall be shown in a sequence as unfolded from a certain point.
8. Full height wall sections indicating dimensions, flashing, anchorage, reinforcing, coursing, cladding, and all other conditions at wall, roof, foundation, interior floors.
9. Exterior details, for roofing, flashing, expansion control and construction joints, waterstops and other details showing all conditions both vertical and horizontal, including schedules.
10. Door, window, entrance, and storefront, schedules, and details.
11. Vertical circulation plans, sections and details including stairs, elevators, conveyors, dumbwaiters.
12. Interior elevations of all significant and typical spaces.
13. Interior details including casework, paneling surfacing and acoustical treatment.
14. Reflected ceiling plans coordinated with fire protection, mechanical and electrical drawings, and ceiling details.
15. Schedules (clearly define new or existing)
    a. Doors
    b. Equipment, e.g. for services
    c. Partitions
    d. Finishes

(e) Structural drawings shall indicate the following:

1. Indicate or refer to location of geotechnical exploration data and reports related thereto.
2. Foundation plans with bottom grades showing layout of all footings, walls, slabs on grade including reinforcing, grade beams, and columns; include design soil bearing pressures and live loads.

3. Floor and roof plans of structural systems including framing, grades of finished floors and depressed areas, with locations and dimensions for all openings. Also indicate design floor loads.
4. Complete foundation wall elevation and typical sections, with reinforcing indicating location, dimensions and grades for all footings, steps and wall openings.
5. Complete details and sections with dimensions for all construction including expansion and construction joints, reinforcing and other embedded items.
6. Schedules (with dimensions) for all lintels, beams, joists, and columns.
7. Unless detailed on the Drawings, the following information shall appear in the general notes: class and 28 day strength of concrete for each portion, structural steel and concrete reinforcing design stresses for each type of structural member, concrete cover for each type of structural member, shrinkage and temperature steel requirements, reinforcing laps for main reinforcing and temperature steel; bendpoint, cutoff, and hook locations for all members, minimum beam and lintel bearing. Reinforcing steel fabrication shall be in accordance with most recent ACI, "Manual of Standard Practice for Detailing Reinforced Concrete." Structural steel fabrication shall be in accordance with the AISC "Manual of Steel Construction."

(f) Fire protection drawings shall indicate standpipe systems, sprinkler systems, suppression systems, access panels, fire pumps, accessories, and piping. All piping, equipment, fixtures and devices shall be located and sized. Design criteria shall be provided on the drawings in accordance with NFPA requirements.

1. Fire protection work, other than site work, shall not be combined on the same sheets with the Plumbing, HVAC, Electrical, or other drawings except with the prior approval of the Owner.

(g) Plumbing drawings shall indicate the following:

1. All work done by the Plumbing Subcontractor, which includes all water, gas, air, vacuum, medical gases, sanitary and storm wastes, and accessories. Include foundation drain lines unless established as the work of the CM at Risk and shall not be indicated on the Plumbing Drawings. Site utilities shall be indicated on the utility drawings.
2. Plumbing work, other than site work, shall not be combined on the same sheets with the Fire Protection, HVAC, Electrical, or other drawings except with the prior approval of the Owner.
3. Trapping and venting of all plumbing fixtures including floor drains.
4. Water and gas supply sources, storm and sanitary discharge mains.
5. All piping shall be carefully sized and all sizes shall be indicated on drawings and riser diagrams. Indicate all directions of flow and pitch on piping.

6. All accessories, valves, fixtures including all drinking fountains, grease traps for kitchen waste and all necessary panels, identified as to type and size.
7. All piping and connections required for other trades (e.g., kitchen equipment, HVAC make-up water, etc.).
8. Acid waste, vents and neutralization systems for laboratories.
9. Plumbing Legend and/or graphical symbols on the first sheet of the Plumbing Drawings in accordance with the American National Standards Institute (ANSI).
10. Plumbing riser diagrams for structures two or more stories in height above the ground level.
11. Domestic water booster pumps, boiler feed water, meter location, hose bibbs, and wall hydrants.
12. Domestic hot water: storage tanks, piping material, hanger details.
13. All required access panels shall be indicated.
14. Backflow preventors and cleanouts. Verify that access and clearance provisions for periodically inspected devices, including backflow prevention, are adequate to satisfy requirements of inspecting agencies.

(h) Heating, Ventilating and Air Conditioning Drawings shall indicate the following:

1. HVAC work, other than site work, shall not be combined on the same sheets with Fire Protection, Plumbing, Electrical, or other drawings except with the prior approval of the Owner.
2. All piping and ductwork systems shall be located and sized. All ductwork shall be shown double line.
3. All systems shall be sized at all reductions and riser diagrams of piping and duct systems shall be indicated.
4. All directions of flow and pitch on piping, and direction of flow, volumes for duct systems shall be indicated.
5. All equipment shall have sufficient servicing and/or replacement space indicated on drawings.
6. All equipment, accessories, valves and dampers with all necessary access panels, identified as to type and size. Access panels, where required for access to valves and dampers shall be indicated on drawings.
7. Cooling system pumps, chillers, cooling towers, air handling units, ductwork system and dampers, fan details, temperature control system, air and hydronic balancing equipment, and schedules shall be indicated.
8. Cooling tower design shall be indicated on the drawings showing site location, elevations and floor plan of equipment layout and typical flow diagram as related to the total HVAC system.
9. All fire and smoke dampers, access panels and doors.
10. Mechanical room designs:

a. Vent pipes for safety valves, relief valves, back pressure valves and tanks shall be extended above flat roofs in accordance with all governing authorities.
b. In all designs for boiler and refrigeration plants, include a complete floor plan indicating location of all major mechanical equipment and sufficient service space.
c. In designs of new and/or replacement boiler and refrigeration plants, provide a flow diagram detailing steam or hot water distribution systems, return systems, including all existing equipment and their function, as well as any proposed expansions with all necessary instrumentation and controls.

(i). Electrical Drawings shall indicate the following:

1. Site utilities shall be indicated on separate electrical site drawings, unless ample space is available on common site for utility drawings.
2. Electrical work, other than site work, shall not be combined on the same sheets with Fire Protection, Plumbing, HVAC, or other drawings except with the prior approval of the Owner.
3. General arrangement: Outline layout of each floor. Typical sections through the structure shall be indicated when necessary to define requirements, floor and ceiling heights, elevations, and type construction, including concrete pads shall be indicated. Indicate interface with other systems. Identify any work by other trades.
4. Interior lighting system: Light fixture schedules, circuiting location and mounting heights of all fixtures, receptacle and switch outlets, sizes and types of all lamps, conduits, all other accessories and riser diagrams shall be indicated on drawings. Indicate details and method of supporting electrical fixtures and conduits. Designer shall specify that all electrical lighting fixtures be supported from the building structure, and shall be independent of ducts, pipes, ceilings and their supporting members. Comply with seismic design criteria.
5. Power system: Locations, types and method of control for all motors, heaters, appliances, controllers, starters, branch circuits, feeder conductors and conduits. Indicate riser diagrams. Show details and indicate method of supporting electrical conduit. For larger projects, thermostats and control wiring are normally covered under the HVAC sub-contract, assure coordination.
6. Fire Alarm, Data, Communications, CATV/CCTV Systems: Locations and types of all devices, outlets and equipment, service connections, wiring diagrams, all other essential details.
7. Services: Location and details of all services, whether overhead or underground, feeder sizes, plans and elevations of switchgear and

transformers, metering and service switchboard arrangements, wiring and ground fault diagram and bus ducts.

8. General and sub-stations: Location, size, method of connection and protection of all generators, transformers, exciters, motor generators, switch gear, and associated equipment, current characteristics and equipment capacities. Indicate equipment connections by means of one line and/on wiring diagrams and schedule all major items of equipment and all instruments.
9. Underground work: The size and locations of manholes and types of cables, number, size, and location of ducts, locations, sizes and types of cable supports, fireproofing, duct line profile, and one line diagram of connections. All underground chambers, including manholes and pull-boxes, shall be constructed of cast in place or one piece pre-cast concrete.
10. Pole line work: if required as contract work, indicate location, length, treatment and class of poles, guying, cross arms, insulators, circuiting, transformers, protective and switching devices, lightning arresters, special structures, diagrams, current characteristics and grounding.
11. Exterior lighting: Location, size, and type of transformers, luminary, poles, light standards, cables, ducts, and manholes, details of control equipment and connection diagrams.
12. Emergency system details including transfer switch, type of fuel.
13. One line diagram indicating load KVA, and available short circuit amperes at each transformer, switchboard, distribution panel board, branch circuit panel board, and at major pieces of equipment.
14. Riser diagrams for all systems.

7.7.9 Project Manual Requirements:

(a) The format for the Project Manual, including its technical specifications shall be in accordance with the current CSI MasterFormat with separate sections for each of class of work required by M.G.L. c. 149 §44F.

(b) The following general information applies to the development of final Specifications:

1. Describe the extent of the work, the materials and workmanship, and include the work under the proper section. If any portion of the work included in a section of the Specifications is to be performed by a trade covered by another section, there shall be clear and distinct cross-referencing between the sections. Merely to state “by others” is not acceptable.
2. For each item of material or equipment, the specifications shall provide for a minimum of three named brands of material or equipment and the words “or equal” or a description of material or equipment which can be met by a minimum of three manufacturers or producers, and the words “or equal.” Proprietary products shall not be specified except as provided by M.G.L. c.

30, § 39M; however, when they are specified, proprietary specifications are subject to the "or equal" provisions of M.G.L. c.30, § 39M.

3. Specify materials mined or manufactured in Massachusetts first and the United States of America second whenever possible.
4. Do not use general clauses intended to be all-inclusive in lieu of complete descriptions.
5. Do not duplicate standard requirements that are contained in the contract form.
6. Use consistency throughout. The word "will" shall be used to designate what the Owner, Authority, Owner's Project Manager, Commissioning Consultant, or the Designer can be expected to do, and the word "shall" shall be used to designate what is mandatory for the CM at Risk or subcontractors to do.
7. Use the same term throughout for the same subject and the term shall be the same as that used on the drawings.
8. Do not use the term "etc."
9. Avoid such terms as "to the satisfaction of the Designer," "as directed by the Designer," "as approved" and "as required."
10. Specify work in appropriate Sections according to local trade jurisdiction.
11. Avoid the use of the following symbols:

Symbol	Use Instead
#	number, no., or pounds
%	percent
"	inch or in.
x	by
'	feet or ft.
o	degree
/	per or at

12. In sections for which filed sub-bids are required, refrain from using such terms as "the Contractor," the "Heating Contractor," or "the Plumbing Contractor," but where necessary for clarity refer to the "HVAC Subcontractor," the "CM at Risk" and the like.
13. Do not give numbers both in words and figures. Numbers less than 10 shall be written in words, 10 and higher numbers shall be written in figures. In expressing dimensions, figures such as 2 in., 16 in., 7 ft., 6 in., shall be used.
14. Each filed sub-bid section shall detail all labor and materials required by the particular sub-trade and list, by number, those drawings (and only those drawings) indicating work of that sub-trade. In addition, list drawings indicating work of a particular trade that appears on drawings that are not customarily included in the work of the trade, when applicable.
15. Do not specify that a product or system shall require prequalification or advance approval prior to bidding.

16. Established unit price items shall be used for work categories which cannot be ascertained for exact quantities in bid documents (e.g. earthwork removal and/or replacement items). In such cases, the Designer shall establish ranges of quantities with associated unit price values for each range. Unit price values shall be established for added work, for deleted work, for base bid quantities when conditions so-suggest. Unit price values shall be ascertained through consultation with cost estimators and the CM at Risk, be current, equitable, and well defined as to elements of work, overhead, like issues to be encompassed. Established unit prices shall be published within the applicable technical specification sections, and referenced from general conditions as being operative as the basis for determining values to be used for payment or recovery for change order work.
17. Staging, scaffolding, cutting and patching, refuse collection and disposal, demolition work and cleaning task, allocation policy and proposed language shall be carefully assigned to avoid duplication or omission.
18. A final draft of Project Advertisement, Notice to Bidders, Instructions to Bidders, Contract Forms, General Conditions, Supplementary General Conditions, and other "front end" documents shall be included in the 90% construction documents submittal, along with a final version of all text to appear in Division 1, General Requirements. The Designer may defer insertion of final advertising / bid dates and wage rates, understanding that they are to be established and inserted immediately prior to release of documents for bidding.

7.7.10 Construction Cost Estimate Requirements

(a) The Designer shall provide the construction cost estimates described in Articles 7.7.4 and 7.7.6 in accordance with the following provisions:

1. The Designer shall review its construction cost estimate in comparison with the detailed construction cost estimate, and any update cost estimates, provided by the CM at Risk and shall work in good faith and in cooperation and coordination with the CM at Risk to reconcile any differences between the cost estimates, to clarify assumptions upon which the cost estimates are based and to address any concerns or questions with the cost estimates that are raised by the Owner, the OPM, the CM at Risk or the Authority. If the Designer is unable to reconcile all differences between the two construction cost estimates with the CM at Risk, then the Designer shall provide a detailed explanation of the differences to the Owner and the Authority. If, in any case, the agreed-upon, reconciled construction cost estimate exceeds the Project Construction Budget, the Designer shall cooperate with the Owner, the OPM, and the CM at Risk in identifying, specifying and recommending changes in materials, equipment, component systems and types of construction, or other adjustments in the scope or materials selections for the Project, including

contingencies or alternative bid items, so as to facilitate revision of the design of the Project to reduce the cost of construction so as to comply with the Project Construction Budget.

2. Cost estimate data shall be organized to identify elements of project work which may be proposed to be advanced under separate construction phases and/or separate bidding packages. When so proposed, estimates shall develop cost data relative to corresponding bidding and work execution dates established in project schedules.

3. Cost estimates shall be projected to the mid point of the construction period.

4. The summary sheets shall contain the following:

   a. The date that the estimate was prepared. (Value Date).

   b. The anticipated bid date.

   c. The project and contract number.

   d. The title and location of the project.

   e. The name of the Designer.

   f. The name of the Estimator.

   g. The site work cost (including all utilities).

   h. The building cost (including fixed equipment).

   i. The estimated construction cost of each Phase of the work, totaled.

7.7.11 The Designer shall participate in a final review of the Construction Documents with the Owner, the Owner's Project Manager, the Commissioning Consultant, and the CM at Risk, and the Designer shall incorporate such changes as are necessary to satisfy the Owner's review comments.

7.7.12 Guaranteed Maximum Price ("GMP")

(a) When the Construction documents are 60% complete as determined by the Owner, or at such later time as may be designated by the Owner, the Designer shall prepare a fully coordinated set of the then-current Construction Documents, which shall be delivered to the CM at Risk and shall be the basis of the CM's GMP proposal.

(b) The Designer shall provide technical assistance to the Owner and the OPM in the negotiation and development of a GMP with a CM at Risk in accordance with M.G.L. c. 149A, §7, that is acceptable to the Owner. The Designer shall meet with the Owner, OPM, and the CM at Risk to review the GMP proposal and the written statement of its basis. If the GMP proposal submitted by the CM at Risk exceeds the Construction Budget, the provisions of Articles 4.10.4 and 4.10.5 shall apply.

(c) The Designer shall provide technical assistance to the Owner and the Owner's Project Manager in the negotiation, preparation and execution of any amendments to the Owner-CM at Risk contract, including, but not limited to, the Guaranteed Maximum Price ("GMP") amendment pursuant to M.G.L. c.149A, § 7 and any separate amendment for any construction work commenced before execution of the GMP amendment pursuant to M.G.L. c.149A, §7(b)(3).

7.8 Bidding Phase

7.8.1 The Designer shall, when authorized by the Owner, prepare for reproduction and distribution the construction bid documents required for the solicitation and receipt of statements of qualifications and bids from Trade Contractors. The Designer shall prepare all addenda (to include bidder questions and Designer responses), subject to the Approval of the Owner. The Designer shall attend the pre-bid conference if one is scheduled, taking note of all questions asked. Relevant questions submitted in writing shall be answered by the Designer by means of written addenda to the bid documents as required. The Designer shall attend each bid opening of the Trade Contractors (and of other bidders if necessary) and shall, within five working days of the respective bid opening dates, advise the Owner in writing of the Designer's opinions as to the bids of Trade Contractors (and of other bidders if necessary).

7.8.2 The Designer shall receive all inquiries relating to the bid documents and, when necessary, answer questions by preparing and issuing written addenda. The Owner shall review and approve all such addenda prior to issuance to bidders.

7.8.3 There may be multiple bid packages for the Project. Multiple bid packages may be assembled and bid concurrently or consecutively as a portion of the Project. Portions of the Project may be bid separately from other portions. The Designer shall appropriately staff and structure its design and construction phase performance to assist the Owner in the preparation, issuance, bidding and negotiation, if any, of so-called early bid packages as provided in G.L. c. 149A, § 7(b)(3).

7.8.4 If the Project has to be re-bid, or the GMP Amendment must be re-negotiated and amended because of a defect in the bid documents prepared by the Designer or in procedures proposed by the Designer, the Designer shall correct the defect and take the necessary actions for re-bidding the Project on proper bid documents without any additional compensation to the Designer.

7.8.5 The Designer shall review alternates and make written recommendations to the Owner as to their acceptance.

7.8.6 If the Owner executes a GMP Amendment for an amount that exceeds the amount established in the Project Construction Budget, such an award will not affect the Fee for Basic Services.

7.8.7 Trade Contractor Selection Process

(a) Trade Contractor Prequalification pursuant to M.G.L. c. 149A, §8(c)

1. The Designer shall participate as a member of the Owner's Trade Contractor Prequalification Committee established by the Owner pursuant to M.G.L. c.149A, § 8(b).

2. The Designer shall review the information provided by the CM at Risk describing the work to be required of each Trade Contractor and shall assist the Owner in the preparation of the Request for Qualifications for Trade Contractors to be used to solicit responses from eligible Trade Contractors and to prequalify Trade Contractors for participation in the Project.

(b) Request for Bids for Trade Contractor Services pursuant to M.G.L. c. 149A, §8(g)

1. The Designer shall assist and advise the Owner in the preparation of the Invitation for Bids for Trade Contractor services in accordance with the provisions of M.G.L. c. 149A, §8.

2. The Designer shall attend all pre-bid conferences and meetings.

(c) Trade Contractor Bid Review

1. The Designer shall attend all bid openings and shall review all Trade Contractor bids in conjunction with the Owner's Project Manager and CM at Risk to determine responsiveness, completeness, accuracy, price and conformance to the requirements of M.G.L. c.149A, § 8(g)-(i), and to provide technical guidance to the Owner regarding the acceptance or rejection of any Trade Contractor bid. Within five business days after the respective bid opening dates, the Designer shall advise the Owner in writing of the Designer's opinions as to the bids of Trade Contractors (and of other bidders if necessary).

7.8.8 Selection of Subcontractors Who Are Not Trade Contractors pursuant to M.G.L. c.149A, § 8(j) ("Non-Trade Contractors")

(a) Non-Trade Contractor Bidding

1. The Designer shall review the detailed bidding information developed by the CM at Risk in accordance with M.G.L. c. 149A, § 8(j) for accuracy, completeness, coordination of scope and conformance with the construction documents.

(b) Non-Trade Contractor Bid Review and Award

1. The Designer shall attend all bid openings and scoping meetings if permitted or otherwise allowed by law, and, in conjunction with the Owner's Project Manager and CM at Risk, the Designer shall review all Non-Trade Contractor bids for responsiveness and completeness and advise the Owner on the acceptance or rejection of any Non-Trade Contractor bids by the CM at Risk. The Designer shall, in conjunction with the OPM, attend all final scope and negotiation meetings conducted by the CM at Risk. The Designer shall, within five working days of the respective bid opening dates, advise the Owner in writing of the Designer's opinions as to the bids of Non-Trade Contractors.

7.9 Construction Administration Phase – Obligations During Construction: Following the execution of the Owner-CM at Risk Agreement, the Designer shall undertake certain of the obligations of administering the Owner-CM at Risk Agreement on behalf of the Owner, provided that Designer shall not be subject to provisions of the Owner-CM at Risk Agreement that would have the effect of expanding Designer's responsibilities or liabilities under this Contract without Designer's written consent. Services during this phase include, but are not necessarily limited to:

7.9.1 Upon commencement of construction activities for the Work or early bid packages or at times established in Project schedules, the Designer shall:

(a) Furnish the CM at Risk with information for establishing lines and grades and such supplemental drawings as are reasonably needed to implement the intent of the Construction Contract Documents;

(b) With reasonable promptness and in accordance with schedules agreed upon by the Designer and CM at Risk, observe testing when required under this Contract, and review and act upon samples, schedules, shop drawings and other submissions from the CM at Risk;

(c) Prepare, maintain and update logs for all submittals;

(d) Visit the site at intervals appropriate to the stage of construction, weekly or as otherwise agreed to by the parties, and observe the progress of the Work, issue written progress reports, and attend job meetings, and review and respond to meeting minutes prepared by the Owner's Project Manager, and to determine in general if the Work observed is being built in a manner indicating the Work when completed will be in accordance with approved Construction Contract Documents;

(e) Collaborate with the on-site Project Representative of the OPM to identify and monitor issues of concern relative to the progress of the Work, and establish communications processes to help assure that matters of mutual concern are exchanged on a timely basis with one another, the OPM, CM at Risk, Commissioning Consultant, and Owner;

(f) On a weekly basis, make specific recommendations on rejection of any Work observed by the Designer that fails to conform to the Construction Contract Documents, and observe corrected Work;

(g) Require each Subconsultant engaged in accordance with Article 5 to make visits weekly or as otherwise agreed to by the parties during the progress of any work to which that Subconsultant 's services relate, and to report upon it in writing to the Designer;

(h) Recommend actions to be taken which may include condemnation or rejection of any work that the Designer determines fails to conform to the Owner- CM at Risk Agreement;

(i) Review and recommend appropriate action for proposed requests for changes and where required by the Owner, prepare documents associated with requests for a change in any Construction Contract Documents. Compensation for change order work by the Designer shall be determined in accordance with Article 10;

(j) Conduct semi-final and final inspections of the Project and report the results of such inspections in writing to the Owner;

(k) In association with the Commissioning Consultant, review the report by such Commissioning Consultant on the balancing of air and water circulation systems;

(l) In association with the Commissioning Consultant, review the report by such Commissioning Consultant on the setting and adjustment of automatic controls;

(m) In a timely manner, decide all questions regarding interpretation of, or compliance with, the Construction Contract Documents, except as the Owner may in writing otherwise determine;

(n) In association with the Commissioning Consultant, review the recommendations of such Commissioning Consultant for requirements upon operating and maintenance documents and building user training events and instructional media as established in the Construction Contract Documents; such Commissioning Consultant or OPM shall coordinate involvement of contracting parties, the Designer, and Owner;

(o) Furnish the Record Drawings as submitted by the CM at Risk in accordance with 7.9.3, and other required documents;

(p) Assist the Owner in providing the written CM at Risk Evaluations required of the Owner pursuant to M.G.L. c.149 §44D(7) at the completion of approximately 50% of the Construction Phase on forms prescribed by M.G.L. c.149 §44D(16);

(q) Perform inspections of the work as necessary to prepare a punch list identifying each incomplete or deficient Work item and performing re-inspections to authorize removal of satisfactorily completed Work items from the punch list, or to determine that the Project is complete. In association with the OPM, a cost shall be assigned to each incomplete or deficient Work item when it has been determined that the Project has reached Substantial Completion; and

(r) Receive from the CM at Risk all maintenance and operating manuals, occupancy permits, guarantees and other similar relevant materials.

7.9.2 The Designer shall submit to the Owner's Project Manager within 48 hours all requisitions for payment submitted by the CM at Risk in the form required by the Owner. The Designer may establish procedures with the CM at Risk for advance notification of requisition and/or draft version processing. With respect to each such requisition, the Designer shall certify to the best of its knowledge that the percentage of Work included in the requisition is accurate and that the work performed is in accordance with the Construction Contract Documents. In the event the Designer does not approve the requisition exactly as submitted by the CM at Risk, the Designer shall forward it for payment to the Owner's Project Manager dated and signed with corrections and with an accompanying letter of explanation setting forth the Designer's objections and recommended changes. The Designer shall coordinate the required visits of its own staff and those of its Subconsultants, to the construction site so as to enable it to submit to the Owner's Project Manager the CM at Risk's monthly requisition for payment. Timely payments to the CM at Risk are required by M.G.L. c. 30, § 39K. Therefore, the Designer shall establish procedures to help assure either immediate mail or messenger delivery of the requisition for payment to the Owner's Project Manager, and shall process requisitions for payment within five business days after receipt of the same, provided the CM at Risk has submitted a full and complete requisition for payment in the correct form.

7.9.3 Prior to issuance of the Certificate of Substantial Completion, the Designer shall obtain from the CM at Risk as-built drawings, including drawings showing the actual installation of the site utilities, plumbing, heating, ventilating and electrical work under the Owner-CM at Risk Agreement, and recording all changes. The Designer shall ascertain that changes authorized by change orders are shown on the CM at Risk's as-built drawings, but Designer shall be entitled to rely upon the accuracy and completeness of the CM at Risk's as-built information, and shall forward such to the Owner as Record Drawings.

7.9.4 Issue the Certificate of Substantial Completion of Construction.

7.9.5 The Designer shall meet with the Owner monthly during this Phase.

7.10 Completion Phase: Upon acceptance of the Certificate of Substantial Completion of Construction by the Owner, the Designer shall thereafter provide the following services:

7.10.1 With respect to a completed Project, preparing a Certificate of Final Completion.

7.10.2 With respect to a punch list, re-inspecting the work up to three times in order to determine that the punch list work is satisfactorily completed.

7.10.3 Reviewing and certifying the CM at Risk's Application(s) and Certificate(s) for Payment as necessary.

7.10.4 Attending meetings as reasonably necessary in the opinion of the Owner or Owner's Project Manager, unless such meetings involve continued discussions of incomplete or deficient work and the Basic Services punch list site visits have been expended. In such instance, the meetings shall be paid for as Extra Services.

7.10.5 Using the as-built information maintained by the CM at Risk during construction referred to in Article 7.9.3, and revising the applicable original reproducible drawings and electronic media drawings on the basis of the as-built drawings, provided that Designer shall be entitled to rely upon the accuracy and completeness of the CM at Risk's as-built information. Upon completion of the required drafting and editing, provide one set of mylar reproducibles, two sets of prints and two (2) electronic version copies to the Owner which shall become the property of the Owner. The cost for printing the mylar reproducibles and two sets of prints are Reimbursable Expenses.

7.10.6 Ten (10) months after the date of substantial completion, performing one (1) site inspection and preparing a list of construction warranty deficiencies. The Designer shall consult with the Commissioning Consultant upon the acceptability of warranty compliance requirements and response actions.

7.10.7 Informing the Owner in writing, through the Owner's Project Manager, of all such warranty deficiencies that should be addressed.

7.10.8 Performing one (1) site inspection within a further sixty (60) days to see that all such warranty deficiencies have been corrected.

7.10.9 Evaluation of CM at Risk: The Designer shall assist the Owner with providing the written CM at Risk Evaluations required of the Owner pursuant to M.G.L. c.149 § 44D(7) within 70 days of the date of Substantial Completion for construction, on forms prescribed by M.G.L. c.149 § 44D(16).

7.11.10 The Designer shall assist the Owner in providing the written summary report on the Project to the Office of the Inspector General as required by the provisions of 945 CMR 2.09

7.10.11 Two (2) suitably bound, legible copies of all original design and quantity calculations including those pertinent to change orders and shop drawings, if applicable, shall be

furnished by the Designer to the Owner at the conclusion of the Owner-CM at Risk Agreement.

Attachment E

MSBA's Designer Selection Panel's Procedures

Massachusetts School Building Authority
Designer Selection Procedures

Section 1: Introduction

The following designer selection process has been adopted by the Massachusetts School Building Authority (MSBA) pursuant to Massachusetts General Laws, Chapter 7C, Sections 44 through 58 for the procurement of designers, and programmers by cities, towns, regional school districts, and independent agricultural and technical schools seeking funding from the MSBA for public school construction projects where the estimated construction cost is equal to or greater than $5,000,000.00 (or other such amount as may be determined from time to time by the Executive Director of the MSBA), except for the MSBA's model schools program. Designer selection for public school construction projects where the estimated construction cost is less than $5,000,000.00 (or other such amount as may be determined from time to time by the Executive Director of the MSBA) shall be conducted pursuant to Massachusetts General Laws, Chapter 7C, Section 54, by the respective city, town, regional school district or independent agricultural and technical school and in accordance with the MSBA's Designer Selection Guidelines.

Section 2: Designer Selection Panel

A. The MSBA Designer Selection Panel (DSP) shall be composed of the following individuals who shall be appointed to the DSP by the MSBA's Executive Director ("Executive Director") in accordance with following procedures:

1. The Executive Director, ex officio, or his/her designee;

2. Three (3) MSBA staff members associated with project management, design and/or construction oversight selected by the Executive Director;

3. One (1) public member selected by the Executive Director;

4. One (1) member who is a Massachusetts registered architect or architect emeritus as recommended by the Boston Society of Architects;

5. Two (2) members who are Massachusetts registered architects or architect emeritus selected by the Executive Director;

6. One (1) member who is a Massachusetts registered engineer as recommended by the American Council of Engineering Companies of Massachusetts;

7. Two (2) members who are Massachusetts registered professional engineers selected by the Executive Director;

8. One (1) member who is a representative of the construction industry as recommended by Associated General Contractors of Massachusetts;

9. One (1) member who is a representative of the construction industry as recommended by the Massachusetts Building Trades Council;

10. Three (3) members who are proposed by the respective city, town, regional school district, independent agricultural and technical school or other public agency that is the Eligible Applicant, as defined in M.G.L. Chapter 70B, Section 2 for the specific project under consideration, one (1) of whom shall be designated by the school committee, district school committee, or board of trustees of the Eligible Applicant, as the case may be; one (1) of whom shall be the superintendent of schools of the Eligible Applicant, ex officio, or his/her designee; and one (1) of whom shall be the chief executive officer of the city or town that is the Eligible Applicant, ex officio, or his/her/its designee or, in all other cases, a member of the School Building Committee designated by the School Building Committee. The appointment of members pursuant to this Section 2(A)(10) shall be subject to the execution of a certification by each such member that the member has read and understands these procedures and the Designer Selection Guidelines.

B. Members proposed or recommended by the societies or associations pursuant to subsections 2(A)(4), 2(A)(6), 2(A)(8), and 2(A)(9) above and the members proposed by the Eligible Applicant pursuant to subsection 2(A)(10) above shall be subject to appointment by the Executive Director who reserves the right, within his/her discretion, not to appoint or to disapprove the appointment of said proposed or recommended members. In considering the appointment of members proposed by the Eligible Applicant pursuant to subsection 2(A)(10), the Executive Director may consider, among other things, the extent to which the three (3) proposed members, as a whole, represent the interests of the Eligible Applicant.

C. The Executive Director shall appoint a chairperson from one of the members appointed to the DSP pursuant to subsections 2(A)(3) through 2(A)(9) above, who is a registered architect, architect emeritus or registered professional engineer and who shall also serve as chairperson of any subcommittee of the DSP.

D. All meetings of the DSP shall be open to the public unless the DSP votes to go into executive session by a roll call vote and announces the purpose of the executive session and whether the DSP will convene in open session at the conclusion of the executive session. Any action taken by the DSP in executive session shall be by a roll call vote.

E. The presence of nine (9) members, no less than four (4) of whom shall be registered architects, architects emeritus or registered professional engineers, shall constitute a quorum. The DSP shall not conduct any business without the presence of a quorum. The affirmative vote of a simple majority of the members present and voting shall be necessary and sufficient for any action taken by the DSP. No vacancy in the membership of the DSP shall impair the right of a quorum to exercise all the rights and duties of the DSP. In the absence of a quorum, the Chairperson may recess a meeting to some other time or until a quorum is obtained.

F. Subject to the discretion of the Executive Director, each member appointed pursuant to subsections 2(A)(3) through 2(A)(9) shall serve for a two-year term provided that every member that is appointed by the Executive Director shall continue to serve until a successor has been appointed to the DSP by the Executive Director. Members representing the Eligible Applicant who are appointed pursuant to subsection 2(A)(10) shall serve only while the DSP

conducts business directly related to the selection of a designer for the project being proposed by that particular Eligible Applicant.

G. No member of the DSP shall participate in the selection of a designer as a finalist for any project if the member's participation would constitute a conflict of interest or an appearance of conflict in violation of M.G.L. Chapter 268A.

Section 3: Public Notice

A. Each contract for designer services for a project subject to these procedures shall be publicly advertised in a newspaper of general circulation in the area in which the project is located or is to be located and, in the Massachusetts Central Register at least two weeks before the deadline for filing applications. The public notice shall contain:

1. A description of the project, including the specific designer services sought, the time period within which the project is to be completed, and, if available, the estimated construction cost;

2. If there is a program for the project, a statement of when and where the program will be available for inspection by applicants, and when and where a briefing session will be held for applicants and if there is not a program for the project, a statement to the effect;

3. The qualifications required of applicants for the projects;

4. The categories of designers' consultants, if any, for which applicants must list the names of consultants which the applicant may choose to use;

5. Whether the fee has been set or will be negotiated, and if the fee has been set, the amount of the fee;

6. The deadline for submission of applications;

7. The person and address from which application forms may be obtained and, when completed, to whom they may be delivered;

8. Any other pertinent information that may be required by law or deemed appropriate by the MSBA.

B. The individual designated by the Eligible Applicant to be in charge of procurement for a project who holds the Massachusetts Certified Public Purchasing Official Program certification shall certify that the public notice and all other documents issued pursuant to the selection of a designer, including, but not limited to, program descriptions and request for services, have been prepared and issued in conformance with these procedures and Massachusetts General Laws, Chapter 7C, Sections 44 through 58.

Section 4: Master File Brochure and Application

A. Prior to filing an application for any project, designers shall first file a Master File Brochure with the DSP containing the following information:

1. Certification that the applicant, if applying to perform design services other than preparation of studies, surveys, soil testing, cost estimates or programs, is a designer as defined in M.G.L. Chapter 7C, Section 44 paragraph (b);

2. The names and addresses of all partners, if a partnership, of all officers, directors and all persons with an ownership interest of more than five per cent in the applicant if not a partnership;

3. The registration number and status of each such person in every jurisdiction in which such person has ever been registered as an architect, landscape architect or engineer;

4. A list of all projects for all public agencies within the Commonwealth for which the applicant has performed or has entered into a contract to perform design services within the five-year period immediately preceding the filing of the information required in this section;

5. A list of all current projects for which the applicant is performing or is under contract to perform any design services; and

6. If the applicant is a joint venture, the information required in this section shall be required for each joint venturer, as well as for the joint venture itself.

B. The DSP shall keep a permanent record of the Master File Brochures. Each designer shall update its Master File Brochure on an annual basis and shall make current the lists of projects required under Section 4(A)(4)-(6) with each application filed.

C. An applicant to perform design, programming or feasibility study services on a project must file, in addition to the Master File Brochure, a written application prescribed by the DSP relating to the applicant's experience, ability, and qualifications.

Every application or Master File Brochure filed shall be sworn to under penalties of perjury. Any applicant who has been determined by the DSP to have filed materially false information shall be disqualified by the DSP from further consideration for any project for such time as the DSP determines is appropriate.

Section 5: Selection Criteria

A. Minimum qualifications shall include:

1. Must be a qualified Designer within the meaning of M.G.L. Chapter 7C, Section 44 employing a Massachusetts registered architect or engineer responsible for and being in control of the services to be provided.
2. The Massachusetts registered architect or engineer responsible for and being in control of the services to be provided for the Designer must have successfully completed the Massachusetts Certified Public Purchasing Official Program seminar “Certification for

School Project Designers and Owner's Project Managers," as administered by the Office of the Inspector General of the Commonwealth of Massachusetts, and must maintain certification by completing the "Recertification for School Project Designers and Owner's Project Managers" seminar every three years thereafter. Proof of recertification or registration in the next recertification seminar for which space is available must be provided.

3. The Commonwealth's Affirmative Marketing Program (AMP) established under M.G.L. Chapter 7C, §6, and Governors' Executive Orders helps ensure that minority owned business enterprises (MBE) and women owned businesses (WBE) certified by the Massachusetts Supplier Diversity Office (SDO) have opportunities to participate on DCAMM and other public construction and design projects across the Commonwealth. DCAMM and the SDO announced a series of AMP program changes that will be in effect for state funded municipal projects advertised on or after July 1, 2020. Please see the updates to the AMP here: https://www.mass.gov/info-details/dcamm-amp-2020-program-changes.

   Applicants should subcontract with MBE and WBE, as certified by the SDO. The AMP project specific goals should be set separately, with distinct participation goals set for MBE firm participation and WBE firm participation. Districts should set the project specific MBE and WBE goals prior to advertising for design services and the individual MBE and WBE goals should clearly be set forth in the RFS. This enables participation goals for an individual project to be specifically tailored to the particular project prior to procurement and ensures the goals more accurately reflect the availability of contractors or design professionals.

   The MBEs and WBEs must be selected from those categories of work identified in Item F of the RFS or be assigned to tasks required under Basic Services as specifically set forth in the Contract for Designer Services as amended. Applicants are strongly encouraged to utilize multiple disciplines and firms to meet their separate MBE and WBE participation goals. Consultants to the prime Designer can team within their disciplines in order to meet the separate MBE and WBE participation goals but must state this relationship on the organizational chart (Section 6 of the application form). Applications from MBE and WBE firms as prime designers are encouraged. Where the prime Designer is an SDO certified MBE or WBE, the Designer must bring a reasonable amount of participation by a firm or firms that hold the certification which is not held by the prime Designer on the project.

B. Other criteria for selection of finalists shall include:

1. Prior similar experience best illustrating current qualifications for the specific project.

2. Past performance of the firm, if any, with regard to public, private, DOE-funded, and MSBA-funded projects across the Commonwealth, with respect to:

   a) Quality of project design.

   b) Quality, clarity, completeness and accuracy of plans and contract documents.

   c) Ability to meet established program requirements within allotted budget.

d) Ability to meet schedules including submission of design and contract documents, processing of shop drawings, contractor requisitions and change orders.

e) Coordination and management of consultants.

f) Working relationship with contractors, subcontractors, local awarding authority and MSBA staff and local officials.

3. Current workload and ability to undertake the contract based on the number and scope of projects for which the firm is currently under contract.

4. The identity and qualifications of the consultants who will work on the project.

5. The financial stability of the firm.

6. The qualifications of the personnel to be assigned to the project.

7. Geographical proximity of the firm to the project site or willingness of the firm to make site visits and attend local meetings as required by the client.

8. Any other criteria that may be required by law or that the DSP considers relevant to the project.

Section 6: Selection Process

A. Cities, towns, regional school districts, and independent agricultural and technical schools subject to these procedures shall not rank or pre-rank applicants. Rankings shall occur only by vote of the DSP in accordance with these procedures and shall occur only after interviews, if allowed by vote of the DSP, have been concluded by the DSP.

B. In the event that, upon reaching the deadline for submission of applications, three or fewer designer applications are received for a project, the Eligible Applicant may choose to modify the project description, estimated construction cost, program, desired designer qualifications, fee information, or other project information as necessary to attract interested designer applicants and begin the selection process again, starting with re-advertisement pursuant to Section 3: Public Notice. Should the Eligible Applicant choose to proceed with three or fewer designer applications and not re-advertise, the following procedure shall be followed:

1. The Eligible Applicant designee shall submit a statement that explains why the Eligible Applicant may have received three or less applications for the proposed project, The explanation should include but not necessarily be limited to:

a. A description of the public advertisement including the names of the publications in which the advertisement was placed and the date(s) in which the advertisement was published.

b. A description of the pre-proposal conference, if any, including the date, time, and location of the conference and names of attendees and the firms they represent.

2. The Eligible Applicant designee and/or the OPM shall contact those design firms that attended the pre-proposal conference/walkthrough but did not submit an application and summarize why an application was not submitted for the proposed project.

3. Legal counsel for the Eligible Applicant (i.e. town counsel or city solicitor) and the individual designated by the Eligible Applicant to be in charge of procurement for a project who holds the Massachusetts Certified Public Purchasing Official Program certification shall certify as to the adequacy and completeness of the procurement activity undertaken by the Eligible Applicant.

4. At the discretion of the chairperson and with the concurrence of the three DSP members representing the Eligible Applicant, the DSP may forego the initial application review and invite all the designer applicants to appear for an interview before the DSP.

C. The DSP may require any number of applicants to:

1. Appear for an interview before the DSP;

2. Present a written proposal to the DSP through the Eligible Applicant; or

3. Participate in a design competition held by the DSP through the Eligible Applicant.

D. The DSP shall use the following procedures to rank three (3) finalists in order of qualifications from among the applicants for a particular project:

1. Prior to a DSP meeting at which the selection of finalists will be made or discussed, each member of the DSP shall be given a copy of each designer's application for his or her review.

2. At the DSP meeting, the DSP shall consider each application alphabetically or by some other method that may be determined by the chairperson from time to time.

3. When recognized by the chairperson, members of the DSP may comment or ask questions related to the selection process or the applications before the DSP.

4. Any potentially disqualifying deficiencies in an application should be noted in the record of the meeting.

5. After each member of the DSP has been given an opportunity to comment or ask questions, at the direction of the chairperson, each member of the DSP who is present shall utilize a ballot form provided by the MSBA to assign points to his or her top three (3) choices in order of qualifications so that each number one choice shall receive three (3) points, each number two choice shall receive two (2) points, and each number three choice shall receive one (1) point. The completed ballot forms shall be signed by each member and submitted to the DSP Administrator who shall tally the total points awarded to each applicant. The chairperson shall then read aloud the total points awarded to each of the applicants. In cases where a DSP meeting is held remotely, or any DSP member(s) attends a DSP meeting remotely, all votes taken at such meeting will be by roll-call vote.

6. Once the point totals have been read aloud by the chairperson, the DSP may request interviews of the applicants with the highest point totals by the following procedure: Upon motion of one of the members, duly seconded by one of the other members, the DSP may vote to interview the applicants with the highest point totals.

7. If the DSP does not vote to conduct interviews, the DSP shall then vote to rank three (3) finalists in order of qualifications. If the DSP votes to conduct interviews, the DSP shall defer the ranking of the three (3) finalists until after the interviews have been concluded.

8. If the DSP votes to conduct interviews, the chairperson shall schedule the time and place of the interviews and written notice shall be given to the firms to be interviewed. Interviews shall be conducted in open session except that the chairperson may order competing firms, their agents and employees, to leave the meeting room during the interviews of their competitors. The MSBA may, within its discretion, develop standard questions to be answered or topics to be discussed by the applicants in the interview. Once the interviews have been concluded, at the direction of the chairperson, the DSP shall award points to the each of the firms in accordance with the procedures set forth in subsection 6(C)(5). Once the point totals have been read aloud by the chairperson, the DSP shall then vote to rank three (3) finalists in order of qualifications

9. In the event of a tie for the first, second or third highest point totals awarded to applicants by the DSP under Section 6(C)(5) or 6(C)(8), the chairperson shall determine, in his or her complete discretion, the procedure by which the tie shall be broken. The chairperson shall then read aloud the total points awarded to each of the applicants. Once the point totals have been read aloud by the chairperson, the DSP shall then vote to rank three (3) finalists in order of qualifications.

Once the DSP has voted to rank the top three (3) firms in order of qualifications, the MSBA shall transmit a list of the three (3) finalists ranked in order of qualifications to the Eligible Applicant along with a record of the final vote of the DSP on the selection and a written statement explaining the DSP's reasons for its ranking of the finalists.

Section 7: Award of Contract

A. The authority to award a contract for designer services for a project that will receive funding from the MSBA is vested with the Eligible Applicant and subject to the approval of the MSBA.

B. In the selection of a designer when the fee for designer services has been set prior to advertisement, the Eligible Applicant shall appoint a designer from the ranked list transmitted by the MSBA to the Eligible Applicant in the order of qualifications as determined by the DSP. If the Eligible Applicant proposes to select any designer other than the one ranked first by the DSP, it shall file a written justification for the proposed appointment with the DSP and shall not proceed until it has obtained written approval to proceed from the Executive Director.

C. When the fee for designer services is to be negotiated, the Eligible Applicant shall review the list transmitted by the MSBA in the order of qualifications as determined by the DSP and may exclude any designer from the list if a written statement of reasons for the exclusion is

filed with the DSP. The Eligible Applicant shall then appoint a designer based upon a successful fee negotiation. The Eligible Applicant shall first negotiate with the first ranked designer remaining on the list. Should the Eligible Applicant be unable to negotiate a satisfactory fee with the first ranked designer within thirty (30) days, negotiations shall be terminated and negotiations undertaken with the remaining designers, one at a time, in the order in which they were ranked by the DSP, until an arrangement is reached. Should the Eligible Applicant be unable to negotiate a successful fee with any designer initially selected by the DSP, the DSP shall recommend additional finalists in accordance with a procedure to be determined by the chairperson of the DSP that is not inconsistent with the procedures set forth in Section 6(B) above. The Eligible Applicant may require a finalist with whom a fee is being negotiated to submit a fee proposal and to provide current cost and pricing data on the basis of which the designer's fee proposal may be evaluated.

Section 8: Continued or Extended Services

A. The Eligible Applicant may appoint a designer to perform continued or extended services that were not contemplated in the original public notice if the following conditions are met:

1. A written statement is filed with the DSP explaining the reasons for the continuation or extension of services;

2. The program for the design services is filed with the DSP;

3. MSBA staff has made a written determination that the request for continued or extended services is otherwise in compliance with the MSBA's regulations, policies, procedures, and guidelines and the provisions of the feasibility study agreement, project scope and budget agreement, and/or project funding agreement, as applicable;

4. The DSP approves the appointment of the designer for continued or extended services and states the reason therefore.

Section 9: Emergency Designer Selection Process

A. If a situation arises in accordance with Chapter 7C, Section 53, which has been declared an "emergency" by the Executive Director, an Eligible Applicant may request an emergency selection of a designer.

B. In consultation with the technical staff of the MSBA, the Eligible Applicant shall prepare a proposed scope of work, an estimate of the cost of construction for the designer's services, and submit this, and any other relevant information to the Executive Director.

C. In lieu of public advertisement, the Executive Director or his/her designee will consult with the Eligible Applicant to select three to six qualified firms who have Master File Brochures on file, to solicit to perform this work.

D. The MSBA staff will poll an ad-hoc committee of three members of the DSP to select at least three qualified finalists and forward the names of the finalists to the Eligible Applicant with a written statement explaining the committee's reasons for its choice(s).

E. The Eligible Applicant will select one of the three finalists to perform the work and forward the name of the selected firm to the DSP with a written statement explaining the reasons for its choice.

Section 10: Statutory Representations by the MSBA

A. The projects of the MSBA and the Eligible Applicants are not subject to the jurisdiction of the Division of Capital Asset Management and Maintenance.

B. The DSP procedures substantially incorporate the procedures required of the Commonwealth's Designer Selection Board in M.G.L. Chapter 7C, Section 45 through 53, inclusive, and Section 55.

Attachment F

Designer Procurement Schedule – Detail

John R. Pierce Floor Plans

DATE:	**September 24, 2020**
SUBJECT:	**Procurement Schedule, Designer RFS**
PROJECT:	**Pierce School Project** **Brookline, Massachusetts**

Thursday	**Sept 17**	**LEFTFIELD reaches out to SDO re: MBE/WBE percentage goals**
Friday	**Sept 18**	**LEFTFIELD provides SDO with project information**
Friday	**Sept 18**	**LEFTFIELD sends DRAFT RFS to SBC for review**
Tuesday	**Sept 22**	**LEFTFIELD receives MBE/WBE goals from SDO**
Wednesday	**Sept 23**	**SBC Meeting to designate TOB contact and approve RFS**
Thursday	**Sept 24**	**LEFTFIELD sends DRAFT RFS to MSBA for review**
Thursday	**Oct 1**	**LEFTFIELD submits notice to the Central Register**
		SBC DRAFT RFS comments due to LEFTFIELD by 5:00 pm
Friday	**Oct 2**	**TOB emails legal notice to The Brookline Tab by 5:00 pm deadline**
		LEFTFIELD sends updated RFS to SBC for final review
Tuesday	**Oct 6**	**SBC votes to approve final RFS**
		TOB posts RFP on http://www.brooklinema.gov/Bids.aspx after 5:00 pm
Wednesday	**Oct 7**	**Notice appears in the Central Register**
Wednesday	**Oct 7**	**TOB submits notice to COMMBUYS**
Thursday	**Oct 8**	**Notice appears in The Brookline Tab**
Tuesday	**Oct 20**	**Site Visit at Pierce School, 50 School Street, Brookline, MA at 3:30 PM**
Wednesday	**Oct 21**	**Additional Site Visit at Pierce School, if necessary, at 3:30 PM**
Thursday	**Oct 22**	**Issue Addendum on Site Visit include handouts, attendee list and Q & A to date**

Monday	**Oct 26**	**Questions, attention Jen Carlson – jcarlson@leftfieldpm.com , must be received by 5:00 pm at LEFTFIELD**
Wednesday	**Oct 28**	**LEFTFIELD issues Addendum in response to questions, if any, for TOB to post by 12:00 noon on website, http://www.brooklinema.gov/Bids.aspx**
Wednesday	**Nov 4**	**Proposals, must be received by 2:00 pm Attention: Jen Carlson, 800 Hingham Street, Office 101AN, Rockland, MA**
Tuesday	**Nov 10**	**Selection Committee meets to review Proposals**
Thursday	**Nov 12**	**Proposals and Reference Check information due to the MSBA**
Tuesday	**Dec 1**	**1st DSP Meeting - Proposal Review**
Tuesday	**Dec 15**	**2nd DSP Meeting – Interviews**
Wednesday	**Dec 16**	**DSP issues official ranking and letter**
Monday	**Jan 4**	**Complete fee negotiations**
Tuesday	**Jan 5**	**SBC votes to recommend contract to Building Commission**
		Contract sent to Building Commission for review and approval
Tuesday	**Jan 12**	**Building Commission votes on Designer Contract**
Wednesday	**Jan 13**	**Execute Designer Contract**
Friday	**Jan 22**	**Send proposed work plan to SBC for review**
Tuesday	**Jan 26**	**SBC votes to approve proposed work plan**
TBD	**TBD**	**MSBA/District kick off meeting**

District Name:	BROOKLINE PUBLIC SCHOOLS
Building Name:	Pierce School
Address:	50 School Street Brookline, MA 02445

Side C

For Official Use Only

1st Floor

Side B

Side D

Legend

- Camera
- Chair Lift
- M/W/T — Bathrooms: Mens, Womens, Unisex
- ST — Storage
- OHD — Overhead Door
- E — Elevator
- EP — Emergency Phone
- KNOX — Knox Box
- W — Water Shutoff
- S — Sprinkler Shutoff
- E — Electrical Shutoff
- GAS — Gas Shutoff
- R — Ramp
- GEN — Emergency Generator
- FACP — Fire Alarm Control Panel
- FDC — Fire Dept. Connection
- FX — Fire Extinguisher

BE SAFE TECHNOLOGIES INC

Side A

District Name:	BROOKLINE PUBLIC SCHOOLS
Building Name:	Pierce School
Address:	50 School Street Brookline, MA 02445

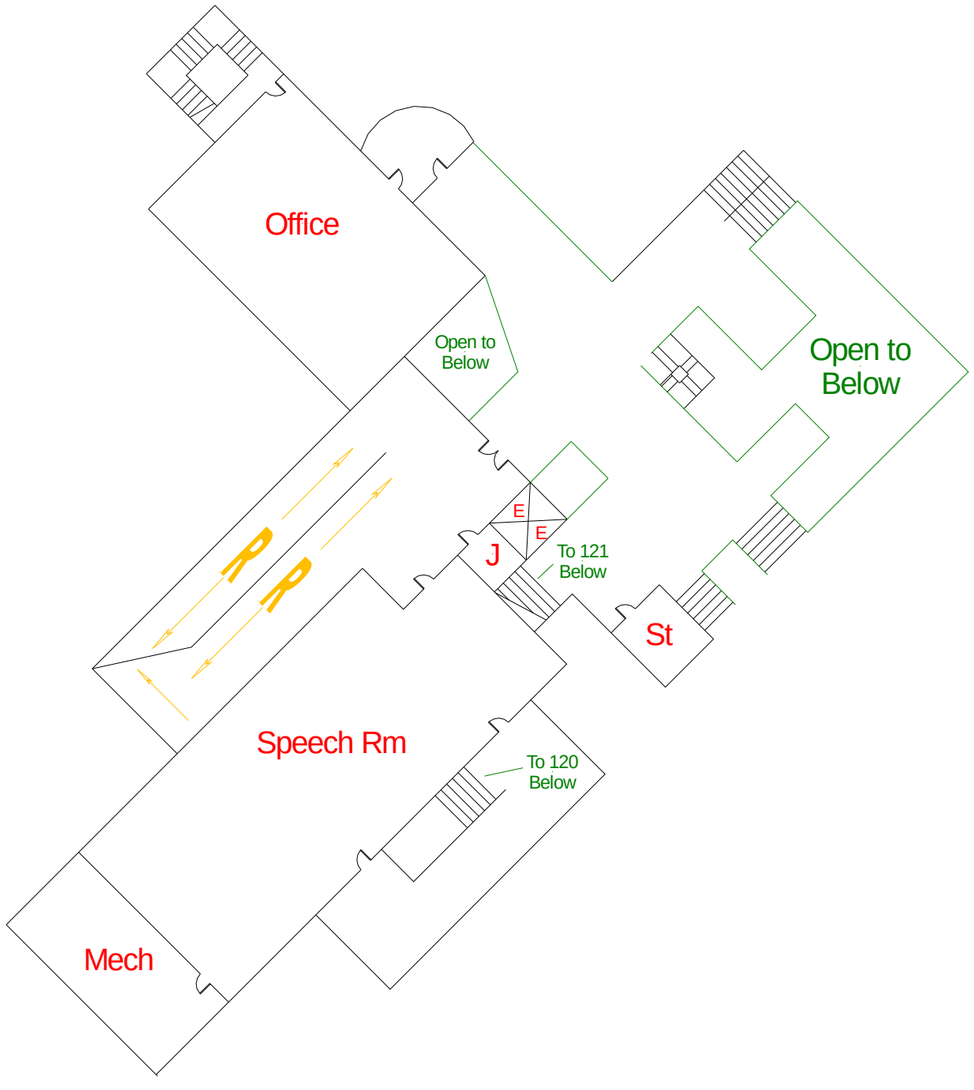
Mid Floor

Side C

For Official Use Only

Mid Floor Plan

SCHOOL STREET



Side B

Legend

- Camera
- Chair Lift
- M/W/T — Bathrooms: Mens, Womens, Unisex
- ST — Storage
- OHD — Overhead Door
- E — Elevator
- Emergency Phone
- KNOX — Knox Box
- W — Water Shutoff
- S — Sprinkler Shutoff
- E — Electrical Shutoff
- GAS — Gas Shutoff
- R — Ramp
- GEN — Emergency Generator
- FACP — Fire Alarm Control Panel
- FDC — Fire Dept. Connection
- FX — Fire Extinguisher

Side D

HARVARD STREET

BE SAFE TECHNOLOGIES INC

Side A

District Name:	BROOKLINE PUBLIC SCHOOLS
Building Name:	Pierce School
Address:	50 School Street Brookline, MA 02445

Side C

For Official Use Only

2nd Floor

Legend

- Camera
- Chair Lift
- M/W/T — Bathrooms: Mens, Womens, Unisex
- ST — Storage
- OHD — Overhead Door
- E — Elevator
- EP — Emergency Phone
- KNOX — Knox Box
- W — Water Shutoff
- S — Sprinkler Shutoff
- E — Electrical Shutoff
- GAS — Gas Shutoff
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- FX — Fire Extinguisher

BE SAFE TECHNOLOGIES INC

Side A

District Name:	BROOKLINE PUBLIC SCHOOLS
Building Name:	Pierce School
Address:	50 School Street Brookline, MA 02445

Historical Building

1st Floor

Side C

For Official Use Only

1st Floor Plan

Side B

Side D

Legend

- Camera
- Chair Lift
- M/W/T — Bathrooms: Mens, Womens, Unisex
- ST — Storage
- OHD — Overhead Door
- E — Elevator
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- W — Water Shutoff
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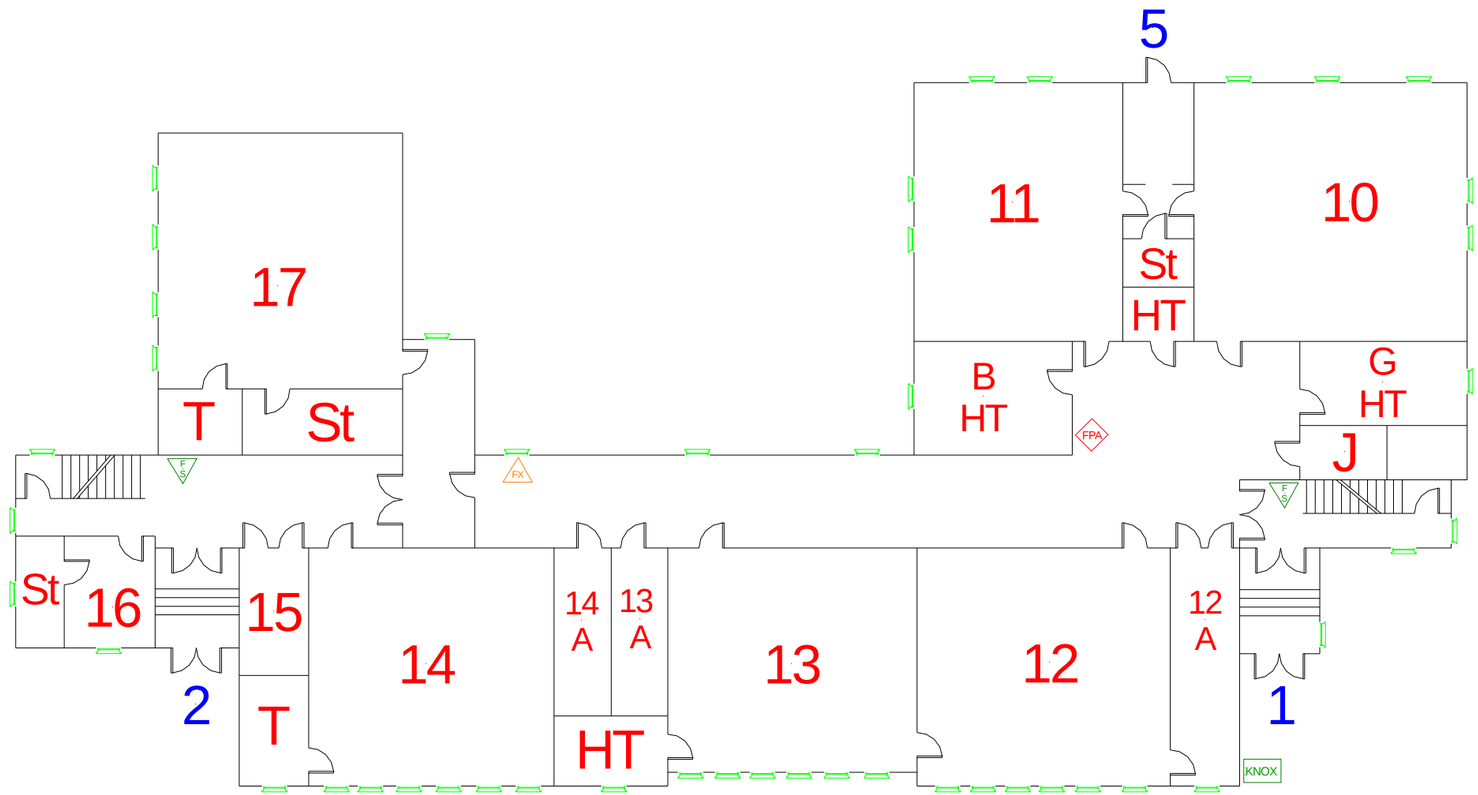


Side A

District Name:	BROOKLINE PUBLIC SCHOOLS
Building Name:	Pierce School
Address:	50 School Street Brookline, MA 02445

Side C

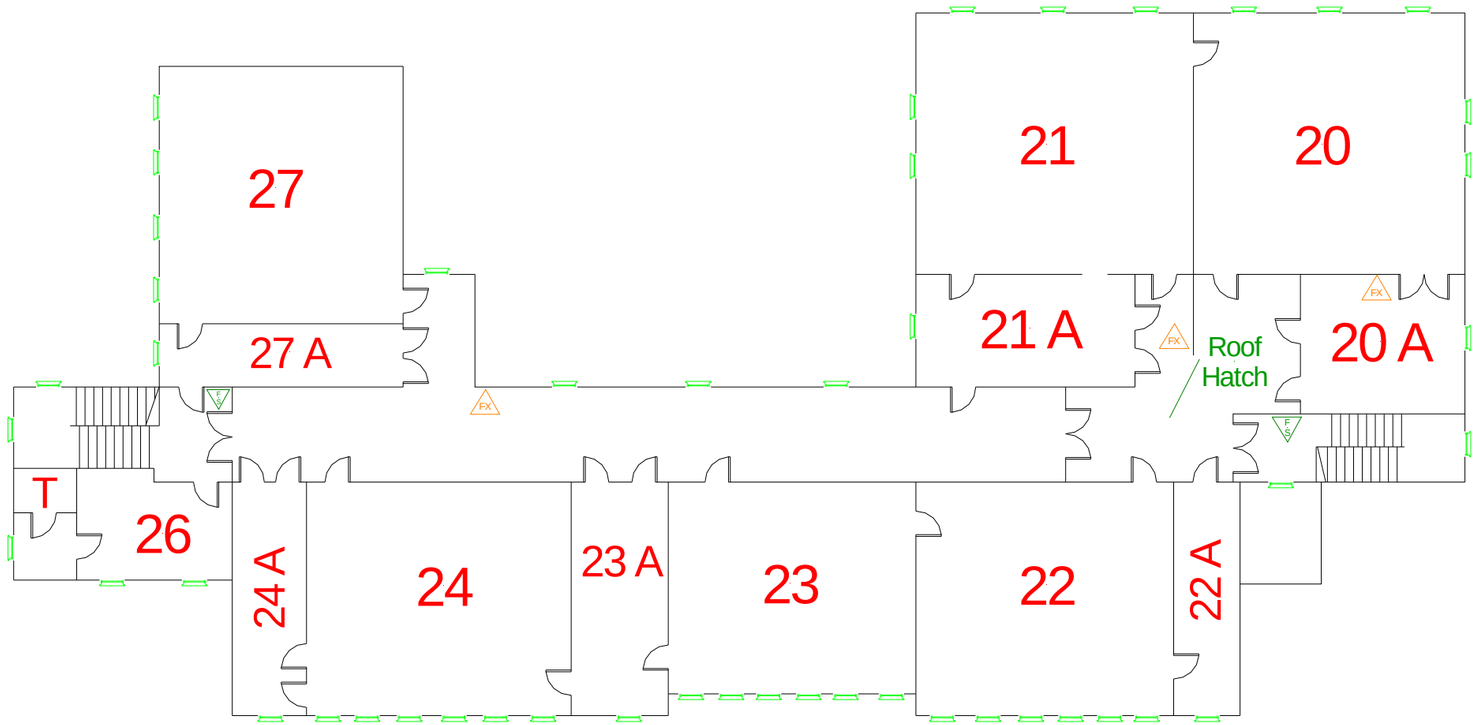
For Official Use Only

Historical Building

2nd Floor

Side B

Side D



Legend

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BE SAFE TECHNOLOGIES INC

Side A

District Name:	BROOKLINE PUBLIC SCHOOLS
Building Name:	Pierce School
Address:	50 School Street Brookline, MA 02445

Side C

For Official Use Only

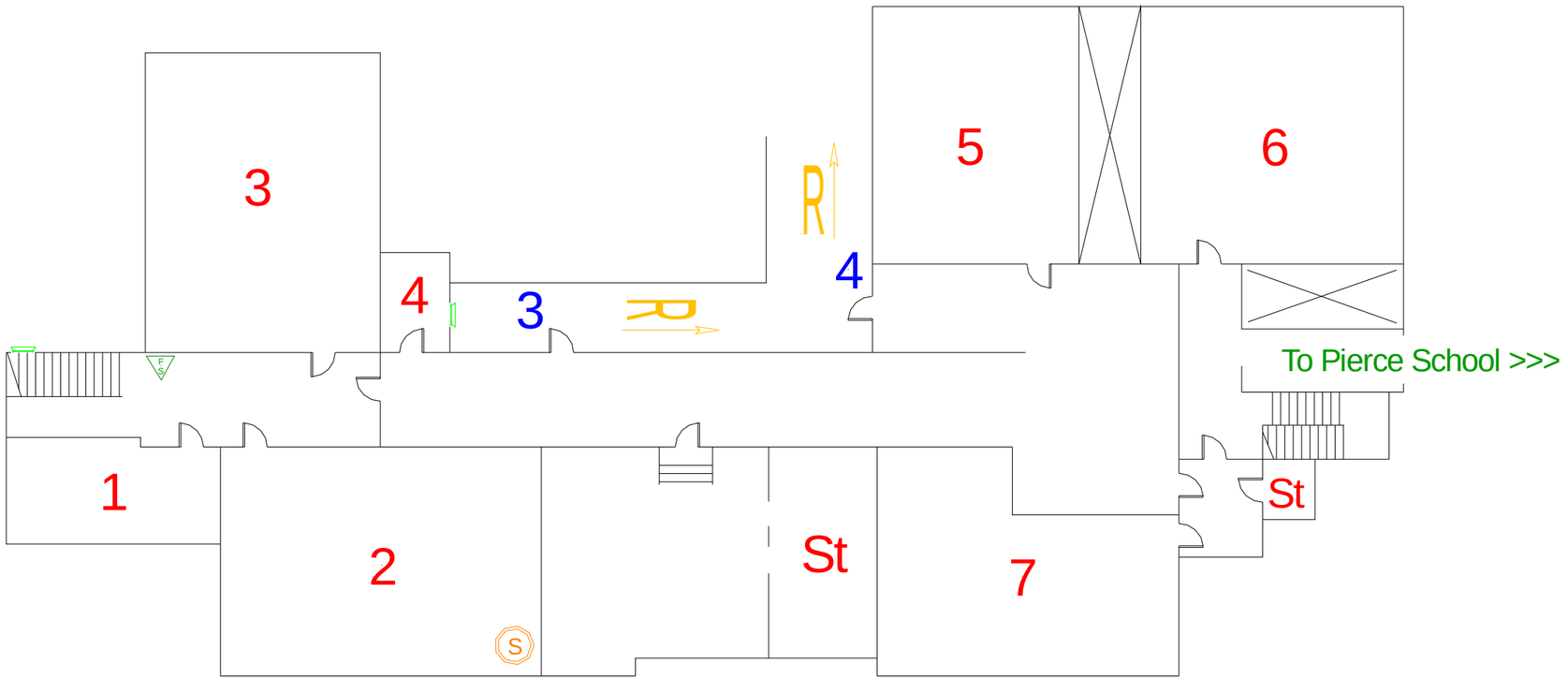
Basement Floor Plan

Historical Building

Basement

Side B

Side D



Legend

- Camera
- Chair Lift
- M/W/T — Bathrooms: Mens, Womens, Unisex
- ST — Storage
- OHD — Overhead Door
- E — Elevator
- Emergency Phone
- KNOX — Knox Box
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- E — Electrical Shutoff
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- R — Ramp
- GEN — Emergency Generator
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BE SAFE TECHNOLOGIES INC

Side A

Attachment G

MSBA enrollment certification letter dated March 21, 2020

MASSACHUSETTS SCHOOL BUILDING AUTHORITY
TOWN OF BROOKLINE
JOHN R. PIERCE SCHOOL
DESIGN ENROLLMENT CERTIFICATION

As a result of a collaborative analysis with the Massachusetts School Building Authority (the "MSBA") of enrollment projections and space capacity needs for the proposed project at the John R. Pierce School, the Town of Brookline hereby acknowledges and agrees that the design of the proposed project at the John R. Pierce School shall be based on an enrollment of no more than 725 students in grades K-8. The Town of Brookline further acknowledges and agrees that, pursuant to 963 CMR 2.00 *et seq.*, the MSBA shall determine the square feet per student space allowance and total square footage for a K-8 school serving 725 students in grades K-8. The Town of Brookline acknowledges and agrees that it has no right or entitlement to any particular design enrollment, square feet per student space allowance, or total square footage and that it has no right or entitlement to a design enrollment any greater than 725 students for the John R. Pierce School, and further acknowledges and agrees that it shall not bring any claim or action, legal or equitable, against the MSBA, or any of its officers or employees, for the purpose of obtaining an increase in the design enrollment of the John R. Pierce School that it has acknowledged and agreed to herein. The Town of Brookline further acknowledges and agrees that, among other things, the design enrollment, square feet per student space allowance, and total square footage of the John R. Pierce School shall be subject to the approval of the MSBA's Board and that the final approval of a proposed project at the John R. Pierce School shall be within the sole discretion of the MSBA's Board.

The undersigned, for themselves and the Town of Brookline, hereby certify that they have read and understand the contents of this Design Enrollment Certification and that each of the above statements is true, complete and accurate. The undersigned also hereby certify that they have been duly authorized by the appropriate governmental body to execute this Certification on behalf of the Town of Brookline and to bind the Town of Brookline to its terms.

Chief Executive Officer

3/25/2020
Date

Duly Authorized Representative of School Committee

3/21/2020
Date

Superintendent of Schools

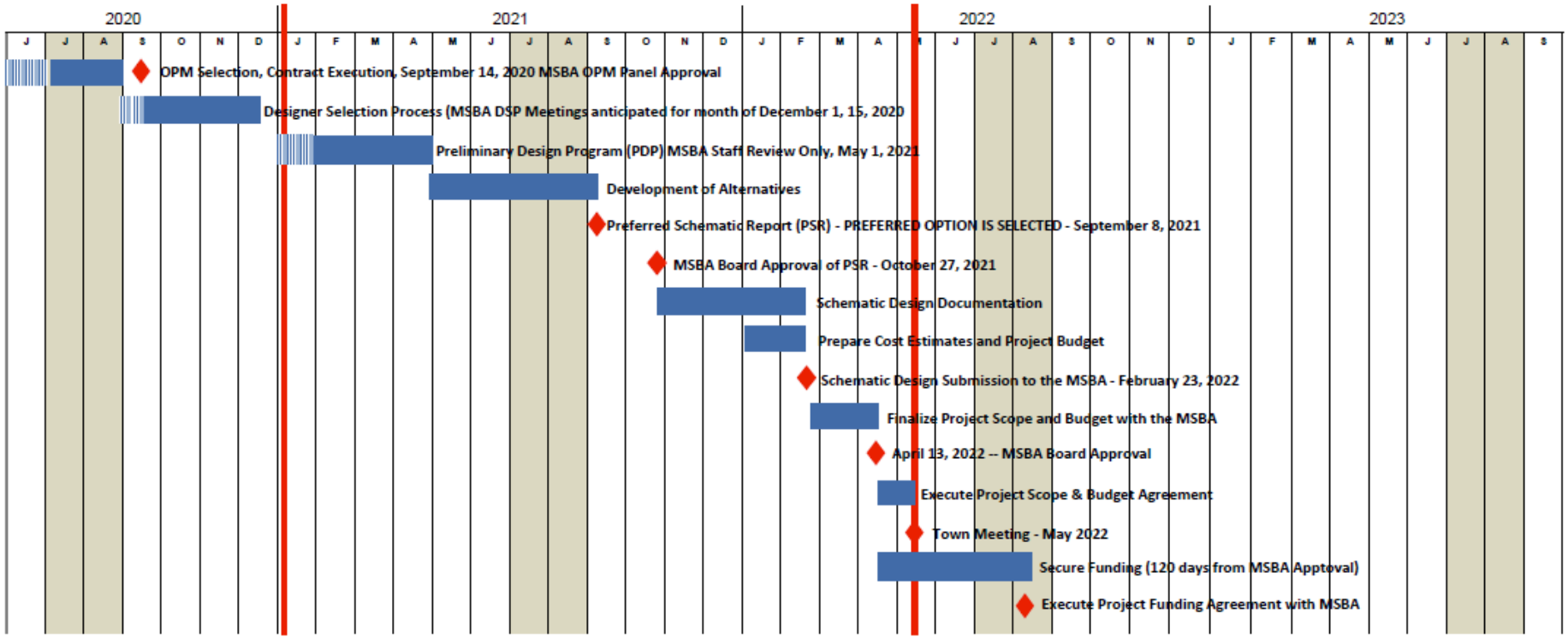
3/20/2020
Date

LEFTFIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT

JOHN R. PIERCE SCHOOL - Brookline, MA

Preliminary Project Schedule

December 31, 2020



JOHN R. PIERCE SCHOOL
DESIGNER REQUEST FOR SERVICES

ADDENDUM No. 1

October 23, 2020

Proposals Due: Wednesday, November 4, 2020, 2:00 PM to:
Town of Brookline, c/o Jen Carlson, Leftfield, LLC
800 Hingham St, Office 101AN, Rockland MA 02370

TO: All Prospective Respondents

Notice to Respondents:
This Addendum is being issued by email and is posted on the website, https://www.brooklinema.gov/Bids.aspx .

It forms a part of the Designer Request for Services (RFS) and supplements the RFS, issued October 7, 2020, as noted below. Please acknowledge receipt of this addendum in your proposal.

Addendum No. 1 consists of **2 pages** and the following **2 Attachments**:
Attachment A – Designer Walkthrough Sign In Sheet, Dated October 20, 2020
Attachment B – Designer Walkthrough Slideshow, Dated October 20, 2020

Questions & Responses:
ADD 1 - Q1: Is PreK included in the Project?
ADD 1 - R1: Yes, 3 classrooms of PreK are included in the Project.

ADD 1 - Q2: Is the Auditorium included in the Project?
ADD 1 - R2: Yes.

ADD 1 - Q3: Is the stair adjacent to the building leading down to Harvard Street included in the Project?
ADD 1 - R3: Yes.

ADD 1 - Q4: Is the Playground across School Street included in the Project?
ADD 1 - R4: The Park and Playground across School Street is Town property, and it would be likely a land swap for other green space would be required to use any portion of that property.

ADD 1 - Q5: What percentage of the student population walks to school?
ADD 1 - R5: The Pierce School is serviced by just one bus, there are a high percentage of students that walk to school.

ADD 1 - Q6: Is the School's underground parking garage used solely for the school's administrators and guests? Or is it also utilized by local businesses as well?
ADD 1 - R6: There are two underground garages that are connected. One is for Pierce School employees, the other is for Town employees.

ADD 1 - Q7: If the School is renovated, does the Town prefer to connect the main school and Pierce Primary School internally?
ADD 1 - R7: Yes.

ADD 1 - Q8: Are site plans and more detailed building plans available?
ADD 1 - R8: There are limited drawings available of the building and site. Any drawings available will be furnished to the firm awarded the contract.

ADD 1 - Q9: Are the adjacent fields available for temp classrooms or construction lay-down areas?
ADD 1 - R9: To be determined.

ADD 1 - Q10: Will there be any off-site swing space available during the construction of the Project?
ADD 1 - R10: To be determined.

ADD 1 - Q11: Where is the property line located between the Pierce School and the Public Library?
ADD 1 - R11: There are limited drawings available of the building and site. Any drawings available will be furnished to the firm awarded the contract.

ADD 1 - Q12: Where is the property line located between the Pierce School and the Public Library?
ADD 1 - R12: There are limited drawings available of the building and site. Any drawings available will be furnished to the firm awarded the contract.

ADDENDUM No. 1

October 23, 2020

Attachment A –

Designer Walkthrough Sign In Sheet
October 20, 2020

John R. Pierce School Designer Walkthrough
October 20, 2020 at 3:30 pm
50 School Street, Brookline, MA

LEFTFIELD

Name	Company / Role	Email Address	Phone Number
Robert Bell	PERKINS EASTMAN	r.bell@perkinseastman.com	617.712.2115
JANA SILSBY	DLR GROUP	jsilsby@DLRGROUP.com	857-334-5159
ALICIA CARITANO	JCJ ARCHITECTURE	acaritano@jcj.com	617 852 4274
DAVID WARNER	WARNER LARSON	dwarner@warnerlarson.com	617-464-1440
Carla Cerruzzi	Sasaki	ccerruzzi@sasaki.com	617-999-3557
Will Spears	MDS	wspears@mds-bos.com	617-997-7061
Latetta Curry	SLAM	lcurry@slamcall.com	857-615-7475
SAMUEL LASKY	William Rawn Assoc	slasky@rawnarch.com	617-872-6408
Deborah Myers	DMLA	deb@dm-la.com	617-922-6741
FRANK HOLMES	LANGAN	FHOLMES@LANGAN.COM	781.264.3874
Chuck Samiotes	Samiotes Consultants	CSamiotes@Samiotes.com	508 246 8877
Lauren Gauthier	CBT	gauthier@cbtarchitects.com	(617 281-384 4472
ED WELLINGTON	CES	EWELLINGTON@CESENG.com	781-258-7626
Kevin Stetson	Sanborn Head	Kstetson@sanbornhead.com	978-846-1790
DONALD WALTER	DORE + WHITTIER	DWALTER@DOREANDWHITTIER.com	978.499-2999

John R. Pierce School Designer Walkthrough
October 20, 2020 at 3:30 pm
50 School Street, Brookline, MA

LEFTFIELD

Name	Company / Role	Email Address	Phone Number
HOLLY MILLER	HMFH ARCHITECT	HMILLER@HMFH.COM	617.492.2200
JONATHAN LEVI FAIA	JONATHAN LEVI ARCHITECTS	JLEVI@LEVIARC.COM	617 669 7272
KEN DiNISCO	DiNISCO DESIGN	K.DINISCO@DINISCO.COM	(617) 947-1394
VITAL ALBUQUERQUE	PERKINS & WILL	VITAL.ALBUQUERQUE@PERKINSWILL.COM	(857) 253-8466
MICHAEL FLYNN	GEI CONSULTANTS	mflynn@geiconsultants.com	(413) 537-3013

ADDENDUM No. 1

October 23, 2020

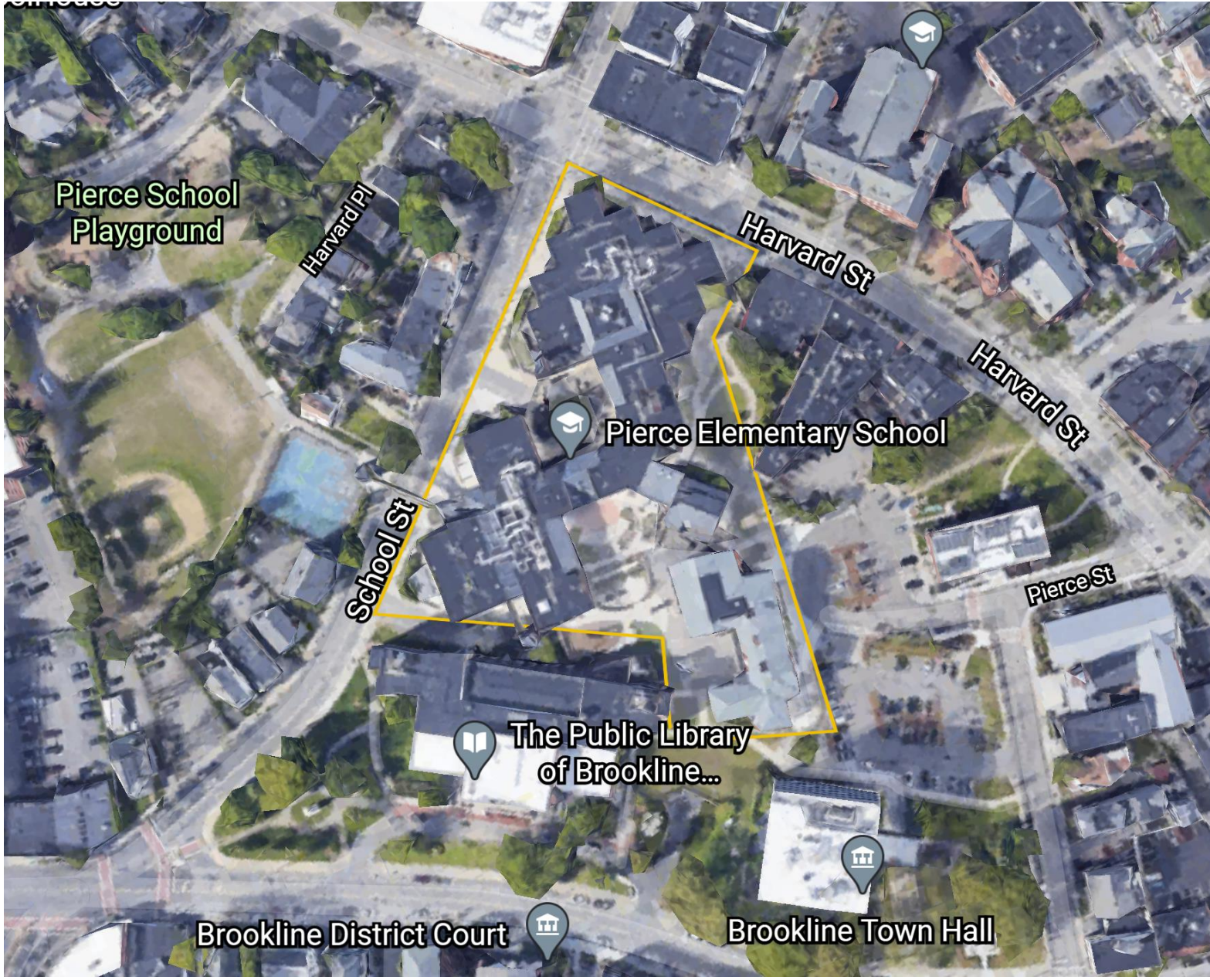
Attachment B –

Designer Walkthrough Slideshow
October 20, 2020

BROOKLINE SCHOOL DISTRICT

JOHN R. PIERCE SCHOOL FEASIBILITY STUDY

OCTOBER 20, 2020



LEFTFIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT

JOHN R. PIERCE SCHOOL

Designer Briefing

Agenda

Introductions

Conceptual Budget

Conceptual Schedule

Designer RFS Schedule

Project & Site Understanding

Next Steps

School Tour

JOHN R. PIERCE SCHOOL

Designer Briefing

Conceptual Budget Range Analysis

New Construction	
Enrollment	725
MSBA ISS per student (NSF)	78,121
Space beyond MSBA guidelines	10,000
Net Building Square Footage	88,121
Assumed Net to Gross factor (1.5) GSF	44,061
Total Building GSF	132,182
Cost per Square Foot - New Construction	$625
Construction Costs	$82,613,438
Parking Garage and Structural Considerations	$5,000,000
Escalation Costs (3.5% for 2 years)	$6,132,941
Adjusted Construction Cost	**$93,746,378**
Soft Costs (25% of Hard Costs)	$23,436,595
Anticipated Total Project Cost	**117,182,973**

Renovation	
Enrollment	725
MSBA ISS per student (NSF)	
Space beyond MSBA guidelines	
Net Building Square Footage	
Assumed Net to Gross factor (1.5) GSF	
Existing Building GSF	198,000
Cost per Square Foot - Renovation	$530
Construction Costs	$104,940,000
Parking Garage and Structural Considerations	$5,000,000
Escalation Costs (3.5% for 2 years)	$7,695,800
Adjusted Construction Cost	**$117,635,800**
Soft Costs (25% of Hard Costs)	$29,408,950
Anticipated Total Project Cost	**147,044,750**

JOHN R. PIERCE SCHOOL

Designer Briefing

Wednesday	Oct 7	Notice appears in the Central Register
Wednesday	Oct 7	TOB submits notice to COMMBUYS
Thursday	Oct 8	Notice appears in The Brookline Tab
Tuesday	Oct 20	Site Visit at Pierce School, 50 School Street, Brookline, MA at 3:00 PM
Thursday	Oct 22	Issue Addendum on Site Visit include handouts, attendee list and Q & A to date
Monday	Oct 26	Questions, must be received by jcarlson@leftfieldpm.com by 5:00 pm
Wednesday	Oct 28	LEFTFIELD issues Addendum in response to questions, if any, for TOB to post by noon
Wednesday	Nov 4	Proposals, attention Jen Carlson, must be received by 2:00 pm
Tuesday	Nov 10	Selection Committee meets to review Proposals
Thursday	Nov 12	Proposals and Reference Check info due to the MSBA

JOHN R. PIERCE SCHOOL

Designer Briefing

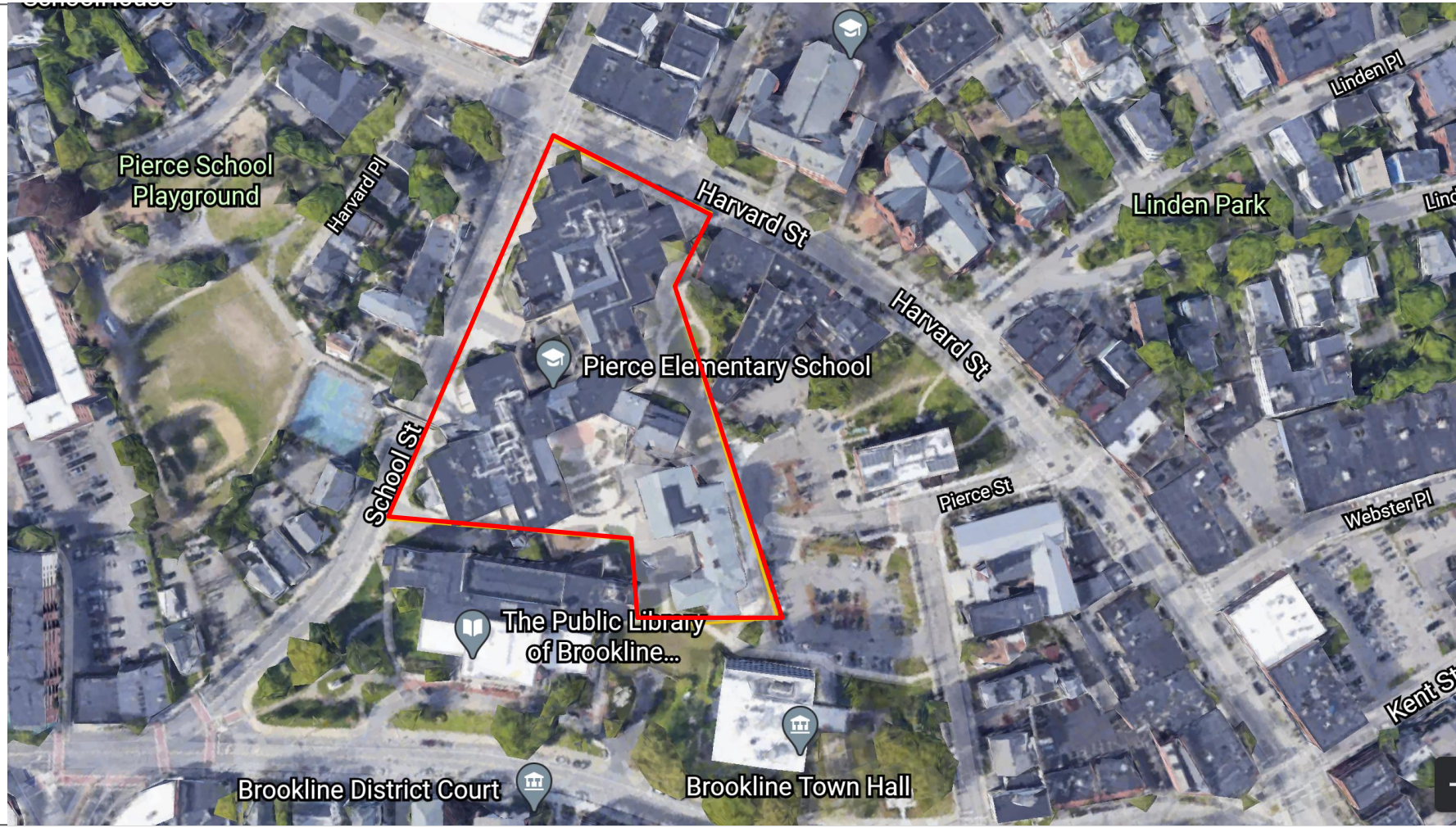
Tuesday	Dec 1	1st DSP Meeting - Proposal Review
Tuesday	Dec 15	2nd DSP Meeting – Interviews
Wednesday	Dec 16	DSP issues official ranking and letter
Monday	Jan 4	Complete fee negotiations
Tuesday	Jan 5	SBC votes to recommend contract to Building Commission
		LEFTFIELD sends contract to Building Commission for review
Tuesday	Jan 12	Building Commission vote to approve Designer Contract
Wednesday	Jan 13	Execute Designer Contract
Friday	Jan 22	LEFTFIELD sends proposed work plan to SBC for review
Tuesday	Jan 26	SBC votes to approve proposed work plan

JOHN R. PIERCE SCHOOL

Designer Briefing

Project Considerations

- ❖ Tight, active site
  - Town Hall
  - Dept. of Public Health
  - Public Library
  - District Court
  - Police Dept.
  - Fire Dept.
- ❖ Underground parking garage structure
- ❖ Playground located across School Street – renovated in 2016.



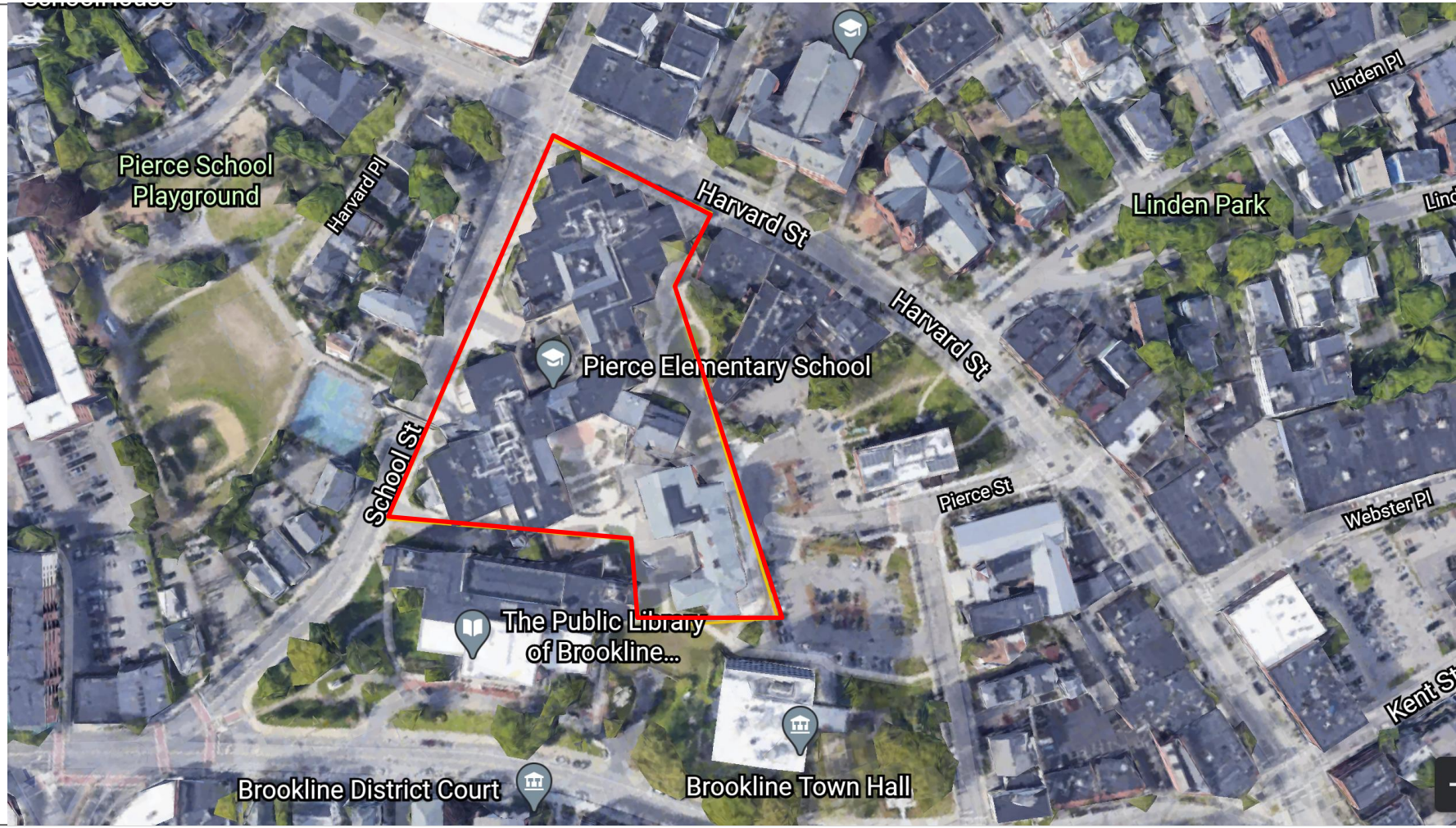
LEFTFIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT

JOHN R. PIERCE SCHOOL

Designer Briefing

Project Considerations

- MSBA Design Enrollment – 725 Students (K – 8)
- Current Enrollment – 842 students (K – 8)
- 2 Main Buildings
  - Pierce Historical (1854)
  - Pierce Main (1974)



LEFTFIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT

JOHN R. PIERCE SCHOOL

Designer Briefing

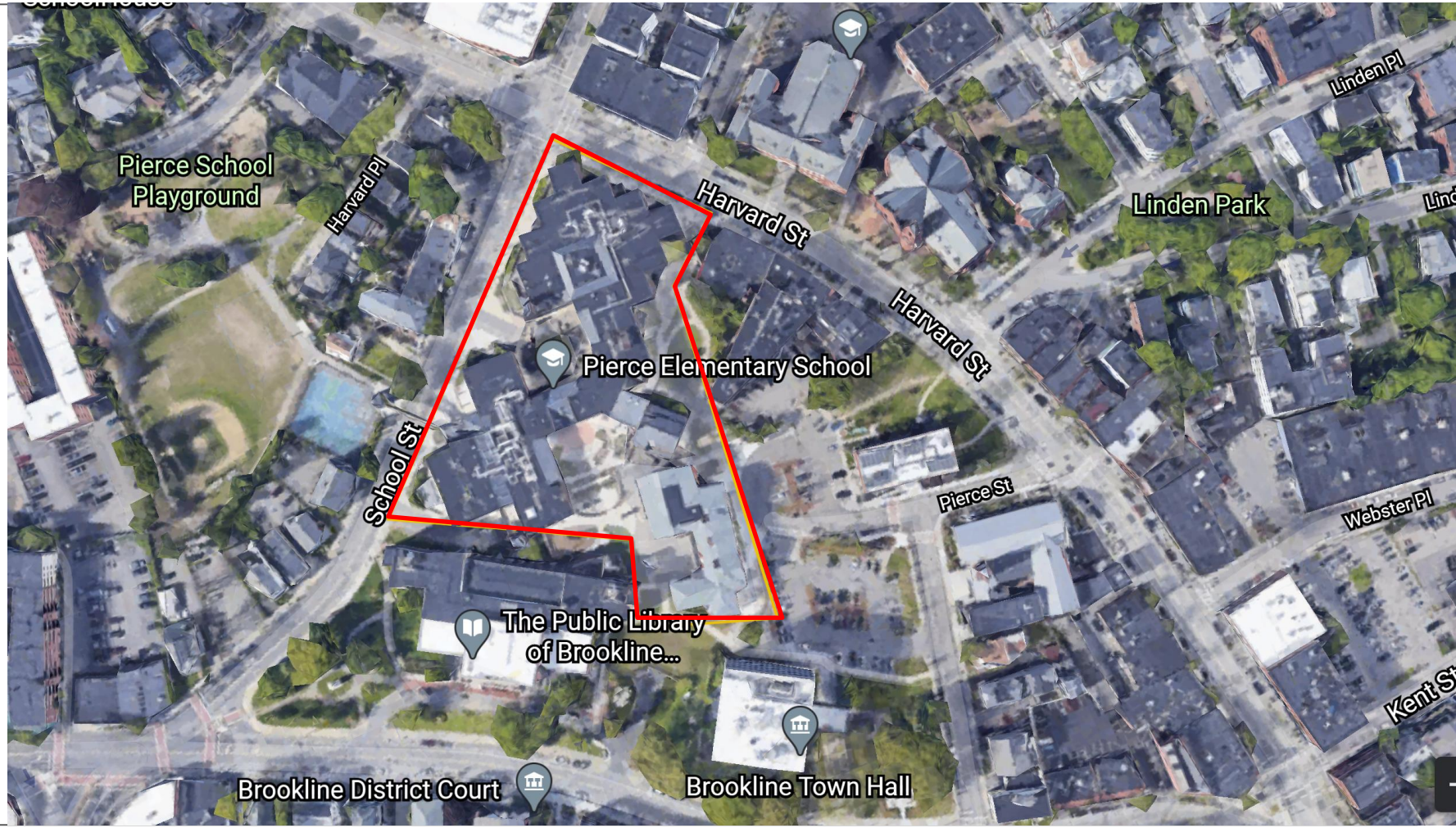
RFS Considerations

- MBE Participation Goal: 5.1%
- WBE Participation Goal: 10%

- Identify whether utilizing a consultant or in house for **EVERY** category of work listed in the RFS

- FFE and Technology during the Schematic Design phase

- The project may consider the Ch. 149A CM-R delivery methodology



LEFTFIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT

JOHN R. PIERCE SCHOOL

Designer Briefing

- Tours by:
  - Matt Gillis – Director of Operations, School Department
  - Tony Guigli – Project Manager, Building Department

- Final Questions due in writing on **Monday October 26, 2020 – 5:00 PM** to:

  Jen Carlson
  jcarlson@leftfieldpm.com

- Proposals [hardcopy and flash drive] due on or before **Wednesday, November 4, 2020 2:00 PM**, and delivered to:

  Jen Carlson
  Leftfield, LLC
  800 Hingham St
  Office 101AN
  Rockland MA 02370

JOHN R. PIERCE SCHOOL

Designer Briefing

Questions & Answers

JOHN R. PIERCE SCHOOL
DESIGNER REQUEST FOR SERVICES

ADDENDUM No. 2

November 2, 2020

Proposals Due: Wednesday, November 4, 2020, 2:00 PM to:
Town of Brookline, c/o Jen Carlson, Leftfield, LLC
800 Hingham St, Office 101AN, Rockland MA 02370

TO: All Prospective Respondents

Notice to Respondents:
This Addendum is being issued by email and is posted on the website, https://www.brooklinema.gov/Bids.aspx .

It forms a part of the Designer Request for Services (RFS) and supplements the RFS, issued October 7, 2020, as noted below. Please acknowledge receipt of this addendum in your proposal.

Addendum No. 1 consists of **2 pages** and the following **2 Attachments**:
Attachment A – Planholder List, dated October 28, 2020
Attachment B – Town Assessor's Map
Attachment C – Enrollment History

ADD 2 - Q1: Are 20 physical copies of the submitted proposals still required?
ADD 2 - R1: Yes.

ADD 2 - Q2: Do you have any floor plans that show the open classrooms in Unit A?
ADD 2 - R2: There are limited drawings available of the building and site. Any drawings available will be furnished to the firm awarded the contract.

ADD 2 - Q3: How many parking spaces are there in the Pierce School's underground parking garage?
ADD 2 - R3: There are 57 parking spaces in the school's underground garage.

ADD 2 - Q4: What is the extent of the underground parking? Is it linked to the municipal parking structure? Are structural drawings available?
ADD 2 - Q4: There are limited drawings available of the building and site. Any drawings available will be furnished to the firm awarded the contract.

ADD 2 - Q5: Are the number of entry/egress points in the building and the parking garage a security concern?
ADD 2 - Q5: Yes. There are currently 45 exterior doors to access the building.

ADD 2 - Q6: Who owns the footbridge? Is repair/ renovation/ ADA upgrades to the bridge part of the scope of this project?
ADD 2 - R6: The Town owns the footbridge. We anticipate that this footbridge will be part of the project.

ADD 2 - Q7: Is the exterior stair and walkway, connecting the main entrance to the building with the Town parking lots and leading down to Harvard Street included in the Project?
ADD 2 - R7: Yes.

ADD 2 - Q8: Can the project utilize the playground land across the street?
ADD 2 - R8: The Park and Playground across the street, located on School Street, is Town property. In order for school building construction to happen on this park, many departments and citizens would have public comment and formal votes would likely be needed for a land swap for other green space would be likely required to use any portion of that property. This does not happen often in Brookline, so more research would need to happen on the mechanics of that process. A detailed explanation how this would be beneficial to school and town would probably be needed to successfully have productive public discussions and approvals to change the use of existing land above.

ADD 2 - Q9: Is the entire playground area and field utilized by the school?
ADD 2 - R9: The park is open to the public, but generally is used only by the school during school hours.

ADD 2 - Q10: Is there swing space in Brookline for students during construction?
ADD 2 - R10: To be determined during Feasibility Study.

ADD 2 - Q9: Please provide a breakdown of the school's enrollment by grade.
ADD 2 - R9: See attached enrollment history.

ADDENDUM No. 2

November 2, 2020

Attachment A –
Planholder List

Pierce Designer RFS "Planholder List"

r.bell@perkinseastman.com
jsilsby@dlrgroup.com
acaritano@jcj.com
LisaF@ns-engineering.com
laurened@studiogarchitects.com
Eigen@silman.com
dduffy@fbra.com
SCallahan@jcj.com
j.charlap@perkinseastman.com
rshen@flansburgh.com
dwarner@warnerlarson.com
cceruzzi@sasaki.com
wspears@mds-bos.com
lcurry@slamcoll.com
klevi@leviarc.com
IanJohnston@deltek.com
SLasky@rawnarch.com
ahovey@warnerlarson.com
Debbie.Turner@lgcinc.net
deb@dm-la.com
fholmes@langan.com
csamiotes@samiotes.com
mmoore@mds-bos.com
JeremyHeim@deltek.com
BForestall@moodynolan.com
LDvarskas@Samiotes.com
Kari.Scullin@perkinswill.com
GordenD@peercpc.com
katie@westfaulkner.com
dw@franklocker.com
Gauthier@cbtarchitects.com
ewellington@ceseng.com
kstetson@sanbornhead.com
dwalter@doreandwhittier.com
hmiller@hmfh.com
jlevi@leviarc.com
KLuo@rawnarch.com
pgray@leviarc.com
k.dinisco@dinisco.com
vital.albuquerque@perkinswill.com
mflynn@geiconsultants.com
jpalmieri@ceseng.com
StevenBriva@deltek.com
kim@imakeyourmarketing.com
GordenD@peercpc.com

ADDENDUM No. 2

November 2, 2020

Attachment B –

Town Assessor's Map of Pierce Property and Playground

Town of Brookline
Board of Assessors

Map Scale 1:1,530

206
198
200
199
197
180
181
182
171
172
154
177
179
178
176
174
141
140A
140
EMERSON GARDEN
PIERCE SCH PLYGRD
S-7
M-1.0
L-0.5
L-1.0
G-1.0
T-6
T-5
G-2.0
M-1.0
GREENDOUGH CIR
LINCOLN RD
CYPRESS ST
SEARLE AVE
WASHINGTON ST
SCHOOL ST
HOMER ST
HARVARD ST
LINDEN PL
LINDEN PARK
PIERCE ST
GOODWIN PL
WAVERLY ST
THAYER PL
THAYER ST
HOLDEN ST
ELM ST
EMERSON ST
BERKELEY CT
DAVIS AVE
ANDEM PL
KENT S
41
35
39
31A
37A
30
37B
36

Town of Brookline
Board of Assessors

Map Scale 1:1,440

AUBURN ST
PARK ST
AUBURN PL
WASHBURN PL
WASHBURN TER
HARVARD AVE
HARVARD CT
HARVARD PL
PARK VALE
GRIGGS TER
GRIGGS PARK
WEYBRIDGE LN
WEYBRIDGE RD
SCHOOL ST
PIERCE SCHL PLYGRD

169 170 171 172 154 155 214 208 207 200 177

M-1.5 M-2.0 F-1.0 L-1.0 M-1.0 T-6 S-7 L-0.5 G-1.0 G-2.0

34 32 31A 42 41 39 36

35

ADDENDUM No. 2

November 2, 2020

Attachment C –
Enrollment History

PIERCE	ENROLLMENT										
School Year	K	1	2	3	4	5	6	7	8	SP	Total
10-11	83	89	83	62	81	79	56	63	53		649
11-12	79	88	94	87	67	83	75	59	67		699
12-13	91	93	86	87	85	67	90	72	64		735
13-14	111	92	91	81	88	85	68	95	72		783
14-15	108	112	91	88	84	89	82	71	90		815
15-16	106	108	107	90	87	85	85	81	75		824
16-17	96	113	106	111	91	83	88	86	80		854
17-18	108	91	111	108	114	84	76	84	83		859
18-19	99	103	87	109	106	110	90	80	81		865
19-20	93	95	96	91	104	106	103	79	75		842
20-21	70	66	76	85	72	83	92	92	69		705

20/21 numbers reflect COVID-19 reopening, preliminary as of 11/2/20








TOWN OF BROOKLINE, BROOKLINE PUBLIC SCHOOLS
JOHN R. PIERCE SCHOOL FEASIBILITY STUDY

DESIGNER SERVICES APPLICATION | NOVEMBER 4, 2020

MDS ARCHITECTS SASAKI

MDS
ARCHITECTS

November 3, 2020

Jen Carlson
Leftfield, LLC
Office 101AN
800 Hingham Street
Rockland, MA 02370

Re: Designer Qualifications for the Pierce School Feasibility Study

Dear Ms. Carlson and Members of the Selection Committee:

As a resident of Brookline, I understand that the John Pierce School project is a critical component of Brookline Public School's strategic plan for providing 21st century learning environments for all students throughout the Town, and the need to address deficiencies in the existing school building. MDS/Miller Dyer Spears proposes to collaborate with Sasaki as associated architect for this project, bringing the best of both firms to this feasibility study. As you review our application, please consider the following differentiators:

- **MDS / Sasaki Team Collaboration.** MDS and Sasaki are excited to team together to address the uniques challenges of the Pierce School project. MDS brings expertise in school design, experience working with the MSBA, and in-depth knowledge of the Town of Brookline's culture and Brookline Public School's mission, vision and core values. Sasaki brings strength in forming urban environments, urban infill projects, and all-electric, net zero energy buildings. Both firms are extremely excited to collaborate on this opportunity, having admired each others work for many years, seeing a kinship of spirit and design aesthetic, as well as great personal dynamics among all the individuals proposed for this project.

  MDS will be the prime architect and Sasaki will be the associated architect. The division of responsibility between the two firms play to each firms strengths: MDS will be responsible for the design of the interior environments, lead the programming process and the shaping of the learning environments, integrity of the documents and cost control. Sasaki will be responsible for exterior envelope design, integration of the building with its urban and landscape context, and act as green design consultant, bringing its expertise in all-electric and net zero buildings. MDS and Sasaki will collaborate on community engagement, melding MDS's understanding of the Brookline community's processes and expectations, and Sasaki's tools and experience building community consensus.

- **MDS Specializes in Schools.** MDS is honored to work with Superintendents, school building committees, MSBA project managers, and the broader community to design innovative schools that help students and teachers thrive and provide long-term value to their communities. Our work is recognized for its quality, durability, and creative approach to enriching student experiences. We design schools that align with current and future curricula and pedagogy, address the social and emotional needs of all learners, and support the health and wellness of diverse student bodies.

- **Engaged in 21st Century Educational Programming.** MDS understands the importance of designing spaces that help students develop the creative, critical thinking and collaboration skills needed to succeed in 21st century academic and work environments. We are eager to apply our diverse portfolio of K-12 school, higher education, collaborative workplace and research experience to create engaging environments for all learners. Flexibility, technology, team teaching, learning neighborhoods, breakout spaces for group work, maker spaces, art and media studios, project presentation and display areas, and other non-traditional school layout patterns, are program elements that will be addressed in our programming and visioning workshops.

- **MDS and Sasaki Excel at Complex Projects.** The portfolios of both firms include a wide range of complex renovation/expansion and new construction projects. By dividing the design task clearly between MDS (Interior) and Sasaki (Exterior), the strengths of both firms can

MDS
ARCHITECTS

enhance this complex building project. Our teams will seamlessly address the challenges posed by the site context, universal building and site accessibility needs, and mechanical systems integration, while also providing optimal learning environments and employing building systems and finishes that are durable and easy to maintain.

- **Sustainable + Net Zero Carbon Design.** Collectively, the MDS and Sasaki team brings diverse resources and a robust knowledge base of sustainable design best practices. MDS's Director of Sustainable Design, Nereyda Rodriguez, is focused on improving indoor air quality and eliminating chemicals of concern from the indoor environments. She will team with Sasaki's Director of Sustainability, Tamar Warburg, who brings deep experience with all-electric, Net Zero Carbon buildings. Together our team will shape a building that promotes health and wellness and aligns with Brookline's commitment to the elimination of fossil fuels from public buildings.

  The project teams from both firms include both WELL and LEED Accredited Professionals. We will apply green design strategies that create healthy, invigorating spaces that promote learning, support comfort and wellness among students, teachers and staff, and meet or exceed LEED certification goals. We are committed to creating schools that promote excellent air quality, and can be adapted to respond to extraordinary circumstances such as the COVID-19 outbreak. Flexibility in the use of spaces and in the HVAC system will be among the considerations that we will discuss to reach the Town's sustainability and HVAC system design goals.

- **Capacity, Continuity of Staff + Client Service.** MDS is known for our high level of professional service. The MDS / Sasaki team has ample capacity to support this project and meet your schedule goals. MDS's success as a firm is rooted in its commitment to being proactive, creative, participatory, and highly responsive to our clients' needs through all phases of a project. MDS will provide continuity of its Project Manager, Margaret Clark, from programming through Construction Administration as she has done previously on the Heath School and Lawrence School projects for the Town of Brookline.

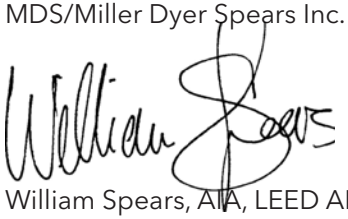
MDS has read the Request for Designer Services (RFS) dated October 7, 2020, its attachments, and Addenda 1 and 2. I certify MDS/Miller Dyer Spears Inc. meets the minimum qualifications outlined in Section E of the RFS. Our team's Supplier Diversity Office certification letters and MCPPO certificates are included after this cover letter. Our certification forms are included at the end of our application. If you have any questions about our proposal, I can be reached directly at wspears@mds-bos.com.

MDS appreciates the professional relationships that were forged with the Town of Brookline during the design and construction of the Lawrence School and the Heath School. I believe these projects have stood up well to the test of time. I have personally been following with great interest the Town's journey to address its growing student enrollment: the search for a ninth school site, multiple resetting of the plan, and Town Meeting votes. I have toured the Ridley School upon its completion and followed the development of the design for the new Driscoll School. I believe that the MDS / Sasaki team would lead a successful study and design process that would be a true partnering experience with the Town, and result in a building that we all would take pride in for generations to come.

Thank you for your consideration of the MDS / Sasaki team. It would be a pleasure and an honor to work with you on this very exciting project, and to imagine together the future Pierce School.

Sincerely,

MDS/Miller Dyer Spears Inc.



William Spears, AIA, LEED AP, MCPPO
Principal

The Commonwealth of Massachusetts
Office of the Inspector General
One Ashburton Place, Boston, MA 02108

Massachusetts Certified Public Purchasing Official Program

Hereby presents this ***Certificate of Completion*** *to*

William Spears

for attendance in the seminar entitled

Recertification for School Project Designers and Owners Project Managers

Boston, Massachusetts
June 14, 2019

Inspector General

7 CPE Credits –"In accordance with the standards of the National Registry of CPE Sponsors, CPE credit has been granted based upon a 50 minute Hour."
The Commonwealth of Massachusetts Office of the Inspector General is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org
Sponsor ID#103866.
Field of Study: Specialized Knowledge and Applications
Instructional / Delivery Method: Group-Live

PDP

Qualifies for 7 Professional Development Points based on the State Plan for Professional Development.

Qualifies for 7 MCPPO points toward recertification.

The Commonwealth of Massachusetts
Office of the Inspector General
One Ashburton Place, Boston, MA 02108

Massachusetts Certified Public Purchasing Official Program

Hereby presents this certificate to

Margaret Clark

for successful completion of

Recertification for School Project Designers and Owner's Project Managers

Boston, Massachusetts
March 21, 2019

Glenn A. Cunha
Inspector General

7 CPE Credits – "In accordance with the standards of the National Registry of CPE Sponsors, CPE credit has been granted based upon a 50-minute hour."

The Massachusetts Office of the Inspector General is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.org.

Sponsor ID#103866
Field of Study: Specialized Knowledge
Instructional/Delivery Method: Group-Live

PDP Qualifies for 7 Professional Development Points based on the State Plan for Professional Development

The Massachusetts Office of the Inspector General is registered with the Department of Elementary & Secondary Education to award professional development points (PDP).

Qualifies for 7 MCPPO points toward recertification

Expires March 2022

MCPPO
Excellence in Public Procurement®

The Commonwealth of Massachusetts
Office of the Inspector General
One Ashburton Place, Boston, MA 02108

Massachusetts Certified Public Purchasing Official Program

Hereby presents this ***Certificate of Completion*** *to*

Nereyda Rodriguez

for attendance in the seminar entitled

Certification for School Project Designers & Owner's Project Managers

Boston
March 6-15, 2019

Inspector General

The Massachusetts Office of the Inspector General is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.org.

27 CPE Credits –"In accordance with the standards of the National Registry of CPE Sponsors, CPE credit has been granted based upon a 50 minute Hour." Sponsor ID#103866. Field of Study: Specialized Knowledge and Applications. Instructional/Delivery Method: Group-Live

The Massachusetts Office of the Inspector General is registered with the Department of Elementary & Secondary Education to award professional development points (PDP).

Qualifies for ***27*** Professional Development Points based on the State Plan for Professional Development.

PDP

Qualifies for MCPPO points toward recertification.

THE COMMONWEALTH OF MASSACHUSETTS
Executive Office for Administration and Finance
OPERATIONAL SERVICES DIVISION
One Ashburton Place, Suit 1017
Boston, MA 02108-1552
Charles D. Baker
Governor
Karyn E. Polito
Lieutenant Governor
Michael J. Heffernan
Secretary
Gary J. Lambert
Assistant Secretary for Operational Services Division

March 15, 2019

Ms. Kathleen Wonkka
Miller Dyer Spears, Inc.
99 Chauncy Street, Floor 8
Boston, MA 02111

Dear Ms. Wonkka:

Congratulations! Your firm has been certified as a woman business enterprise (WBE) with the Supplier Diversity Office ('SDO') under the business description of ARCHITECTURE, PLANNING AND INTERIOR DESIGN. Your firm will be listed in the SDO Certified Business Directory and the Massachusetts Central Register under this description. **This letter serves as the sole proof of your SDO certification**. Your designation as a WBE is valid for three (3) years unless revoked pursuant to 425 CMR 2.00.

Your firm's next renewal date is March 14, 2022. SDO will send written renewal notices to your business and/or e-mail address on file approximately thirty (30) business days prior to your firm's three (3) years certification anniversary. Additionally, every six (6) years, certified companies that wish to remain certified may undergo a substantive review which will require certain updated supporting documentation.

SDO also reserves the right to monitor your firm and to perform random spot checks to ensure the firm continues to meet the certification criteria. Your firm is required to notify the SDO in writing of any material changes. Examples include but are not limited to changes in its business description, as well as business phone number, fax number, business' physical location, webpage and e-mail addresses. Other reportable changes include business structure, ownership (the business is sold or transferred), control and outside employment. You also have a duty to report decertification and debarment notices from this or any other jurisdiction. Failure to abide by the continuing duty requirements shall constitute grounds for the firm's decertification.

We look forward to working with you and your firm to maximize its business opportunities. Should you have any questions, please feel free to contact us via email at wsdo@state.ma.us.

Sincerely,

William M. McAvoy
Deputy Assistant Secretary and
Chief Legal Counsel

Tel: (617) 720-3311 TDD: (617) 727-2716 Fax: (617) 727-4527
www.mass.gov/osd Follow us on Twitter: @Mass_OSD

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Secretary
Gary J. Lambert
Assistant Secretary for Operational Services Division

June 11, 2020

Mr. Abdelmadjid M. Lahlaf
Lahlaf Geotechnical Consulting, Inc.
100 Chelmsford Road, Suite 2
Billerica, MA 01862-6420

Dear Mr. Lahlaf:

Congratulations! Your firm has been renewed as a minority business enterprise (MBE) with the Supplier Diversity Office ('SDO') under the business description of **GEOTECHNICAL SERVICES FOR ALL PROJECT PHASES, INCLUDING FEASIBILITY STUDIES DURING SITE SELECTION, GEOTECHNICAL DESIGN, MONITORING DURING CONSTRUCTION, FORENSIC ENGINEERING, AND FAILURE ANALYSIS**. Your firm will be listed in the SDO Certified Business Directory and the Massachusetts Central Register under this description. **This letter serves as the sole proof of your SDO certification**. Your designation as a MBE is valid for three (3) years unless revoked pursuant to 425 CMR 2.00.

Your firm's next renewal date is June 09, 2023. SDO will send written renewal notices to your business and/or e-mail address on file approximately thirty (30) business days prior to your firm's three (3) years certification anniversary. Additionally, every six (6) years, certified companies that wish to remain certified may undergo a substantive review which will require certain updated supporting documentation.

SDO also reserves the right to monitor your firm and to perform random spot checks to ensure the firm continues to meet the certification criteria. Your firm is required to notify the SDO in writing of any material changes. Examples include but are not limited to changes in its business description, as well as business phone number, fax number, business' physical location, webpage and e-mail addresses. Other reportable changes include business structure, ownership (the business is sold or transferred), control and outside employment. You also have a duty to report decertification and debarment notices from this or any other jurisdiction. Failure to abide by the continuing duty requirements shall constitute grounds for the firm's decertification.

We look forward to working with you and your firm to maximize its business opportunities. Should you have any questions, please feel free to contact us via email at wsdo@state.ma.us.

Sincerely,

William M. McAvoy
Deputy Assistant Secretary and
Chief Legal Counsel

Charles D. Baker, Governor
Karyn E. Polito, Lieutenant Governor
Stephanie Pollack, MassDOT Secretary & CEO

massDOT
Massachusetts Department of Transportation

DBE Certification Office | MassUCP

June 17, 2020

Mr. Abdelmadjid M. Lahlaf
Lahlaf Geotechnical Consulting, Inc.
100 Chelmsford Road, Suite 2
Billerica, MA 01862-6420

This letter serves as sole and exclusive proof of your firm's DBE certification

Dear Mr. Lahlaf:

Congratulations! The Massachusetts Unified Certification Program (MassUCP), is pleased to notify you that we have renewed your company as a disadvantaged business enterprise (DBE). Your company continues to be assigned **NAICS Code(s) 541330** with the certified business description of **GEOTECHNICAL SERVICES FOR ALL PROJECTS PHASES, INCLUDING FEASIBILITY STUDIES DURING SITE SELECTION, GEOTECHNICAL DESIGN, MONITORING DURING CONSTRUCTION , FORENSIC ENGINEERING, AND FAILURE ANALYSIS** and will remain listed in our certified business directory.

As a DBE, you must inform MassUCP in writing of any change in circumstances affecting your ability to meet size, disadvantaged status, ownership, control requirements or any material change in the information provided in your application form. Changes in management responsibility among members of a limited liability company are covered by this requirement. You must attach supporting documentation describing in detail the nature of such changes. The notice must take the form of an affidavit sworn to by the owners of the firm before a person who is authorized by state law to administer oaths or of an un-sworn declaration executed under penalty of perjury of the laws of the United States. You must provide the written notification within 30 days of the occurrence of the change. If you fail to make timely notification of such a change, you will be deemed to have failed to cooperate under 49 CFR 26.109(c).

To renew your firm's DBE certification and if it continues to meet the applicable criteria, on or before your firm's certification anniversary date of **June 9, 2021**, and each year thereafter, please send the MassUCP the following documents:

(1) No Change Affidavit **(will be sent with reminder letter)**

(2) A **signed** copy of your company's, and all of its affiliates', U.S. Tax Returns including all schedules and attachments for the year(s) indicated.

(3) A **signed** copy of your personal tax returns for years(s) indicated.

(4) If a sole proprietor, **a signed** copy of your Schedule C for year(s) indicated.

(5) A statement of the **number only** of full and part-time employees (including owner) for each year indicated.

If you have changed your company name or address, please notify Ms. Nedra D. White, in writing on the company's letterhead in order to update your state vendor file.

MassUCP reserves the right to monitor, perform random spot checks, re-evaluate the firm or revoke the firm's certification if it no longer meets the certification criteria.

During the period of your certification, if you have further questions regarding annual review, please contact Ms. Nedra D. White, Director, MassUCP at (857) 368-8659.

Very truly yours,

Nedra D. White, Director
MassUCP/DBE Certification Program

Ten Park Plaza, Suite 2600-B, Boston, MA 02116
Tel: 857-368-8656

THE COMMONWEALTH OF MASSACHUSETTS
Executive Office for Administration and Finance
OPERATIONAL SERVICES DIVISION
One Ashburton Place, Suit 1017
Boston, MA 02108-1552
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Secretary
Gary J. Lambert
Assistant Secretary for Operational Services Division

September 11, 2020

Ms. Diana Tucker Harrison
Peer Consultants, P.C.
409 12th Street SW, Suite 603
Washington, DC 20024

Dear Ms. Tucker Harrison:

Congratulations! Your firm has been renewed as a minority and woman business enterprise (MBE and WBE) with the Supplier Diversity Office ('SDO') under the business description of **CIVIL ENGINEERING, FACILITIES SUPPORT, AND CONSTRUCTION MANAGEMENT SERVICES** . Your firm will be listed in the SDO Certified Business Directory and the Massachusetts Central Register under this description. **This letter serves as the sole proof of your SDO certification**. Your designation as a MBE and WBE is valid for three (3) years unless revoked pursuant to 425 CMR 2.00.

Your firm's next renewal date is September 08, 2023. SDO will send written renewal notices to your business and/or e-mail address on file approximately thirty (30) business days prior to your firm's three (3) years certification anniversary. Additionally, every six (6) years, certified companies that wish to remain certified may undergo a substantive review which will require certain updated supporting documentation.

SDO also reserves the right to monitor your firm and to perform random spot checks to ensure the firm continues to meet the certification criteria. Your firm is required to notify the SDO in writing of any material changes. Examples include but are not limited to changes in its business description, as well as business phone number, fax number, business' physical location, webpage and e-mail addresses. Other reportable changes include business structure, ownership (the business is sold or transferred), control and outside employment. You also have a duty to report decertification and debarment notices from this or any other jurisdiction. Failure to abide by the continuing duty requirements shall constitute grounds for the firm's decertification.

We look forward to working with you and your firm to maximize its business opportunities. Should you have any questions, please feel free to contact us via email at wsdo@state.ma.us.

Sincerely,

William M. McAvoy
Deputy Assistant Secretary and
Chief Legal Counsel

THE COMMONWEALTH OF MASSACHUSETTS
Executive Office for Administration and Finance
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Boston, MA 02108-1552
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Secretary
Gary J. Lambert
Assistant Secretary for Operational Services Division

January 8, 2020

Ms. Pamela Perini
Pamela Perini Consulting
20 Freemont Terrace
Waltham, MA 02452

Dear Ms. Perini:

Congratulations! Your firm has been renewed as a woman business enterprise (WBE) with the Supplier Diversity Office ('SDO') under the business description of **SECURITY CONSULTANT; SCHOOL SECURITY; K-12 SECURITY; CAMPUS SECURITY; SECURITY ASSESSMENTS; SECURITY DESIGN; LOW INCOME HOUSING SECURITY; ELDERLY HOUSING SECURITY; MUNICIPALITY SECURITY; TRANSPORTATION SECURITY; OPM; PROJECT MANAGEMENT; ACCESS CONTROL; CCTV; INTRUSION DETECTION; ALARM SYSTEMS; SECURITY COMMUNICATIONS**. Your firm will be listed in the SDO Certified Business Directory and the Massachusetts Central Register under this description. **This letter serves as the sole proof of your SDO certification**. Your designation as a WBE is valid for three (3) years unless revoked pursuant to 425 CMR 2.00.

Your firm's next renewal date is January 22, 2023. SDO will send written renewal notices to your business and/or e-mail address on file approximately thirty (30) business days prior to your firm's three (3) years certification anniversary. Additionally, every six (6) years, certified companies that wish to remain certified may undergo a substantive review which will require certain updated supporting documentation.

SDO also reserves the right to monitor your firm and to perform random spot checks to ensure the firm continues to meet the certification criteria. Your firm is required to notify the SDO in writing of any material changes. Examples include but are not limited to changes in its business description, as well as business phone number, fax number, business' physical location, webpage and e-mail addresses. Other reportable changes include business structure, ownership (the business is sold or transferred), control and outside employment. You also have a duty to report decertification and debarment notices from this or any other jurisdiction. Failure to abide by the continuing duty requirements shall constitute grounds for the firm's decertification.

We look forward to working with you and your firm to maximize its business opportunities. Should you have any questions, please feel free to contact us via email at wsdo@state.ma.us.

Sincerely,

William M. McAvoy
Deputy Assistant Secretary and
Chief Legal Counsel

THE COMMONWEALTH OF MASSACHUSETTS
Executive Office for Administration and Finance
OPERATIONAL SERVICES DIVISION
One Ashburton Place, Suit 1017
Boston, MA 02108-1552
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Secretary
Gary J. Lambert
Assistant Secretary for Operational Services Division

May 4, 2020

Ms. Susan Messier
Campbell-McCabe Worldwide, LLC
65 Great Road, Suite 201
Maynard, MA 01754-2097

Dear Ms. Messier:

Congratulations! Your firm has been renewed as a woman business enterprise (WBE) with the Supplier Diversity Office ('SDO') under the business description of **CONSULTING DOOR HARDWARE SPECIFICATIONS**. Your firm will be listed in the SDO Certified Business Directory and the Massachusetts Central Register under this description. **This letter serves as the sole proof of your SDO certification**. Your designation as a WBE is valid for three (3) years unless revoked pursuant to 425 CMR 2.00.

Your firm's next renewal date is February 16, 2023. SDO will send written renewal notices to your business and/or e-mail address on file approximately thirty (30) business days prior to your firm's three (3) years certification anniversary. Additionally, every six (6) years, certified companies that wish to remain certified may undergo a substantive review which will require certain updated supporting documentation.

SDO also reserves the right to monitor your firm and to perform random spot checks to ensure the firm continues to meet the certification criteria. Your firm is required to notify the SDO in writing of any material changes. Examples include but are not limited to changes in its business description, as well as business phone number, fax number, business' physical location, webpage and e-mail addresses. Other reportable changes include business structure, ownership (the business is sold or transferred), control and outside employment. You also have a duty to report decertification and debarment notices from this or any other jurisdiction. Failure to abide by the continuing duty requirements shall constitute grounds for the firm's decertification.

We look forward to working with you and your firm to maximize its business opportunities. Should you have any questions, please feel free to contact us via email at wsdo@state.ma.us.

Sincerely,

William M. McAvoy
Deputy Assistant Secretary and
Chief Legal Counsel

Commonwealth of Massachusetts

Standard Designer Application Form for Municipalities and Public Agencies not within DSB Jurisdiction (Updated July 2016)

1. Project Name/Location For Which Firm Is Filing:

John R. Pierce School Feasibility Study
Brookline, MA

2. Project #

This space for use by Awarding Authority only.

3a. **Firm (Or Joint-Venture) - Name and Address Of Primary Office To Perform The Work:**

MDS ARCHITECTS

Miller Dyer Spears Inc.
99 Chauncy Street, 8th Floor
Boston, MA 02111

3. Name Of Proposed Project Manager:

For Study: (if applicable) Margaret Clark, RA, LEED AP BD+C WELL AP, MCPPO

For Design: (if applicable) Margaret Clark, RA, LEED AP BD+C WELL AP, MCPPO

3b. Date Present and Predecessor Firms Were Established:

1993

3f. Name and Address Of Other Participating Offices Of The Prime Applicant, If Different From Item 3a Above:

3c. Federal ID #:
04-3191972

3g. Name and Address Of Parent Company, If Any:

3d. Name and Title Of Principal-In-Charge Of The Project (MA Registration Required):

William C. Spears, AIA, LEED AP, MCPPO, Principal
MA Reg. #6017

Email Address: wspears@mds-bos.com

Telephone No: 617-338-5350 Fax No.: 617-338-0033

3. Check Below If Your Firm Is Either:

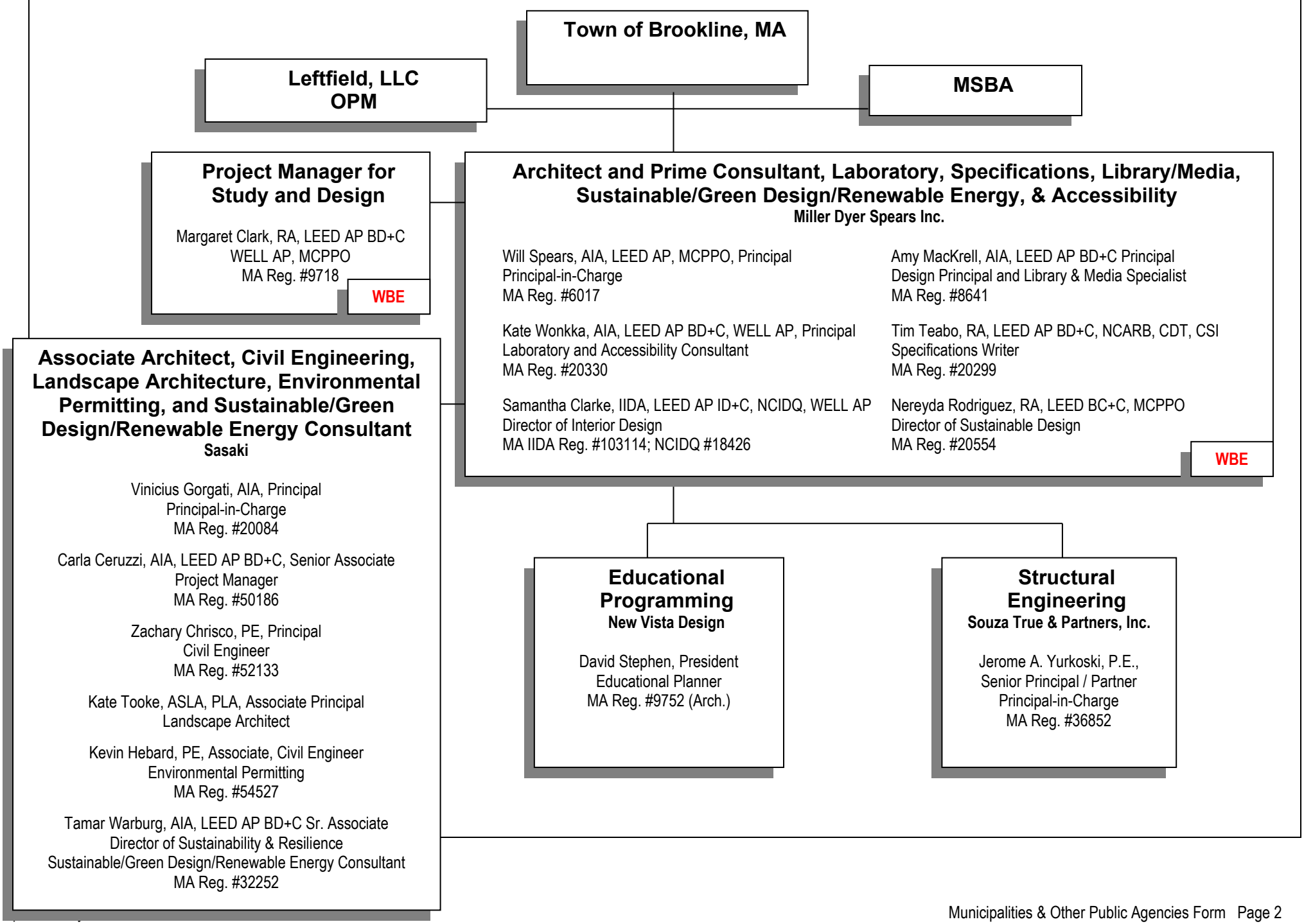
(1) SDO Certified Minority Business Enterprise (MBE) ☐
(2) SDO Certified Woman Business Enterprise (WBE) ☑
(3) SDO Certified Minority Woman Business Enterprise (M/WBE) ☐
(4) SDO Certified Service Disabled Veteran Owned Business Enterprise (SDVOBE) ☐
(5) SDO Certified Veteran Owned Business Enterprise (VBE) ☐

4. **Personnel From Prime Firm Included In Question #3a Above** By Discipline (List Each Person Only Once, By Primary Function -- Average Number Employed Throughout The Preceding 6 Month Period. Indicate Both The Total Number In Each Discipline And, Within Brackets, The Total Number Holding Massachusetts Registrations):

Admin. Personnel	2	( )	Ecologists		( )	Licensed Site Profs.		( )	Other		( )
Architects	22	(17)	Electrical Engrs.		( )	Mechanical Engrs.		( )			( )
Acoustical Engrs.		( )	Environmental		( )	Planners: Urban./Reg.	1	(1)			( )
Civil Engrs.		( )	Fire Protection		( )	Specification Writers	1	(1)			( )
Code Specialists	1	(1)	Geotech. Engrs.		( )	Structural Engrs.		( )			( )
Construction Inspectors		( )	Industrial		( )	Surveyors		( )			( )
Cost Estimators		( )	Interior Designers	4	(2)			( )			( )
Drafters	8	( )	Landscape		( )			( )	Total	39	(22)

5. Has this Joint-Venture previously worked together? ☐ Yes ☐ No

6. List **ONLY** Those Prime And Sub-Consultant Personnel Specifically Requested In The Advertisement. This Information Should Be Presented Below In The Form Of An Organizational Chart. Include Name Of Firm And Name Of The One Person In Charge Of The Discipline, With Mass. Registration Number, As Well As MBE/WBE Status, If Applicable:



6. List **ONLY** Those Prime And Sub-Consultant Personnel Specifically Requested In The Advertisement. This Information Should Be Presented Below In The Form Of An Organizational Chart. Include Name Of Firm And Name Of The One Person In Charge Of The Discipline, With Mass. Registration Number, As Well As MBE/WBE Status, If Applicable:

Fire Protection, Plumbing, HVAC, Electrical/Lighting & Data/Communications

Garcia Galuska & DeSousa, Inc.

Christopher M. Garcia, P.E., Principal
Fire Protection & Plumbing Engineering
MA Reg. #45034

Dominick B. Puniello, P.E., CEM, LEED AP
Principal
HVAC Engineering
MA Reg. #48326

Carlos G. DeSousa, P.E., Principal
Electrical/Lighting
MA Reg. #41003

David M. Pereira, P.E., Principal
Data/Communications
MA Reg. #49310

Geotechnical Engineering

Lahlaf Geotechnical Consulting, Inc.

Abdelmadjid M. Lahlaf, Ph.D., P.E. Principal
Engineer & Project Manager
MA Reg. #39814

Abner Reis, P.E.
Geotechnical Engineer
MA Reg. #54524

MBE DBE

Geoenvironmental Engineering & Hazardous Materials

PEER Consultants, P.C.

John M. Corliss, Jr., PE; Vice President & Chief Engineer
Principal-in-Charge
MA Reg. #38859

David Gorden, CWS, CPSS
Asbestos Inspector AI900459
Asbestos Designer AD900373
Asbestos Project Monitor AM900674
Asbestos Management Planner AP900468
Lead Inspector I-4057
Lead Safe Renovator Supervisor
Certified Professional Soil Scientist

MBE WBE

Cost Estimating

A.M. Fogarty

Pete Timothy, President
Principal-in-Charge
Cost Estimator

Kitchen/Foodservice Consultant

Crabtree McGrath

John Sousa, President
Principal-in-Charge
Foodservice Equipment Consulting

Acoustical Consultant

Acentech

Ioana Pieleanu, Principal Consultant
Principal-in-Charge
Acoustics Consultant

Technology/AV Consultant

ACT Associates

Peter Thompson
Senior AV Design Consultant
Lead AV Design Engineer

Tyler Brown, Design Engineer

6. List **ONLY** Those Prime And Sub-Consultant Personnel Specifically Requested In The Advertisement. This Information Should Be Presented Below In The Form Of An Organizational Chart. Include Name Of Firm And Name Of The One Person In Charge Of The Discipline, With Mass. Registration Number, As Well As MBE/WBE Status, If Applicable:

Theatrical Consultant
Port Lighting

Ron Kuszmar II
VP of Architectural and Theatrical Lighting

Daniel Bourgeois
Senior Project Manager

Code Consultant
Hastings Consulting

Kevin S. Hastings, P.E.
President
Code Consultant
MA Reg. #41651

Traffic Consultant
Vanasse & Associates, Inc.

Scott W. Thornton, P.E.,
Principal – Project Manager
Traffic Engineer 3
MA Reg. #49066 (Civil)

Furniture, Fixtures & Equipment
Point Line Space, Inc.

Peter S. Constable
Principal
Furniture and Equipment Consultant

Site Surveying
Feldman

Kevin Arsenault
Project Manager
MA Reg. #45286

Tim Agurkis
Senior Project Manager
MA Reg. #52782

Damien J. Raffle, PLS
Project Manager
MA Reg. #49629

Security Consultant
Pamela Perini, PSP

Pamela Perini, PSP
Security Consultant

WBE

Hardware Consultant
Campbell McCabe

Susan McCabe Messier, DHT
Principal, Owner
Hardware Specification Consultant
DHI# 113886

Michael Bartoloni, AHC, DHT
Senior Hardware Specification Consultant
DHI# 04567

WBE

Historical Consultant
Building Conservation Associates

Lisa Howe, Director
New England Office
Architectural Conservator
Historic Preservation

Lisa Harrington
Senior Project Manager
Architectural Conservator
Historic Preservation

7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.

a. Name and Title Within Firm:
Will Spears, AIA, LEED AP, MCPPO, Principal

b. Project Assignment:
Principal-in-Charge

c. Name and Address Of Office In Which Individual Identified In 7a Resides:
Miller Dyer Spears Inc.
99 Chauncy Street
8th Floor
Boston, MA 02111

MDS ARCHITECTS

MBE ☐
WBE ☑
SDVOBE ☐
VBE ☐

d. Years Experience: With This Firm: 27 With Other Firms: 14

e. Education: Degree(s) /Year/Specialization
Master of Architecture / 1979 / Architecture

f. Active Registration: Year First Registered/Discipline/Mass Registration Number
1984 / Architecture / 6017

g. Current Work Assignments and Availability For This Project:
Braintree South Middle School; Animal Rescue League Dedham Campus Expansion; Wheaton College Old Science Center Renovation
Available 33% of the time for duration of this project

h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):
Town of Braintree **- East Middle School Renovation and Expansion,** Braintree, MA
Town of Braintree - South Middle School, Braintree, MA
Town of Brookline **- Lawrence School Renovation and Expansion**, Brookline, MA City of Newburyport **- Nock-Molin School Renovation**, LEED-Gold certified, Newburyport, MA
Town of Brookline **- Heath School phased Renovation and Expansion,** Brookline, MA
Codman Academy Charter Public School - **Lithgow Building K-8 School Renovation/ Adaptive Reuse**, LEED-Gold certified, **Initial High School Facilities,** Dorchester, MA
Boston Collegiate Charter School **- Sydney Street Lower School Renovation and Adaptive Reuse,** Dorchester, MA
Boston Collegiate Charter School **- Mayhew Street Upper School Renovation and Expansion (Study and Design),** Dorchester, MA
Brooke East Boston Charter School - East Boston, MA
Malden Catholic High School - **Master Planning and Phased Renovations** - entrance, cafeteria, circulation, classroom, science, library, dining and athletic facilities, Malden, MA
Catholic Memorial School - **Master Planning and Phased Renovations**, West Roxbury, MA
Framingham State University **- Dwight Hall Renovation**, Framingham, MA
Worcester State University - Shaughnessy Administration Building Renovation, LEED-Gold certified, Worcester, MA
Northern Essex Community College - **El-Hefni Allied Health and Technology Center**, Lawrence, MA**; Hartleb Fine Arts and Technology Center**, Haverhill, MA
Invictus Forever – Study for a new Life Skills Development Center and Day Hab for adults and children with Autism

a. Name and Title Within Firm:
Margaret Clark, RA, LEED AP BD+C, WELL AP, MCPPO, Senior Associate

b. Project Assignment:
Project Manager for Study & Design

c. Name and Address Of Office In Which Individual Identified In 7a Resides:
Miller Dyer Spears Inc.
99 Chauncy Street
8th Floor
Boston, MA 02111

MDS ARCHITECTS

MBE ☐
WBE ☑
SDVOBE ☐
VBE ☐

d. Years Experience: With This Firm: 19 With Other Firms: 9

e. Education: Degree(s) /Year/Specialization
Master of Architecture / 1991 / Architecture

f. Active Registration: Year First Registered/Discipline/Mass Registration Number
1996 / Architecture / 9718

g. Current Work Assignments and Availability For This Project:
Braintree South Middle School
Available 100% of the time for duration of this project

h. Other Experience and Qualifications Relevant To The Proposed Project: **(**Identify Firm By Which Employed, If Not Current Firm):
Town of Braintree - **East Middle School Renovation and Expansion;** Braintree, MA
Town of Braintree, South Middle School, Braintree, MA
Town of Brookline **- Heath School Renovation and Expansion,** Brookline, MA City of Newburyport **- Nock-Molin School Renovation**, LEED-Gold certified, Newburyport, MA
Town of Brookline **- Lawrence School Renovation and Expansion**, Brookline, MA
Codman Academy Charter Public School **- Lithgow Building Renovation K-8 School Planning**, LEED-Gold certified, Dorchester, MA
Boston Collegiate Charter School **- Sydney Street Lower School Renovation and Adaptive Reuse,** Dorchester, MA
Boston Collegiate Charter School **- Mayhew Street Upper School Renovation and Expansion (Study and Design),** Dorchester, MA
Malden Catholic High School - **Phased Renovations and Expansion** encompassing the main entrance, circulation, classrooms, science center, library, dining and athletic facilities, Malden, MA
City of Boston - **112 Southampton Street Homeless Shelter**, delivered on a fast-track schedule, Boston, MA
Cresset Development – 60 Grove Street Renovation/Adaptive Reuse of a vacant warehouse into office space, Watertown, MA
Northeastern University **- Matthews Arena renovations and accessibility improvements; Richards & Ryder Halls, Dean's Offices and Classroom Renovation**, Boston, MA
Berklee College of Music, 1140 Boylston Street and 22 The Fenway – renovations to academic and administrative space, Boston, MA

7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.

a. Name and Title Within Firm:
Amy MacKrell, AIA, LEED AP BD+C, Principal

b. Project Assignment:
Design Principal & Library & Media Specialist

c. Name and Address Of Office In Which Individual Identified In 7a Resides:
Miller Dyer Spears Inc.
99 Chauncy Street
8th Floor
Boston, MA 02111

MDS ARCHITECTS

MBE ☐
WBE ☑
SDVOBE ☐
VBE ☐

d. Years Experience: With This Firm: 23 With Other Firms: 14

e. Education: Degree(s) /Year/Specialization
Bachelor of Architecture / 1987 / Architecture

f. Active Registration: Year First Registered/Discipline/Mass Registration Number
1991 / Architecture / 8641

g. Current Work Assignments and Availability For This Project:
Braintree South Middle School
Available 60% of the time for duration of this project

h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):
Town of Braintree - **East Middle School Renovation and Expansion,** Braintree, MA
Town of Braintree - **South Middle School,** Braintree, MA
Phillips Exeter Academy - Lamont Health & Wellness Center Renovations, Exeter, NH
City of Boston/Boston Public Library - Branch Library Small Projects - Targeted renovations to the Lower Mills, West Roxbury and South Boston branch libraries, Boston, MA
City of Cambridge/Cambridge Public Library - Privacy Furniture Study for the Central Square Branch Library, Cambridge, MA
City of Cambridge/Cambridge Public Library - Lighting Study for the Main Branch Library
Invictus Forever – Study for a new Life Skills Development Center and Day Hab for adults and children with Autism
Eastern Connecticut State University - **Goddard Hall & Communications Building Renovation,** Willimantic, CT
Framingham State University - **McCarthy Dining Commons Renovation; Dwight Hall Renovation,** Framingham, MA
Boston University - **George Sherman Union Food Hall Renovation,** Boston, MA
Boston University - **Photonics Classroom Renovations,** Boston, MA
Massachusetts College of Art and Design - Kennedy Campus Center Renovation and Expansion, LEED-Gold certified**; Kennedy Campus Center Servery Expansion**, Boston, MA
University of New Hampshire - **Holloway Commons Renovation/Expansion,** Durham, NH
Worcester State University - **Shaughnessy Administration Building Renovation,** LEED-Gold certified, Worcester, MA
Boston College - 129 Lake Street Renovation/Adaptive Reuse, Brighton, MA
Westfield State University – Parenzo Hall Renovation, Westfield, MA

a. Name and Title Within Firm:
Kate Wonkka, AIA, LEED AP BD+C, WELL AP, Principal

b. Project Assignment:
Laboratory and Accessibility Consultant

c. Name and Address Of Office In Which Individual Identified In 7a Resides:
Miller Dyer Spears Inc.
99 Chauncy Street
8th Floor
Boston, MA 02111

MDS ARCHITECTS

MBE ☐
WBE ☑
SDVOBE ☐
VBE ☐

d. Years Experience: With This Firm: 21 With Other Firms: 5

e. Education: Degree(s) /Year/Specialization
BA / 1994 / Architecture

f. Active Registration: Year First Registered/Discipline/Mass Registration Number
2005 / Architecture / 20330

g. Current Work Assignments and Availability For This Project:
UMass Lowell Ngwa Lab, Olink Proteomics Laboratory Expansion Study
Available 20% of the time for duration of this project

h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):
Catholic Memorial School, West Roxbury, MA- Center for Integrated and Applied Learning, and accessibility survey and ADA/ MAAB compliance renovations
Malden Catholic High School, Malden, MA**-** Accessibility survey and ADA/ MAAB compliance renovations for the Science Center and Learning Commons Renovation, and School for Girls Renovation and Expansion
British International School of Boston at Showa University – teaching lab
Philips Exeter Academy, Lamont Health & Wellness Center, Exeter, NH- Renovation and expansion, ADA reviews
University of Massachusetts Dartmouth- Violette Chemistry Lab renovation
University of Massachusetts Lowell- Ngwa Lab renovation
Tufts University Cummings School of Veterinary Medicine - Multipurpose Teaching and Simulation Lab/Wellness Clinic; Lerner Clinic Induction Room & Loew Teaching Lab Renov.
Dana-Farber Cancer Institute Boston MA - Dana Building accessibility survey and ADA/MAAB compliance renovations; Jimmy Fund 4 Pathology Lab renovation; Smith 5 & 7 CIV Lab renovations and Mayer 3 Lab renovations; Collaborative Genomics Lab; Cell Manipulation & Gene Therapy Lab
Massachusetts General Hospital, Boston, MA**-** campus-wide ADA/MAAB compliance renovations (while with Partners HealthCare)
Northeastern University, Lowell Institute Burlington, MA- Instructional STEM Labs; building wide accessibility survey and ADA/MAAB compliance renovations
Massachusetts Institute of Technology, Cambridge, MA- Accessibility survey and ADA/ MAAB compliance renovations

7. Brief resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.

a. Name and Title Within Firm: **Tim Teabo, RA, LEED AP BD+C, NCARB, CDT CSI, Senior Associate**	 a. Name and Title Within Firm: **Samantha Clarke, IIDA, LEED AP ID+C, WELL AP, NCIDQ, Senior Associate** 
b. Project Assignment: **Specifications Consultant**	b. Project Assignment: **Director of Interior Design**
c. Name and Address of Office in Which Individual Identified in 7a Resides: **Miller Dyer Spears Inc.** **99 Chauncy Street** **8th Floor** **Boston, MA 02111** MDS ARCHITECTS MBE ☐ WBE ☑ SDVOBE ☐ VBE ☐	c. Name and Address of Office in Which Individual Identified in 7a Resides: **Miller Dyer Spears Inc.** **99 Chauncy Street** **8th Floor** **Boston, MA 02111** MDS ARCHITECTS MBE ☐ WBE ☑ SDVOBE ☐ VBE ☐
d. Years Experience: With This Firm: 19 With Other Firms: 14	d. Years Experience: With This Firm: 12 With Other Firms: 11
e. Education: Degree(s) /Year/Specialization Bachelor of Architecture / 1997 / Architecture	e. Education: Degree(s) /Year/Specialization Bachelor of Science / 1995 / Interior Architecture
f. Active Registration: Year First Registered/Discipline/Mass Registration Number 2005 / Architecture / 20299	f. Active Registration: Year First Registered/Discipline/Mass Registration Number 2002 / Interior Design / 18426
g. Current Work Assignments and Availability for This Project: Braintree South Middle School; Westfield State Parenzo Hall Renov.; Animal Rescue League **Available 20% time for duration of this project**	g. Current Work Assignments and Availability for This Project: *Private Client* Harvard Business School Shad Hall Improvements **Available 20% time for duration of this project**
h. Other Experience and Qualifications Relevant to the Proposed Project: (Identify Firm by Which Employed, if not Current Firm): Town of Braintree - **East Middle School Renovation and Expansion Specifications;** Town of Braintree - **South Middle School Specifications,** Braintree, MA **Phillips Exeter Academy** - **Lamont Health & Wellness Center renovation and expansion, Specifications,** Exeter, NH **Eastern Connecticut State University** - **Goddard Hall Communications Building Renovation,** Willimantic, CT **Framingham State University** - **Dwight Hall Renovation,** Framingham, MA **MassArt Kennedy Campus Center**- Comprehensive renovation & expansion of dining, servery, student development, student organizations & services offices, accessibility upgrades, LEED CI Gold Certified, Boston, MA **Bentley University - ACELAB (Accounting Center for Electronic Learning and Business Measurement) Renovation;** **Bentley Koumantzelis Auditorium Renovation**, Waltham, MA **Harvard Business School - Klarman Hall Multimedia Studio**, Boston, MA **Framingham State University - McCarthy Dining Commons,** Framingham, MA **Three Rivers Community College** - **Theatre & Classroom Building**, Norwich, CT **Boston University - Myles Standish Hall Renovation** **George Sherman Union Food Hall Renovation,** Boston, MA **Salem State University - Residence Hall Renovations**, Salem, MA **Boston College - 129 Lake Street Renovation/Adaptive Reuse**, Brighton, MA **Mount Holyoke College - Blanchard Campus Center Renovation/Expansion**, South Hadley, MA	h. Other Experience and Qualifications Relevant to the Proposed Project: (Identify Firm by Which Employed, if not Current Firm): **Town of Braintree** - **East Middle School Renovation and Expansion**, Braintree, MA **Town of Brookline** - **Heath School Renovation and Expansion**, Brookline, MA **Brooke East Boston Charter School** East Boston, MA **Perkins School for the Blind - New Lower School**, LEED-Gold and MA-CHPS certified, Watertown, MA **MassArt Kennedy Campus Center**- Comprehensive renovation & expansion of dining, servery, student development, student organizations & services offices, accessibility upgrades *LEED CI Gold Certified* **Framingham State University** - **McCarthy Dining Commons Renovation**, Framingham, MA **Berklee College of Music – 150 Massachusetts Avenue Renovation** – classrooms, student meeting areas and lounges, and accessibility improvements, Boston, MA **Boston College** - **Maloney Hall Phased Renovations**, Chestnut Hill, MA **Fitchburg State University/MSCBA** - **Landry Arena Renovation/ Adaptive Reuse** to Athletic Fieldhouse, Fitchburg, MA **Northeastern University – Classroom Renovations and Academic Workplace Suites** in Richards, Ryder, EI, and Mugar Halls, Boston, MA **Harvard Business School - HBS Studios –** multimedia suite in Klarman Hall, Boston, MA **Harvard Business Publishing - Headquarters Relocation**, Brighton, MA **City of Cambridge - Coffon Building Renovations —** Department of Human Service Programs and Baby University; and **City Manager's Office Renovations** **Private Client, Collaborative Workplace**, tracking LEED Silver, Cambridge, MA

7. Brief resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.

a. Name and Title Within Firm: **Nereyda Rodriguez, RA, LEED AP BD+C, MCPPO, Associate**	a. Name and Title Within Firm:
b. Project Assignment: **Director of Sustainable Design**	b. Project Assignment:
c. Name and Address of Office in Which Individual Identified in 7a Resides: **Miller Dyer Spears Inc.** **99 Chauncy Street** **8th Floor** **Boston, MA 02111** MBE ☐ WBE ☑ SDVOBE ☐ VBE ☐	c. Name and Address of Office in Which Individual Identified in 7a Resides: MBE ☐ WBE ☐ SDVOBE ☐ VBE ☐
d. Years Experience: With This Firm: 19 With Other Firms: 8	d. Years Experience: With This Firm: _____ With Other Firms: _____
e. Education: Degree(s) /Year/Specialization Master of Architecture / 1998 / Architecture	e. Education: Degree(s) /Year/Specialization
f. Active Registration: Year First Registered/Discipline/Mass Registration Number 2007 / Architecture / 20554	f. Active Registration: Year First Registered/Discipline/Mass Registration Number
g. Current Work Assignments and Availability for This Project: Westfield State Parenzo Hall Renovation; Braintree South Middle School **Available 20% time for duration of this project**	g. Current Work Assignments and Availability for This Project:
h. Other Experience and Qualifications Relevant to the Proposed Project: (Identify Firm by Which Employed, if not Current Firm): **Town of Braintree - South Middle School,** serving as Project Manager and Director of Sustainable Design, Braintree, MA **Town of Braintree - East Middle School Renovation and Expansion** – Directed the project's sustainable design strategy, targeting LEED Silver certification, Braintree, MA **Perkins School for the Blind - New Lower School**, LEED-Gold and MA-CHPS certified, Watertown, MA **Codman Academy Charter Public School - Lithgow Building Renovation/Adaptive Reuse**, LEED Gold Certified, Dorchester, MA **Phillips Exeter Academy - Lamont Health & Wellness Center Renovation**, Exeter, NH **Suzuki School of Newton** - **Reconfiguration and renovations creating Preschool Classrooms and Music Classrooms**, Newton, MA **Eastern Connecticut State University** - **Goddard Hall & Communications Building Renovation**, Willimantic, CT **MassArt Kennedy Campus Center Renovation and Expansion** - LEED-Gold certified **Worcester State University** - **Shaughnessy Administration Building renovation**, oversaw LEED-Gold certification, Worcester, MA **Northern Essex Community College - El Hefni Allied Health and Technology Center,** oversaw LEED-Silver certification, Lawrence, MA **Mount Holyoke College - Blanchard Campus Center renovation & Expansion**, LEED-Certified, South Hadley, MA **Harvard Business Publishing - Headquarters Relocation** – Sustainable Design Strategy, Brighton, MA **Berklee College of Music - 150 Massachusetts Ave Renovations,** Boston, MA	h. Other Experience and Qualifications Relevant to the Proposed Project: (Identify Firm by Which Employed, if not Current Firm):

7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.

a. Name and Title Within Firm: **Vinicius Gorgati, AIA, Principal | Architect**	a. Name and Title Within Firm: **Carla Ceruzzi, AIA, LEED AP BD+C, Senior Associate | Architect**
b. Project Assignment: **Associate Architecture | Principal-in-Charge**	b. Project Assignment: **Associate Architecture | Project Manager**
c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Sasaki Architects, P.C.** **64 Pleasant Street** **Watertown, MA 02472** MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑	c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Sasaki Architects, P.C.** **64 Pleasant Street** **Watertown, MA 02472** MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑
d. Years Experience: With This Firm: 17 With Other Firms: 9	d. Years Experience: With This Firm: 6.5 With Other Firms: 7
e. Education: Degree(s) /Year/Specialization Bachelor | 1986 | Architecture ; Master | 1994 | Architecture & Urban Design	e. Education: Degree(s) /Year/Specialization Bachelor | 2002 | Applied Mathematics; Master | 2007 | Architecture
f. Active Registration: Year First Registered/Discipline/Mass Registration Number 2003 | Architect | #20084	f. Active Registration: Year First Registered/Discipline/Mass Registration Number 2010 | Architect | #50186
g. Current Work Assignments and Availability For This Project: Vinicius is immediately available to work on this project. His other commitments include: • Princeton University Athletics Projects • The Lawrenceville School Tsai Dining and Athletic Center	g. Current Work Assignments and Availability For This Project: Carla is immediately available to work on this project. Her other commitments include: • Southern Connecticut State University School of Business • MassBay Community College Health Science Center
h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Vinicius plays a leading design role in the firm's institutional practice with a focus on the planning and design of student life facilities. Collaborating with interior designers, landscape architects, planners, and urban designers, he synthesizes all disciplines through the design process. The rational and inquisitive nature of his planning, enhanced by the human dimension of his architectural artistry, empowers Vinicius to immerse himself in campus culture and promote change from within. He engenders client trust from the start through a shared commitment to implementable frameworks, thus creating momentum toward the creation of synergistic campus environments. His work—which includes student centers, student residences, concert halls, commercial centers, art galleries, chapels, urban housing, and sports facilities—embodies design excellence and grace. • The Lawrenceville School Master Plan, Gruss Center for Art and Design, and Tsai Dining and Athletic Center; Lawrenceville, NJ • Greenwich Academy Campus Master Plan; Greenwich, CT • Milton Academy Master Plan; Milton, MA • Northfield Mount Hermon School Master Plan & Implementation; Mount Hermon, MA • Blair Academy Kathryn & Lakeside Residence Halls and Hardwick Hall; Blairstown, NJ • Dana Hall School Master Plan; Wellesley, MA • New England Center for Children Master Plan and Pool Building; Southborough, MA • St. Anselm's Abbey and Abbey School Master Plan; Washington, DC	h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Carla is an architect in Sasaki's campus architecture practice with broad involvement in design, master planning implementation, and project management. She has significant experience working with institutional clients, and particularly enjoys projects that serve a diverse public. Her work seeks to build consensus around design solutions that are grounded in a deep understanding of each project's aspirations, program, and site. • MassBay Community College Health Science Center; Framingham, MA • University of Massachusetts Amherst Student Housing P3 Technical Advisor and Concept Design; Amherst, MA • North End Community Center Study; Boston, MA • Massachusetts Board of Library Commissioners Prototypes Study; Statewide, MA • Dartmouth College Residential Life Study & House Center Pilots; Hanover, NH • Southern Connecticut State University School of Business; New Haven, CT • University of Connecticut Honors Residence and Dining Facility; Storrs, CT • Lehigh University Housing Study & Bridge West Student Housing; Bethlehem, PA • Milton Academy Pritzker Science Center; Milton, MA (William Rawn Associates) • The Winsor School Centers for Performing Arts and Wellness; Boston, MA (William Rawn Associates) • East Boston Branch Public Library; Boston, MA (William Rawn Associates) • Main Branch of the Boston Public Library Master Plan and Renovation; Boston, MA (William Rawn Associates)

7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.

a. Name and Title Within Firm:
Zachary Chrisco, PE, Principal | Civil Engineer

b. Project Assignment:
Civil Engineering

c. Name and Address Of Office In Which Individual Identified In 7a Resides:
Sasaki Architects, P.C.
64 Pleasant Street
Watertown, MA 02472

MBE ❑
WBE ❑
SDVOBE ❑
VBE ❑

d. Years Experience: With This Firm: 15 With Other Firms: 1

e. Education: Degree(s) /Year/Specialization
Bachelor | 2004 | Civil Engineering

f. Active Registration: Year First Registered/Discipline/Mass Registration Number
2018 | Civil Engineer | #52133

g. Current Work Assignments and Availability For This Project:
Zach is immediately available to work on this project. His other commitments include:

- Boston City Hall Plaza Renovations
- Boston Children's Museum Waterfront Master Plan
- East Boston and Charlestown Coastal Resilience Strategies
- Fort Point District 100 Acres Open Space Plan
- Greenwood Community Park Phase 1 Implementation
- Sarasota Bayfront Phase 1 Implementation
- Davenport Flood Resilience Plan

h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):
As Sasaki's lead Civil Engineer, Zach works with built design leaders and interdisciplinary teams to execute, strengthen, and innovate resilient engineering solutions. His portfolio includes some of Sasaki's most complex site work—all of which closely integrate architecture, landscape, and civil engineering. He is driven to find integrated civil engineering solutions to site design by means of sustainable and long-lasting products. Zach's greatest motivation is creating built work that is both durable and well-loved by the client and users.

- Blair Academy Outdoor Athletics Facilities and Hardwick Hall; Blairstown, NJ
- Northfield Mount Hermon School Campus Arts; Northfield, MA
- Boston City Hall Plaza Renovations; Boston, MA
- Boston Children's Museum Waterfront Master Plan; Boston, MA
- Smale Riverfront Park and Playscape; Cincinnati, OH
- Moore Square Park Design and Implementation; Raleigh, NC
- Greenwood Community Park Master Plan; Baton Rouge, LA

a. Name and Title Within Firm:
Kate Tooke, ASLA, PLA, Associate Principal | Landscape Architect

b. Project Assignment:
Landscape Architecture

c. Name and Address Of Office In Which Individual Identified In 7a Resides:
Sasaki Architects, P.C.
64 Pleasant Street
Watertown, MA 02472

MBE ❑
WBE ❑
SDVOBE ❑
VBE ❑

d. Years Experience: With This Firm: 7 With Other Firms: 11

e. Education: Degree(s) /Year/Specialization
Bachelor | 2002 | Civil Engineering; Master | 2011 | Landscape Architecture;
Master | 2007 | Education

f. Active Registration: Year First Registered/Discipline/Mass Registration Number
2015 | Architect | ME #LAR4230

g. Current Work Assignments and Availability For This Project:
Kate is immediately available to work on this project. Her other commitments include:

- Boston City Hall Plaza Renovations
- Boston Children's Museum Waterfront Master Plan
- Greenwood Community Park Phase 1 Implementation
- Port of Los Angeles Wilmington Waterfront Promenade
- Copley Square Revitalization
- Downtown Crossing Engineering Services
- Franklin Park Zoo Entry Landscape

h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):
Kate is a landscape architect at Sasaki. Her project leadership, strategic thinking, design eye, and technical skills have been instrumental in the success of diverse projects ranging from master planning to site-scale work. As a naturally interdisciplinary thinker, she excels at collaborating across disciplines to craft elegant, contextual solutions to complex design challenges. Kate brings a diverse background in engineering, K-12 urban education and community engagement to the practice of landscape architecture In particular, having begun her career teaching in the Boston Public School system, Kate's familiarity with the community will deepen the project team's understanding of the site context for this project.

- Boston City Hall Plaza Renovations; Boston, MA
- Boston Children's Museum Waterfront Master Plan; Boston, MA
- Smale Riverfront Park and Playscape; Cincinnati, OH
- Copley Square Revitalization; Boston, MA
- Downtown Crossing Engineering Services; Boston, MA
- Franklin Park Zoo Entry Landscape; Boston, MA

7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.

a. Name and Title Within Firm: **Kevin Hebard, PE, Associate | Civil Engineer**	a. Name and Title Within Firm: **Tamar Warburg, AIA, LEED AP BD+C Sr. Associate | Dir. of Sustainability & Resilience**
b. Project Assignment: **Environmental Permitting**	b. Project Assignment: **Sustainable/Green Design/Renewable Energy Consultant**
c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Sasaki Architects, P.C.** **64 Pleasant Street** **Watertown, MA 02472** MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑	c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Sasaki Architects, P.C.** **64 Pleasant Street** **Watertown, MA 02472** MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑
d. Years Experience: With This Firm: 7 With Other Firms: 0	d. Years Experience: With This Firm: 2 With Other Firms: 25
e. Education: Degree(s) /Year/Specialization Bachelor | 2014 | Civil Engineering ; Master | 2018 | Business Administration	e. Education: Degree(s) /Year/Specialization Bachelor | 1981 | Arts; Master | 1987 | Architecture
f. Active Registration: Year First Registered/Discipline/Mass Registration Number 2018 | Civil Engineer | #54527	f. Active Registration: Year First Registered/Discipline/Mass Registration Number 2015 | Architect | #32252
g. Current Work Assignments and Availability For This Project: Kevin is immediately available to work on this project. His other commitments include: • Boston City Hall Plaza Renovations • Bonnet Springs Park Children's Museum • Greenwood Community Park Phase 1 Implementation	g. Current Work Assignments and Availability For This Project: Tamar is immediately available to work on this project. Her other commitments include: • Amherst College Student Center • Microsoft NoVA • Colorado University Boulder Master Plan
h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Kevin loves the challenge of designing creative, context-sensitive civil engineering solutions that integrate seamlessly with the project design and the client's vision. Kevin works across disciplines and project types, adding value to projects with his enthusiasm, creativity and ability to get to the core of any problem. He has experience with a broad range of civil engineering skills and is a key part of Sasaki's site structures team. Kevin spends much of his spare time applying his creative problem solving skills to his work with the Boston Chapter of Engineers Without Borders. He is working to help solve health and sanitation problems in developing communities through the application of intelligent, appropriate engineering solutions. • Boston City Hall Plaza Renovations; Boston, MA • Bonnet Springs Park Children's Museum; Lakeland, FL • Greenwood Community Park Phase 1 Implementation; Baton Rouge, LA • Franklin Park Zoo Entry Landscape; Boston, MA • MassBay Community College Health Science Center; Framingham, MA • Cantigny Park Garden and Landscape Improvements; Wheaton, IL • Nord Family Greenway; Cleveland, OH • University of Rhode Island Brookside Apartments and Landscape Restoration; Kingston, RI • MIT Northwest Landscape and Circulation; Cambridge, MA • Heritage Museums and Garden Master Plan; Sandwich, MA	h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Tamar works with Sasaki teams to develop sustainability and resilience goals appropriate for each project and access critical resources to reach those goals. She enjoys collaborating to integrate sustainability considerations throughout the design process, from preliminary programming through construction management practices. In this era of climate change, she believes that every project is an opportunity to make a healthy and resilient contribution to our clients, our communities, and our planet. Tamar works across all Sasaki disciplines, on projects as varied as net-zero campus buildings, resilience and sustainability strategies for cities and corporate clients, and minimizing carbon emissions from buildings and landscape projects. Tamar came to Sasaki with 25 years of experience designing educational and community buildings. • Boston City Hall Plaza Renovations; Boston, MA • Bonnet Springs Park Children's Museum; Lakeland, FL • MassBay Community College Health Science Center; Framingham, MA • Harvard University Allston Campus Master Planning; Boston, MA • Princeton University Athletics Projects; Princeton, NJ • Excel Academy High School; Boston, MA (Studio G Architects) • Match Community Day School; Boston, MA (Studio G Architects) • Atlantis Charter School; Fall River, MA (Studio G Architects) • Sturgis Charter Public School; Hyannis, MA (Studio G Architects)

7. Brief Resume Of ONLY Those Prime Applicant And Sub-Consultant Personnel Requested In The Advertisement. Confine Responses To The Space Provided On The Form And Limit Resumes To ONE Person Per Discipline Requested In The Advertisement. Resumes Should Be Consistent With The Persons Listed On The Organizational Chart In Question # 6. Additional Sheets Should Be Provided Only As Required For The Number Of Key Personnel Requested In The Advertisement And They Must Be In The Format Provided. By Including A Firm As A Sub-Consultant, The Prime Applicant Certifies That The Listed Firm Has Agreed To Work On This Project, Should The Team Be Selected.

a.	Name and Title Within Firm: **David Stephen, President**	a. Name And Title Within Firm:
b.	Project Assignment: **Educational Planner**	b. Project Assignment:
c.	Name and Address Of Office In Which Individual Identified In 7a Resides: **New Vista Design** **32 Sheridan Street, #2** **Jamaica Plain, MA** MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑	c. Name And Address Of Office In Which Individual Identified In 7a Resides: MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑
d.	Years Experience: With This Firm: 12 With Other Firms: 8	d. Years Experience: With This Firm: _____ With Other Firms: _____
e.	Education: Degree(s) /Year/Specialization B Arch, Rhode Island School of Design, 1982 Master of Education, Lesley College, Cambridge, MA, 1998	e. Education: Degree(s) /Year/Specialization
f.	Active Registration: Year First Registered/Discipline/Mass Registration Number 1996, Commonwealth of MA Architectural License No. 9752	f. Active Registration: Year First Registered/Discipline/Mass Registration Number:

g. Current Work Assignments and Availability for This Project:
Current work assignments include:
Educational Programming for Westfield Elementary School, Westfield, MA (75% complete); Educational Programming for The MET Middle School, Providence, RI (80% complete); Educational Programming for Joseph Sears School, Chicago, IL (90% complete)
Available .6 time available for this project

h. Other Experience and Qualification Relevant to The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):
With 20 years of experience as a licensed architect and school designer, and 15 years of experience as a secondary school teacher and assistant principal, I speak the language of both education and design. I have worked as an educational planner, architectural designer, and curriculum developer on a variety of award winning, inquiry-based, and forward-thinking school programs and facilities across the U.S. The design of STEM-focused, project-based, and CTE schools are areas of particular interest and expertise.

1. New Vista has completed over 40 MSBA projects Including: Dearborn 6-12 STEM Academy (2012), Essex Technical School (2012), Holbrook K-12 (2013), West Bridgewater Middle High School (2013), Hunking K-8 (2014), Lowell Master Plan (2014), Beverly Middle School (2014), Jacobs Elementary (2014), Center/Sylvester Elementary (2015), Bourne Intermediate School (2015), Mt. Greylock Middle High School (2015), Wildwood Elementary (2015), Somerville High School (2015), Waltham High School (2015), Winthrop Elementary (2016), Maple Elementary (2016), Westport Middle School (2016), Lowell High School (2016), Hildreth Elementary (2017), Kennedy Middle School (2017), Hildreth Elementary (2017), Oliver Education Complex (2018), Fuller Middle School (2018), Driscoll Elementary (2018), Leicester Middle (2018), Upham/Hardy Elementary (2019), West Elementary (2019), Roche Elementary (2019), Mindess Elementary (2019), Watertown High School (2019).
2. Harvard Project Zero / Agency by Design (March 2013 – June 2014) Architectural programming for, and curriculum development assistance to California schools interested in developing Fabrication Labs and Maker Spaces within their facilities.
3. Linden STEAM Academy, (September 2012 – 2018), Malden, MA. Ongoing teacher training in STEM-focused curriculum development for a staff of 140 teachers & administrators grades K-8.
4. MUSE Elementary School (2011), Calabasas, CA. Educational Planner and FF&E for Reggio Emilia K-8.
5. Essex Agricultural and Technical High School (Sept. 2010 – June 2012), Hathorne, MA. Educational Planner for merging technical and agricultural school in design of their new facility.
6. Harlem Village Academies (2004-2011), Harlem, NY. Educational Planner for middle and high school projects within the highly successful urban charter school network.
7. Denver School of Science and Technology (2003-2004), Denver, CO. Educational Planner for the award-winning facility. Worked in collaboration with Klipp Architecture.
8. High Tech Middle (2002) and High Tech Middle Media Arts (2005), San Diego, CA. Educational Planner and Project Manager for one of the most recognized STEM programs in country. (Worked as employee of High Tech High

7.	Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.	
a.	Name and Title Within Firm: **Jerome A. Yurkoski, P.E., Senior Principal / Partner**	a. Name and Title Within Firm:
b.	Project Assignment: **Principal Structural Engineer**	b. Project Assignment:
c.	Name and Address Of Office In Which Individual Identified In 7a Resides: **Souza True and Partners, Inc.** **265 Waltham Street** **Third Floor** **Waltham, MA 02451** MBE ❑ WBE ❑ SDOVBE ❑ VBE ❑	c. Name and Address Of Office In Which Individual Identified In 7a Resides: MBE ❑ WBE ❑ SDOVBE ❑ VBE ❑
d.	Years Experience: With This Firm: 34 With Other Firms: 3	d. Years Experience: With This Firm: _____ With Other Firms: _____
e.	Education: Degree(s) /Year/Specialization B.S. – Architectural Engineering, University of Miami, Coral Gables, FL-1983	e. Education: Degree(s) /Year/Specialization
f.	Active Registration: Year First Registered/Discipline/Mass Registration Number 1992/Structural Engineering/Massachusetts #36852	f. Active Registration: Year First Registered/Discipline/Mass Registration Number:
g.	Current Work Assignments and Availability For This Project: Wareham Elementary School 20% Lahey Hospital & Medical Center 10% Exchange South End 20% Yale New Haven Hospital 20% Dartmouth Hitchcock Medical Center 10% AVAILABILTY FOR THIS PROJECT 20%	g. Current Work Assignments and Availability For This Project
h.	Other Experience and Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Mr. Yurkoski has been actively engaged in structural engineering since 1983. He has extensive experience in the design and construction of school buildings. He has been Principal-in-Charge for a variety of school projects including Braintree East Middle School, Braintree, MA; Sylvester Center School, Hanover, MA; Wareham Elementary School, Wareham, MA; Sizer School, Fitchburg, MA; Duxbury School, Duxbury, MA; Morton Middle School, Fall River, MA; Dracut High School, Dracut, MA; Minnechaug Regional High School, Wilbraham, MA, Nock Molin School, Newburyport, MA, Beverly High School, Beverly, MA; Monomoy Regional High School, Harwich, MA; Ludlow Elementary School, Ludlow, MA; Marlboro Richer Elementary School, Marlboro, MA; UMass AECPC, Worcester, MA; Northern Essex Community College, Lawrence, MA; and several other school projects.	h. Other Experience and Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):

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a.	Name and Title Within Firm: **Dominick B. Puniello, P.E., CEM, LEED AP - Principal**	a. Name and Title Within Firm: **Christopher M. Garcia, P.E., Principal**
b.	Project Assignment: **HVAC Engineering**	b. Project Assignment: **Plumbing and Fire Protection Engineering**
c.	Name and Address of Office in Which Individual Identified in 7a Resides: **Garcia, Galuska & DeSousa, Inc.** **375 Faunce Corner Road** **Suite D** **Dartmouth, MA 02747-1258** MBE ❑ WBE ❑ SDOVBE ❑ VBE ❑	c. Name and Address of Office in Which Individual Identified in 7a Resides: **Garcia, Galuska & DeSousa, Inc.** **375 Faunce Corner Road** **Suite D** **Dartmouth, MA 02747-1258** MBE ❑ WBE ❑ SDOVBE ❑ VBE ❑
d.	Years' Experience: With This Firm: 11 With Other Firms: 12.5	d. Years' Experience: With This Firm: 24 With Other Firms: 0
e.	Education: Degree(s) /Year/Specialization ▪ Bachelor of Science at the Roger Williams University, Bristol, RI / 1996 / Mechanical Engineering and Electrical Engineering	e. Education: Degree(s) /Year/Specialization ▪ University of Massachusetts, Dartmouth, Bachelor of Science -1995 Civil Engineering
f.	Active Registration: Year First Registered/Discipline/Mass Registration Number ▪ 2009 / Mechanical / MA#48326	f. Active Registration: Year First Registered/Discipline/Mass Registration Number: ▪ 2002 / Civil / MA #45034
g.	Current Work Assignments and Availability for This Project: ▪ Bristol Plymouth Regional Technical High School, Taunton, MA (Study was conducted and actively in Preliminary Schematic Design Phase) ▪ Saugus Middle High School (New Construction project, in Construction phase) ▪ 20% of time available	g. Current Work Assignments and Availability for This Project: ▪ Braintree East Middle School, Braintree, MA (Renovation/Addition Project; Study-Closeout Phase) – **with MDS** ▪ Cambridge Community Charter School, Cambridge, MA (Renovations/Accessibility Upgrades, Study-Closeout Phase) ▪ 20% of time available
h.	Other Experience and Qualification Relevant to The Proposed Project: (Identify Firm by Which Employed, If Not Current Firm): ▪ Certifications: U.S. Green Building Council; LEED Accredited Professional (since 2002); Certified Energy Manager by the Association of Energy Engineers ▪ MSBA experience includes: House Doctor Contracts | Park Avenue Elementary School (LEED Gold), Webster | West Parish Elementary School (LEED Gold), Gloucester |Ludlow East Street School Boiler & Roof Replacement, Ludlow | Scituate Middle School (LEED Silver), Scituate | Florida Ruffin Ridley School (LEED Gold), Brookline | Provincetown High School, Provincetown | Pathfinder Regional Vocational Technical High School, Palmer |Thurgood Marshall Middle School, Lynn (LEED Gold) | Winthrop Middle/High School, Winthrop (LEED Gold)	h. Other Experience and Qualification Relevant to The Proposed Project: (Identify Firm by Which Employed, If Not Current Firm): ▪ Certifications: Certified Fire Protection Specialist (CFPS); MA Approved Soil Evaluator; MA Approved Title V System Inspector. ▪ MSBA experience includes: House Doctor contracts | Park Avenue Elementary School (LEED Gold), Webster | Concord Carlisle High School, Concord | Longmeadow High School, Longmeadow, MA | West Parish Elementary School (LEED Gold), Gloucester |Scituate Middle School (LEED Silver), Scituate | Florida Ruffin Ridley School (LEED Gold), Brookline | Maria Weston Chapman M.S., Weymouth (LEED pending) | West Bridgewater Middle/High School, West Bridgewater (MA-CHPS Certified) | Thurgood Marshall Middle School, Lynn (LEED Gold)

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a.	Name and Title Within Firm: **David M. Pereira, P.E., Principal**	a. Name and Title Within Firm: **Carlos G. DeSousa, P.E., Principal**
b.	Project Assignment: **Data/Communications**	b. Project Assignment: **Electrical/Lighting**
c.	Name and Address of Office in Which Individual Identified in 7a Resides: **Garcia, Galuska & DeSousa, Inc.** **375 Faunce Corner Road** **Suite D** **Dartmouth, MA 02747-1258** MBE ❑ WBE ❑ SDOVBE ❑ VBE ❑	c. Name and Address of Office in Which Individual Identified in 7a Resides: **Garcia, Galuska & DeSousa, Inc.** **375 Faunce Corner Road** **Suite D** **Dartmouth, MA 02747-1258** MBE ❑ WBE ❑ SDOVBE ❑ VBE ❑
d.	Years' Experience: With This Firm: 20 With Other Firms: 0	d. Years' Experience: With This Firm: 21 With Other Firms: 14
e.	Education: Degree(s) /Year/Specialization ▪ Bachelor of Science at the University of Massachusetts, Dartmouth / 2004 / Electrical Engineering	e. Education: Degree(s) /Year/Specialization ▪ Bachelor of Science at the Northeastern University Boston, MA / 1996 / Electrical & Technology Engineering
f.	Active Registration: Year First Registered/Discipline/Mass Registration Number ▪ 2010 / Electrical / MA #49310	f. Active Registration: Year First Registered/Discipline/Mass Registration Number: ▪ 1999 / Electrical / MA Registration #41003
g.	Current Work Assignments and Availability for This Project: ▪ Braintree East Middle School, Braintree, MA (Renovation/Addition Project; Study-Closeout Phase) – **with MDS** ▪ Braintree South Middle School, Braintree, MA (New Construction; Study-Closeout Phase) – **with MDS** ▪ 20% of time available	g. Current Work Assignments and Availability for This Project: ▪ Driscoll School, Brookline, MA (New Construction, Net Zero) ▪ Lowell High School, Lowell, MA (Gut Renovation/Addition/New Construction) ▪ Saugus Middle High School (New Construction project, in Construction phase) ▪ 20% of time available
h.	Other Experience and Qualification Relevant to The Proposed Project: (Identify Firm by Which Employed, If Not Current Firm): ▪ Affiliation: Institute of Electrical and Electronic Engineers since 2002 ▪ MSBA experience includes: House Doctor contracts, Thurgood Marshall Middle School, Lynn (LEED Gold, CM at Risk, Chapter 149A) | Winchester High School, Winchester (LEED Gold, Chapter 149A) | Holbrook PreK-12 School, Holbrook (LEED Gold, CM at Risk) | George Englesby Elementary School and Brookside Elementary School, Dracut (Accelerated Repair Program) | Ayer Shirley Regional Middle/High School, Ayer (LEED Silver, Chapter 149A) | Irwin M. Jacobs Elementary School, New Bedford (New Construction)	h. Other Experience and Qualification Relevant to The Proposed Project: (Identify Firm by Which Employed, If Not Current Firm): ▪ MCPPO Certified ▪ Carlos's experience with the Town of Brookline includes the following projects: Pierce School Transformer Replacement, Town Hall Transfer Switch Replacement, Conceptual Design for Baldwin and Driscoll Schools, Fire Alarm and Fire Protection District-Wide Master Plan for 27 Buildings, Brookline Fire Station #1 & #4 Life Safety Renovations, Brookline Town Hall MDF Room Power and Air Conditioning Modifications, Amos Lawrence Modular Classroom (New Classroom Addition), Heath Elementary School (Renovation)

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a. Name and Title Within Firm: **Abdelmadjid M. Lahlaf, Ph.D., P.E. / Principal Engineer**	a. Name and Title Within Firm: **Abner Reis/Geotechnical Engineer, P.E.**
b. Project Assignment: **Geotechnical Engineer/Project Manager**	b. Project Assignment: **Geotechnical Engineer**
c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Lahlaf Geotechnical Consulting, Inc.** **100 Chelmsford Road** **Suite 100** **Billerica, MA 01862** LGCI Lahlaf Geotechnical Consulting, Inc. MBE ☑ WBE ☐ SDVOBE ☐ VBE ☐	c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Lahlaf Geotechnical Consulting, Inc.** **100 Chelmsford Road** **Suite 100** **Billerica, MA 01862** LGCI Lahlaf Geotechnical Consulting, Inc. MBE ☑ WBE ☐ SDVOBE ☐ VBE ☐
d. Years Experience: With This Firm: 14 With Other Firms: 15	d. Years Experience: With This Firm: 4 With Other Firms: 10
e. Education: Degree(s) /Year/Specialization Ph.D./1991/Civil Engineering	e. Education: Degree(s) /Year/Specialization MSCE/2008/Civil Engineering
f. Active Registration: Year First Registered/Discipline/Mass Registration Number 1996/MA/39814	f. Active Registration: Year First Registered/Discipline/Mass Registration Number 2018/MA/54524
g. Current Work Assignments and Availability For This Project: Geotechnical Project Manager - Available	g. Current Work Assignments and Availability For This Project: Geotechnical Project Engineer - Available
h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Worked on numerous public elementary school projects, including most recently (or currently), Hannigan School in New Bedford, MA, Tisbury Elementary School in Tisbury, Burrell Elementary School in Foxborough, MA, MA, Nelson Place Elementary School in Worcester, MA, Athol Elementary School in Athol, MA, Hildreth Elementary School in Harvard, MA, Richer Elementary School in Marlborough, MA, Ludlow Elementary School in Ludlow, MA, Manchester Memorial Elementary School in Manchester-by-the-Sea, MA, Balmer Elementary School in Northbridge, MA, and Hardy Elementary School in Arlington, MA. We are also currently working on Somerville High School, Billerica Memorial High School, Minuteman Technical High School, Lexington, MA, and many other K-12 schools. Work includes planning and supervising subsurface exploration programs, performing analyses and preparing geotechnical reports with foundation design and construction recommendations, preparing earthwork specifications, and observing earthwork operations during construction. Made cost saving recommendations for reclaiming and improving onsite materials for reuse on many projects.	h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Reviewed contract drawings and specifications, and observed the geotechnical aspect of foundations during construction for numerous public school projects, including most recently (or currently), Richer Elementary School in Marlborough, MA, Worcester South High School in Worcester, MA, Sterling Middle School in Sterling, MA, Billerica Memorial High School in Billerica, MA, Minuteman Technical High School, Lexington, MA, and Blue Hills Technical High School in Canton, MA

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a. Name and Title Within Firm: **David Gorden, CWS, CPSS, Senior Environmental Scientist & Soil Scientist**	a. Name and Title Within Firm:
b. Project Assignment: **Geo-Environmental Engineering Consulting Services**	b. Project Assignment:
c. Name and Address Of Office In Which Individual Identified In 7a Resides: **PEER Consultants, P.C.** **67 South Bedford Street** **Suite 400 West** **Burlington, MA 01803** MBE ☑ WBE ☑ SDVOBE ❑ VBE ❑	c. Name and Address Of Office In Which Individual Identified In 7a Resides: MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑
d. Years Experience: With This Firm: 7 With Other Firms: 19	d. Years Experience: With This Firm: _____ With Other Firms: _____
e. Education: Degree(s) /Year/Specialization MS / Plant and Soil Science / University of Massachusetts, Amherst/ 1994 BS / Environmental Science and Management / University of Rhode Island/ 1991	e. Education: Degree(s) /Year/Specialization

f. Active Registration: Year First Registered/Discipline/Mass Registration Number
2012 Asbestos Inspector, Massachusetts (AI900459); 2016 Asbestos Designer, Massachusetts (AD900373); 2017 Asbestos Management Planner, Massachusetts, (AP900468); 2018 Asbestos Project Monitor (AM900674); 2012 Lead Inspector, Massachusetts (I-4057); 2003 Certified Wetland Scientist #226; 1991 Certified Professional Soil Scientist #4322

g. Current Work Assignments and Availability For This Project:
Hazardous Building Material Surveys, Surface and Subsurface Soil and Groundwater Investigations for Oil and Hazardous Materials, and Natural Resource and Wetland Delineation and Permitting on various projects in Education and Housing, Healthcare, and at City/Town and other Municipal Buildings.
Availability 35%

h. Other Experience and Qualifications Relevant To The Proposed Project:
In the environmental industry, Mr. Gorden conducts preliminary wetland evaluations; natural resource site reviews; wetland boundary delineations; hydrology, soils, and vegetation analyses; wetland inventory, wetland classification and mapping; wetlands function and value assessment; threatened and endangered species reviews; wildlife habitat evaluations; preparation of permit applications; including permitting strategies; interactions with local, State, and Federal regulatory officials; impact avoidance and alternatives analyses; erosion and sediment control reviews; Conservation Commission peer reviews; and natural resource restoration, creation, or enhancement. Mr. Gorden has worked on ASTM 1527-13 Phase I Environmental Site Assessments, Complex Environmental Field Investigations (air, biota, groundwater, sediment, soil, storm water, surface water, vapor), Compliance Audits, Hazard Ranking System/National Priority List Packages, Hazardous Material Response, Remediation, Removal Activities, Limited Site Investigations, Operation and Maintenance of Remedial Treatment Systems, Subsurface Geotechnical Exploration and Testing, Plan Review, Design/Build Transportation Projects, and QA/QC Reviews. Mr. Gorden also performs regulated building material surveys which includes both a visual assessment and physical inspection for the presence of any hazardous materials such as lead, lead in paint, mercury, polychlorinated biphenyls, radon, mold (microbial growth) and asbestos. Relevant Projects may include:

- **BROOKLINE (Kickham Apartments, Morse Apartments, Arthur A O'Shea House)** – Mr. Gorden conducted a limited asbestos in building materials survey and associated asbestos abatement designs and reporting related to the proposed Mechanical and Electrical Upgrades and Associated Work at these three housing authority buildings, in Brookline, MA.
- **BROOKLINE (1080 Beacon Street Condominiums)** – Mr. Gorden conducted a limited asbestos and lead in paint in building materials survey and associated reporting, related to the required structural support for the basement of the building and Associated Work at this privately owned and commercially managed Condominium building, 1080 Beacon St., Brookline, MA.
- **Hopkins Elementary School** – Mr. Gorden conducted a limited asbestos in building materials survey and associated reporting related to the proposed Roof Replacement and Associated Work at this school building, 104 Hayden Rowe Street, Hopkinton MA.
- **Innovation Academy Charter School** – Mr. Gorden conducted a limited asbestos and lead in paint in building materials survey and associated reporting related to the proposed placement of historic wood windows, concrete masonry repairs, and granite stair repairs and Associated Work at this Innovation Academy Charter School building, 72 Tyng Road, Tyngsborough, MA.
- **Fitchburg High School** – Mr. Gorden conducted a limited asbestos in building materials survey and associated reporting related to the proposed Roof Replacement and Associated Work at this school building, 140 Arn-How Farm Road, Fitchburg, MA.

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a. Name and Title Within Firm: **John M. Corliss, Jr., PE; Vice President & Chief Engineer**	a. Name and Title Within Firm:
b. Project Assignment: **Principal-in-Charge**	b. Project Assignment:
c. Name and Address Of Office In Which Individual Identified In 7a Resides: **PEER Consultants, P.C.** **67 South Bedford Street** **Suite 400 West** **Burlington, MA 01803** MBE ☑ WBE ☑ SDVOBE ☐ VBE ☐	c. Name and Address Of Office In Which Individual Identified In 7a Resides: MBE ☐ WBE ☐ SDVOBE ☐ VBE ☐
d. Years Experience: With This Firm: 12 With Other Firms: 28	d. Years Experience: With This Firm: With Other Firms:
e. Education: Degree(s) /Year/Specialization M.S. Industrial Engineering, Purdue University May 1980 M.S. Public Policy & Administration, Krannert School of Management – Purdue University May 1980 B.S.E. Urban Systems, Purdue University May 1978	e. Education: Degree(s) /Year/Specialization
f. Active Registration: Year First Registered/Discipline/Mass Registration Number 1995, Professional Engineer, Massachusetts #38859 (Industrial)	f. Active Registration: Year First Registered/Discipline/Mass Registration Number
g. Current Work Assignments and Availability For This Project: Principal in Charge and Chief Engineer, Managing Technical Staff at PEER, and Directly Working on Both Organizing an Engineering Assessment of the Baltimore City Water and Wastewater Facility, as well as Organizing an Engineering Assessment of the DC Water Facility. **Availability 15%**	g.

h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):

- **Josiah Quincy School** – Mr. Corliss acted as Principal in Charge and Chief Engineer as PEER conducted a limited asbestos in building materials survey and associated reporting related to the proposed Boiler Replacement and Associated Work at this school building, 885 Washington Street, Boston, Suffolk County, Massachusetts.
- **Greenwood School** – Mr. Corliss acted as Principal in Charge and Chief Engineer as PEER conducted a limited asbestos and lead in paint in building materials survey and associated reporting related to the proposed Roof Replacement/Accessibility Upgrades and Associated Work at this school building, 1030 Main Street, Wakefield, Middlesex County, Massachusetts
- **Simmons University – Bartol Dining Hall** – Mr. Corliss acted as Principal in Charge and Chief Engineer as PEER conducted a limited asbestos in building materials survey and associated reporting related to the proposed Roof Replacement and Associated Work at this University building, 275 Brookline Avenue, Boston, Suffolk County, Massachusetts.
- **First Parish Meeting House** – Mr. Corliss acted as Principal in Charge and Chief Engineer as PEER conducted a limited asbestos and lead in paint in building materials survey and associated reporting, including designs and contract administration related to the proposed interior and exterior renovations and Associated Work at this Town Building, 214 Middlesex Road, Tyngsborough, Middlesex County, Massachusetts.
- **Dale Street School** – Mr. Corliss acted as Principal in Charge and Chief Engineer as PEER conducted a Phase I Environmental Site Assessment, a limited asbestos and lead in paint in building materials survey, and a limited geo-environmental (subsurface soil) investigation, along with associated reporting related to the proposed Renovation/Demolition and Associated Work at this school building, 45 Adams Street, Medfield, Norfolk County, Massachusetts.

7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.

a. Name and Title Within Firm: **Peter T. Timothy, President – Cost Estimator**	a. Name and Title Within Firm: **John Sousa, President**
b. Project Assignment: **Cost Estimator**	b. Project Assignment: **Foodservice Equipment Consulting**
c. Name and Address Of Office In Which Individual Identified In 7a Resides: **A. M. Fogarty & Associates, Inc.** **175 Derby Street, Suite 5** **Hingham, MA 02043-4014** **(781) 749-7272** A.M. Fogarty & Assoc., Inc. MBE ❑ WBE ❑ SDOVBE ❑ VBE ❑	c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Crabtree McGrath Associates, Inc.** **161 West Main Street** **Georgetown, MA 01833** Crabtree McGrath Associates, Inc. MBE ❑ WBE ❑ SDOVBE ❑ VBE ❑
d. Years Experience: With This Firm: 31 With Other Firms: 4	d. Years Experience: With This Firm: 19 With Other Firms: 10
e. Education: Degree(s) /Year/Specialization University of Wisconsin-Platteville, 1985, Bachelor of Science Degree in Construction Management	e. Education: Degree(s) /Year/Specialization Bachelor of Science / 1998 / Architectural Engineering
f. Active Registration: Year First Registered/Discipline/Mass Registration Number N/A	f. Active Registration: Year First Registered/Discipline/Mass Registration Number: N/A
g. Current Work Assignments and Availability For This Project: We currently are estimating approximately 10 projects per month. We are very flexible increasing our work load due to the nature of our staffing	g. Current Work Assignments and Availability For This Project Durfee High School - CA Phase Lowell High School – CD Phase John is available and able to devote 35% of his time to this project.
h. Other Experience and Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Mr. Timothy, on average, completes 100 Chapter 149 Massachusetts Public Construction projects per year. These projects range from $250,000 to $250 million dollars. A. M. Fogarty & Associates, Inc. performs all their estimating in house and has a full staff of Mechanical, Electrical, Civil as well as Structural and Building Component Estimators	h. Other Experience and Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed , If Not Current Firm): Hingham Elementary School Norwood High School King Philip High School Plymouth South High School Jacobs Middle School High Rock Elementary School Taunton High School Hingham Middle School

7.	Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.	
a.	Name and Title Within Firm: **Ioana Pieleanu, Principal Consultant**	a. Name and Title Within Firm:
b.	Project Assignment: **Principal-in-Charge, Acoustics Consultant**	b. Project Assignment:
c.	Name and Address Of Office In Which Individual Identified In 7a Resides: **Acentech Inc.** **33 Moulton Street** **Cambridge, MA 02138** ACENTECH MBE ❑ WBE ❑ SDOVBE ❑ VBE ❑	c. Name and Address Of Office In Which Individual Identified In 7a Resides: MBE ❑ WBE ❑ SDOVBE ❑ VBE ❑
d.	Years Experience: With This Firm: 15 With Other Firms: 0	d. Years Experience: With This Firm: _____ With Other Firms: _____
e.	Education: Degree(s) /Year/Specialization MS, Building Sciences – Architectural Acoustics, Rensselaer Polytechnic Institute, 2004 BA, Music Production & Sound Engineering, Berklee College of Music, 2001	e. Education: Degree(s) /Year/Specialization
f.	Active Registration: Year First Registered/Discipline/Mass Registration Number N/A	f. Active Registration: Year First Registered/Discipline/Mass Registration Number:
g.	Current Work Assignments and Availability For This Project: Ms. Pieleanu has the technical expertise and the time available to fulfill the requirements of this project. Acentech will dedicate the staff and resources necessary to ensure that the project's deadlines, workflow, and budgetary requirements are met. Ms. Pieleanu's current assignments include: Cunniff and Hosmer Elementary Schools, Watertown, MA: Waltham High School, Waltham, MA; and Quincy High School Auditorium, Quincy, MA.	g. Current Work Assignments and Availability For This Project
h.	Other Experience and Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): • Attleboro High School, Attleboro, MA • Braintree South Middle School, Braintree, MA • Caleb Dustin Hunking School, Haverhill, MA • Concord Carlisle High School, Concord, MA • Derby Academy, Innovation Center, Hingham, MA • Durfee High School, Fall River, MA • Fitzgerald Elementary School, Waltham, MA • Irwin Jacobs Elementary School, New Bedford, MA • Longmeadow High School, Longmeadow, MA • Martin Luther King Junior School, Cambridge, MA • Natick High School, Natick, MA • North Reading Middle and High School, North Reading, MA • Waltham High School, Waltham, MA • Whitmore Elementary School, Waltham, MA	h. Other Experience and Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed , If Not Current Firm):

7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.

a. Name and Title Within Firm: **Peter Thompson – Senior AV Design Consultant**	a. Name and Title Within Firm: **Tyler Brown – Design Engineer**
b. Project Assignment: Lead AV Design Engineer	b. Project Assignment: Design Engineer
c. Name and Address Of Office In Which Individual Identified In 7a Resides: **DGI Communications (DBA ACT Associates)** **922F Stafford Road** **Storrs, CT 06268** MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑	c. Name and Address Of Office In Which Individual Identified In 7a Resides: **DGI Communications** **101 Billerica Ave.** **Building 6** **North Billerica, MA 1862** MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑
d. Years Experience: With This Firm: 16 With Other Firms: 20	d. Years Experience: With This Firm: 1 With Other Firms: 12
e. Education: Degree(s) /Year/Specialization Springfield College 1980/Hartford State Technical College 1984	e. Education: Degree(s) /Year/Specialization Lane Community College 2004 -2005
f. Active Registration: Year First Registered/Discipline/Mass Registration Number N/A	f. Active Registration: Year First Registered/Discipline/Mass Registration Number N/A
g. Current Work Assignments and Availability For This Project: Currently working on 10+ projects – Project schedule listed November 2020 Through August 2024 – Full availability during this period	g. Current Work Assignments and Availability For This Project: Currently working on 14 projects scheduled through 2022, Fully available for this project.
h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): • AV Associates (AV Integration Firm) Director of Projects (1982-2004) • Avixa Certifications – CTS-D (Certified Technology Specialist – Design) • NICET – National Institute Certified Engineering Technolgies. • Extron – AV Associate, XTP Design • Crestron – DMC- D	h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): • AVIXA CTS-D • Crestron DMC-E • Boston University – Lead AV Engineer (2016-2019) • Portland Community College – Media Services Specialist, Capital Projects (2010-2016)

7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.

a. Name and Title Within Firm: **Ron Kuszmar II VP of Architectural and Theatrical Lighting**	a. Name and Title Within Firm: **Daniel Bourgeois Senior Project Manager**
b. Project Assignment: **Theatrical Consultant**	b. Project Assignment: **Theatrical Consultant**
c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Port Lighting Systems** **24 London Lane** **Seabrook NH 03874** Port Lighting Systems MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑	c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Port Lighting Systems** **24 London Lane** **Seabrook NH 03874** Port Lighting Systems MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑
d. Years Experience: With This Firm: 13 With Other Firms: 5	d. Years Experience: With This Firm: 8 With Other Firms: 20
e. Education: Degree(s) /Year/Specialization High School 2002	e. Education: Degree(s) /Year/Specialization High School/93 United States Army 92-14
f. Active Registration: Year First Registered/Discipline/Mass Registration Number N/A	f. Active Registration: Year First Registered/Discipline/Mass Registration Number N/A
g. Current Work Assignments and Availability For This Project: 15-20 Active projects with plenty of availability for this project	g. Current Work Assignments and Availability For This Project: 15-20 Active projects with plenty of availability for this
h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Osha 10 Certification #36-003686167 ETCP Certified Rigger – Theatre #1402 ETCP Certified Entertainment Electrician #1787 Electronic Theatre Controls Certified Field Technician Certified ETC and JR Clancy hoist installer Hubbell Building Automation Certified Field Technician Acuity Brands Certified Field Technician	h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): 20 years' experience within the lighting and rigging industry as a stage rigger, Audio Engineer, and production manager with the following certifications. Osha 10 Certification #36-003689812 Certified ETC and JR Clancy hoist installer Hubbell Building Automation Certified Field Technician Acuity Brands Certified Field Technician

7.	Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.	
a.	Name and Title Within Firm: **Kevin S. Hastings, P.E., President**	a. Name and Title Within Firm: **Scott W. Thornton, P.E., Principal – Project Manager**
b.	Project Assignment: **Code and Accessibility Consultant**	b. Project Assignment: **Traffic Engineering**
c.	Name and Address Of Office In Which Individual Identified In 7a Resides: **Hastings Consulting, Inc.** **142 Hanlon Road** **Holliston, MA 01746** HASTINGS CONSULTING Building, Fire & Access Codes • Fire Protection Engineering MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑	c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Vanasse & Associates, Inc.** **35 New England Business Center Drive** **Suite 140** **Andover, MA 01810** MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑
d.	Years Experience: With This Firm: 4 With Other Firms: 20	d. Years Experience: With This Firm: 23 With Other Firms: 2
e.	Education: Degree(s) /Year/Specialization Bachelor of Science/1996/Mechanical Engineering Master of Science/1997/Fire Protection Engineering	e. Education: Degree(s) /Year/Specialization Northeastern University, B.S.C.E., 1995
f.	Active Registration: Year First Registered/Discipline/Mass Registration Number 2001/Fire Protection/MA#41651	f. Active Registration: Year First Registered/Discipline/Mass Registration Number MA – 2011/Civil/49066
g.	Current Work Assignments and Availability For This Project: Available to provide code support for the duration of the project as needed.	g. Current Work Assignments and Availability For This Project: Mr. Thornton has 25 years of professional experience including transportation planning and engineering work for public and private sector throughout New England, including Traffic Impact and Access Studies, Site Feasibility Studies, Environmental Impact Reports, town-wide Traffic Studies, Corridor Studies, and Parking Studies. Available as needed by team.
h.	Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Certified Building Inspector – Commonwealth of Massachusetts ICC Certified Accessibility Inspector & Plans Examiner Member of Massachusetts State Building Code Existing Buildings Subcommittee Chairman of Massachusetts Architectural Access Board Subcommittee on Regulations	h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): King Phillip High School Expansion – Wrentham, MA Chestnut Hill School Expansion Monitoring – Chestnut Hill, MA Dover High School and Middle School Circulation Study – Dover, NH Mildred Street School – Boston, MA

7.	Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.	
a.	Name and Title Within Firm: **Peter S. Constable, Principal**	a. Name and Title Within Firm:
b.	Project Assignment: **Furniture and Equipment Consultant**	b. Project Assignment:
c.	Name and Address Of Office In Which Individual Identified In 7a Resides: **Point Line Space, Inc.** **75 Lowell Street** **Carlisle, MA 01741** POINT LINE SPACE Interior Design for Primary and Secondary Education MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑	c. Name and Address Of Office In Which Individual Identified In 7a Resides: MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑
d.	Years Experience: With This Firm: 14 With Other Firms: 33	d. Years Experience: With This Firm: _____ With Other Firms: _____
e.	Education: Degree(s) /Year/Specialization Pratt Institute, Bachelor of Industrial Design, 1973	e. Education: Degree(s) /Year/Specialization
f.	Active Registration: Year First Registered/Discipline/Mass Registration Number N/A	f. Active Registration: Year First Registered/Discipline/Mass Registration Number
g.	Current Work Assignments and Availability For This Project: Brightwood/Lincoln ES, Springfield, MA (w/DiNisco) Braintree East MS, Braintree, MA (w/MDS) Natick MS, Natick, MA (w/Ai3) Amesbury ES, Amesbury, MA (w/DiNisco) Fales ES, Westborough, MA (w/HMFH) Easton ES, Easton, MA (w/Perkins Eastman)	g. Current Work Assignments and Availability For This Project:
h.	Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Essex North Shore Agricultural Technical School Bresnahan Elementary School, Newburyport, MA Nock Molin Middle School, Newburyport, MA Cambridge Rindge and Latin School, Cambridge, MA Hanover High School, Hanover, MA John D. Runkle School, Brookline, MA Dane Eastman Elementary School, Concord, NH Conant Elementary School, Concord, NH Kimball Elementary School, Concord. NH Claiborne Pell Elementary School, Newport, RI Carlisle Elementary School, Carlisle, MA Boston Renaissance Charter School, Hyde Park, MA Baker & George Elementary Schools, Brockton, MA	h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):

7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.

a. Name and Title Within Firm: **Kevin Arsenault, Project Manager**	a. Name and Title Within Firm: **Tim Agurkis, Senior Project Manager**
b. Project Assignment: **Project Manager (Survey)**	b. Project Assignment: **Project Manager (Survey)**
c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Feldman** **152 Hampden Street** **Boston, MA 02119** MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑	c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Feldman** **152 Hampden Street** **Boston, MA 02119** MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑
d. Years Experience: With This Firm: 1.5 With Other Firms: 31	d. Years Experience: With This Firm: 10 With Other Firms: 9
e. Education: Degree(s) /Year/Specialization Completed 93 credits in BS toward Civil Engineering 3.0	e. Education: Degree(s) /Year/Specialization AS/Civil Engineering/2005/Survey
f. Active Registration: Year First Registered/Discipline/Mass Registration Number 2002/Massachusetts Professional Land Surveyor, #45286	f. Active Registration: Year First Registered/Discipline/Mass Registration Number 2002/Massachusetts Professional Land Surveyor, #52782
g. Current Work Assignments and Availability For This Project: Currently overseeing 15-20 ongoing projects and team of 14 people Available as needed for this project.	g. Current Work Assignments and Availability For This Project: Currently overseeing 15-20 ongoing projects and team of 15 people Available as needed for this project.
h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): MassDOT - Monsignor William J. Casey Overpass, Boston, MA (Green International) MassDOT – Woods Memorial Bridge, Route 16, Medford/Everett, MA (Green International) MassDOT Silver Line Project, Chelsea, MA (Green International) Border to Boston Rail Trail, Salisbury, Byfield, Georgetown, Boxford, Topsfield, MA (Green International) Bruce Freeman Rail Trail, Westford, Acton, MA (Green International) Assabet River Rail Trail, Acton, Maynard, MA (Green International)	h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Massachusetts College of Art Wynn Boston Harbor Burnham Building Redevelopment and Millennium Tower at Downtown Crossing Channel Center, South Boston University of Massachusetts Medical School, Worcester University of Massachusetts, Boston Bentley University, Waltham Millennium Place, Boston

7.	Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.	
a.	Name and Title Within Firm: **Damien J. Raffle, PLS**	a. Name and Title Within Firm:
b.	Project Assignment: **Project Manager (Survey)**	b. Project Assignment:
c.	Name and Address Of Office In Which Individual Identified In 7a Resides: **Feldman** **152 Hampden Street** **Boston, MA 02119** MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑	c. Name and Address Of Office In Which Individual Identified In 7a Resides: MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑
d.	Years Experience: With This Firm: 8 With Other Firms: 12	d. Years Experience: With This Firm: _____ With Other Firms: _____
e.	Education: Degree(s) /Year/Specialization BS, Geomatics/1998	e. Education: Degree(s) /Year/Specialization
f.	Active Registration: Year First Registered/Discipline/Mass Registration Number Massachusetts Professional Land Surveyor, #49629	f. Active Registration: Year First Registered/Discipline/Mass Registration Number
g.	Current Work Assignments and Availability For This Project: Currently overseeing 15-25 ongoing projects and team of 15 people Available as needed for this project.	g. Current Work Assignments and Availability For This Project:
h.	Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Lovejoy Wharf, Boston Southfield, Weymouth Malden Field of Dreams, Malden 319 Rear A Street, Boston The Winsor School, Boston Technology Park Drive, Westford Milton Academy, Milton Chestnut Hill Shopping Center, Newton/Brookline South of Main, Cambirdge River Street, Cambridge	h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):

7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.

a. Name and Title Within Firm: **Pamela Perini, PSP President**	a. Name and Title Within Firm:
b. Project Assignment: **Principal-in-Charge, Security Consultant**	b. Project Assignment:
c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Pamela Perini, PSP** **20 Freemont Terrace** **Waltham, MA 02452** Pamela Perini Consulting A Security Consulting Firm you can depend on... MBE ❑ WBE ☑ SDVOBE ❑ VBE ❑	c. Name and Address Of Office In Which Individual Identified In 7a Resides: MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑
d. Years Experience: With This Firm: 11 With Other Firms: 25	d. Years Experience: With This Firm: _____ With Other Firms: _____
e. Education: Degree(s) /Year/Specialization BA / 1994 / Economics	e. Education: Degree(s) /Year/Specialization
f. Active Registration: Year First Registered/Discipline/Mass Registration Number PSP/Physical Security Professional with ASIS Since January 27, 2014	f. Active Registration: Year First Registered/Discipline/Mass Registration Number

g. Current Work Assignments and Availability For This Project:
Easton Early Middle School, Leominster Public Safety Facility, BHA Authorty-Wide CCTV Upgrade and Expansion, Dennis-Yarmouth Intermediate Middle School, North Acton Fire Station, Braintree South Middle School, Massport North Service Area, Watertown High School, Medfield Dale Street Elementary School, Benjamin Franklin Institute of Technology (on hold) Brockton Public Safety, Westfield Franklin Ave. Middle School (feasibility)
Note- Available for This Project

h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):

- Physical Security Professional (PSP), (2014) ASIS International **
- Crime Prevention Through Environmental Design (CPTED), Facilities Management Int'l.
- PREPaRE WS1: Crisis Prevention & Preparedness: Comprehensive School Safety Planning, Northeast Homeland Security Regional Advisory Council/NASP (National Association of School Psychologists)
- SANS Isaca/Audit Serve; IT Auditing for Disaster Recovery & Business Continuity Planning
- OSHA10 Construction, OSHA Training Institute
- Commonwealth of Massachusetts MCPPO Program, Cyber Threats to Local Government
- Rhode Island School Safety Committee, Annual School Safety & Security Conference (2019)
- Infrastructure Protection (Master Certification), Texas A&M University Engineering Extension, National Emergency Response and Recovery Center (2020)

** The Physical Security Professional (PSP) ASIS credential is subject to The Department of Homeland Security's Safety Act. The SAFETY Act Designation gives ASIS board-certified professionals and their customers immediate protection from lawsuits involving ASIS certification and the ASIS certification process that arise out of an act of terrorism. Not only does it limit the types of liability claims that can be brought against a certificant, but it also entitles the certificant to immediate dismissal of those specific types of claims

- FEMA AWR-136 Essentials of Community Cybersecurity
- FEMA AWR-175 Information Security for Everyone
- FEMA AWR-375 Risk Management for After School Activities & Interscholastic Athletics
- FEMA ISC-100 Introduction to Incident Command
- FEMA IS-120.c Introduction to Exercises
- FEMA IS-700 National Incident Management System (NIMS)
- FEMA IS-906 Workplace Security Awareness
- FEMA IS-907 Active Shooter
- FEMA MGT-384 Community Preparedness for Cyber Incidents
- FEMA AWR-213 Critical Infrastructure Security & Resilience
- FEMA MTG-310 Jurisdictional Threat & Hazard Identification and Risk Assessment
- FEMA MGT-414 Advanced Critical Infrastructure Protection
- FEMA MGT-315 Critical Asset Risk Management

7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.

a. Name and Title Within Firm: **Michael Bartoloni, AHC, DHT, Senior Hardware Specification Consultant**	a. Name and Title Within Firm: **Susan McCabe Messier, DHT, Principal, Owner, Hardware Specification Consultant**
b. Project Assignment: **Project Manager, Door/Frame/Hardware Consulting**	b. Project Assignment: **Principal**
c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Campbell-McCabe Worldwide LLC** **63 Great Road** **Suite 201** **Maynard, MA 01754** CAMPBELL | McCABE Independent Architectural Hardware Consulting MBE ❑ WBE ☑ SDVOBE ❑ VBE ❑	c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Campbell-McCabe Worldwide LLC** **63 Great Road** **Suite 201** **Maynard, MA 01754** CAMPBELL | McCABE Independent Architectural Hardware Consulting MBE ❑ WBE ☑ SDVOBE ❑ VBE ❑
d. Years Experience: With This Firm: 6 With Other Firms: 30	d. Years Experience: With This Firm: 30 With Other Firms: 2
e. Education: Degree(s) /Year/Specialization BS 1980 Business Entrepreneurship Course	e. Education: Degree(s) /Year/Specialization BA 1980 Art History / History of Architecture Northeastern University, Boston, MA
f. Active Registration: Year First Registered/Discipline/Mass Registration Number 1991 Architectural Hardware Consultant (AHC), DHI 04567 2018, Door and Hardware Technician (DHT). (note: certifications are a National Credential not a Mass Registration)	f. Active Registration: Year First Registered/Discipline/Mass Registration Number 2018, Door and Hardware Technician (DHT), DHI 113886 (note: this certification is a National Credential not a Mass Registration
g. Current Work Assignments and Availability For This Project: Current Work Assignments are consistent with previous years. George H. Mitchell Elementary Bridgewater, MA Shattuck Hospital Renovation Boston City Hall Plaza UMass Medical **Availability: Fully-Available for this project**	g. Current Work Assignments and Availability For This Project: Powell Elementary & SLA Middle School at Drexel Philadelphia, PA Rockland ES Waltham HS Belmont HS **Availability: Fully Available for this project**.
h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Billerica High School Ellis Island Door Hardware Replacement, Nat'l Parks Commission Departments of Public Works Middleboro, Yarmouth, Burlington, Holden VAMC Northhampton Blg. 1 YWCA Central Mass UMASS VA BOC MIT Site 4 MIT Site	h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Boston Public Library Boston Public School Department Belmont High School Drexel Academic Tower and Data Center King Open School Maine Medical Tower Renovation Maine Medical Center New Congress St. Facility Maynard High School Somerville High School VA Providence Police Services

7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.

a. Name and Title Within Firm: **Lisa Howe, Director, New England Regional Office**	a. Name and Title Within Firm: **Lisa Harrington, Senior Project Manager**
b. Project Assignment: **Architectural Conservator/Historic Preservation**	b. Project Assignment: **Architectural Conservator/Historic Preservation**
c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Building Conservation Associates, Inc.** **10 Langley Road** **Suite #202** **Newton Centre, MA 02459** MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑	c. Name and Address Of Office In Which Individual Identified In 7a Resides: **Building Conservation Associates, Inc.** **10 Langley Road** **Suite #202** **Newton Centre, MA 02459** MBE ❑ WBE ❑ SDVOBE ❑ VBE ❑
d. Years Experience: With This Firm: 5 With Other Firms: 29	d. Years Experience: With This Firm: 19 With Other Firms: 6
e. Education: Degree(s) /Year/Specialization BS Roger Williams University/1995/Historic Preservation MA University of Maryland/2013/ Real Estate Development	e. Education: Degree(s) /Year/Specialization BA Syracuse University/1989/Environmental Design Boston Architectural College/1993/Architecture MA Boston University/2001/Preservation Studie
f. Active Registration: Year First Registered/Discipline/Mass Registration Number N/A	f. Active Registration: Year First Registered/Discipline/Mass Registration Number N/A
g. Current Work Assignments and Availability For This Project: St. Mary's Church, Charlestown Harkness Estate Service Buildings Available	g. Current Work Assignments and Availability For This Project: Boston University, 855 Commonwealth Avenue Abbot Buildings, Harvard Square Available
h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Lisa Howe brings over 30 years of experience in the construction and restoration industry, from her beginnings as a mason to her tenure as a Principal at Goody Clancy, an architecture firm in Boston. Before joining BCA, Lisa was Director of Preservation at Consigli, a 600-person construction company specializing in restoration. Lisa has extensive experience documenting the condition of historic building materials, developing treatments for their repair and conservation, preparing construction documents for the implementation of these treatments, providing project monitoring during the repair and conservation work, and writing Historic Structures Reports. Projects include building assessment, alternative material investigation and document production for the granite and terra cotta of the Conrad B. Duberstein U.S. Bankruptcy Courthouse in Brooklyn, NY; and existing conditions assessment of 900,000 SF of building stock at St. Elizabeth's Campus in Washington, DC.	h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Lisa Harrington joined BCA in 2000 with a background in architecture, early New England building practices and community preservation. Prior to joining BCA, she was employed by the Boston Landmarks Commission, assisting in preservation planning for the South End Landmark District. She also spent several years working as an architect, specializing in residential structures. At BCA, Lisa conducts building conditions assessments, with an emphasis on historic masonry, roofing and windows, prepares drawings and specifications for building restorations projects and provides project monitoring. Lisa's recent projects include: Fenway Park in Boston, Massachusetts; the Edward T. Gignoux Courthouse in Portland, ME; the Portland Custom House in Portland, ME; and the Landmark Theatre in Richmond, VA.

8a. Current and Relevant Work By Prime Applicant Or Joint-Venture Members. Include ONLY Work Which Best Illustrates Current Qualifications In The Areas Listed In The Advertisement (List Up To But Not More Than 5 Projects).

a. Project Name And Location Principal-In-Charge	b. Brief Description Of Project And Services (Include Reference To Relevant Experience)	c. Client's Name, Address And Phone Number (Include Name Of Contact Person)	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
				Construction Costs (Actual, Or Estimated If Not Completed)	Fee for Work for Which Firm Was Responsible
(1) Braintree East Middle School Renovation and Expansion, Braintree, MA Will Spears, AIA, LEED AP, MCPPO, Principal-in-Charge Amy MacKrell, AIA, LEED AP BD+C, Design Principal		Dr. Frank Hackett, Superintendent of Schools Braintree Public Schools, 348 Pond St, Braintree, MA 02184 781-380-0130, x8475, frank.hackett@braintreeschools.org Michael Carroll, MCPPO, Project Director, Hill International, 330 Congress St, Boston, MA 02210 617-778-0930, MikeCarroll@hillintl.com	Aug. 2020	$68,311	$6,751

Our renovation and expansion of Braintree's East Middle School modernized an aging 1961 school with environments that advance Braintree Public School's (BPS) strategic goals and mission of promoting excellence in instruction and student achievement. The project enabled a town-wide redistribution of students that integrates fifth grade into the middle schools. East Middle School now serves 1,180 students in grades 5-8.

The scope of our renovation and expansion encompassed approximately 184,400 sf and reused much of the existing school. Following BPS's "schools within a school" model, the new organization shapes small learning communities with distinct academic clusters or "academies" for grades 5-6 and 7-8. Our approach also enabled the consolidation of the community-oriented, public spaces to provide easy, controlled access for the public. The expansion and site improvements minimize impact on the existing playfields and maximize available parking capacity.

A new, centrally located Media Commons is East Middle School's hub for learning and engagement. It occupies a previously underutilized courtyard and is connected to separate Innovation Labs serving grades 5-6 and 7-8. A bright and energizing space, the Media Commons features a saw-tooth roof with north-facing skylights to optimize natural light. Flexible furniture shapes a range of learning environments for small, medium and large group activities.

The project is targeting LEED Silver certification, providing significant reductions to energy usage with improvements to the building envelope, addition of sun shades, and roof mounted photovoltaic panels. Our implementation approach allowed the current student population to remain throughout construction, which was phased to minimize impact to occupants and promote safety. Phase One opened for the fall 2019 school year. Phase Two welcomed students in Sept. 2020.

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				Construction Costs (Actual, Or Estimated If Not Completed)	Fee for Work for Which Firm Was Responsible
(2) Braintree South Middle School, Braintree, MA Will Spears, AIA, LEED AP, MCPPO, Principal-in-Charge Amy MacKrell, AIA, LEED AP BD+C, Design Principal		Michael Carroll, MCPPO, Project Director Hill International 330 Congress Street, 6th fl, Boston, MA 02210 617-778-0930 MikeCarroll@hillintl.com	2022	$69,181 (est.)	$720 (Study and SD only)

MDS is currently working with the Town of Braintree to create a new middle school for 800 students in grades 5–8, replacing the existing South Middle School. The project is part of Braintree Public Schools' plan to relieve overcrowding in the town's elementary schools by integrating fifth grade into the middle schools. In support of the strategic plan, the primary goals for the project are to provide a building that is highly efficient, educationally appropriate, supportive of collaboration and programmatic connections, adaptable and flexible, and supportive of small learning communities within a larger school.

South Middle School operates with an "academies" concept, with independent learning facilities and circulation patterns for grades 5–6 and 7–8. Each wing reinforces the small school concept and enables the consolidation of the community oriented, public spaces to provide easy, controlled access for the public.

Multiple renovation and expansion options were analyzed, considering estimated costs, construction schedules, benefits to energy performance, and impact on occupants. The scope of the preferred solution, selected over a renovation, proposes a new construction option of a two-story building while retaining the 63-year-old existing school building for other town use.

The project is targeting LEED Silver certification, seeking significant reductions to energy usage with building envelope enhancements, sun shades, and roof mounted photovoltaic panels. Construction is set to begin in summer 2021 and complete in spring 2023.

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a. Project Name And Location Principal-In-Charge	b. Brief Description Of Project And Services (Include Reference To Relevant Experience)	c. Client's Name, Address And Phone Number (Include Name Of Contact Person)	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
				Construction Costs (Actual, Or Estimated If Not Completed)	Fee for Work for Which Firm Was Responsible
(3) Heath School Renovations and Expansion Brookline, MA Will Spears, AIA, LEED AP, MCPPO, Principal-in-Charge		Ray Masak Town of Brookline Town Hall, 333 Washington Street Brookline, MA 02445 617-264-6449	2012	$6,450	$793

Brookline's Heath School serves 560 students in grades K–8. Our renovation and expansion added five classrooms, one lab-classroom, a new gymnasium/multipurpose room, and cafeteria and library expansions. With the new construction, the school is now 81,400 sf. ADA deficiencies were addressed throughout the school and site, including accessible paths across the steeply sloping site. Bus and car drop-off areas were improved to alleviate traffic congestion. Contaminated soils from an old underground oil tank were discovered and mitigated prior to construction. The project was designed to a fixed budget utilizing a decision matrix to identify cost implications of various scope options. Design and construction occurred in a very short 12 month timeframe with construction occurring primarily over the summer months. The building was fully occupied during the academic year. The project was implemented with the Chapter 149 delivery method on time and under budget.

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a. Project Name And Location Principal-In-Charge	b. Brief Description Of Project And Services (Include Reference To Relevant Experience)	c. Client's Name, Address And Phone Number (Include Name Of Contact Person)	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
				Construction Costs (Actual, Or Estimated If Not Completed)	Fee for Work for Which Firm Was Responsible
(4) Lawrence School Renovation and Expansion Brookline, MA Will Spears, AIA, LEED AP, MCPPO, Principal-in-Charge		Anthony Guigli, Project Manager Town of Brookline Building Commission 617-730-2044	2004	$12,300	$1,193

MDS designed the renovation and expansion of Brookline's Lawrence School to meet the growth needs of a 650-student, pre-K to 8th Grade institution. Challenging urban site conditions required an efficient expansion that did not intrude on adjacent parkland. Working closely with the Town's building commission, school committee, neighborhood group, parks department, and the local historic commission, our design replaced an existing 1970's wing with a compact addition that respects the 1930's structure while adding 32,000 sf of expansion space. The existing 69,000 sf school was comprehensively renovated.

The project included: new classroom clusters, specialist rooms, gym, cafeteria, library and reconfigured common areas. The existing auditorium was transformed into a performance theater with a new stage, A/V, lighting systems, backstage greenroom, music room and practice space.

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				Construction Costs (Actual, Or Estimated If Not Completed)	Fee for Work for Which Firm Was Responsible
(5) Brooke East Boston Charter School East Boston, MA Will Spears, AIA, LEED AP, MCPPO, Principal-in-Charge		Jon Clark, Co-Director 617-325-7977, ext. 203 Edward W. Brooke Charter School 190 Cummings Highway Roslindale, MA, 02131	2014	$12,545	$850

The newest addition to the Edward W. Brooke Charter Schools network, Brooke East Boston Charter School involved the comprehensive renovation of a vacant 1903, 30,000 sq. ft. school building and a 13,000 sq. ft. addition. The addition establishes a new entrance to the school and shapes an outdoor artificial turf play area that is used by the school and shared with the neighboring community. The corrugated metal exterior cladding of the addition and color accents bring a contemporary, cost-effective image to the school that complements the original brick structure. Extensive value analysis of all systems was an integral part of the design process to balance cost with the school's limited capital budget. To reduce cost, an innovative dehumidification and ventilation air displacement system was installed in lieu of air-conditioning. The project was designed and implemented on a fast-track schedule utilizing Chapter 149A delivery methods. Early packages were issued for demolition, foundations and structural steel to meet the demanding schedule.

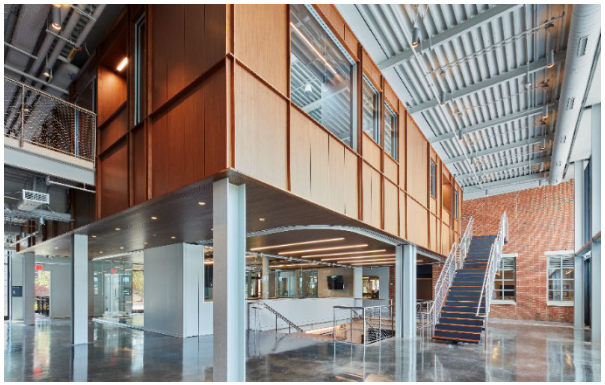
8b.	List Current and Relevant Work By Sub-Consultants Which Best Illustrates Current Qualifications In The Areas Listed In The Advertisement (Up To But Not More Than 5 Projects For Each Sub-Consultant). Use Additional Sheets Only As Required For The Number Of Sub-Consultants Requested In The Advertisement.					
Sub-Consultant Name:	**Sasaki Architects, P.C. | Associate Architecture**					
a.	Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
					Construction Costs (Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was/Is Responsible
(1)	**The Lawrenceville School Gruss Center for Art and Design and Tsai Dining and Athletic Center** Lawrenceville, New Jersey PIC: Vincius Gorgati		Stephen Murray The Lawrenceville School Box 6008 Lawrenceville, NJ 08648 609 896 0408	2020 (Gruss) 2023 (Tsai)	$150,000	$7,068

The Gruss Center for Art and Design is a new 21st-century student learning center and makerspace at The Lawrenceville School that bridges museum space and the school's visual arts studios. The strategy for enclosure responds to this new typology with simple, neutral materials that allow for transparency and student engagement with the activities happening inside.

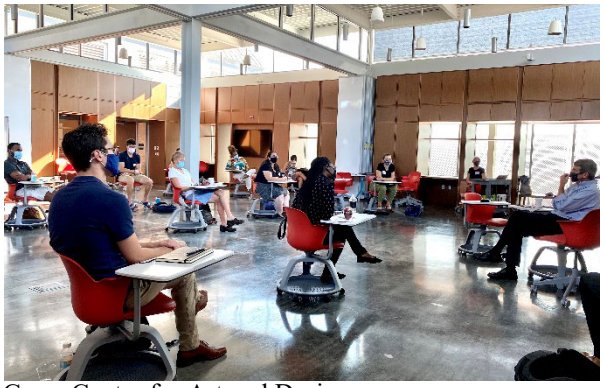
Today's shift in educational paradigm centers on project-based learning to promote cross disciplinary teaching. Students realize their potential world impact by making things with their hands and fostering their creativity through group collaboration. The project aims to nurture this hands-on culture. Work-focused spaces are organized across three levels and include a forum for student engagement, wood and metal shops, clean labs, print and seminar rooms, and large storage areas. The "flex room", which floats over the forum, is a 2,000-square-foot space that can be divided to suit a variety of needs.

Anchoring the second phase of implementation of the Lawrenceville School master plan, the Tsai Dining and Athletic Center will reposition student life for the school by bringing together recreation, wellness, athletics, and dining into one interconnected environment. The strategy includes both new buildings and the restoration of the historic Lavino Fieldhouse. New facilities include an ice rink, basketball gym, swimming pool, and a fitness center. The gym is designed to double as a function space that will serve multiple school functions.

The new dining facility accommodates over 500 students, staff and faculty daily. The design includes a mezzanine dedicated to freshman as a way to create a sense of belonging for new students. The main floor is subdivided into modules designed to foster community.



Gruss Center for Art and Design



Gruss Center for Art and Design

Tsai Dining and Athletic Center

(2)	**Greenwich Academy Master Plan** Greenwich, Connecticut PIC: Caitlyn Clauson	Molly King Greenwich Academy 200 North Maple Avenue Greenwich, CT 06820 203 625 8914	2018	N/A	$250

The master plan for Greenwich Academy (GA) envisions a campus befitting the school's status as a preeminent educational institution. The recommendations present a comprehensive vision for a unified campus. The GA Master Plan was driven by key factors, including improving the parity of space across the learning environments, enhancing the campus environment—including development, landscape, open space, and mobility—and supporting the implementation of the academic strategic plan.

Foundational to this are rationalized pedestrian and vehicular mobility systems that foster the dynamic interactions of the campus community and improve accessibility and safety for everyone. The integrated landscape framework elaborates on the pedestrian paths at central campus locations, providing a place for assembly and impromptu interactions, and enhances the natural systems of the campus. New buildings and strategic renovations improve parity across learning environments and provide visual and physical connections to the landscape. This holistic approach to the campus extends learning beyond the classroom, supporting the inquiry-based approach of the GA curriculum.

Recognizing that community is integral to the GA experience, gathering spaces are celebrated in every recommendation. These spaces serve GA students, faculty, and staff as well as parents, alumni, and students from the Brunswick School who visit campus daily.

(3)	**Blair Academy Master Plan, Kathryn & Lakeside Residence Halls, Hardwick Hall, and Outdoor Athletics Facilities** Blairstown, New Jersey PIC: Vinicius Gorgati, AIA	Jim Frick Blair Academy Finance and Operations PO Box 600 Blairstown, NJ 07825 908 362 6121 x5627	2015	$31,500	$2,500

Blair Academy, a private secondary school in Blairstown, New Jersey required improvements to student housing to support the school's educational mission, including fostering a culture of close student-faculty communities. Following a Sasaki master planning study, the project design for 88 new student beds supports campus community at several scales. The selected project site is located within easy walking distance of the main academic buildings and dining hall and adjacent to the campus lake, taking advantage of an underappreciated campus natural feature. To support an intimate community, the beds are arranged into two 3- story buildings of 44 students each, which together frame a new campus green. The buildings' materials borrow from the existing campus palette of grey limestone and red brick, while the forms follow a domestic language of gabled roofs and open porches. The new landscape around the buildings uses the same limestone in site walls to mediate between the domestic scale of the campus green and the existing naturalistic park campus open spaces.

Sasaki also completed a multi-phased project for the 20,000-SF renovation and 80,000-SF expansion of Blair's Hardwick Hall, their sports and recreation center. The new facility integrates elements of a student center into the building by adding a bookstore, day student lounge, an informal café, and future infirmary. A new lounge overlooking the weights and fitness area includes study carrels and the existing indoor running track. The existing sports facility has been added to over time and combines the original large utilitarian spaces with newer wings of more modern character. The design challenge was to unite these elements, bring the sense of scale into keeping with the rest of the campus, and form a transition to engage the lower ceremonial field space adjoining this site, known as the "bowl".

After completing an outdoor athletic facilities master plan for Blair, Sasaki was hired to design all components of the plan, including a new sandwich system track and synthetic turf field, multiple natural turf fields, new tennis courts, and 100-car parking lot with infiltration swales.

Hardwick Hall and synthetic turf field

Outdoor athletics facilities

Kathryn Hall feature from Blair

(4)	**Bristol Community College John J. Sbrega Health and Science Building** Fall River, Massachusetts PIC: Fiske Crowell, FAIA, LEED AP	Steve Kenyon Bristol Community College 777 Elsbree Street Fall River, MA 02720 508 678 2811	2016	$42,800	$1,000

The John J. Sbrega Health and Science Building is a shared resource occupied by multiple disciplines within the Sciences and Health Professions disciplines at Bristol Community College. The 50,600-SF facility represents the translation of basic science to its application in the health professions. For the sciences, the building accommodates flexible instructional labs and support space for field biology, biotech, microbiology, and general chemistry. The health professions are represented by nursing skills and simulation labs, clinical laboratory science and medical assisting labs, dental hygiene labs and teaching clinic, which provides care to underserved populations.

These spaces are organized around a common, light-filled learning commons and student living room, meant to invite a broader set of users to the building as a place to study and otherwise learn in more informal ways. The walls separating lab spaces from the atrium are glazed, with a combination of opaque markerboard glass and clear glass, allowing for views into the labs and putting science on display.

The 50,600-square-foot building serves traditionally energy-dense uses, including a large number of fume hoods, high plug loads, and specific ventilation and lighting requirements. While initial requirements called for Massachusetts LEED Silver Plus, the team made a strategic investment to develop a Zero Net Energy design, which would balance annual energy consumption with renewable energy generated on site. The resultant design is projected to use less than 20% of the new array and no fossil fuels for heating and cooling. Significantly, the ZNE design was achieved without increasing the budget, serving as an important benchmark for future campus development and a model for other institutions.

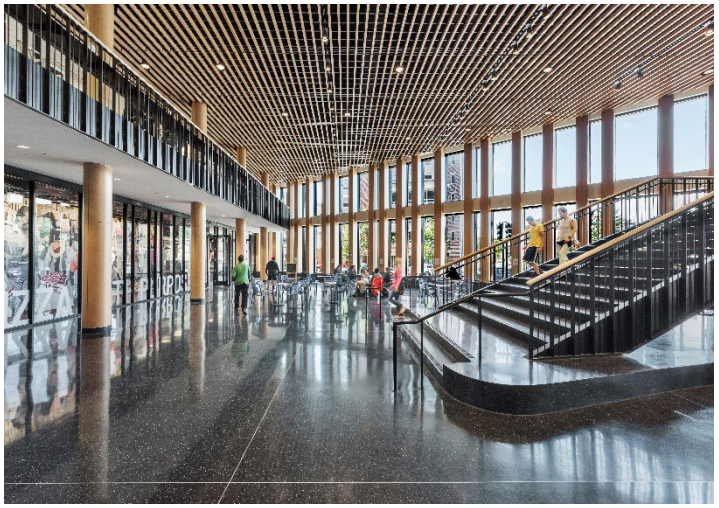
(5)	**Bruce C. Bolling Municipal Building** Boston, Massachusetts PIC: Fiske Crowell, FAIA, LEED AP	Maureen Anderson Boston Public Facilities Department 26 Court Street, 10th Floor Boston, MA 02108 617 635 0535	2015	$94,700	$7,500

Sasaki, in collaboration with the Netherlands-based design firm Mecanoo, worked with the City of Boston to design a municipal office building in Nubian Square (formerly Dudley Square). Located in the heart of Roxbury, Nubian Square is a mass transit hub rich with culture and history. The facility is a part of former Mayor Thomas M. Menino's Dudley Square Vision Project, which sought to revitalize the once-thriving urban neighborhood. Using the past to create the future, the facility preserves and incorporates the iconic Ferdinand Furniture Building, an emblem of the square's historic commercial vitality. The 215,000-square-foot structure has become the headquarters of Boston Public Schools (BPS), and includes a green roof, state-of-the-art office space, retail, civic spaces, and community meeting space.

The ground floor of the facility serves as a public zone, providing both community gathering space and opportunities for economic advancement through retail and dining. The second floor is outfitted with meeting rooms to provide an interaction zone for BPS, while the sixth floor public meeting space and roof terrace is open and accessible to all.

Sasaki's design for the BPS offices creates a new model for municipal workers, promoting collaboration and transparency through an open layout. To support not only the staff members, but also the students and parents they serve, the design is welcoming and punctuated with spaces that facilitate interaction between BPS and the Boston community.

The design process involved extensive public outreach and several open design forums. The Sasaki team worked closely with the city, including the Boston Redevelopment Authority and the Public Facilities Department. In addition, the process has necessitated frequent review from Boston Landmarks Commission.



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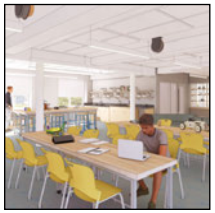
Sub-Consultant Name: **New Vista Design- Educational Programming**						
a. Project Name And Location Principal-In-Charge		b. Brief Description Of Project And Services (Include Reference To Areas Of Experience Listed In DSB Advertisement)	c. Client's Name, Address And Phone Number (Include Name Of Contact Person)	d. Completion Date (Actual Or Estimated)	E. Project Cost (In Thousands)	
					Construction Costs (Actual, Or Estimated If Not Completed)	Fee for Work for Which Firm Was Responsible
(1) **Catholic Memorial School** West Roxbury, MA David Stephen – Principle in Charge In collaboration with MDS Architects		Full range of educational & architectural visioning workshops for Master Planning of their middle & high school campus, as well as articulation of a vision for 21st century teaching & learning to inform their development & fund-raising initiatives.	MDS 99 Chauncy Street Boston, MA 02111 Tel: (617) 338-5350 Contact: Kate Wonkka	Programming completed May 2016	NA	$12K
(2) Driscoll School Brookline, MA David Stephen – Principle in Charge In collaboration with Jonathan Levi Architects		Full range of educational and architectural programming services for a new K-8 school facility that strives to create a strong sense of whole school community connections as well as smaller learning communities within.	JLA 266 Beacon Street Boston, MA 02116 Tel: (617) 437-9458 Contact: Jonathan Levi	Programming completed March 2019	Estimated $115M	$10K
(3) Brookline High School Brookline, MA David Stephen – Principle in Charge In collaboration with SMMA		Full range of educational and architectural programming services for a renovated and new 9-12 facility to accommodate Brookline's growing student body through the addition of a 9th Grade Academy building and renovated the Science Wing.	SMMA 1000 Massachusetts Aves Cambridge, MA 02138 Tel: (617) 547-5400 Contact: Phil Poinelli	Study completed June 2015	NA	$16K
(4) Hunnewell Elementary School Wellesley, MA David Stephen – Principle in Charge In collaboration with SMMA		Full range of educational and architectural visioning workshops for new elementary school that supports a student-centered and personalized approach that includes co-teaching and project-based learning.	SMMA 1000 Mass Ave Cambridge, MA 02138 Tel: (617) 547-5400 Contact: Kristen Olsen	Programming completed February 2019	Estimated $50M	$11K
(5) Caleb Dustin Hunking School Haverhill, MA Educational Visioning and Programming David Stephen – Principle in Charge In collaboration with JCJ Architecture		Full range of educational and architectural visioning workshops for a new K-8 school. Process included exploration of varied grade level configurations and consolidation of elementary and middle school programs.	JCJ Architecture One State Street Suite 900 Boston, MA 02109 (617) 532-6600 Contact: Jim LaPosta	Completed September 2013	$61.5M	$15K

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Sub-Consultant Name:	**Sasaki Architects, P.C. | Civil Engineering**					
a. Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
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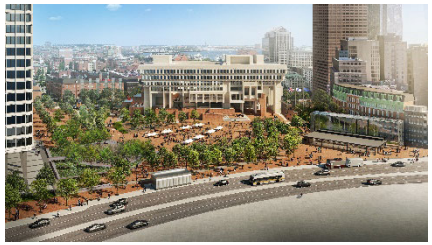
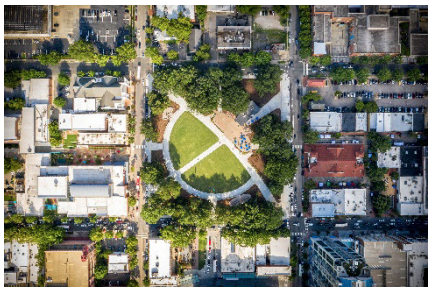
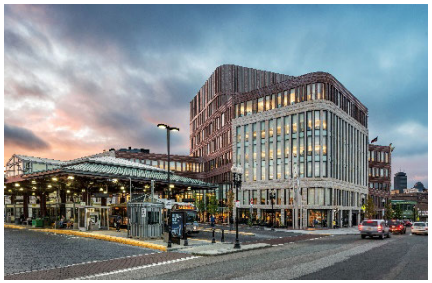
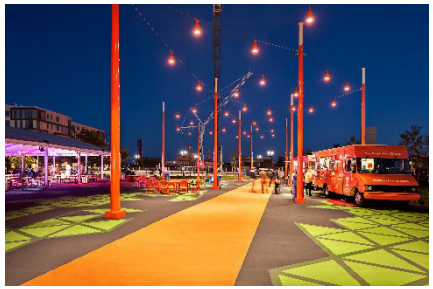
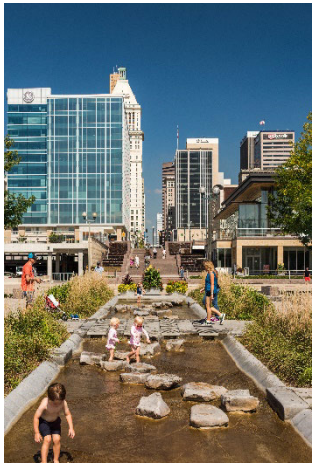
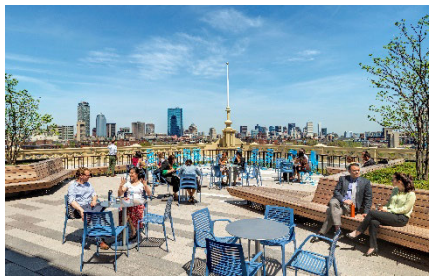
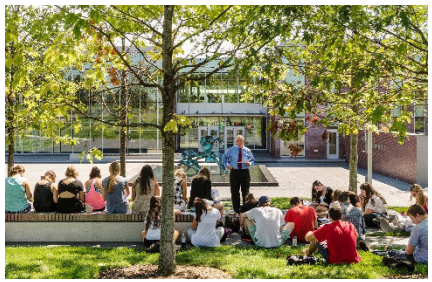
(1) **Blair Academy** **Outdoor Athletics Facilities** Blairstown, New Jersey PIC: Vinicius Gorgati, AIA 	After completing an outdoor athletic facilities master plan for Blair Academy, Sasaki was hired to design all components of the plan. The existing football field received continued wear through the season and needed continual rest in the off-season in order to be used by football again in the fall. The infill synthetic turf field will now allow all sports teams to utilize a safe playing surface and have occasional night games. The new sandwich system track gives the team a needed upgrade to a facility that was constructed in the 1950s. Providing multiple natural turf fields gives Blair's sport teams the opportunity for multiple team practices. The competition tennis courts round out the new facilities for Blair. A 100-car parking lot with infiltration swales was constructed as primary parking for these facilities, while the synthetic turf field provides additional storage during heavy rain events.	Jim Frick Blair Academy PO Box 600 Blairstown, NJ 07825-0600 908 362 6121 x5627	2007	$6,500	$500
(2) **Boston City Hall Plaza Renovation** Boston, Massachusetts PIC: Fiske Crowell, FAIA, LEED AP 	Sasaki, in partnership with Mayor Martin J. Walsh and the City of Boston, is embarking on a renovation of the historic Boston City Hall Plaza. The new design for City Hall Plaza aims to connect Congress and Cambridge Streets with an accessible sloped promenade activated by 21st century civic amenities like shady seating and gathering areas, a destination play space, public art space, and an iconic water feature. The main plaza will accommodate events of up to 20,000 people in a wide variety of potential configurations.	Patricia Lyons Boston Public Facilities Department 26 Court Street, 10th Floor Boston, MA 02108 617 635 4814	2021	$60,000	$1,500

(3) **Moore Square** Raleigh, North Carolina PIC: Zachary Chrisco, PE 	For over two centuries, Moore Square has persisted as an urban green space of tree canopy and turf providing a mix of shady and sunny places to gather and recreate, to see and be seen. Like all great public squares, the 4.5-acre park has evolved over time to fulfill the changing needs of the City of Raleigh. Sasaki led the redesign of the park to strengthen the square's historic configuration and include a new visitor center.	Grayson Maughan City of Raleigh 222 W. Hargett Street 6th Floor Raleigh, NC 27602 919 996 4793	2019	$12,500	$768
(4) **Bruce C. Bolling Municipal Building** Boston, Massachusetts PIC: Fiske Crowell, FAIA, LEED AP 	Sasaki worked with the City of Boston to design a municipal office building in Nubian (formerly Dudley) Square. Located in the heart of Roxbury, Nubian Square is a mass transit hub rich with culture and history. The 215,000-square-foot structure has become the headquarters of Boston Public Schools (BPS), and includes a green roof, state-of-the-art office space, retail, civic spaces, and community meeting space.	Maureen Anderson Boston Public Facilities Department 26 Court Street, 10th Floor Boston, MA 02108 617 635 0535	2015	$94,700	$7,500
(5) **The Lawn on D** Boston, Massachusetts PIC: Gina Ford, FASLA 	The Massachusetts Convention Center Authority, in partnership with a Sasaki-led design team, conceived of the Lawn on D—a flexible, vibrant, and temporary urban space—to be an early arrival on D Street, setting the tone for civic impact and expressing the ambitions of a new district. The Lawn on D is conceived as a platform for innovation and an armature for infinite programming—packing multiple agendas and possibilities into 2.7 acres with skillful design and strong vision. The plaza's paths blaze trails from D Street to the side entrance of the BCEC, its signature lights describe a right-sized space for gatherings, and its bright, playful, movable furniture invites visitors to make the space their own. The lawn at The Lawn on D—sited where four feet of urban fill used to block views and preclude access—now provides a gracious forecourt to the BCEC along D Street and hosts a range of shorter-term art installations and projects.	Katie Hawkes Massachusetts Convention Center Authority 415 Summer Street Boston, MA 02210 617 954 2385	2014	$1,505	$165

8b.	List Current and Relevant Work By Sub-Consultants Which Best Illustrates Current Qualifications In The Areas Listed In The Advertisement (Up To But Not More Than 5 Projects For Each Sub-Consultant). Use Additional Sheets Only As Required For The Number Of Sub-Consultants Requested In The Advertisement.					
Sub-Consultant Name:	**Sasaki Architects, P.C. | Landscape Architecture**					
a. Project Name and Location Principal-In-Charge		b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
					Construction Costs (Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was/Is Responsible
(1) **Boston City Hall Plaza Renovation** Boston, Massachusetts PIC: Fiske Crowell, FAIA, LEED AP 		Sasaki, in partnership with Mayor Martin J. Walsh and the City of Boston, is embarking on a renovation of the historic Boston City Hall Plaza. The new design for City Hall Plaza aims to connect Congress and Cambridge Streets with an accessible sloped promenade activated by 21st century civic amenities like shady seating and gathering areas, a destination play space, public art space, and an iconic water feature. The main plaza will accommodate events of up to 20,000 people in a wide variety of potential configurations.	Patricia Lyons Boston Public Facilities Department 26 Court Street, 10th Floor Boston, MA 02108 617 635 4814	2021	$60,000	$1,500
(2) **Boston Children's Museum Waterfront Master Plan** Boston, Massachusetts PIC: Zachary Chrisco, PE 		The master plan and design ideas for the Boston Children's Museum will emphasize resilience at multiple levels, while creating an immersive learning landscape on the harborwalk. In March 2018, the Museum's campus briefly became an island when a severe storm brought high tides that flooded adjacent Congress and Sleeper Streets. The entire Fort Point area is one of the lowest lying areas in South Boston and is a "flood corridor" into the heart of South Boston and the Seaport District. The Museum's objective is to provide a creative civic solution to address the acute risk of flooding to Fort Point and the Seaport. In addition to achieving resilience goals, the Museum is uniquely situated to lead an initiative that reimagines a portion of the Harborwalk as a captivating place for children and families to play and learn through engagement with the natural environment. Taking a proactive approach to climate change management, the Museum has selected Sasaki to lead the development of a design masterplan to address critical flood mitigation challenges while also reimagining the Harborwalk in front of the Museum as an engaging play and learning landscape.	Amy Auerbach Boston Children's Museum 308 Congress Street Boston, MA 02210 617 426 6500	2020	$34,000	$135

(3) **Smale Riverfront Park and Playscape** Cincinnati, Ohio PIC: Mark Dawson, FASLA, PLA 	The John G. and Phyllis W. Smale Riverfront Park is a 32-acre park along the banks of the Ohio River in downtown Cincinnati. The largest in a series of public parks along the high banks of the river, the park is framed by great city landmarks including the Roebling Bridge, the National Underground Railroad Freedom Center, the Paul Brown Stadium, and the Great American Ball Park. The riverfront park completes a necklace of open spaces on the river, links statewide recreation trail and bike systems, and reconnects the heart of downtown Cincinnati to the great Ohio River. Sasaki's design for the park creates an appropriate setting for the Roebling Bridge—a historically significant architectural icon—along with areas for large gatherings, passive recreation, and programmed events. Adventure playscape elements like the slide, climbing walls, and bridges were designed specifically to help kids achieve feelings of great heights and rapid speeds, while small nooks in the rock outcrops and winding paths capture a sense of mystery.	Steven Schuckman Cincinnati Park Board 950 Eden Park Drive Cincinnati, OH 45202 513 421 4085	2010	$105,000	$8,700
(4) **Bruce C. Bolling Municipal Building** Boston, Massachusetts PIC: Fiske Crowell, FAIA, LEED AP 	Sasaki worked with the City of Boston to design a municipal office building in Nubian (formerly Dudley) Square. Located in the heart of Roxbury, Nubian Square is a mass transit hub rich with culture and history. The 215,000-square-foot structure has become the headquarters of Boston Public Schools (BPS), and includes a green roof, state-of-the-art office space, retail, civic spaces, and community meeting space.	Maureen Anderson Boston Public Facilities Department 26 Court Street, 10th Floor Boston, MA 02108 617 635 0535	2015	$94,700	$7,500
(5) **Sacred Heart University Martire Business & Communications Center** Fairfield, Connecticut PIC: Vinicius Gorgati, AIA 	The Martire Center brings together Sacred Heart's Business and Communications programs into an academic nexus on a gateway site on the campus's northern edge. The main entry court includes a reflective water feature integrated with sculptural art. Seat walls in the landscape, shaded by trees, offer informal areas for gathering. The lower entry court provides a pedestrian connection to the campus to the south, and creates an iconic view of the archway for those approaching from campus. The lower entry court, the courtyard, and the main entry court at Park Avenue are all tied together by a series of sculptural trees.	Carmelo Cicero-Santalena Sacred Heart University 5151 Park Avenue Fairfield, CT 06825 203 396 6892	2015	$50,000	$2,755

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Sub-Consultant Name: **Souza True and Partners, Inc.- Structural Engineering**						
a. Project Name and Location Principal-In-Charge		b. Brief Description Of Project and Services (Include Reference To Areas Of Experience Listed In DSB Advertisement)	c. Client's Name, Address and Phone Number (Include Name Of Contact Person)	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
					Construction Costs (Actual, Or Estimated If Not Completed)	Fee for Work for Which Firm Was Responsible
(1)	**Braintree East Middle School** Braintree, MA Jerome A. Yurkoski, P.E. Principal-In-Charge	Renovation of existing 110,000sf school plus a new 76,000sf addition.	Miller Dyer Spears 99 Chauncy Street Boston, MA 02111 Will Spears 617-338-5350	2021	$68,000	$175
(2)	**Sylvester/Center School** Hanover, MA Jerome A. Yurkoski, P.E. Principal-In-Charge	Renovation of existing 53,000sf school plus design of new 93,000sf addition.	Mount Vernon Group 200 Harvard Mill Square, Wakefield, MA 01880 Mr. Frank Tedesco 781-213-5030	2018	$25,000	$94.5
(3)	**Ludlow Elementary School** Ludlow, MA Jerome A. Yurkoski, P.E. Principal-In-Charge	New 2 / 3-story, 170,000sf elementary school building with multiple wings constructed of composite steel floor construction. Long-spans were designed with open web steel joists.	Mount Vernon Group 200 Harvard Mill Square, Wakefield, MA 01880 Mr. Frank Tedesco 781-213-5030	2020	$38,000	$146
(4)	**Wareham Elementary School** Wareham, MA Jerome A. Yurkoski, P.E. Principal-In-Charge	New, stand-alone, three-story 159,000sf elementary school building with long-span joists over large floor areas.	Mount Vernon Group 200 Harvard Mill Square, Wakefield, MA 01880 Mr. Frank Tedesco 781-213-5030	2021	$35,000	$138.5
(5)	**Duxbury Co. Located Middle & High School** Duxbury, Massachusetts Jerome A. Yurkoski, P.E. Principal-In-Charge	New, separate wing, three story high school and middle school with classrooms, gymnasium and auditorium, plus separate field house.	Mount Vernon Group 200 Harvard Mill Square, Wakefield, MA 01880 Mr. Frank Tedesco 781-213-5030	2014	$100,000	$265

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Sub-Consultant Name: **Garcia, Galuska & DeSousa, Inc. – Electrical/Lighting, HVAC Engineering, Plumbing and Fire Protection Engineering**						
a.	Project Name and Location Principal-In-Charge	b. Brief Description of Project and Services (Include Reference to Areas of Experience Listed in DSB Advertisement)	c. Client's Name, Address and Phone Number (Include Name of Contact Person)	d. Completion Date (Actual or Estimated)	e. Project Cost (In Thousands) Construction Costs (Actual, Or Estimated If Not Completed)	 Fee for Work for Which Firm Was Responsible
(1)	**Florida Ruffin Ridley School** Brookline, MA *Carlos G. DeSousa* Principal-in-Charge	New construction (Study-CA, MSBA) LEED Gold Certified ▪ 2019 Illuminating Engineering Society of North America – Commendable Achievement in Lighting Design ▪ Systems include a Building Management System to control the HVAC systems & lighting; demand control ventilation, geothermal system.	HMFH Architects, Inc. 130 Bishop Allen Drive Cambridge, MA 02140 Pip Lewis (617) 492-2200	2018	$120,000	$1,228
(2)	**Driscoll School** Brookline, MA *Carlos G. DeSousa* Principal-in-Charge	New Construction, approx. 155,890 S.F. (Study-CA)) ▪ Currently in 60% design phase ▪ NZE Design Strategies: photovoltaic solar array, daylighting, demand limiting (power), daylight dimming, and occupancy sensors (lighting/HVAC), all electric HVAC systems, heat recovery units, demand control ventilation, VFDs, geothermal option, and displacement ventilation.	Jonathan Levi Architects 266 Beacon Street Boston, MA 02116 Jonathan Levi (617) 437-9458	2024 Estimated	$89,973	$1,252
(3)	**Old Lincoln School** Brookline, MA *Carlos G. DeSousa* Principal-in-Charge	Selective Renovations to the existing building (SD-CA) ▪ Design included energy efficient lighting fixtures and dimming controls, extension of fire alarm system, dual technology occupancy sensors, access control system, heating steam piping system air handling units, exhaust fans, unit heaters, fin tube radiation, air cooled condensers, chemical treatment systems, & ATC.	Arrowstreet 10 Post Office Square Boston, MA 02109 Laurence Spang (617) 623-5555	2015	$3,486	$87.7
(4)	**Braintree East M.S.** Braintree, MA *Dominick B. Puniello* Principal-in-Charge	Renovation/addition (Study-CA), LEED certification pending ▪ Design includes local sound system, wireless master clock system, integrated public access system, classroom amplification system, ultra-short throw projector, audio/visual cabling, and LCD/LED message display. ▪ Our services for technology equipment procurement was also provided in a separate contract for computer equipment, network electronic equipment, and telephone equipment.	Miller Dyer Spears, Inc. 99 Chauncy Street Boston, MA 02111 Danyul Cho, AIA, Architect (617) 338-5350	2020 Estimated	$83,472	$1,391.5
(5)	**Sunita L. Williams E.S.** Needham, MA *Carlos G. DeSousa* Principal-in-Charge	New Construction (Study-CA, MSBA) ▪ LEED Silver certification in progress Design included natural gas generator, energy efficient lighting fixtures, electric vehicle charging equipment, & photovoltaic solar array, terminal heating units, highly efficient boilers, ductless cooling units, rooftop units, fabric air duct dispersion system, & ATC.	Dore + Whittier 260 Merrimac Street Newburyport, MA 01950 Donald Walter (978) 499-2999	2019	$42,515	$624

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Sub-Consultant Name: **Garcia, Galuska & DeSousa, Inc. – Data/Communications**					
a. Project Name and Location Principal-In-Charge	b. Brief Description of Project and Services (Include Reference to Areas of Experience Listed in DSB Advertisement)	c. Client's Name, Address and Phone Number (Include Name of Contact Person)	d. Completion Date (Actual or Estimated)	e. Project Cost (In Thousands)	
				Construction Costs (Actual, Or Estimated If Not Completed)	Fee for Work for Which Firm Was Responsible
(1) **Florida Ruffin Ridley School** Brookline, MA *Carlos G. DeSousa* Principal-in-Charge	New construction (Study-CA) ▪ LEED Gold Certified ▪ Design consisted of four components, active switch equipment, an optical fiber backbone, a copper twisted-pair backbone, and twisted pair copper workstation.	HMFH Architects, Inc. 130 Bishop Allen Drive Cambridge, MA 02140 Pip Lewis (617) 492-2200	2018	$120,000	$1,228
(2) **Driscoll School** Brookline, MA *Carlos G. DeSousa* Principal-in-Charge	New Construction, approx. 155,890 S.F. (Study-CA)) ▪ Currently in 60% design phase ▪ NZE Focus ▪ Systems design for sound, public address, master clock and intercom cabling, equipment racks and cabinets, terminations, relay brackets, data network racks, patch panels and patch cables, etc.	Jonathan Levi Architects 266 Beacon Street Boston, MA 02116 Jonathan Levi (617) 437-9458	2024 Estimated	$89,973	$1,252
(3) **Old Lincoln School** Brookline, MA *Carlos G. DeSousa* Principal-in-Charge	Selective Renovations to the existing building (SD-CA) ▪ Design included an integrated instructional technology network system including public address and voice software, telephone system outlets, signaling system, local sound system, etc. ▪	Arrowstreet 10 Post Office Square Boston, MA 02109 Laurence Spang (617) 623-5555	2015	$3,486	$87.7
(4) **Martin Luther King, Jr. E.S.** Cambridge, MA *David M. Pereira* Principal-in-Charge	New Construction (Net Zero Building, SD-CA) ▪ Design for telephone and data system including cabling for sound and clock, equipment racks and cabinets, sound, public address, and master clock systems.	Perkins Eastman 20 Ashburton Place, Floor 8 Boston, MA 02108 Robin Greenburg (617) 449-4000	2016	$70,832	$67.3
(5) **Braintree East M.S**. Braintree, MA *Dominick B. Puniello* Principal-in-Charge	Renovation/addition (Study-CA) ▪ LEED certification pending ▪ Design includes cabling, data network racks & patch panels, network fiber, telephone outlets, integration req, bell signaling system, controls, etc. ▪ Technology Equipment Procurement services were provided for the Computer, Network Electronic and Telephone equipment.	Miller Dyer Spears, Inc. 99 Chauncy Street Boston, MA 02111 Danyul Cho, AIA, Architect (617) 338-5350	2020 Estimated	$83,472	$1,391.5

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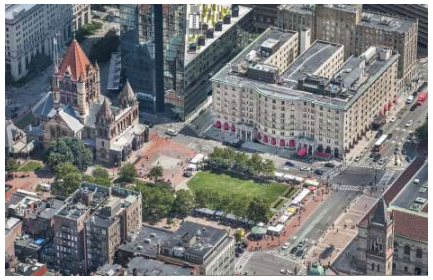
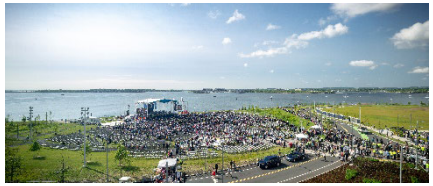
Sub-Consultant Name:	**Sasaki Architects, P.C. | Environmental Permitting**					
a. Project Name and Location Principal-In-Charge		b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
					Construction Costs (Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was/Is Responsible
(1) **Franklin Park Zoo Entry Landscape** Boston, Massachusetts PIC: Zachary Chrisco, PE 		Sasaki, in partnership with Torre Design, is currently engaged with the design of a new entry for the Franklin Park Zoo in Dorchester. The entry will serve as a new gateway to the zoo's grounds, and will include a penguin exhibit. The design process began with a landscaping conceptual plan and will progress through full design and construction.	Ace Torre Torre Design Consortium 5005 Magazine Street New Orleans, LA 70115 504 899 2932	2022	$15,000	$200
(2) **Bruce C. Bolling Municipal Building** Boston, Massachusetts PIC: Fiske Crowell, FAIA, LEED AP 		Sasaki worked with the City of Boston to design a municipal office building in Nubian (formerly Dudley) Square. Located in the heart of Roxbury, Nubian Square is a mass transit hub rich with culture and history. The 215,000-square-foot structure has become the headquarters of Boston Public Schools (BPS), and includes a green roof, state-of-the-art office space, retail, civic spaces, and community meeting space.	Maureen Anderson Boston Public Facilities Department 26 Court Street, 10th Floor Boston, MA 02108 617 635 0535	2015	$94,700	$7,500

(3) **Boston City Hall Plaza Renovation** Boston, Massachusetts PIC: Fiske Crowell, FAIA, LEED AP 	Sasaki, in partnership with Mayor Martin J. Walsh and the City of Boston, is embarking on a renovation of the historic Boston City Hall Plaza. The new design for City Hall Plaza aims to connect Congress and Cambridge Streets with an accessible sloped promenade activated by 21st century civic amenities like shady seating and gathering areas, a destination play space, public art space, and an iconic water feature. The main plaza will accommodate events of up to 20,000 people in a wide variety of potential configurations.	Patricia Lyons Boston Public Facilities Department 26 Court Street, 10th Floor Boston, MA 02108 617 635 4814	2021	$60,000	$1,500
(4) **Copley Square Revitalization** Boston, Massachusetts PIC: Zachary Chrisco, PE 	Sasaki is collaborating with Boston Parks and Recreation on the revitalization of the historic Copley Square, seeking to improve the quality, functionality, and resiliency of this high-profile, high-use, high-value park. The project includes comprehensive analysis of use, program, and adjacencies to inform design approach. The public process includes close collaboration with Boston Public Library and Boston Planning and Development Agency, with extensive stakeholder review, meetings, and coordination.	B Chatfield Boston Parks and Recreation Department 1010 Massachusetts Avenue Boston, MA 02118 617 504 7709	2022	$4,000	$260
(5) **UMass Boston Utility Corridor and Road Relocation** Boston, Massachusetts PIC: Mark Dawson, FASLA, PLA 	Sasaki collaborated with BVH Integrated Services to design a complete street network and landscape at UMass Boston associated with a new utility corridor. The new landscape covers 77 acres and reimagines the entire coastal edge of campus overlooking Boston Harbor. Sasaki's design creates new spaces on campus for the UMass Boston community, pedestrians and bicyclists, and the public. Sustainability plays a major role in the design, where Sasaki incorporated multiple green infrastructure strategies including bioretention, reuse of on-site construction soils and materials, and native and naturalized plantings.	Dorothy Renaghan University of Massachusetts Boston 100 Morrissey Boulevard Boston, MA 02125 617 287 5486	2019	$95,000	$1,400

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Sub-Consultant Name:	**Lahlaf Geotechnical Consulting, Inc.- Geotechnical Engineering**					
a. Project Name and Location Principal-In-Charge		b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
					Construction Costs (Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was/Is Responsible
(1)	**Braintree South Middle School** Braintree, MA Principal: Abdelmadjid M. Lahlaf	Performed and observed soil borings and test pits. Monitored ground water wells and prepared a geotechnical report with foundation design and construction recommendations, including removing existing fill. Prepared earth moving specifications and monitored restoration of test pit locations.	Miller Dyer Spears 99 Chauncy Street Boston, MA 02111 Ms. Nereyda Rodriguez Phone: (617) 338 5350 Fax: (617) 338 0033	Ongoing	Unknown	$65.7
(2)	**Carr Elementary School** Newton, MA Principal: Abdelmadjid M. Lahlaf	Performed borings and test pits and prepared a geotechnical report with foundation design and construction recommendation including underpinning of existing school foundation. Provided construction field services.	Turowski2 Architecture, Inc. P.O. Box 1290 313 Wareham Road Marion, MA 0273 Mr. Peter Turowski Phone: (508) 758 9777 Fax: (508) 758 9677	2016	Unknown	$13
(3)	**Lowell, Cuniff & Hosmer Schools** Watertown, MA Principal: Abdelmadjid M. Lahlaf	Preformed borings for Feasibility Study and DD phases. Prepared geotechnical reports containing recommendations for foundation design and construction. Currently observing preparation of subgrade for footings at two of the three schools.	Ai3 Architects, 526 Boston Post Rd, Wayland, MA 01778 L. Scott Dunlap Phone: (508) 358 0790	Ongoing	Unknown	$145.6
(4)	**Richer Elementary School** Marlborough, MA Principal: Abdelmadjid M. Lahlaf	Observed soil borings and test pits for the feasibility, SD, and DD phases of the project. Prepared geotechnical report with foundation design and construction recommendations, including removing unsuitable materials. Prepared Earth Moving Specifications and observed the construction of foundations and retaining walls.	Mount Vernon Group, Inc. 200 Harvard Mill Square, Suite 410 Wakefield, MA 01880 Mr. William Peters Phone: (781) 213-5030	2019	Unknown	$107
(5)	**Hunnewell Elementary School** Wellesley, MA Principal: Abdelmadjid M. Lahlaf	Preformed boring and test pit explorations for Feasibility Study and DD phases. Prepared geotechnical reports containing recommendations for foundation design and construction.	Symmes Maini & McKee Associates 1000 Massachusetts Ave Cambridge, MA 02138 Ms Erin Prestileo Phone (617) 547-5400	Ongoing	Unknown	$56.5

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Sub-Consultant Name:	**PEER Consultants P.C. Geoenvironmental Engineering**					
a.	Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Areas Of Experience Listed In DSB Advertisement)	c. Client's Name, Address and Phone Number (Include Name Of Contact Person)	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
					Construction Costs (Actual, Or Estimated If Not Completed)	Fee for Work for Which Firm Was Responsible
(1)	**Boston Showa Institute for Language** Boston, MA John M Corliss, Jr., PE	PEER provided natural resource site review, wetland determination and delineation services related to the proposed stormwater recharge system and electrical work on the subject property, which may occur within 100 feet of a wetland.	Prime: MDS/Miller Dyer Spears 99 Chauncy Street, 8th Floor Boston, MA 02111 James Loftus; 617-338-53501 Owner: Showa Institute for Language 420 Pond Street, Boston, MA 02130 Michael Muldowney, Tel: 617-522-0080	2019	8,000	1.4
(2)	**Raymond E. Shaw Elementary School** Millbury MA John M Corliss, Jr., PE	PEER is conducting a full hazardous building materials investigation related to the proposed demolition of an existing school building. Activities have included an ASTM 1527-13 Environmental Site Assessment, a Phase 2 Environmental Site Investigation, hazardous building materials sampling, and laboratory coordination of sampled building materials.	Prime: Turowski2 Architecture, Inc. 313 Wareham Road, PO Box 1290 Marion, MA 02738 Peter Turowski; Tel: 508-758-9777 Owner: Town of Millbury Millbury Public School 12 Martin St., Millbury, MA 01527 Tel: 508-865-9501	On-going	49,000	20.6
(3)	**Dedham Combined Town Hall and Senior Center** Dedham, MA John M Corliss, Jr., PE	PEER provided environmental services for site selection and design including Phase I ESA, ground penetrating radar survey, soil sampling investigation and hazardous materials investigation. Design services included abatement specifications and cost estimate, universal waste specification, submittal review, and construction oversight.	Prime: Turowski2 Architecture, Inc. 313 Wareham Road, PO Box 1290 Marion, MA 02738 Peter Turowski; Tel: 508-758-9777 Owner: Town of Dedham 26 Bryant St., Dedham, MA 02026 Jim Kern Tel: 781-751-9100	2019	N/A	29.4
(4)	**John Hannigan School (former) (Irwin M Jacobs)** New Bedford, MA John M Corliss, Jr., PE	PEER has conducted a full hazardous building materials investigation related to demolition of an existing school building, & reconstruction in place of a new school building. Activities have included ASTM 1527-13 Environmental Site Assessment, Phase 2 Environmental Site Investigation, MCP, UST investigation, hazardous materials inspection & remediation planning, abatement specifications, cost estimates & environmental oversight during early demolition & early construction activities.	Prime: Turowski2 Architecture, Inc. 313 Wareham Road, PO Box 1290 Marion, MA 02738 Mr. Peter Turowski; 508-758-9777 Owner: New Bedford Public Schools 455 County Street New Bedford, MA 02740 Tel: 508-997-4511	2017	28,500	72.4
(6)	**Union Square Utilities and Roadway Improvements Project** Somerville MA John M Corliss, Jr., PE	Performed a Limited Environmental Site Analysis corridor study for the Project. Based on the results, PEER completed a combined geoenvironmental investigation along the corridor, including a Limited Environmental Soil & Groundwater Sampling Investigation. The activities were completed to pre-characterize the soil & groundwater within the Union Square area as part of the proposed utility improvements. PEER's Environmental Monitor oversight continues for the project.	Prime: WSP 75 Arlington St, 9th Fl., Boston, MA 02116 Rachel Burckhardt; 617-960-4861 Owner: City of Somerville Engineering Division Infrastructure & Asset Management 93 Highland Avenue Somerville, MA 02143 Dan Amelin 617-625-6600 x5424	On-going	1,000,000	45.5

8b.	List Current and Relevant Work By Sub-Consultants Which Best Illustrates Current Qualifications In The Areas Listed In The Advertisement (Up To But Not More Than 5 Projects For Each Sub-Consultant). Use Additional Sheets Only As Required For The Number Of Sub-Consultants Requested In The Advertisement.					
Sub-Consultant Name:	**PEER Consultants, P.C. Hazardous Materials Consultant**					
a.	Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
					Construction Costs (Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was/Is Responsible
(1)	**Raymond E. Shaw Elementary School** Millbury MA John M Corliss, Jr., PE	Full hazardous building materials investigation related to the proposed demolition of an existing school building. Activities have included an ASTM 1527-13 Environmental Site Assessment, a Phase 2 Environmental Site Investigation, a visual assessment of regulated building materials, hazardous building materials sampling, and laboratory coordination of sampled building materials.	Prime: Turowski2 Architecture, Inc. 313 Wareham Road, PO Box 1290 Marion, MA 02738 Peter Turowski; Tel: 508-758-9777 Owner: Town of Millbury Millbury Public School, 12 Martin Street Millbury, MA 01527 Tel: 508-865-9501	On-going	49,000	20.5
(2)	**Elizabeth G. Lyons Elementary School** Randolph, MA John M Corliss, Jr. PE	PEER is conducting a full hazardous building materials investigation related to the proposed demolition of an existing school building. Activities have included visual assessment of regulated building materials, limited hazardous building materials sampling, and laboratory coordination of sampled building materials.	Prime: TSKP 119 Braintree St. #201 Boston, MA 02134 Mr. Yugon Kim; Tel: 617-987-0182 Owner: Randolph Public Schools 40 Highland Ave., Randolph, MA 02368 Tel: 781.961.6200	On-going	29,000 (estimated)	12.7
(3)	**John Hannigan School (former) (Irwin M Jacobs)** New Bedford, MA John M Corliss, Jr., PE	Full hazardous building materials investigation related to the demolition of existing school building, & reconstruction in place of a new school building. Activities have included ASTM 1527-13 Environmental Site Assessment, Phase 2 Environmental Site Investigation, MCP, UST investigation, hazmat inspection & remediation planning, abatement specifications, cost estimates & environmental oversight during early demolition & construction activities.	Prime: Turowski2 Architecture, Inc. 313 Wareham Road, PO Box 1290 Marion, MA 02738 Mr. Peter Turowski; Tel: 508-758-9777 Owner: New Bedford Public Schools 455 County Street New Bedford, MA 02740 Tel: 508-997-4511	2017	28,500	72.4
(4)	**Tantasqua Regional Junior High School** Fiskdale, MA John M Corliss, Jr., PE	PEER provided asbestos abatement cost estimate of assumed asbestos containing materials; preparation, hazardous material inspection, sample chain of custody documentation, and delivery of the samples services; hazardous material summary report; asbestos abatement design; and lead-safe renovation design services for this window and door replacement project.	Prime: Next Phase Studios, Architects 344 Boylston St., Boston, MA 02116 Mr. Rick Ames; Tel: 617.375.9300 Owner: Tantasqua Regional School District 320B Brookfield Rd. Fiskdale, MA 01518 Tel: 508-347-5977	On-going	1,306	15.8
(5)	**Multi-Elementary School Renovations [Hernandez, Lyndon, McKay, Quincy, Otis, O'Bryant]** Boston, MA John M. Corliss, Jr., PE	PEER provided hazardous materials services at six Boston Elementary schools under one project for window and door replacement and/or boiler room renovations. Services included asbestos and lead paint inspection, sampling and analysis of representative materials related to the proposed renovation areas. Design services include inspection, sampling, report preparation, and abatement specifications.	Prime: CSS Architects Inc. 107 Audubon Rd. Wakefield, MA 01880 Kaja Martin-Savasta, 781-245-8400 Owner: City of Boston Public Schools 2300 Washington St. Roxbury, MA 02119 Brenda Cassellius, 617-635-9000	On-Going	1,400 (estimated)	63.1

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Sub-Consultant Name:	**A. M. Fogarty & Associates, Inc. – Cost Estimator**					
a. Project Name and Location Principal-In-Charge		b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address and Phone Number Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
					Construction Costs (Actual, Or Estimated If Not Completed)	Fee for Work for Which Firm Was Responsible
(1)	**Coburn Elementary School** West Springfield, MA Peter Timothy	Cost Estimating New Construction	Town of West Springfield 29 Central Street West Springfield, MA 01089 413-495-1891	2020	$54,600	$45
(2)	**Brightwood Elementary School** Springfield, MA Peter Timothy	Cost Estimating New Construction	City of Springfield 36 Court St – Springfield, MA 01103 413-259-3333	2019	$66,000	$54
(3)	**South High Community School** Worcester, MA Peter Timothy	Cost Estimating New Construction Sitework	City of Worcester 455 Main Street Worcester, MA 01608 508-799-1121	20198	$172,900	$55
(4)	**Boston Arts Academy High School** Boston, MA Peter Timothy	Cost Estimating New Construction	City of Boston 1 City Hall Square Boston, MA 02201 617-635-4000	2018	$97,600	$62
(5)	**Clyde Brown Elementary School** Millis, MA Peter Timothy	Cost Estimating New Construction	Town of Millis 900 Main Street Millis, MA 508-376-7040	2017	$42,000	$63

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Sub-Consultant Name:	**Crabtree McGrath Associates, Inc.- Kitchen/Foodservice Consultants**					
a.	Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
					Construction Costs (Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was/Is Responsible
(1)	**Brookline High School Expansion - Cypress** Brookline, Massachusetts Principal in charge: John Sousa	Schematic Design through Construction Administration phases for a new kitchen and servery. Design of the new Culinary Arts teaching kitchen and working Café.	William Rawn Associates 10 Post office Square Boston, MA 02109 Andrew Jonic 617.423.34700	2021	$128,000	$72.9
(2)	**Brightwood Elementary School** Springfield, Massachusetts Principal in Charge: John Sousa	Crabtree McGrath Associates is in the process of preparing Construction Documents and will be performing Construction Administration services related to the commercial kitchen and the serving area.	Dinisco Design, Inc. 99 Chauncy Street Boston, MA 02111 Contact: Ms. Donna Dinisco -Crawford 617-426-2858	2022	$70,200	$21.8
(3)	**Driscoll School** Brookline, Massachusetts Principal-In-Charge: John Sousa	Crabtree McGrath Associates is preparing Construction Documents and will performed Construction Administration services related to the commercial kitchen and servery.	Ms. Kay Levi Jonathan Levi Architects 266 Beacon Street, Boston MA 02116 Phone: 617.437.9458	2023	$115,300	$35.2
(4)	**Caleb Dustin Middle School** Haverhill, MA Principal in charge: John Sousa	Crabtree McGrath Associates prepared Construction Documents and performed Construction Administration services related to the commercial kitchen and the serving area.	JCJ Architecture Mr. James LaPosta 319 A Street Boston, MA 02210 Phone: 617.532.6600	2016	$61,000	$22.0
(5)	**Galvin Middle School** Wakefield, Massachusetts Principal in charge: John Sousa	Crabtree McGrath Associates prepared Construction Documents and performed Construction Administration services related to the commercial kitchen and the serving area.	Tappe Architects Mr. Charles Hay 6 Edgerly Place Boston, MA 02116 Phone: 617-451-0200	2015	$74.400	$16.7

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Sub-Consultant Name: **Miller Dyer Spears Inc.- Laboratory**						
a.	Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
					Construction Costs (Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was/Is Responsible
(1)	**Malden Catholic High School** **Learning Commons and Science Center Renovation** Malden, MA William C. Spears, AIA, LEED AP Principal-in-Charge	Renovation of the Malden Catholic High School library, creating a new learning commons, and renovation of the science labs, creating a new science center, in addition to an elevator addition and fire protection upgrades. Work encompassed 67,000 gsf.	MCHS- 99 Crystal Street Malden, MA 02148 Steve O'Neill, MCHS Trustee Assoc./Principal Engineer Hayner/Swanson, Inc. 3 Congress St. Nashua, NH 603-883-2057	2014	$2,887	$312
(2)	**Catholic Memorial School** **Center for Integrated and Applied Learning** West Roxbury, MA Kate Wonkka AIA, LEED AP BD+C, WELL AP Principal-in-Charge	Full study, architectural, interior design and construction administration services for the 8,000 sf renovation of a 1970s school, adapting a former residential wing. Supporting hands-on, project-based learning and STEAM skills development, the CIAL includes a wet lab and art studio, build and create studio/maker space, digital studio, collaborate and share studio, and black box theatre.	Brian Palm, Dir. of Operations Catholic Memorial School 235 Baker Street West Roxbury, MA 02132 617-469-8020	2020	$4,500	$755
(3)	**Gann Academy Innovation Center** Waltham, MA Kate Wonkka AIA, LEED AP BD+C, WELL AP Principal-in-Charge	Full architectural, interior design and construction administration services for a 14,000 sf renovation of a 2003 school, adapting the library into a learning commons with adjacent maker spaces and labs for prototyping, fabrication, digital media and robotics, as well as an Academic Resource Center for student advising.	Gail Schulman Chief Operating Officer Gann Academy 781-642-6800 X107 gschulman@gannacademy.org	2019	$1,732	$184.9
(4)	**University of Massachusetts Dartmouth** **Violette Inorganic Chemistry Laboratories Renovation** Dartmouth, MA Kate Wonkka, AIA, LEED AP, BD+C Principal-in-Charge	As part of our House Doctor Contract with the University of Massachusetts Dartmouth, MDS designed the renovation of two inorganic chemistry labs. The project involved the ft-out of approximately 1,500 sq. ft. on the second floor of the Violette Building, which was undergoing an upgrade of its fire protection system. The renovation provided new research space for the Manke and Cappillino Labs. Equipment intensive labs, most of the research involves use of flammable, pyrophoric and toxic materials, and is done on the fume hoods and glove box. Design and finishes follow UMD Lab standards	University of Massachusetts Dartmouth 285 Old Westport Road Dartmouth, MA 02747-2300 Crystal Bradwin University Architect 508-999-8000 x6428	2016	$1,300	$150
(5)	**Loew Teaching Lab Renovation** **Tufts University, Cummings School of Veterinary Medicine** Grafton, MA Kate Wonkka AIA, LEED AP BD+C, WELL AP Principal-in-Charge	Renovation of a lab in the basement of the Franklin M. Loew Veterinary Education Center. The primary goal of the project was to provide a new flexible learning environment for 50 students, serving the Microbiology, Pathology and Infectious Diseases programs. The project involved the renovation of approximately 1,200 sf of existing classroom. The flexible layout includes overhead distribution, sinks and other fixed equipment located on the perimeter.	Chris Hogan Construction Program Manager Tufts University Medford/Somerville Campus 781-870-0454	2017	$434	463

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Sub-Consultant Name: **Acentech - Acoustics Consulting**						
a.	Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Areas Of Experience Listed In DSB Advertisement)	c. Client's Name, Address and Phone Number (Include Name Of Contact Person)	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
					Construction Costs (Actual, Or Estimated If Not Completed)	Fee for Work for Which Firm Was Responsible
(1)	**Brookline High School** Braintree, MA **Jonah Sacks** Principal Consultant	Acentech is providing acoustical and AV consulting services for the renovation and expansion of the Brookline High School. The scope of services includes environmental noise and vibration mitigation, community noise evaluation, architectural acoustics, and an audiovisual system for various spaces.	William Rawn Associates, Architects, Inc. 10 Post Office Square Suite 1010 Boston, MA 02109 Sindu Meier AIA (617) 598-3317	2021 (Est.)	$135,000 (Est.)	$144.5
(2)	**Braintree South Middle School** Braintree, MA **Jonah Sacks** Principal Consultant	Acentech provided acoustical consulting services for the feasibility study and schematic design phases of the South Middle School Project. Acentech focused on creating an acoustical environment that is consistent with LEED standards.	Millller Dyer Spears 99 Chauncy St. 8th Floor Boston, MA 02111 William Spears AIA, LEED AP BD+C (617) 338-5350	2021 (Est.)	$90,000 (Est.)	$36.0
(3)	**Belmont Middle / High School** Belmont, MA **Kristen Murphy** Project Manager	Acentech is providing acoustical and AV consulting services for the new Belmont Middle / High School. Our scope includes room acoustics, sound isolation, HVAC system noise and vibration control and AV system design.	Perkins + Will 225 Franklin St. Suite 1100 Boston, MA 02110 Brooke Trivas AIA, MCPPO, LEED AP BD+C (617) 478-0300	2021 (Est.)	$313,000 (Est.)	$175.0
(4)	**Leicester Middle School** Leicester, MA **Nicole Cuff** Project Manager	Acentech is providing acoustical consulting services for the Leicester Middle School. The scope of services includes sound isolation and room acoustics, and mechanical system noise and vibration control	Finegold Alexander Architects 77 North Washington St. Boston, MA 02114 Regan Ives AIA, LEED (617) 227-9272	2020 (Est.)	$70,000 (Est.)	$5.0
(5)	**North Reading Middle and High School** North Reading, MA **Ioana Pieleanu** Principal Consultant	Acentech provided acoustics and audiovisual consulting services for the 267,000 sf Middle & High School in North Reading, MA. Auditorium, gym, typical classrooms, music rooms and TV studio.	Dore & Whittier Architects, Inc. 29 Water Street Newburyport, MA 01950 Brad Dore (978) 499-2999	2017 (Act.)	$123,228 (Act.)	$57.0

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Sub-Consultant Name:	**Miller Dyer Spears Inc. – Specifications**					
a. Project Name and Location Principal-In-Charge		b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
					Construction Costs (Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was/Is Responsible
(1)	**City of Braintree** **East Middle School** **Renovation & Expansion** Braintree, MA Will Spears, AIA, LEED AP, MCPPO Principal-in-Charge	Approx. 185,000sf renovation and expansion for 1,180 students in grades 5-8. Expansion includes new two-story entry with offices and conference room, as well as a new Media Commons connected to separate Innovation Labs. A new double loaded two-story classroom addition will accommodate a larger student population. The project is targeting LEED Silver certification.	Michael Carroll, MCPPO Project Director Hill International 330 Congress Street 6th Floor Boston, MA 02210 617-778-0930	2020	$66,424 (Est.)	$6,751 (Est.)
(2)	**City of Newburyport** **Nock-Molin School Phased** **Renovations** Boston, MA James Loftus, RA, LEED GA, NCARB Principal-in-Charge	Renovation of a 1970s building that reorganized the arts and special education programs, integrated comprehensive accessibility improvements, and addressed structural defects and water infiltration. The school serves 900 students in grades 4-8.	Anthony Pruner, PE Senior Associate Heery, 781-494-9000 apruner@heery.com	2014	$21,831	$1,240
(3)	**Phillips Exeter Academy Lamont** **Health & Wellness Center** **Renovation & Expansion** Exeter, NH Myron Miller, AIA Principal-in-Charge	Addition and renovation to a 1923 building including reconfiguration of layout and interior design of existing floors to improve operations. Renovations included reconfigured outpatient space, infirmary, nurse station oversight, lounge, kitchen and staff space, counselor therapy and consultation rooms, Health Education classrooms, meeting space, and shared office, workroom, and support space. Green roof and rainwater garden were incorporated to reflect the school's commitment to sustainable design.	Roger Wakeman Director of Facilities Management 603-777-3292	2014	$7,227	$507
(4)	**Massachusetts College of** **Art Kennedy Campus Center** **Renovation & Addition** Boston, MA Myron Miller, AIA Principal-in-Charge	Complete planning, design and construction feasibility study, existing conditions evaluation, comprehensive planning, design & construction for renovation of three floors of existing academic and student center building. New glazed addition, facades and exterior image, and improved entrance, student services, student organization offices, dining facilities, bookstore, student lounges, art galleries, and cafe; HVAC & building infrastructure & utility upgrades. LEED Gold Certified	Ed Adelman Executive Director MSCBA 136 Lincoln Street Boston, MA 02111 617-542-1081	2010	$8,500	$1,126
(5)	**Framingham State University** **McCarthy Dining Commons** **Improvements** Framingham, MA Amy MacKrell, AIA, LEED AP BD+C Principal-in-Charge	Comprehensive renovation of existing servery to modernize operations and revitalize the student dining experience. Included reconfiguration of serving stations, sustainable finishes in dining areas, updated check-in stations. The 13,500sf renovation was completed in one summer to allow use during academic calendar year.	Amanda Forde Director of Capital Renewal MSCBA 617-542-1081 aforde@mscba.org	2018	$1,997	$303

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Sub-Consultant Name: **Miller Dyer Spears Inc. – Library/Media**						
a.	Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands) Construction Costs (Actual, Or Estimated If Not Completed)	 Fee For Work For Which Firm Was/Is Responsible
(1)	**City of Braintree** **East Middle School** **Renovation & Expansion** Braintree, MA Will Spears, AIA, LEED AP, MCPPO Principal-in-Charge	Approx. 185,000sf renovation and expansion for 1,180 students in grades 5-8. Expansion includes new two-story entry with offices and conference room, as well as a new Media Commons connected to separate Innovation Labs. A new double loaded two-story classroom addition will accommodate a larger student population. The project is targeting LEED Silver certification.	Michael Carroll, MCPPO Project Director Hill International 330 Congress Street 6th Floor Boston, MA 02210 617-778-0930	2020	$66,424 (Est.)	$6,751 (Est.)
(2)	**City of Braintree** **South Middle School** Braintree, MA Will Spears, AIA, LEED AP, MCPPO Principal-in-Charge	New 148,000 sf middle school replacing an existing school, targeting LEED Silver certification. MDS is providing full architectural design-CA, interior design, FF&E, and Sustainable Design for LEED submission services. The new school includes a state-of-the-art media center.	Michael Carroll, MCPPO Project Director Hill International 330 Congress Street 6th Floor Boston, MA 02210 617-778-0930	2023	$69,200 (Est.)	$720 (Study and SD)
(3)	**City of Boston** **Branch Library Renovations** **(Various branches)** Exeter, NH Amy MacKrell, AIA, LEED AP BD+C Principal-in-Charge	Targeted renovations to multiple BPL branches - Lower Mills (8,000 sf), South Boston (10,700 sf), and West Roxbury (24,200 sf). MDS provided architectural and interior design services.	Lissa Schwab Major Projects Coordinator Boston Public Library City of Boston 700 Boylston Street Boston, MA 02116 617-859-2051	2020	$500	$35
(4)	**City of Cambridge** **Main Library Lighting Study** Cambridge, MA Amy MacKrell, AIA, LEED AP BD+C Principal-in-Charge	Study for lighting improvements to the historic portion of Cambridge Public Library's main branch	William F. Courier Manager, Finance & Operations 449 Broadway Cambridge, MA 02138 617-349-4040	2019	n/a	$8
(5)	**Phillips Exeter Academy Lamont** **Health and Wellness Center** **Renovation & Addition** Exeter, NH Myron Miller, AIA Principal-in-Charge	Addition and renovation to a 1923 building including reconfiguration of layout and interior design of existing floors to improve operations. Renovations included a Health & Wellness Library. Green roof and rainwater garden were incorporated to reflect the school's commitment to sustainable design.	Roger Wakeman Director of Facilities Management 603-777-3292	2014	$7,227	$507

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Sub-Consultant Name:	**DGI Communications (DBA ACT Associates)- Technology/Audio-Visual Consultant**					
a. Project Name and Location Principal-In-Charge		b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
					Construction Costs (Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was/Is Responsible
(1)	**Wheaton College** Norton, MA (PIC) Peter Thompson	AV Design for Old Science Center – 18 Classrooms, 4 Conference rooms, Maker space, Digital Signage Deployment, Active Learning Classrooms, Seminar Rooms (MDS – Architect)	Ellen Kane – Director of Media Services – Wheaton College (508)-286-3806	Estimated – September 2021	$30,000 (est)	$69
(2)	**UCONN- STEM Science One** UCONN Campus – Storrs, CT (PIC) Peter Thompson	AV Design for New STEM Science 1 Building on Storrs Main Campus – 200,000SF Includes full AV Design for Teaching Labs, Core Labs, Computational Labs, 300 Seat TEAL Classroom, Collaboration areas	Jeffrey Albright – UITS/AV Technology UCONN – Storrs, CT 860-486-1782	Estimated June of 2022	$95,000	$89
(3)	**UCONN – Hartford Times Building** Hartford, CT (PIC) – Peter Thompson	AV Design for new Downtown Hartford, CT Campus. 60,000SF includes for AV Design for Classrooms, and Teaching Labs	Jeffrey Albright – UITS/AV Technology UCONN – Storrs, CT 860-486-1782	Completed in August 2017	$140,000	$80
(4)	**University of Hartford** West Hartford, CT – New Academic Building (PIC) Peter Thompson	AV Design for new Academic Building and Renovations to existing buildings 65,000SF – AV Design included College of Engineering, Technology and Architecture and College of Education. Included classrooms and teaching labs.	Sebby Sorrentino Assistant VP -of Operations University of Hartford 860-768-4034	Estimated Fall of 2021	$58,000	$90
(5)	**Skating Club of Boston** (Norwood Media) New USFS Skating Rink Facility (PIC) Peter Thompson	AV Design for New 3 Rink Skating Facility -Includes Main Center Rink to be used for USFS Skating events with full rink audio System. ACT worked with Norwood Media on their Broadcast facility within Rink 3 to support Norwood HS Hockey Team	Jack Tolman Norwood Community Media 781-801-2120	Completed Sept 2020	$37,000	$85

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Sub-Consultant Name: **Port Lighting Systems- Theatrical Consultant**						
a.	Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands) Construction Costs (Actual, Or Estimated If Not Completed)	 Fee For Work For Which Firm Was/Is Responsible
(1)	**Hingham Middle School** 1103 Main Street Hingham Ma 02043 Daniel Bourgeois, Principal-in-Charge	Install: complete dimming, staging platforms, control, curtains, track, automated hoists, audio, Led and conventional fixtures, pipe grids. Integration, training of system	Brait Builders Bob Brait 781-837-6400 506 Plain Street, Suite 201 Marshfield, MA 02050 Architect AI3	2014	$50,932.43	$370.25
(2)	**Braintree East Middle School** 348 Pond Street Braintree Ma 02184 Ron Kuszmar II, Principal-in-Charge	Design: wrote specification, work with architect. Install: dimming, control, curtains, track, automated rigging, audio, clear com, assisted listening, led fixtures. Integration and training of system.	Architect Miller Dyer Spears Danyul Cho 617-338-5350 GC: Shawmut Construction Inc. 560 Harrison Avenue Boston, MA 02118	2019	$83,000	$546.68
(3)	**Philips Academy Tang Theater** 180 Main Street Andover Ma 01810 Ron Kuszmar II, Principal-in-Charge	Install: Dimming, control, curtains, track, motorized hoist for Austrian curtain, automated rigging, counterweight sets, audio. *Port Lighting was also the GC for the project, responsible for bringing in the subs, electrician to do the work. Pull all necessary permits.*	Contact: Casey Russo 978-749-4679 Consultant: Cavanaugh Tocci Alex Bagnall	2019	$1,410.58	$1,410.58
(4)	**Philips Exeter Goel Center for Theater and Dance** 20 Maine Street Exeter, NH 03833 Daniel Bourgeois, Principal-in-Charge	Install: Dimming, control, curtains, track, automated rigging, studio grids, Integration and training of system. 5 theatrical spaces under one roof.	Architect: Tod Williams Billie Tsien GC: Daniel O'Connell's Sons PM: Kevin Burns 413-534-5667 480 Hampden Street Holyoke, MA 01040	2019	N/A	$849.85
(5)	**Brooks School Center for the Arts** 1160 Great Pond Road North Andover, MA 01845 Daniel Bourgeois, Principal-in-Charge	Install: Dimming, control, curtains, track, automated rigging, acoustic shells, studio grid, Integration and training of system	GC: Consigli Construction Co. Inc. Construction Managers and General Contractors 72 Sumner Street Milford, MA 01757 508-473-2580	2018	$28,000	$478.97

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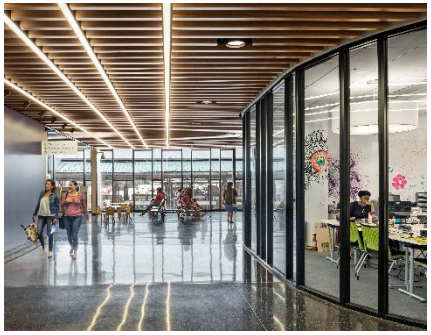
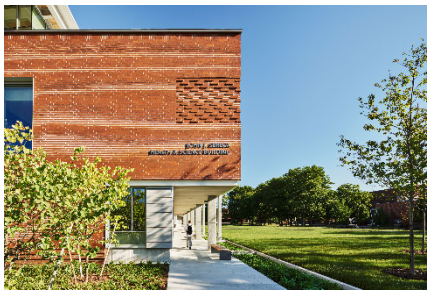
Sub-Consultant Name:	**Sasaki Architects, P.C. | Sustainable/Green Design/Renewable Energy Consultant**					
a. Project Name and Location Principal-In-Charge		b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
					Construction Costs (Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was/Is Responsible
(1) **Bruce C. Bolling Municipal Building** Boston, MA PIC: Fiske Crowell, FAIA, LEED AP 		Sasaki worked with the City of Boston to design a municipal office building in Nubian (formerly Dudley) Square. Located in the heart of Roxbury, Nubian Square is a mass transit hub rich with culture and history. The 215,000-square-foot structure has become the headquarters of Boston Public Schools (BPS), and includes a green roof, state-of-the-art office space, retail, civic spaces, and community meeting space. Certified LEED Gold.	Maureen Anderson Boston Public Facilities Department 26 Court Street, 10th Floor Boston, MA 02108 617 635 0535	2015	$94,700	$7,500
(2) **Bristol Community College John J. Sbrega Health and Science Building** Fall River, MA PIC: Fiske Crowell, FAIA, LEED AP 		While initial requirements called for Massachusetts LEED Silver Plus, the team made a strategic investment to develop a Zero Net Energy design, which would balance annual energy consumption with renewable energy generated on site. The resultant design is projected to use less than 20% of the new array and no fossil fuels for heating and cooling. Significantly, the ZNE design was achieved without increasing the budget, serving as an important benchmark for future campus development and a model for other institutions. Zero Net Energy; LEED Platinum certified.	Steve Kenyon Bristol Community College 777 Elsbree Street Fall River, MA 02720 508 678 2811	2016	$42,800	$1,000

(3) **Massachusetts Bay Community College Health Science Center** Framingham, Massachusetts PIC: Fiske Crowell, FAIA, LEED AP 	This building will provide a new home for Massachusetts Bay Community College's health sciences programs, a key component of the school's offerings, along with new facilities for early childhood education and general education classes. With plans to accommodate a third-party photovoltaic solar array at the parking lot and the building roof, along with highly efficient systems and a geothermal wellfield, the building will be Zero Net Energy ready. LEED Silver minimum is targeted, and this building will meet Massachusetts LEED Plus.	Elayne Campos Massachusetts Division of Capital Asset Management and Maintenance 1 Ashburton Place #15 Boston, MA 02108 617 727 4050	2023	$39,000	$1,379
(4) **Harvard University ArtLab** Boston, Massachusetts PIC: Lan Ying Ip, AIA 	The building, which complies with Massachusetts's high energy-efficiency standards, is constructed of lightweight steel columns and open web steel trusses on a concrete slab on grade. Framing is mechanically fastened, able to be assembled and disassembled easily and efficiently, allowing for the building to be transferred and given a second life when needed. The steel frame is clad in transparent insulated glass and lightweight high-insulating polycarbonate panels. Energy is produced on site via a roof-mounted photovoltaic array. Building has achieved Zero Net Energy.	Shirin Karanfiloglu Harvard Capital Projects 1350 Massachusetts Avenue Cambridge, MA 02138 617 384 7512	2018	Confidential	Confidential
(5) **Southern Connecticut State University School of Business** New Haven, CT PIC: Fiske Crowell, FAIA, LEED AP 	The new Business School Instructional Facility for Southern Connecticut State University is a 65,000-SF classroom building that targets zero net energy and Connecticut High Performance Building standards. Through creative siting and massing, the design improved upon the school's initial concept by opening up part of the landscape to connect to a nearby quad and preserving a grove of mature trees.	David Barkin Connecticut Department of Administrative Services 450 Columbus Boulevard, Suite 1301 Hartford, CT 06103 860 713 5631	2022	$30,000	$740

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Sub-Consultant Name: **Hastings Consulting, Inc.- Code Consultant**						
a.	Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
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(1)	**Devotion School** Brookline, MA Kevin Hastings, P.E.	Code consulting services for renovation and addition to existing elementary school.	Vassilios Valaes HMFH Architects 130 Bishop Allen Dr, Cambridge, MA 02139 (617) 492-2200	2018	$120,000	$7
(2)	**Codman Academy Charter School** Dorchester, MA Kevin Hastings, P.E.	Code consulting services for conversion of an existing commercial building for use as a K-8 charter school	Nereyda Rodriguez MDS | MILLER DYER SPEARS 99 Chauncy Street, 8th Floor Boston, MA 02111 (617) 338-0033	2016	$12,000	$7
(3)	**Hannigan Elementary School** New Bedford, MA Kevin Hastings, P.E.	Code consulting services for the construction of a new K-5 school.	Peter Turowski Turwoski2 Architecture P.O. Box 1290 313 Wareham Road Marion, MA 02738 (508) 758-9777	2017	$27,000	$10
(4)	**Hastings Elementary School** Lexington, MA Kevin Hastings, P.E.	Code consulting services for new 645 student elementary school.	Vivian Low DiNisco Design Partnership 99 Chauncy Street, Suite 901 Boston, MA 02111 (617) 426-2858	2020	$63,000	$10
(5)	**Clarksburg Elementary School** Clarksburg, MA Kevin Hastings, P.E.	Code consulting services for study of existing school for grades K-8.	Margo Jones Jones Whitsett Architects 308 Main Street Greenfield, MA 01301 (413) 773-5551	2018	Study	$7

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Sub-Consultant Name: **Miller Dyer Spears Inc.- Accessibility**						
a.	Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands) Construction Costs (Actual, Or Estimated If Not Completed)	 Fee For Work For Which Firm Was/Is Responsible
(1)	**Malden Catholic High School Learning Commons and Science Center Renovation** Malden, MA William C. Spears, AIA, LEED AP Principal-in-Charge	Renovation of the Malden Catholic High School library, creating a new learning commons, and renovation of the science labs, creating a new science center, in addition to an elevator addition and fire protection upgrades. Work encompassed 67,000 gsf.	MCHS- 99 Crystal Street Malden, MA 02148 Steve O'Neill, MCHS Trustee Associate/Principal Engineer Hayner/Swanson, Inc. 3 Congress Street Nashua, NH 03062 603-883-2057	2014	$2,887	$312
(2)	**Catholic Memorial School Center for Integrated and Applied Learning** West Roxbury, MA Kate Wonkka AIA, LEED AP BD+C, WELL AP Principal-in-Charge	Full study, architectural, interior design and construction administration services for the 8,000 sf renovation of a 1970s school, adapting a former residential wing. Supporting hands-on, project-based learning and STEAM skills development, the CIAL includes a wet lab and art studio, build and create studio/maker space, digital studio, collaborate and share studio, and black box theatre.	Brian Palm Director of Operations Catholic Memorial School 235 Baker Street West Roxbury, MA 02132 617-469-8020	2020	$4,500	$755
(3)	**Phillips Exeter Academy Lamont Health & Wellness Center Renovation & Expansion** Exeter, NH Myron Miller, AIA Principal-in-Charge	Addition and renovation to a 1923 building including reconfiguration of layout and interior design of existing floors to improve operations. Renovations included reconfigured outpatient space, infirmary, nurse station oversight, lounge, kitchen and staff space, counselor therapy and consultation rooms, Health Education classrooms, meeting space, and shared office, workroom, and support space. Green roof and rainwater garden were incorporated to reflect the school's commitment to sustainable design.	Roger Wakeman Director of Facilities Management 603-777-3292	2014	$7,227	$507
(4)	**Malden Catholic High School Girls Catholic Renovation and Expansion** Malden, MA Kate Wonkka AIA, LEED AP BD+C, WELL AP Principal-in-Charge	Renovation of 24,000sf and a minor addition implemented on a fast-track schedule to expand into a co-divisional school. The new facilities include a Learning Commons with a central courtyard, classrooms, meeting rooms, faculty offices, and a nurses' office.	Domenic (D.J.) Cacciapuoti Jr., Director of Facilities MCHS- 99 Crystal Street Malden, MA 02148 781-475-5309 cacciapuotid@maldencatholic.org	2018	$4,190	$381
(5)	**Massachusetts Institute of Technology MIT Medical Accessibility Survey and ADA/ MAAB Compliance Renovations** Cambridge, MA Myron Miller, AIA, Principal-in-Charge	Comprehensive renovations implemented in four phases over nine years of the six-floor, 100,000sf Homberg Infirmary. Project enhances clinical operations, expands critical services, and upgrades interior treatments and building systems.	Massachusetts Institute of Technology 77 Massachusetts Ave. Cambridge, MA 02139 Robert Bright, Facilities Manager 617-253-8251	2013	$8,000	$53

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Sub-Consultant Name: **Vanasse & Associates, Inc. – Traffic Consultant**						
a.	Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands) Construction Costs (Actual, Or Estimated If Not Completed)	 Fee For Work For Which Firm Was/Is Responsible
(1)	**Fuller Middle School Feasibility Study** Framingham, MA F. Giles Ham, P.E.	VAI completed an evaluation of existing conditions which included observations of existing traffic, pick-up and drop-off circulation, busing, pedestrians, vehicle queuing, level-of-service operations and safety deficiencies in the vicinity of the school. The final phase on the project is an assessment of the relocated school within the existing campus	Mr. Philip Gray Jonathan Levi Architects 266 Beacon Street Boston, MA 02116 617-437-945	2019	N/A	$25,000
(2)	**Proposed Saugus High School/ Middle School** Saugus, Massachusetts F. Giles Ham, P.E	VAI prepared a Traffic and Parking Study to evaluate the anticipated traffic impacts associated with the development of a new High School and Middle School off Pierce Memorial Drive in Saugus, MA. This study included observations of existing traffic and parking conditions in the vicinity of the project site, an analysis of the anticipated increase and traffic and parking demand associated with the project and made recommendations to enhance future traffic operations in the vicinity of the school. VAI also assisted in the design and permitting of a new Route 1 exit only driveway.	Tina Stanislaski, AIA, LEED HMFH Architects, Inc. 130 Bishop Allen Drive Cambridge, MA 02139	2018	N/A	$50,000
(3)	**Baldwin Elementary School** Brookline, MA F. Giles Ham, P.E.	VAI prepared a Transportation Impact Assessment to identify the potential traffic impacts associated with the 453-student elementary school with 86 staff Baldwin 2 Section PK-8 School to be located off Heath Street in Brookline, MA. In addition, critical measures have been recommended to facilitate traffic flow in the area and to manage peak conditions. These include: crossing guard control at Heath Street at Oak Street (School Drive), new phasing and timing at Heath Street and Hammond Street with a crossing guard; and a recommended Earlier Start Time. These new measures are designed to improve area safety conditions and reduce the school traffic during the area peak periods	Mr. Philip Gray Jonathan Levi Architects 266 Beacon Street Boston, MA 02116 617-437-9458	2019	N/A	$75,000
(4)	**Driscoll School Expansion** Brookline, MA F. Giles Ham, P.E.	VAI completed a detailed assessment of the potential impacts on the transportation infrastructure associated with the proposed Driscoll School Expansion located along Westbourne Terrace and Washington Street in Brookline, MA. The proposed expansion will accommodate up to 800 students with 125 staff. The school size will be increased by 168 students. As a result of the new school plan and recommended changes, the overall traffic and safety conditions in the area will be improved.	Mr. Philip Gray Jonathan Levi Architects 266 Beacon Street Boston, MA 02116 617-437-945	2019	N/A	$25,000
(5)	**Groton School** Groton, MA Stephen M. Boudreau, P.E.	VAI is providing on-going transportation services in support of the Groton School Master Plan. The impacts of a Route 111 Bypass including permitting issues and funding sources are being evaluated.	Mr. J. Hale Smith Chief Financial Officer Groton School, Box 991 Groton, MA 01450 978-448-7566	ongoing	N/A	$100,000

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Sub-Consultant Name: **Point Line Space- Furniture Fixtures and Equipment Consultant**						
a. Project Name and Location Principal-In-Charge		b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
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(1)	King Open/Cambridge Street Upper School (PreK - 5) Cambridge, MA (Architect: Rawn/Arrowstreet) Peter S. Constable	Furniture and equipment, layouts, selection, procurement, installation oversight, Technology selection and procurement	William Rawn Associates 10 Post Office Square Boston, MA 02109 Samuel Lasky (617) 423-3470	2019	F&E/T $5,000	$195
(2)	Cabot Elementary School Newton, MA (Architect: DiNisco Design) Peter S. Constable	Library/Media consulting, furniture and equipment, layouts, selection, procurement, and installation oversight	DiNisco Design Partnership 99 Chauncy Street Boston, MA 02111 Donna DiNisco, Principal (617) 426-2858	2019	F&E $815	$55
(3)	Carver Elementary School Carver, MA (Architect: HMFH Architects, Inc.) Peter S. Constable	Library/Media consulting, furniture and equipment, layouts, selection, procurement, and installation oversight	HMFH Architects, Inc. 130 Bishop Allen Place Cambridge, MA 02139 Laura Wernick, Senior Principal 617.492.2200	2018	F&E $1,133	$62.4
(4)	Woodland Elementary School Milford, MA (Architect: HMFH Architects, Inc.) Peter S. Constable	Library/Media consulting, furniture and equipment, layouts, selection, procurement, and installation oversight	HMFH Architects, Inc. 130 Bishop Allen Place Cambridge, MA 02139 Laura Wernick, Senior Principal 617.492.2200	2016	F&E $1,000	$70.55
(5)	Martin Luther King, Jr. School Cambridge, MA (Pre-K – 5) (Architect: Perkins Eastman Architects) Peter S. Constable	Library/Media consulting, furniture and equipment, layouts, selection, procurement, and installation oversight. Technology selection and procurement	Perkins Eastman Architects 50 Franklin Street, Suite 203 Boston, MA 02110 Alicia Caritano, AIA, LEED AP 617.449.4000	2015	F&E/T $3,015	$108.875

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Sub-Consultant Name: **Feldman- Site Surveying**						
a. Project Name and Location Principal-In-Charge		b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
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(1)	**UMass Boston Campus** Boston, MA Paul Foley/Tim Agurkis	Feldman provided UMass with a full existing conditions and utility survey for its entire Dorchester campus. The survey was used for the design and installation of updated utilities and development of parcels for new dormitory and academic buildings.	Jim Velleman, PE BVH Integrated Services P.C. 50 Griffin Road South Bloomfield, CT 06002 860-286-917	2012	N/A	N/A
(2)	**Binney Street Redevelopment** Cambridge, MA Tim Agurki	As the surveyor of record, Feldman provided boundary Surveys, Existing Conditions/Utility Surveys ,ALTA Surveys, Easement and AUL Plan Preparation, and construction layout for all of Alexandria Real Estate properties from Land Blvd. to Cardinal Medeiros Ave.	Andy Reinach Senior Vice President Development & Construction Alexandria Real Estate Equities, Inc. 400 Technology Square, Suite 101 Cambridge, MA 0213	Ongoing	N/A	N/A
(3)	**City of Cambridge River Street** Cambridge, MA Damien Raffle	As part of the On-Call House Doctor contract with the City of Cambridge, Feldman is assisting by providing survey and data collection for existing condition to reconstruct a vital urban corridor leading to the heart of Central Square. The project will provide both grey and green infrastructure to manage stormwater volume and promote water quality to meet stringent MS4 standards for discharging stormwater to the Charles River. The team's blending of old and new practices in constrained environment with a high water table will provide for a design to meet and exceed the challenges of Climate Change in the coming years.	Arthur Bonney, PE LEED AP Project Manager HDR 99 High Street Suite 2300 Boston, MA 02110-237	Ongoing	N/A	N/A
(4)	**Encore Boston Harbor** Everett, MA Paul Foley/Tim Agurkis	The largest private single-phase construction project in the history of the Commonwealth of Massachusetts – Feldman is proud to have worked on the project since its inception,Feldman has spent every day since providing office and field support from Laser Scanning, field engineering, existing conditions and ALTAs to both Suffolk Construction and Wynn Development.	Richard Michaels Suffolk Construction 65 Allerton Street Boston, MA 02119 617-719-6540	2019	N/A	N/A
(5)	**MIT South of Main Project** Cambridge, MA Damien Raffle	Covering an area of 21 acres in Cambridge, Feldman provided full boundary, existing conditions, ALTA survey, and construction layout services for the construction of four multi-use developments.	Maureen McCaffrey MIT Investment Management Co. 238 Main Street, Suite 200 Cambridge, MA 617-452-3039	Ongoing	N/A	N/A

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Sub-Consultant Name: **Pamela Perini Consulting- Security Consultant**						
a.	Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
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(1)	**Boston Housing Authority** **Authority-Wide Video Management System Upgrade** 125A Amory Street Boston, MA 02119 (Various Property Sites)	BHA is doing an Authority-wide CCTV upgrade and additions to roughly 35 properties that include cameras, switches, software, servers, wireless antennas, communications, etc. PPC is the Security Consultant and is working in conjunction with David Pereira of GGD (Electrical Engineer.) Currently in 95% CD.	Mauori Stavenson 617-988-5395 Boston Housing Authority Capital Construction 125A Amory Street Boston, MA	2022	$4,500 (est.)	TBD
(2)	**Easton Early Elementary School** 50 Spooner Street Easton, MA	MSBA School project in Easton, MA. The Building to be approx. 148,244 sq. ft and will include spaces for the School District Central Administration Offices. Scope to include Security Systems Design, Landscape & CPTED review.	Daniel Colli, Principal 617-449-4000 Perkins Eastman Architects 20 Ashburton Place, Floor 8 Boston, MA 02108	2023/4	$100,000 (est.)	TBD
(3)	**Dennis-Yarmouth Intermediate School** 296 Station Street South Yarmouth, MA	MSBA School project in South Yarmouth, MA. The Building to be approx. 187,200 sq. ft. Scope to include Security Systems Design, Landscape and CPTED review.	Daniel Colli, Principal 617-449-4000 Perkins Eastman Architects 20 Ashburton Place, Floor 8 Boston, MA 02108	2022/3	$120,000 (est.)	TBD
42)	**Braintree South Middle School** 232 Peach Street Braintree, MA 02184	Provide security consulting and documentation (specifications) services for New Middle School in Braintree, MA.	Nereyda Rodriguez, AIA, LEED AP BD+C, MCPPO 617-338-5350 Associate, Director of Sustainable Design Miller Dyer Spears 99 Chauncy St, 8th Fl. Boston, MA 02111	2023	$95,000 (est.)	TBD
(5)	**Leominster Public Safety Building** Leominster, MA	Provide security consulting and documentation (drawings and specifications) services for Public Safety building in Leominster, MA. Currently in site selection (09/2020).	Michael McKeon, Principal 508-203-8760 Kaestle Boos Associates Inc. 16 Chestnut Street Suite 301 Foxborough, MA 02035	2023/4	$37,200 (est.)	TBD

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Sub-Consultant Name:	**Campbell-McCabe Worldwide LLC- Hardware Consultant**					
a. Project Name and Location Principal-In-Charge		b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
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(1)	**Boston Public Library, PH I&II** 700 Boylston Street Boston, MA Susan McCabe Messier, DHT Principal	The Johnson Building 156,00 SF in renovations in two phases. 2015 Phase I, Renovations include many existing to remain door frames with new doors and hardware. 2016 Phase II Includes new doors, frames hardware, security upgrade and an additional entry point and retail.	Carla Ceruzzi Associate William Rawn Assoc. 10 Post Office Square, Suite 1010 Boston, MA 02109 617-598-3332 (D)	2015 & 2016	$111,000	$22
(2)	**East Boston Public Safety Building District, A-7** Eagle Street Boston, MA Susan McCabe Messier, DHT Principal	New 27,000 square-foot, 3 story station includes community space and public art. Carbon footprint in mind the Eagle St building is part of the Mayor's Climate Action Plan goals with LEED Silver Scope items: Consulting Door Hardware and Security interface.	James Vogel, AIA, CSI, LEED AP Senior Associate Leers Weinzapfel Assoc. Architects 75 Kneeland St., 301, Boston, MA O: 617-426-5711 x 24	TBA	$30,000	$15
(3)	**Boston City Hall Plaza Renovation** Boston, MA Susan McCabe Messier, DHT Principal	Mayor Walsh stated that, "City Hall Plaza is one of Boston's most-used public spaces, and we are working hard to create safe areas for residents to gather as we strengthen our commitment to civic services in our City." Some changes include North Bldg entry re-opening. added platform for performances. Scope items: Consulting Door Hardware Specifications	Kate Tooke. ASLA, PLA Associate Principal Sasaki 64 Pleasant St Watertown, MA O: 617-923-3300	3 phases set to begin August 2020, 20 months to completion	$70,000	$15
(4)	**King Open School** 850 Cambridge St. Cambridge, MA Susan McCabe Messier, DHT Principal	The project sets a new standard for school design and high-preforming building through the creation of a 21st century learning lab is 100% electric resulting in both a carbon and emission free building. The Community Complex is the 1st Net 0 Emissions and first LEED v4 Platinum sch in MA. Scope: Consulting Door Hardware.	Sindu Meier, AIA, LEED AP BD+C William Rawn Assoc. 10 Post Office Square, Suite 1010 Boston, MA 02109 617-598-3317 (D)	Fall 2019	$95,500	$24.25
(5)	**Somerville High** **Somerville, MA** Susan McCabe Messier, DHT Principal	370,000 GSF for reference 900 Openings. Not all of those are unique HW Sets but there is a lot of scale & complexity to this particular facility. Scope items: Consulting Door Hardware Specifications, Electromechanical Door and Frame Elevations for electrified hardware & security interface	Lorraine Finnegan Symmes, Maini & McKee Associates 1000 Massachusetts Ave. Cambridge, MA 0213	Fall 2020	$256,000	$22

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Sub-Consultant Name:	**Building Conservation Associates, Inc.- Historical Consultant**					
a. Project Name and Location Principal-In-Charge		b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
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(1)	**BU Center of Fine Arts** 855 Commonwealth Ave. Boston, MA Lisa Howe Lisa Harrington	Exterior envelope survey of conditions, construction document production and construction administration for the 1919 limestone and brick façade.	Wilson Butler Architects 195 State Street Boston, MA 02109 Thomas Hains 617-720-7127	2020	$28,000	$170
(2)	**Cambridge Fire Headquarters** Cambridge, MA Lisa Howe Lisa Harrington	Renovation of the historic 1933 fire headquarters. Exterior masonry restoration, including survey, construction documents and project monitoring. Paint and mortar analysis.	The Galante Architecture Studio 146 Mount Auburn Street Cambridge, MA 02138 Ted Galante 617-576-2500	2019-present	N/A	$55
(3)	**Somerville High School** Somerville, MA Lisa Howe	Surveyed and documented the conditions of the exterior of the building. Prepared drawings and specifications for restoration work and provided construction administration services. Historic Permit consulting.	Symmes Maini and McKee Associates 1000 Massachusetts Avenue Cambridge, MA 01238 Lorraine Finnegan 617-547-540	2018-present	$256,000	$123
(4)	**BU Dahod Family Alumni Center** Boston, MA Lisa Howe Lisa Harrington	Exterior envelope survey and report, construction documents and project monitoring services for repair and restoration of 1915 sandstone masonry, cast iron and wood windows	Finegold Alexander & Associates 77 North Washington Street Boston, MA 02114-1967 Rebecca Berry	2018	$9,000	$76
(5)	**Boston City Hall** Boston, MA Lisa Howe	Developing a Conservation Management Plan, partially funded by the Getty Foundation as part of the Keeping it Modern grant program. Work includes existing conditions survey, materials evaluation and conservation policy development	Utile 115 Kingston St., Boston, MA 02111 (617) 423-7200 Michael LeBlanc	2017-present	N/A	$85

9. List All Projects Within The Past 5 Years For Which Prime Applicant Has Performed, Or Has Entered Into A Contract To Perform, Any Design Services For All Public Agencies Within The Commonwealth.

# of Total Projects: 46	**# of Active Projects: 10**	**Total Construction Cost (In Thousands) of Active Projects (excluding studies): $117,981**

Role P, C, JV *	Phases St., Sch., D.D., C.D.,A.C. *	Project Name, Location and Principal-In-Charge:	Awarding Authority (Include Contact Name and Phone Number)	Construction Costs (In Thousands) (Actual, or Estimated if Not Completed)	Completion Date (Actual or Estimated) (R)Renovation or (N)New
P	All	1. **Boston Collegiate Charter School** **Expansion Study & 11 Mayhew Street School** **Renovation and Expansion** Boston, MA William Spears, AIA, LEED AP Principal-in-Charge	Larry Borins, Owner's Project Manager Pinck & Company 98 Magazine Street Roxbury, MA 02119 617-445-3555	$9,500	Dec. 2018, St., N+R
P	All	2. **City of Boston** **Boston Public Schools Kitchen Renovation** Boston, MA Myron Miller, AIA, Principal-in-Charge	Brian McLaughlin City of Boston Property & Construction Management Department 1 City Hall Sq., Rm 811 Boston, MA 02201 617-635-4100	Ph. 1 $4,290 Ph. 2 $4,968 Ph. 3 $11,500 (Est.)	Ph. 1 Dec. 2018 R Ph. 2 Nov. 2019 R Ph. 3 Nov. 2020 R
P	All	3. **City of Boston** **CMF Complex Renovations** Boston, MA Myron Miller, AIA, Principal-in-Charge	Patricia M. Lyons, Director City of Boston Public Facilities Department 26 Court Street, 10th Floor Boston, MA 02108 617-635-0412	$4,430	Sept. 2019 R
P	St.	4. **City of Boston** **Franklin Park Yard Master Plan Update** Boston, MA Myron Miller, AIA, Principal-in-Charge	Robert Melvin City of Boston Public Facilities Department 26 Court Street, 10th Floor Boston, MA 02108 617-635-0412	TBD	May 2018 St.
P	All	5. **City of Boston** **New Street Lighting Division Facility- 300 Canterbury St.** **City of Boston Property & Construction Management** Boston, MA Myron Miller, AIA, Principal-in-Charge	Robert Melvin, Project Manager Boston Property & Construction Management 617-635-4848	$9,270 (Est.)	Project on hold CD complete Dec 2016 N
P	All	6. **Boston Public Library/City of Boston** **Small Project Renovations – Multiple Branches** Boston, MA Amy MacKrell, AIA, LEED AP BD+C, Principal-in-Charge	Lissa Schwab, Major Projects Coordinator Boston Public Library, City of Boston 700 Boylston Street Boston, MA 02116 617-859-2051	$500 (Est.)	2019 R

P	St.	7. **Boston Public Library/City of Boston** **Chinatown Branch Library Services Study** Boston, MA Myron Miller, AIA, Principal-in-Charge	David Leonard, President Boston Public Library, City of Boston 700 Boylston Street Boston, MA 02116 617-859-2034	TBD	Dec. 2017 St.
P	All	8. **Town of Braintree** **East Middle School Renovation/Expansion** Braintree, MA William Spears, AIA, LEED AP Principal-in-Charge	Mike Carroll, OPM Hill International, Inc. 330 Congress Street Boston, MA 02210 617-778-0900	$67,700 (Est.)	Aug. 2020 R, N
P	All	9. **Town of Braintree** **South Middle School** Braintree, MA William Spears, AIA, LEED AP Principal-in-Charge	Mike Carroll, OPM Hill International, Inc. 330 Congress Street Boston, MA 02210 617-778-0900	$68,311	2022 (Est.) N
P	St.	10. **Cambridge Public Library/City of Cambridge** **Main Library Lighting Study** Cambridge, MA Amy MacKrell, AIA, LEED AP BD+C, Principal-in-Charge	William F. Courier Manager, Finance & Operations 449 Broadway Cambridge, MA 02138 617-349-4040	TBD	Dec. 2019 R
P	All	11. **City of Cambridge** **City Manager's Office Renovation** Cambridge, MA James Loftus, AIA, NCARB, Principal-in-Charge	Lisa C. Peterson, Deputy City Manager City of Cambridge 795 Massachusetts Ave. Cambridge, MA 02139 617-349-4300	N/A	2017 R
P	All	12. **City of Cambridge** **Coffon Building Lower Level Renovation – Baby University** Cambridge, MA James Loftus, AIA, NCARB, Principal-in-Charge	Julie Lynch, Project Manager Municipal Facilities Capital Program City of Cambridge 617-349-9452	$450	Oct. 2018 R
P	All	13. **City of Cambridge** **Law Department Office Renovation** Cambridge, MA James Loftus, AIA, NCARB, Principal-in-Charge	Julie Lynch, Project Manager Municipal Facilities Capital Program City of Cambridge 617-349-9452	N/A	2017 R
P	St.	14. **Division of Capital Asset Management and Maintenance (DCAMM)** **DPH Workspace & Leasing Strategy Study** Boston, MA Myron Miller, AIA, Principal-in-Charge	Lorna Moritz, Project Manager DCAMM Office of Leasing One Ashburton Place, 15th Floor Boston, MA 02108 617-727-8000x31224	N/A	Sept. 2018 St.
P	All	15. **Fitchburg State University** **Holmes Dining Hall Renovation** Fitchburg, MA William Spears, AIA, LEED AP Principal-in-Charge	Leigh Warren, Capital Project Coordinator MSCBA 253 Summer St. Suite 300 Boston, MA 02210 617-933-8345	$1,551	July 2019
P	All	16. **Fitchburg State University** **Landry Arena Renovation** Fitchburg, MA William Spears, AIA, LEED AP, Principal-in-Charge	Leigh Warren, Capital Project Coordinator MSCBA 253 Summer St. Suite 300 Boston, MA 02210 617-933-8345	$3,000 (Ph 1) $500 (Ph 2)	Feb 2018 (Ph. 1) Sept. 2018 (Ph. 2) R

C	All	17. **Forest Dale Cemetery – Superintendent's House Renovations** Malden, MA William Spears, AIA, LEED AP Principal-in-Charge	James Cahill, Superintendent of Cemeteries Forest Dale Cemetery 150 Forest Street Malden, MA 02148 781-397-7191	$106	2016 R
P	All	18. **Framingham State University** **McCarthy Dining Commons Improvements** Framingham, MA Amy MacKrell, AIA, LEED AP BD+C, Principal-in-Charge	Amanda Forde, Director of Capital Renewal MSCBA 253 Summer St. Suite 300 Boston, MA 02210 617-542-1081	$1,700 (Est.)	Sept. 2018 R
P	St.	19. **Massachusetts College of Art & Design** **Residence Hall Study** Boston, MA James Loftus, AIA, NCARB, Principal-in-Charge	Amanda Forde, Director of Capital Renewal MSCBA 253 Summer St Boston, MA 02210 617-933-8345	TBD	2019 St.
P	St.	20. **Salem State University** **Bates Housing Complex Feasibility Study** Salem, MA James Loftus, AIA, NCARB, Principal-in-Charge	Leigh Warren, Capital Project Coordinator MSCBA 253 Summer St. Suite 300 Boston, MA 02210 617-933-8345	TBD	TBD St.
P	St.	21. **Salem State University** **Campus Controls Study** Salem, MA James Loftus, AIA, NCARB, Principal-in-Charge	Leigh Warren, Capital Project Coordinator MSCBA 253 Summer St. Suite 300 Boston, MA 02210 617-933-8345	TBD	July 2019 St.
P	St.	22. **Salem State University** **Sophia Gordon Humidity Study** Salem, MA James Loftus, AIA, NCARB, Principal-in-Charge	Ben Szalewicz, Associate Vice President Capital Planning & Facilities Management 352 Lafayette Street Salem, MA 01970 978-542-7115	TBD	July 2019 St.
P	All	23. **Salem State University** **Peabody and Bowditch Halls Renovations** Salem, MA James Loftus, AIA, NCARB, Principal-in-Charge	Leigh Warren, Capital Project Coordinator MSCBA 253 Summer St. Suite 300 Boston, MA 02210 617-933-8345	$6,997	Aug. 2019 R
P	St.	24. **Salem State University** **2020 Summer Projects** Salem, MA James Loftus, AIA, NCARB, Principal-in-Charge	Ben Szalewicz, Associate Vice President Capital Planning & Facilities Management 352 Lafayette Street Salem, MA 01970 978-542-7115	TBD	2020 St.
P	All	25. **Soldiers' Home in Chelsea** **House Doctor Projects** Chelsea, MA Kate Wonkka, AIA, LEED AP BD+C, Principal-in-Charge	Robert Maniatis, Director of Operations Commonwealth of Massachusetts Soldiers' Home 91 Crest Avenue Chelsea, MA 02150 617-884-5660	TBD	2019 R

P	St.	26. **University of Massachusetts Amherst** **Auditoria Study- 19 Large Auditoria Renovations** Amherst, MA William Spears, AIA, LEED AP, Principal-in-Charge	Andrew Soles, Project Manager UMass Amherst Facilities Planning University of Massachusetts Amherst 360 Campus Center Way, Amherst, MA 01003-9248 413-545-6464	$20,350 (Est.)	Aug. 2018 St.
P	St.	27. **University of Massachusetts Amherst** **Campus Center Laundry Relocation** Amherst, MA Myron Miller, AIA, Principal-in-Charge	Jeff Quackenbush, Project Executive UMass Amherst Facilities Planning University of Massachusetts Amherst 360 Campus Center Way Amherst, MA 01003-9248 413-362-1644	N/A	March 2018 St.
P	All	28. **University of Massachusetts Amherst** **Cranberry Research Station Addition & Renovation** Wareham, MA Myron Miller, AIA, Principal-in-Charge	Peter Gray-Mullen UMass Amherst Facilities Planning University of Massachusetts Amherst 360 Campus Center Way, Amherst, MA 01003-9248 413-545-1383	$4,100 (Est.)	2017 (St.) 2019 (St.) Dec. 2020 N+R
P	St.	29. **University of Massachusetts Amherst** **Marston and Mathers Buildings Re-roofing Study** Amherst, MA Myron Miller, AIA, Principal-in-Charge	Jeff Quackenbush, Project Manager UMass Amherst Facilities Planning University of Massachusetts Amherst 360 Campus Center Way Amherst, MA 01003-9248 413-362-1644	$2,000 (Est.)	July 2018 St.
P	St.	30. **University of Massachusetts Amherst** **Hampton Hall Dining Commons Study** Amherst, MA William Spears, AIA, LEED AP, Principal-in-Charge	Nicholas Macy Sr. Capital Project Manager Design & Construction Management University of Massachusetts Amherst 360 Campus Way 413-545-1383	TBD	2020 St.
P	St.	31. **University of Massachusetts Amherst** **Northeast Residential Study** Amherst, MA James Loftus, AIA, NCARB, Principal-in-Charge	Rebecca J. Ducharme, P.E. Capital Project Manager UMass Amherst Facilities Planning University of Massachusetts Amherst 360 Campus Center Way Amherst, MA 01003-9248 413-577-1714	$15,000 (Est.)	May 2018 St.
P	All	32. **University of Massachusetts Amherst** **Totman Lab Renovation** Amherst, MA Myron Miller, AIA, Principal-in-Charge	Gaetan Blais, Capital Project Manager UMass Amherst Facilities Planning University of Massachusetts Amherst 360 Campus Center Way Amherst, MA 01003-9248 413-545-6508	$1,000	Aug. 2016 R

P	St.	33. **University of Massachusetts Dartmouth** **EHS Chemical Distribution Center** Dartmouth, MA William Spears, AIA, LEED AP, Principal-in-Charge	Michael Hayes, Assistant Vice Chancellor University of Massachusetts Dartmouth Campus Master Planning / Capital Projects Foster Administration 006 285 Old Westport Road Dartmouth, MA 02747 508-999-8058	TBD	Dec. 2016 St.
P	D.D., C.D., A.C	34. **University of Massachusetts Lowell** **Ngwa Lab Renovations** Lowell, MA Kate Wonkka, AIA, LEED AP BD+C, WELL AP, Principal-in-Charge	Fred Gavriel, Owner's Project Executive Facilities Management and Planning UMass Lowell 600 Suffolk Street Wannalancit Business Center Ste 450 Lowell, MA 01854 978-934-4834	$2,000 (Est.)	Dec. 2020 R
P	All	35. **University of Massachusetts Lowell** **Southwick Interdisciplinary Robotics Lab** Lowell, MA Myron Miller, AIA, Principal-in-Charge	Thomas Weber, Senior Project Manager UML Facilities Project Management Wannalancit Business Center 600 Suffolk St., Suite 450 Lowell, MA 01854 978-934-1877	$1,500 (Est.)	TBD 2021 R
P	All	36. **University of Massachusetts Medical School** **Clinical Building 5th Floor Lab Conversion to Offices** Worcester, MA Myron Miller, AIA, Principal-in-Charge	Mark Armington Dir. of Facilities Engineering & Construction University of Massachusetts Medical School 55 N Lake Avenue Worcester, MA 01655 508-856-5202	$4,200	July 2018 R
P	All	37. **University of Massachusetts Medical School** **Vector Core Lab** Worcester, MA Myron Miller, AIA, Principal-in-Charge	Brian Duffy Senior Architect/Project Manager University of Massachusetts Medical School 55 N Lake Avenue Worcester, MA 01655	$608	Jan. 2020 R
P	St., Sch.	38. **University of Massachusetts Medical School** **Cosmic Bliss, Li Weibo Institute for Rare Diseases Research Lab Renovation, Biotech 3 Study** Worcester, MA Myron Miller, AIA, Principal-in-Charge	Shawn McGuiness Manager of Design & Construction UMass Medical School 55 Lake Ave. North Worcester, MA 021655 508-856-7610	TBD	July 2019 St.
P	All	39. **University of Massachusetts Medical School** **Toilet Rooms Renovations Feasibility Study** Shrewsbury, MA Myron Miller, AIA, Principal-in-Charge	Shawn McGuiness Manager of Design & Construction UMass Medical School 55 Lake Ave. North Worcester, MA 02165 508-856-7610	TBD	TBD (Study Completed 10/18)
P	St.	40. **University of Massachusetts Medical School** **All Gender Bathroom Study** Worcester, MA Myron Miller, AIA, Principal-in-Charge	Brian Duffy Senior Architect/Project Manager University of Massachusetts Medical School 55 N Lake Avenue Worcester, MA 01655	TBD	2020

P	All	41. **Town of Watertown** **Town of Watertown On-Call Contract** Watertown, MA Myron Miller, AIA, Principal-in-Charge	Steven Magoon Assistant Town Manager Town of Watertown, MA 617-972-6417	Multiple studies and renovation projects (cost TBD)	2017 St., R
P	All	42. **Westfield State University** **Parenzo Hall Renovation** Westfield, MA James Loftus, AIA, NCARB, Principal-in-Charge	Mila Mendoza, Senior Project Manager Division of Capital Asset Management & Maintenance Office of Planning One Ashburton Place, 15th Floor Boston, MA (617) 727-4050	$28,000 (est.)	Fall 2023
P	All	43. **Westfield State University** **Scanlon Hall Renovation** Westfield, MA James Loftus, AIA, NCARB, Principal-in-Charge	Leigh Warren, Capital Projects Coordinator MSCBA lwarren@mscba.org, 617-933-8345	$1,700 (Est.)	2021
P	St.	44. **Massachusetts College of Art and Design** **Kennedy Building Roof Replacement** Myron Miller, AIA, Principal-in-Charge	Howard LaRosee Assistant VP of Facilities Planning Massachusetts College of Art and Design 621 Huntington Avenue Boston, MA 02115 617-879-7938	N/A	2021
P	St.	45. **Massachusetts College of Art and Design** **Kennedy Building Loading Dock** Myron Miller, AIA, Principal-in-Charge	Howard LaRosee Assistant VP of Facilities Planning Massachusetts College of Art and Design 621 Huntington Avenue Boston, MA 02115 617-879-7938	N/A	2021
P	St.	46. **Massachusetts College of Art and Design** **Tower Building Beam Repair & Exterior Waterproofing** Myron Miller, AIA, Principal-in-Charge	Howard LaRosee Assistant VP of Facilities Planning Massachusetts College of Art and Design 621 Huntington Avenue Boston, MA 02115 617-879-7938	N/A	2021

* P = Principal; C = Consultant; JV = Joint Venture; St. = Study; Sch. = Schematic; D.D. = Design Development; C.D. = Construction Documents; A.C. = Administration of Contract

10. Use This Space To Provide Any Additional Information Or Description Of Resources Supporting The Qualifications Of Your Firm And That Of Your Sub-Consultants For The Proposed Project. If Needed, Up To Three, Double-Sided 8 ½" X 11" Supplementary Sheets Will Be Accepted. **APPLICANTS ARE ENCOURAGED TO RESPOND SPECIFICALLY IN THIS SECTION TO THE AREAS OF EXPERIENCE REQUESTED IN THE ADVERTISEMENT**.

PLEASE SEE ATTACHED DOCUMENTATION

11. Professional Liability Insurance:

Name of Company	Aggregate Amount	Policy Number	Expiration Date
Poole Professional Ltd.	$5,000,000	V10B23100101	6/07/21

12. Have monies been paid by you, or on your behalf, as a result of Professional Liability Claims (in any jurisdiction) occurring within the last 5 years and in excess of $50,000 per incident? Answer **YES** or **NO**. If YES, please include the name(s) of the Project(s) and Client(s), and an explanation (attach separate sheet if necessary). **(Note: N/A is not an acceptable answer)**
NO

13. Name Of Sole Proprietor Or Names Of All Firm Partners and Officers:

Name	Title	MA Reg #	Status/Discipline
a. Kathleen Wonkka, AIA, LEED AP,	Principal, President & CEO	20330	Current/Architect
b. Amy MacKrell, AIA LEED AP,	Principal, Vice President	8641	Current/Architect
c. James Loftus, AIA, LEED AP, NCARB,	Principal, Treasurer & COO	31805	Current/Architect
d. Will Spears, AIA, LEED AP, MCPPO,	Principal	6071	Current/Architect
e. Janet Fierman,	Secretary	N/A	Current/Attorney

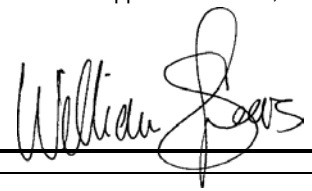
14. If Corporation, Provide Names Of All Members Of The Board Of Directors:

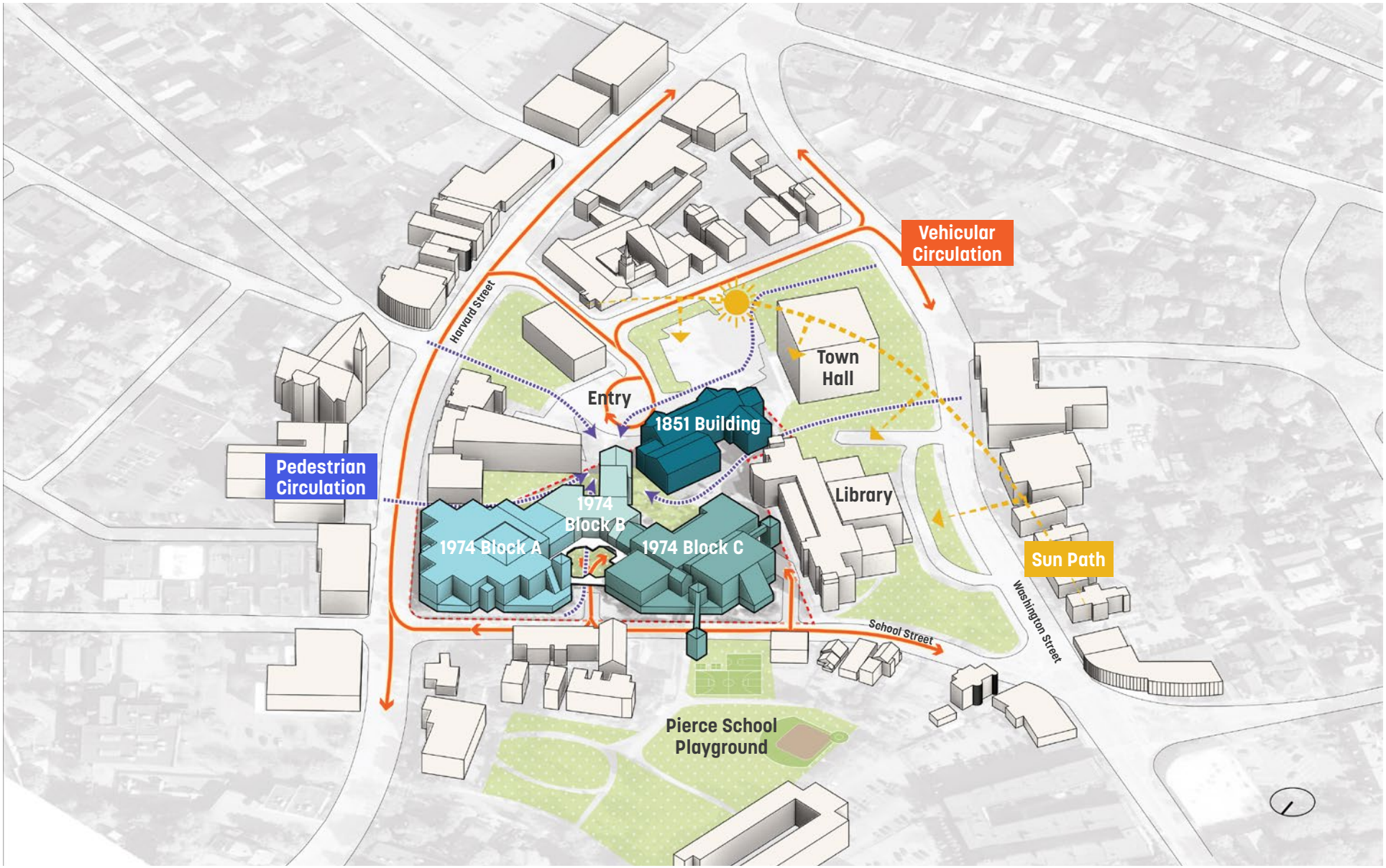
Name	Title	MA Reg #	Status/Discipline
a. Kathleen Wonkka, AIA, LEED AP,	Principal, President & CEO	20330	Current/Architect
b. William Spears, AIA, LEED AP	Principal	6017	Current/Architect
c. Amy MacKrell, AIA LEED AP	Principal, Vice President	8641	Current/Architect

15. Names Of All Owners (Stocks Or Other Ownership):

Name And Title	% Ownership	MA. Reg.#	Status/Discipline
a. William Spears, Principal	23.5%	6017	Current/ Architect
b. Amy MacKrell, AIA, LEED AP, Principal, Vice President	25.5%	8641	Current/Architect
c. Kathleen Wonkka, AIA, LEED AP, Principal, President & CEO	25.5%	20330	Current/Architect
d. James Loftus, RA, LEED AP, Principal, Treasurer & COO	25.5%	31805	Current/Architect

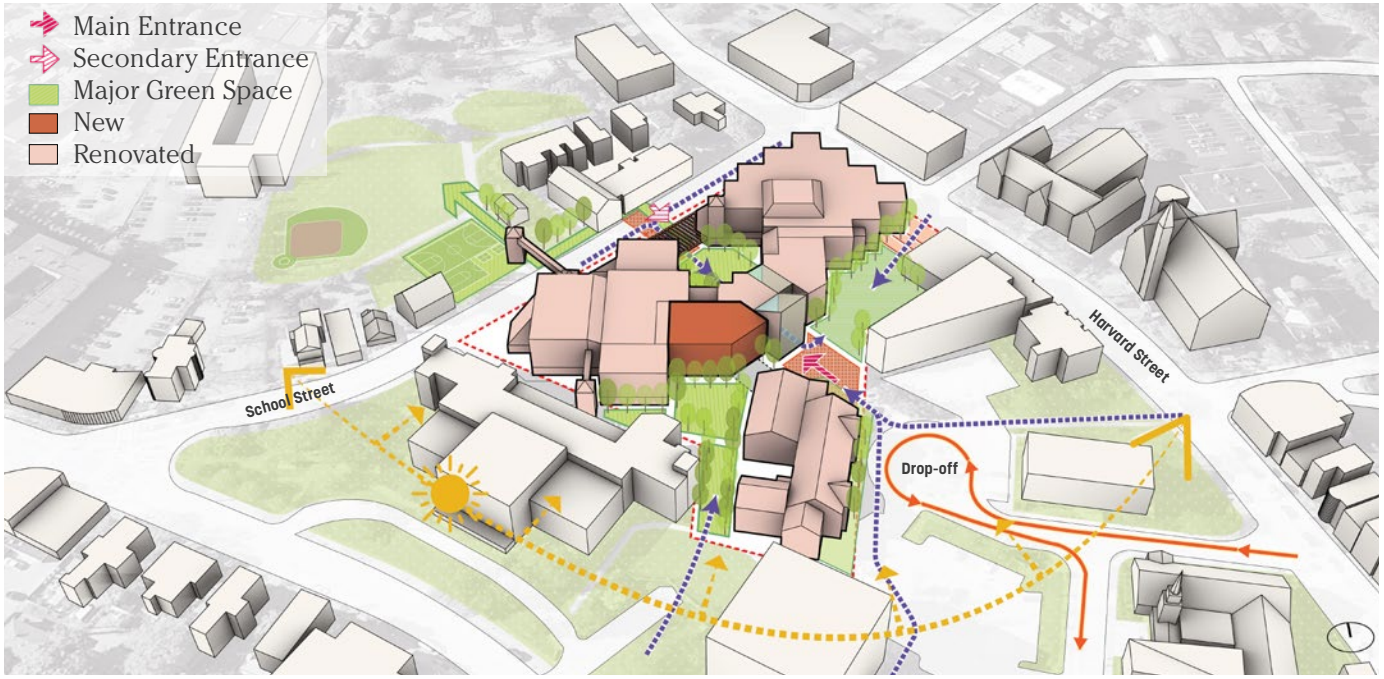
16. I hereby certify that the undersigned is an Authorized Signatory of Firm and is a Principal or Officer of Firm. I further certify that this firm is a "Designer", as that term is defined in Chapter 7C, Sections 44-57 of the General Laws, or that the services required are limited to construction management or the preparation of master plans, studies, surveys, soil tests, cost estimates or programs. The information contained in this application is true, accurate and sworn to by the undersigned under the pains and penalties of perjury.

Submitted by (Signature)  Printed Name and Title **William Spears, AIA, LEED AP, MCPPO Principal** Date November 3, 2020



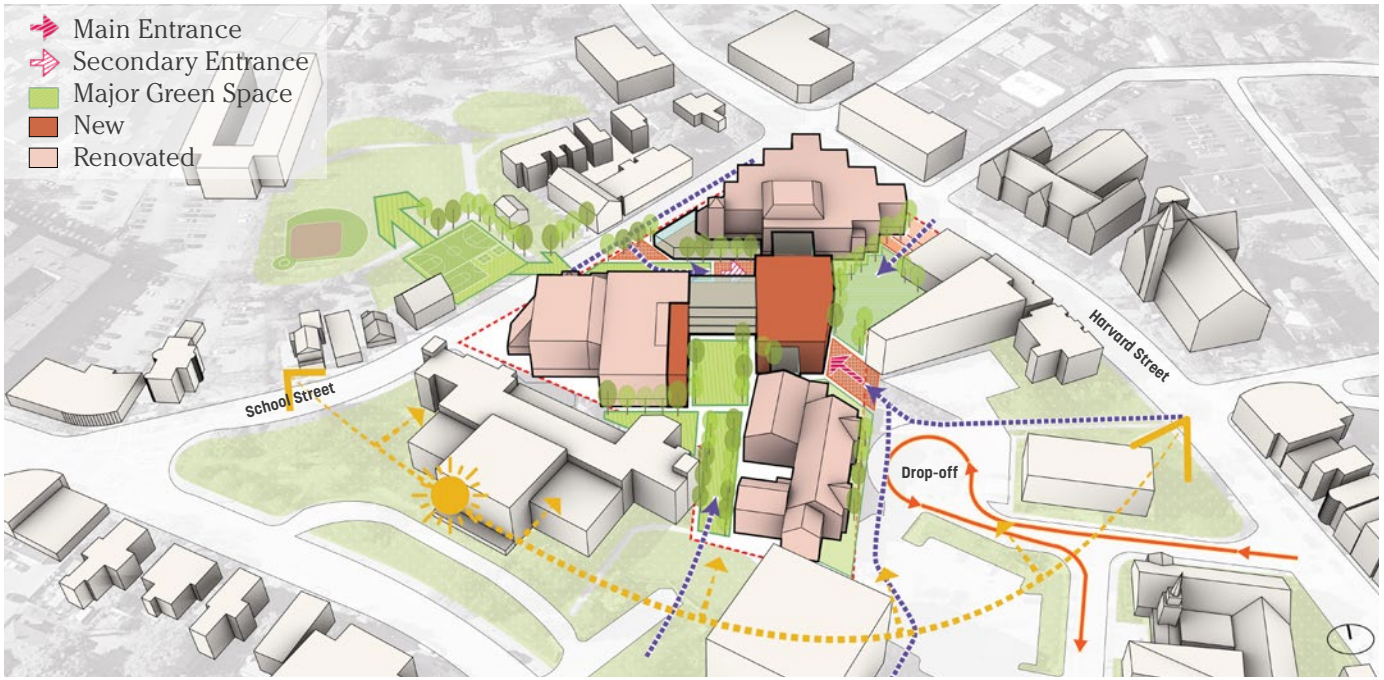
MDS / Sasaki see this project as an exciting opportunity to effectuate meaningful change to an urban block that represents the heart of Brookline. Town Hall, the Public Library, Health Building and the Pierce School—old and new—all share this space. Permeability, wayfinding, continuity of open space, and the relationship of buildings to each other, can all be improved immensely by this project. Busy streets on all sides, and the Pierce playground on the opposite side of School Street, add to the challenge and energizes us as designers.

Site Analysis
Existing Conditions



Option A
Strategic Interventions

A strategic addition and renovation of the central connector adds enough square footage to allow removal of the most challenging pieces of the 1974 building while improving internal connectivity and providing a new dining hall. The quality of the three existing open spaces is improved, and their relationship to the building interior is made more direct and transparent. The 1851 building's subterranean connector is also simplified.

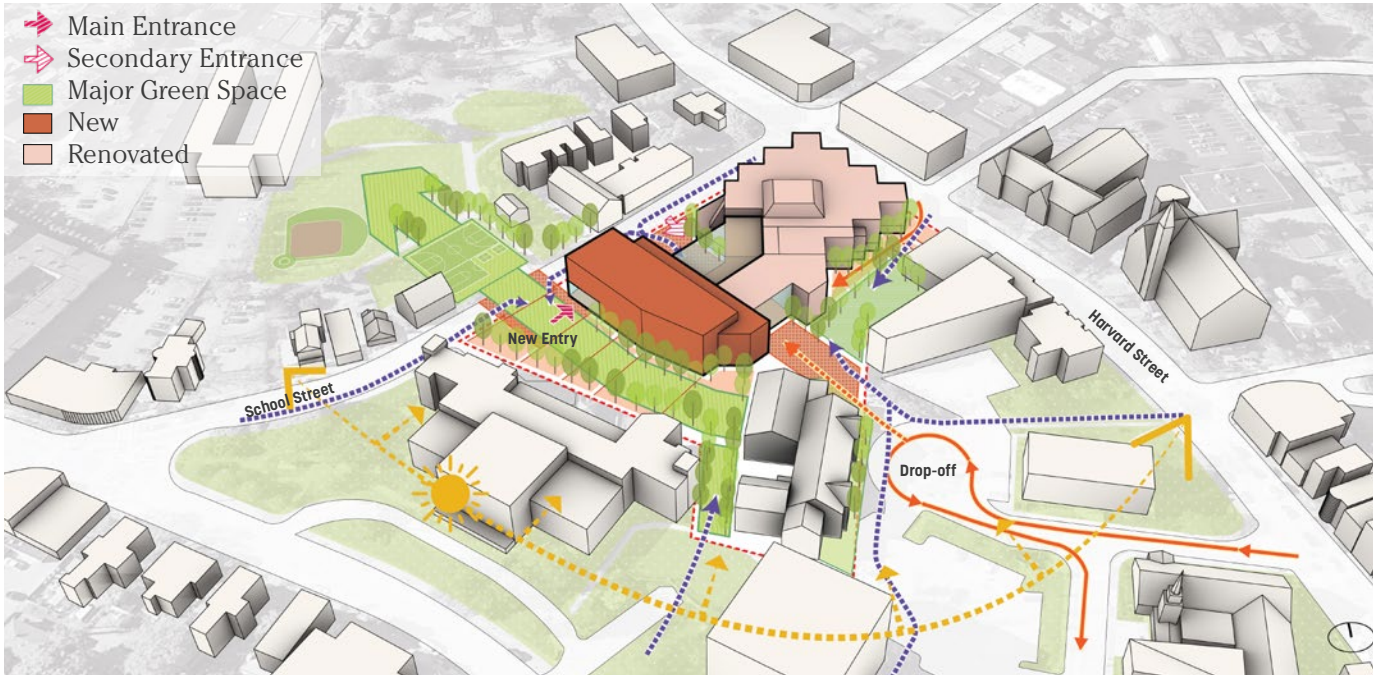


Option B
A New Central Pavilion

Replacing the central connector with a new classroom pavilion linked by common spaces (including a new cafeteria and breakout spaces) improves connectivity and allows the school to delineate four neighborhoods. A more open entry courtyard strengthens the connection to the park across School Street; a new open space west of the 1851 building drives solar exposure deep into the site and promotes better relationships between new and existing structures.

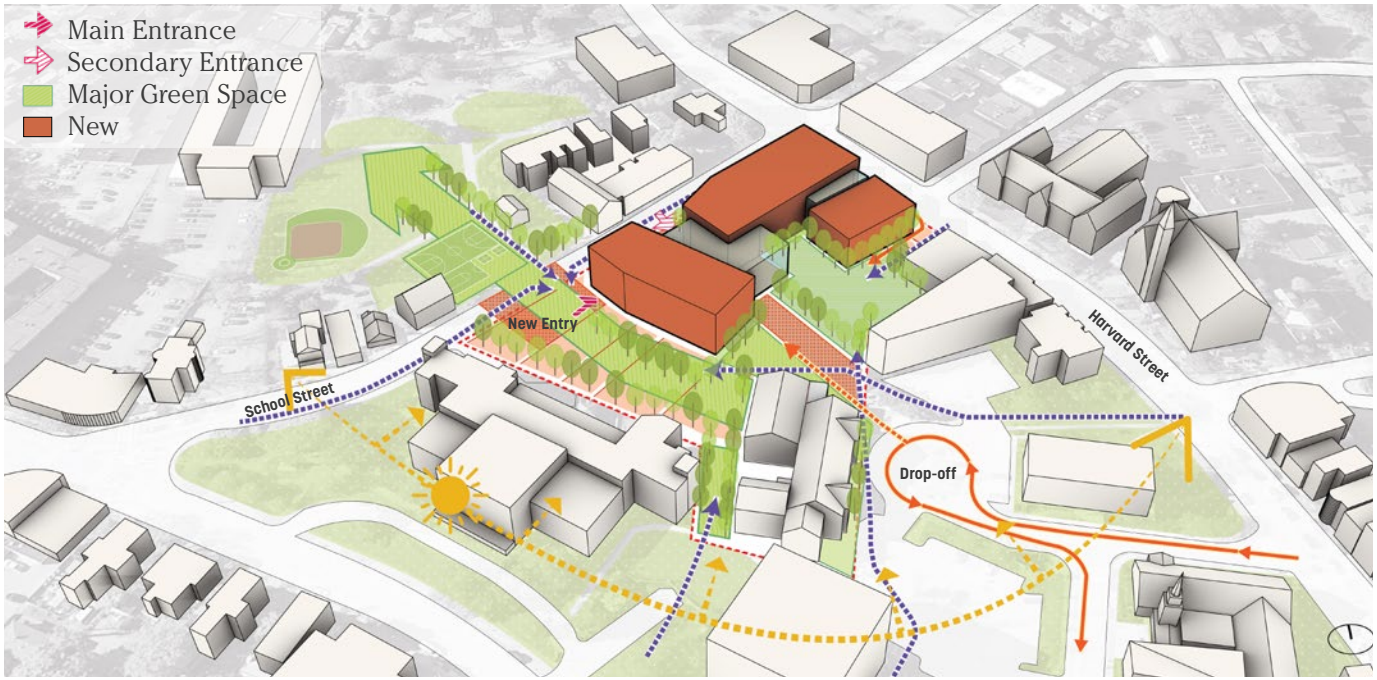
Option C
A New Green

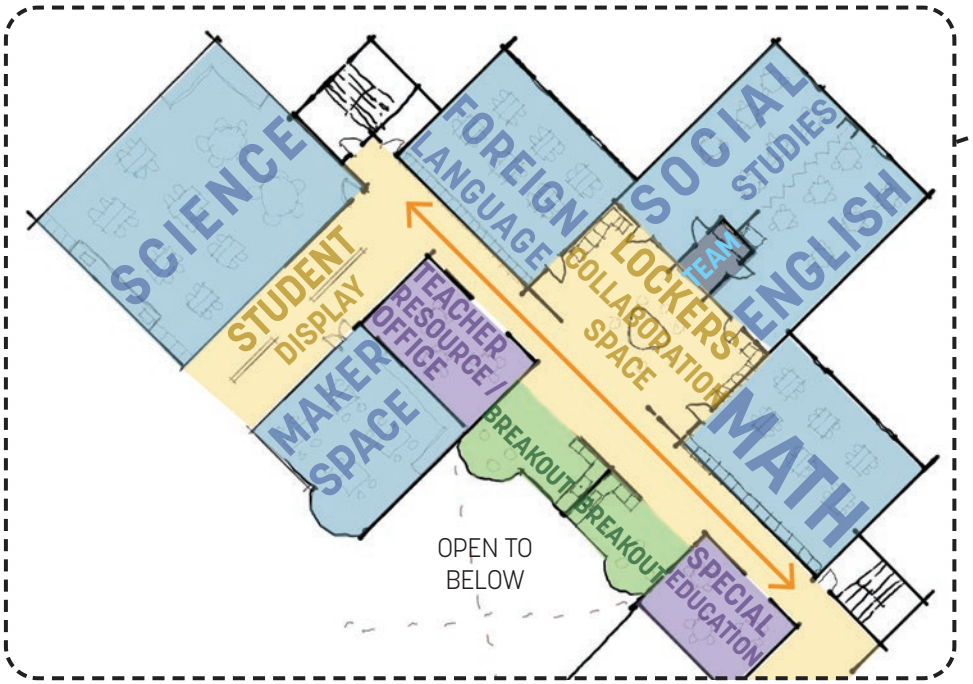
The challenging and outdated gym, multipurpose room, and cafeteria wing is replaced with an efficient new wing that optimizes space and provides connections to each level of the existing building. A transparent cafeteria/ connector infills the School Street cul-de-sac as it connects renovated and new structures. The large new open space provides abundant solar exposure to the new wing, leads to a new entrance, and connects to the park across the street. In this scenario, the 1851 building can be given back to the Town.



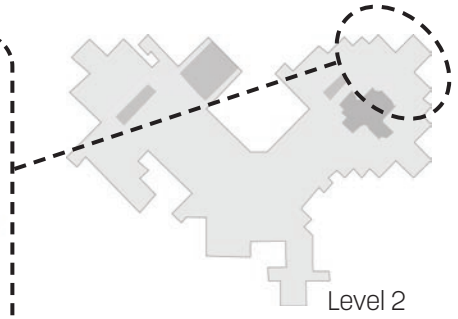
Option D
A New School

The new building holds the corner of School and Harvard Streets while opening up the site with a well-lit, sheltered open space that connects to the park. A careful arrangement of wings linked by common spaces organizes the school into learning neighborhoods thereby supporting spatial identity and clarity of circulation. The massing frames two interconnected open spaces, creating a crescent of landscapes that rings the school. In this scenario the 1851 building can be given back to the Town.

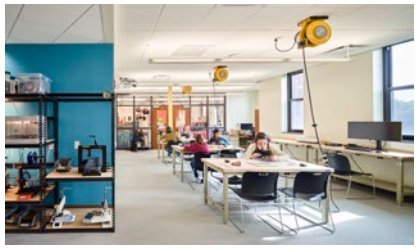




Possible reuse strategy for current library — creating "Neighborhood Pods" and locating break out spaces around the edges of the atrium

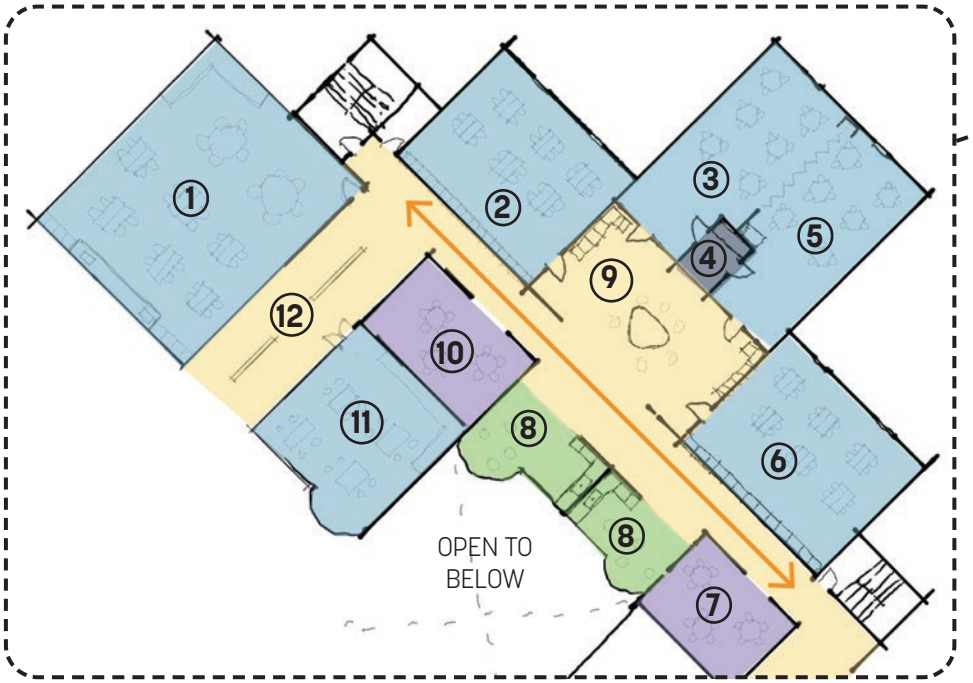


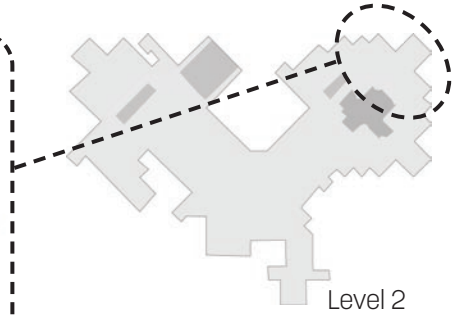
Renovation
Neighborhood Pod



Malden Catholic High School, School for Girls, MDS

Gann Academy, Innovation Center, MDS





Renovation
Neighborhood Pod

1. Science
2. Foreign Language
3. Social Studies
4. Team Huddle
5. English
6. Math
7. Special Education
8. Breakout
9. Locker/Collaboration Space
10. Teacher Resource/ Office
11. Maker Space
12. Student Display

Malden Catholic High School, School for Girls, MDS

Architectural and Landscape Approach

AN URBAN CAMPUS

The Pierce School and surrounding buildings should be thought of as a campus; one that would benefit from clarity and spatial cohesion. Whether the project is primarily a renovation, a completely new building, or something in between, several site design principles will guide the approach. The school's form should hold the urban corner at School and Harvard Streets and allow for clear, welcoming entrances both at School Street and from the existing central block drop-off. New open spaces will open up to favorable solar exposure and strengthen the connection to the park across the street. The block will remain permeable to pedestrian traffic while improving wayfinding.

PEDAGOGY INFORMS ARCHITECTURE

As a fairly large K-8 school, the Pierce School would benefit from an architectural approach that organizes it into neighborhoods, allowing students to feel a sense of ownership of, and comfort in their particular area of the school. Wayfinding and navigation will be improved in parallel with the provision of universal access. Each possible renovation and new construction scheme must bring the school up to today's standards of flexibility, visual and acoustic separation for focused instruction, and provisions for breakout spaces and team teaching—ideally while retaining some of the quirky communal character of the existing building. Communal spaces like the cafeteria and the multi-purpose space can act as the connectors that bring the entire community together.

Sacred Heart University Martire Business & Communications Center, Sasaki

INTEGRATING ARCHITECTURE AND LANDSCAPE

The MDS / Sasaki approach to the landscape at the Pierce School is to seek greater cohesion while embracing the particular conditions that exist within each type of landscape space—from roof terrace to at-grade courtyard, entry plaza to streetscape. We will identify opportunities for age-appropriate and engaging outdoor learning environments that further Brookline Public Schools' commitments to community, inclusivity, and sustainability. These spaces need strong connections to corresponding interior spaces in order to be well-used. At the scale of the site, improving the at-grade connection to the park (perhaps with a tabled crossing) would calm traffic and reduce reliance on the non-accessible pedestrian bridge.

Community Outreach + Building Consensus

A successful planning process should enable and inspire dialogue, facilitate decisions, and build enthusiasm and advocacy for the future of the school. It should also be fun! We recognize that one size does not fit all, and offer multiple, proven strategies for engagement, which bring together diverse stakeholders as partners in the process, with the goal of facilitating the broadest possible campus and community participation in the development of the plan.

The MDS / Sasaki team will work with Town administrators, the Pierce School Building Committee and School Committee to craft a tailored engagement strategy that responds to what has worked well in the past, encourages participation across all constituents, and aligns with the culture of the school. We offer strategies that are both traditional and innovative; planned and impromptu; analog and digital; broad-based and targeted; formal and informal. We seek inspiration from the institutions and clients with whom we work, and are eager to innovate around engagement. We have experience with a variety of internal and external engagement tools, and look forward to working with you to craft an engagement approach that will ensure the success of the master plan.

In addition to a full range of in-person engagement strategies, the Sasaki team will bring a broad palette of online engagement approaches that have proven to be particularly effective while social distancing considerations are in place. Online tools include custom websites for virtual open houses, online storytelling activities for children and families, online meeting tools, and visual collaboration platforms such as Miro and Mural. Sasaki Strategies, Sasaki's team of in-house programmers and software designers, is constantly developing new custom engagement tools, as well as plug-ins and scripts to best leverage existing open source software. We're prepared to find novel solutions to the engagement needs specific to reaching the Brookline community.

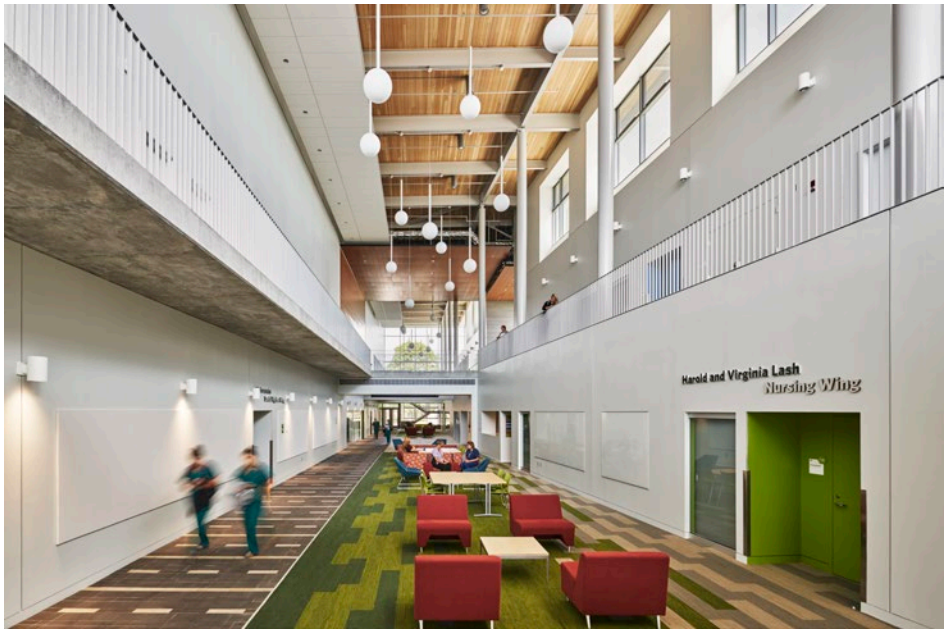
Health, Wellness + Sustainable Design

Creating environments that support the health and wellness of students, teachers and staff is a foundation of the MDS / Sasaki design approach. This guides material selection, ventilation, and daylighting strategies, among many other factors. We will seek opportunities to apply WELL design principles and encourage activity and healthy behaviors in the school. Our team of dedicated professionals continually researches and updates the products we select with green materials, to provide the healthiest, most affordable and durable materials in support of the building's occupants. In evaluating new materials, we review their chemical composition to limit usage of materials that contain chemicals of environmental or health concern, or products that have unvetted, third-party certifications. MDS's in-house specification writers identify these criteria in the bid documents and put controls in place to ensure that the products installed meet our healthy material requirements.

Schools can provide an example to students of sustainable values and mission. Within the strategies that we employ to achieve environmental sustainability are embedded educational opportunities that students can grasp at a fundamental level. MDS / Sasaki can make those aspects of the building apparent, making the building itself a teaching tool. Illustrating these strategies can teach about sustainability, climate change, living in balance with nature, and the need for climate resiliency. Providing an example of "building a better future" in a hands-on manner can be a powerful way to foster hope and teach advocacy for a cause.

NET ZERO ENERGY OPPORTUNITIES

For the Pierce School team, Sasaki with MDS will lead an integrated design process from the inception of planning and programming, through design and construction to post-occupancy evaluation. Schools are exceptional opportunities to demonstrate environmental responsibility including passive strategies, high-performance building envelope and systems that conserve energy and water, reducing embodied carbon, and planning for all electric, net-zero buildings that generate renewable energy onsite. Sasaki's recent experience includes the design of seven all-electric buildings and five net-zero academic buildings, including two for the MSCBA: the Mass Bay Community College's Health Sciences Center, and the Bristol Community College Health and Science Building which won an AIA COTE Top 10 Award. The MDS / Sasaki team has tremendous respect for the Town of Brookline's environmental leadership, including their efforts to electrify all new construction. Our expertise can help Brookline realize this goal for the Pierce School.



Bristol Community College Health and Science Building, Sasaki

Attachment D

Non-Collusion Affidavit

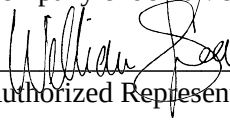
The undersigned hereby declares under the penalties of perjury that they have carefully examined the Request for Proposals, Sample Contract and General Conditions, Schematic Design outline specifications and plans referred to and also the site upon which the proposed work is to be performed.

The undersigned also hereby certifies under the penalties of perjury that the Offeror is the only entity interested in this proposal; that it is made without any connection with any other person making any bid for the same work, that no person acting for, or employed by, the Town of Brookline is directly or indirectly interested in this proposal, or in any contract which be made under it, or in expected profits to arise therefrom; and without directly or indirectly influencing or attempting to influence any other person or corporation to bid or to refrain from bidding or to influence the amount of the bid of any other person or corporation; and that this proposal is made in good faith without collusion or connection with any other person bidding for the same work; and that this proposal is made with distinct reference and relation to the plans and specifications prepared for this contract and herein mentioned. The undersigned further declares that in regard to the conditions affecting the work to be done and the labor and materials needed, this proposal is based solely on Offeror's own investigation and research and not in reliance upon any representation of any employee officer or agent of the Town of Brookline.

No oral, written or telegraphic amendments to this bid will be accepted. An Offeror wishing to amend this proposal after transmittal to Owner may do so only by written notice received by Owner in the office designated in the request for proposal prior to the time and date set for the opening of proposals.

Name of Offeror: Miller Dyer Spears Inc.

Company or Joint Venture Name



Authorized Representative Signature

William C. Spears, AIA, LEED AP, MCPPO, Principal

Print Name and Title

Affidavit of Compliance

_X_ Massachusetts Business Corp. _____Foreign Corp. _____Non-Profit Corp.

I, President Kathleen Wonkka, AIA, LEED AP Clerk _____ of

Miller Dyer Spears Inc., principal office is located at 99 Chauncy Street, 8th Floor

Boston, MA 02111

I do hereby certify that the above-named corporation has filed with the State Secretary all certificates and annual reports required by Chapter 156B Sec. 109 (business corporation), by Chapter 181, Sec. 4 (foreign corporation) or by Chapter 180, Sec. 26A (non-profit corporation) of the Massachusetts General Laws.

SIGNED UNDER THE PENALTIES OF PERJURY this 3rd day of November, 20 20.

Signature of Duly Authorized Corporate Officer

Affidavit of Prevailing Wage Compliance
(C. 149, S. 26 AND 27)

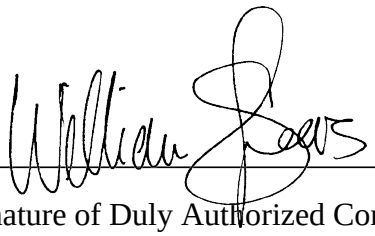
I William C. Spears, Principal, of the
Name Title

Miller Dyer Spears Inc., with a principal office is located at 99 Chauncy Street
Offeror's Company Name

8th Floor, Boston, MA 02111

do hereby certify that the above-named corporation will comply with the prevailing wage laws as set forth in Sections 26 and 27 of the Massachusetts General Laws.

SIGNED UNDER THE PENALTIES OF PERJURY this 3rd day of November, 2020.



Signature of Duly Authorized Corporate Officer

Certification of Tax Compliance

TOWN OF BROOKLINE, MA

Pursuant to M.G.L. Ch. 62c. sec. 49a.

I, William C. Spears,

President, _____, Clerk, _____, Partner, of X,

Miller Dyer Spears Inc., hereby certify under penalties of

perjury that Miller Dyer Spears Inc. has, to my best knowledge and belief,

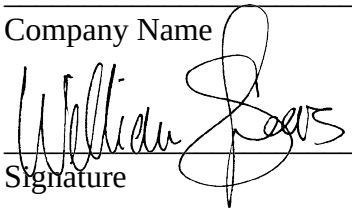
filed all state tax returns and paid all state taxes required under law.

04-3191972

Federal Identification Number
or Social Security Number

Miller Dyer Spears Inc.

Company Name



Signature

William C. Spears

Name of Duly Authorized (type/print)

Principal

Title/Company Position

Article 4.4 of the Town of Brookline General By-Laws

By signing below, CONTRACTOR hereby agrees to comply with the provisions of Article 4.4 of the Town's General By-laws, Fair Employment Practices with Regard to Contracts, a copy of which is incorporated herein by reference, with respect to the foregoing Contract.

(Miller Dyer Spears, Inc.)

Article 4.5 of the Town of Brookline General By-Laws

In compliance with Article 4.5 of the Town's General By-laws, CONTRACTOR hereby certifies as follows: I shall not discriminate against any individual because of the race, color, religious creed, national origin, sex, gender identity or gender expression, sexual orientation, which shall not include persons whose sexual orientation involves minor children as the sex object, age or ancestry of any individual in fulfilling the terms of the foregoing attached contract.

Signed under the pains and penalties of perjury, on this 6th day of January, 2021:

(Miller Dyer Spears, Inc.)

MILLE-1 OP ID: CWP

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 01/06/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Poole Professional B&B of MA 107 Audubon Rd, #2, Ste 305 Wakefield, MA 01880 Thomas M. Mullard	CONTACT NAME: PHONE (A/C, No, Ext): 781-245-5400 FAX (A/C, No): 781-245-5463 E-MAIL ADDRESS:
INSURED Miller Dyer Spears Inc. 99 Chauncy Street Boston, MA 02111	INSURER(S) AFFORDING COVERAGE — NAIC # INSURER A : Continental Casualty Company — 20443 INSURER B : XL Specialty Insurance Company — 37885 INSURER C : INSURER D : INSURER E : INSURER F :

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE / X OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: POLICY X PRO-JECT LOC OTHER:	Y	Y	6021109644	07/01/2020	07/01/2021	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	$ 1,000,000 $ 1,000,000 $ 10,000 $ 1,000,000 $ 2,000,000 $ 2,000,000
A	AUTOMOBILE LIABILITY ANY AUTO ALL OWNED AUTOS / SCHEDULED AUTOS X HIRED AUTOS / X NON-OWNED AUTOS	Y	Y	6021109644	07/01/2020	07/01/2021	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$ 1,000,000 $ $ $
A	X UMBRELLA LIAB / X OCCUR EXCESS LIAB / CLAIMS-MADE DED X RETENTION $ 10,000	Y	Y	6021109658	07/01/2020	07/01/2021	EACH OCCURRENCE AGGREGATE	$ 5,000,000 $ 5,000,000
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y / N: N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N / A	Y	6021486846	05/01/2020	05/01/2021	X PER STATUTE / OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	$ 1,000,000 $ 1,000,000 $ 1,000,000
B	Arch/Engrs Prof Liability			DPR 9961316	06/07/2020	06/07/2021	Per Claim Aggregate	5,000,000 5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

RE:John R. Pierce School

CERTIFICATE HOLDER

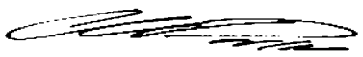
BROOKL8

Town of Brookline
Anthony Guigli, Project Administrator
333 Washington Street
Brookline, MA 02445

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE



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Form **W-9**
(Rev. November 2017)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

▶ **Go to *www.irs.gov/FormW9* for instructions and the latest information.**

Give Form to the requester. Do not send to the IRS.

Print or type. See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

Miller Dyer Spears Inc.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☑ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

99 Chauncy Street

Requester's name and address (optional)

6 City, state, and ZIP code

Boston, MA 02111

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

			–			–				

or

Employer identification number

0	4	–	3	1	9	1	9	7	2

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here Signature of U.S. person ▶ William Spears Date ▶ 1/7/2021

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9*.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, *later.*

Massachusetts School Building Authority
Designer Selection Panel

Town of Brookline
John R. Pierce School

Interview Topics
12/15/2020

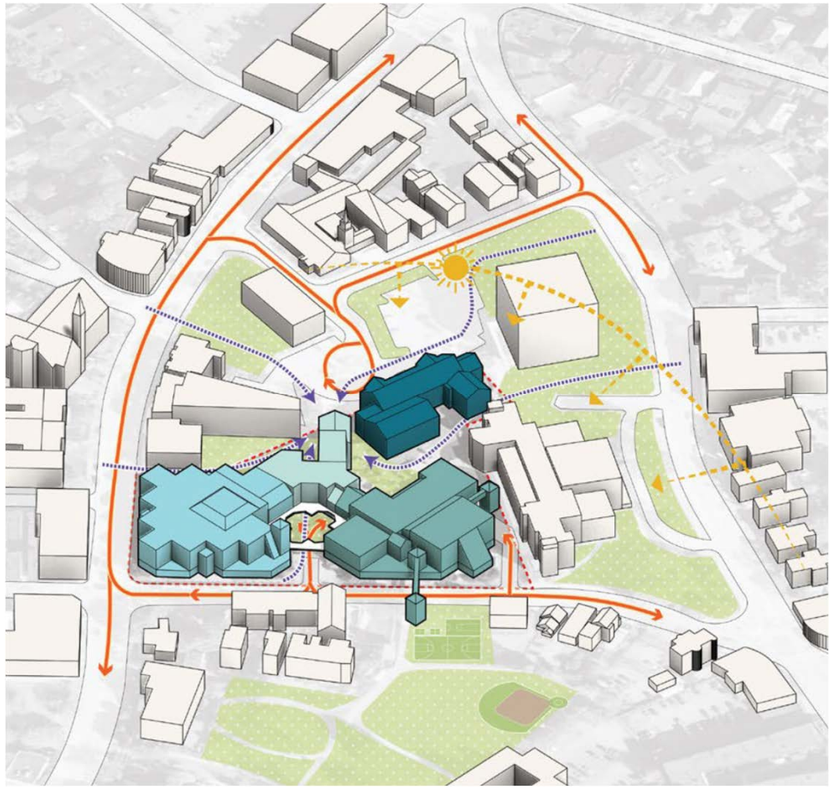
1. The District intends to investigate the feasibility of additional high-performance energy features beyond standard design and construction practices and minimum MSBA requirements, including "fossil fuel free" and/or "net zero energy." What design elements would you suggest pursuing to further the community's increased environmental and sustainability goals? Discuss cost premiums, maintenance and pay-back aspects of each. Give examples of other project(s) where you have implemented these and describe the benefits to the community, and where these options had a larger upfront cost, how you communicated to the community the value of the upfront investment.

2. The Brookline community has multiple boards, committees, and individuals representing important constituencies who have approval authority and/or a vested interest in this project. Describe how you have collaborated with such committees and community groups successfully on other projects to disseminate information and help the District achieve consensus of design while keeping the project on track.

3. The potential project as described in the RFS includes scope of work that involves significant existing historic building construction. Describe your firm's experience working with historic buildings and any efforts to successfully incorporate new construction with existing historic building areas.

4. Provide a listing of your firm's minority and women employees including the following information: Title, Job Duties, Length of employment with the firm, Location (Boston area or other), Demographic (please include specific information as to Black/African American, Hispanic/Latinx, Asian or Native American).

5. Provide examples of choices you have made in specifying systems such as lighting, BMS, HVAC and/or auditorium controls that provide the "right" level of sophistication. Describe "lessons learned" from previous projects that you will implement in the proposed project.

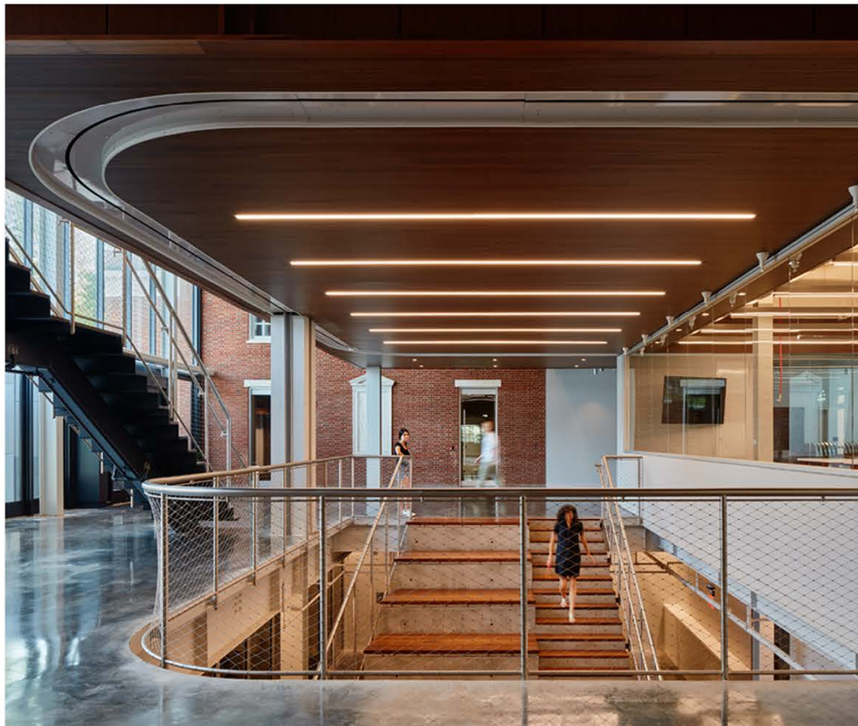


Town of Brookline, Brookline Public Schools
John R. Pierce School Feasibility Study

DESIGNER INTERVIEW | DECEMBER 15, 2020

MDS ARCHITECTS SASAKI


JOHN J. SBREGA
HEALTH & SCIENCE BUILDING
BRISTOL COMMUNITY COLLEGE

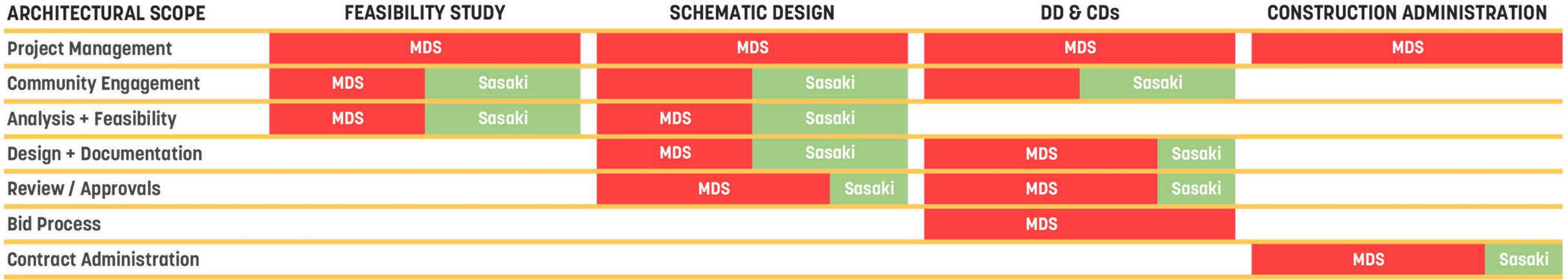


Meeting the Complexity of the Pierce School Project

Shared Ethos of Collaboration

MDS: prime architect – Will Spears, Principal-in-Charge

Sasaki: associated architect



MDS/Sasaki Collaboration:

- design of building
- design of site
- sustainable strategies
- community engagement
- cost control
- peer review and quality control

MDS Responsibilities:

- project management & coordination
- organization of the learning environments
- development of interior environments
- integrity of the document package
- specifications
- construction administration

Sasaki Responsibilities:

- landscape / civil design and coordination
- net zero, all electric strategies
- development of exterior envelope

Successful Teaming Experience

Dana-Farber Cancer Institute, Yawkey Center for Cancer Care, LEED-Gold certified
MDS, Architect of Record
ZGF, Design Architect

City of Boston, Bruce C. Bolling Municipal Building, LEED-Gold certified
Sasaki, Architect of Record
Mecanoo, Design Architect

Diversity

(4) Provide a listing of your firm's minority and women employees including the following information: Title, Job Duties, Length of employment with the firm, Location (Boston area or other), Demographic (please include specific information as to Black/African American, Hispanic/Latinx, Asian or Native American).

Diverse and Inclusive Culture & Support the Next Generation

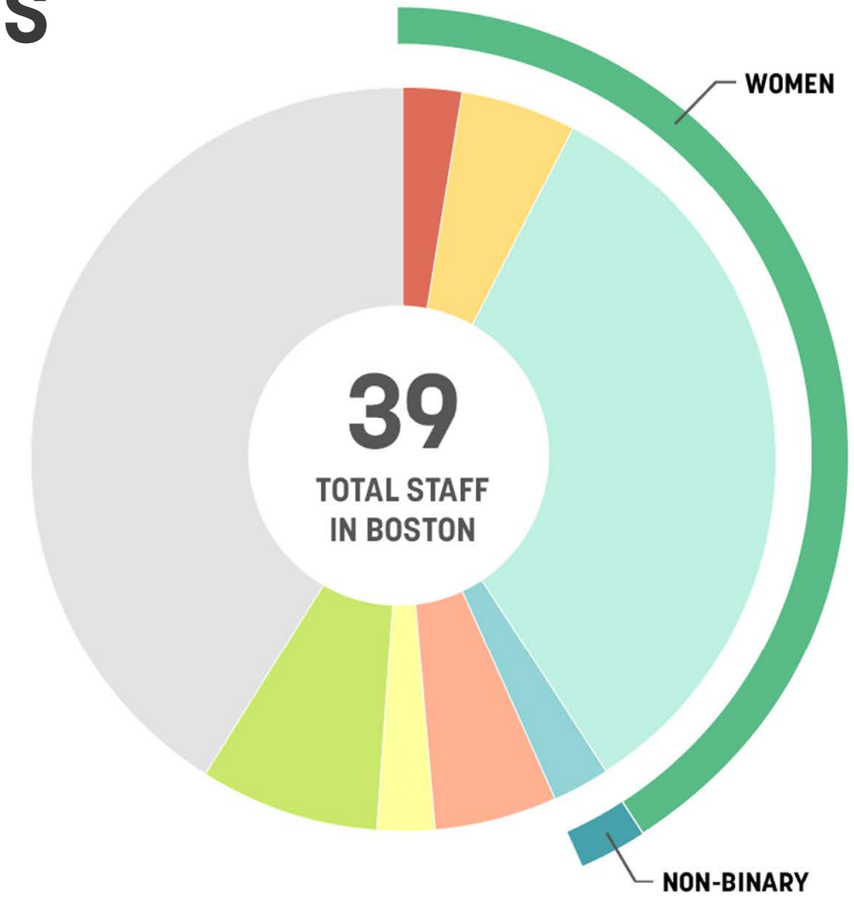
Diversity at MDS

MDS is a Woman Business Enterprise (WBE)

41%
Women

2%
Non-Binary

23%
Minorities



- BLACK/AFRICAN AMERICAN WOMAN
- HISPANIC/LATINX WOMEN
- WHITE/CAUCASIAN WOMEN
- WHITE/CAUCASIAN GENDER NON-BINARY
- BLACK/AFRICAN AMERICAN MEN
- HISPANIC/LATINX MAN
- ASIAN MEN
- WHITE/CAUCASIAN MEN

MDS YEARS	PRINCIPALS
27	James Loftus, AIA, LEED Green Assoc., NCARB, MCPPO, Principal
23	Amy MacKrell, AIA, LEED AP BD+C, Principal
27	Myron Miller, AIA, Senior Principal
27	Will Spears, AIA, LEED AP, MCPPO, Principal
21	Kate Wonkka, AIA, LEED AP BD+C, WELL AP, Principal
	ASSOCIATES + SENIOR ASSOCIATES / PROJECT MANAGERS / QA/QC
16	Danyul Cho, AIA, MCPPO, Associate
19	Margaret Clark, RA, LEED AP BD+C, WELL AP, MCPPO, Senior Associate
12	Samantha Clarke, IIDA, LEED AP ID+C, WELL AP, NCIDQ, Senior Associate, Director of Interior Design
26	Paul Farrell, RA, Senior Associate
8	Molly Moore, Associate, Director of Marketing
19	Nereyda Rodriguez, RA, LEED AP BD+C, MCPPO, Associate, Director of Sustainable Design
21	Susann Schlaud, RA, LEED AP BD+C, Associate
20	Tim Teabo, RA, LEED AP BD+C, CDT, CSI, NCARB, Senior Associate
	STAFF / PROJECT ARCHITECTS / DESIGNERS / JOB CAPTAINS / DRAFTERS
17	David Anderson, Assoc. AIA
2	Emerson Ball
18	Richard Berliner, RA, LEED AP BD+C, CDT, CSI
3	Meghan Burke, AIA
3	Connor Byrne, AIA
1	Jake Droogan, LEED AP BD+C
8	Brendon Duffy, AIA, NCARB
1	Stephanie Duhau, Senior Interior Designer
1	Ugo Ewulonu
13	Gaia Grazia Giudicelli, LEED AP BD+C
5	Norm Goulet, AIA, LEED AP, Director of Laboratory and Health Facilities
1	Rowan Greenlaw
8	Kelsey Holmes, RA, LEED Green Assoc.
2	Courtney Kresel, IIDA, LEED AP, NCIDQ, EDAC, Senior Interior Designer
7	Diana Lattari, LEED AP BD+C
20	Joanne O'Rourke, Receptionist
12	Brian Pace, RA, LEED AP
1	Keyanna Phillips
1	Warren Randle
15	Jon Ramos, LEED AP
1	Álvaro Ribeiro, AIA, Senior Research and Laboratory Architect
3	Katie Skeeles
1	Sumath Sok, RA
15	Zachary Stanesa
17	Steven Thomas
1	Connor Tiches

Diversity at Sasaki

Sasaki's practice is built on bringing many perspectives together

48% Women

1% Non-Binary

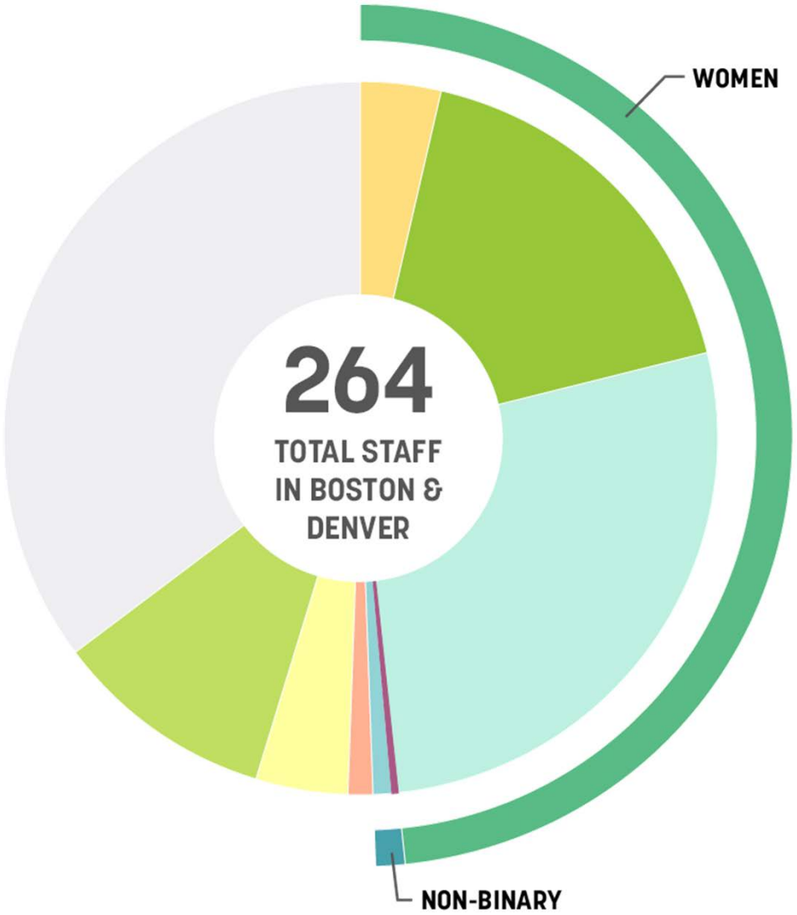
37% Minorities

8 Professional Disciplines

45 Languages Spoken

30 Countries Represented

20 years - Sasaki Foundation supports equity in design and pipeline-building initiatives



- HISPANIC/LATINX WOMEN
- ASIAN WOMEN
- WHITE/CAUCASIAN WOMEN
- BLACK/AFRICAN AMERICAN GENDER NON-BINARY
- WHITE/CAUCASIAN GENDER NON-BINARY
- BLACK/AFRICAN AMERICAN MEN
- HISPANIC/LATINX MEN
- ASIAN MEN
- WHITE/CAUCASIAN MEN

Historic Experience

(3) The potential project as described in the RFS includes scope of work that involves significant existing historic building construction. Describe your firm's experience working with historic buildings and any efforts to successfully incorporate new construction with existing historic building areas.

Finding a Common Language Between Historic and New

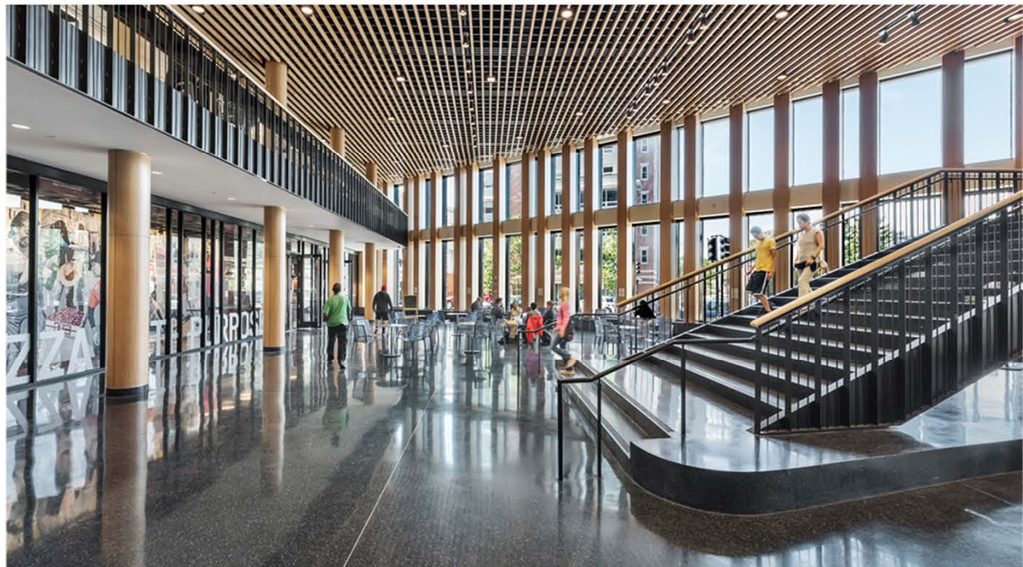
Town of Brookline, Lawrence School

Incorporating New Systems in Historic Buildings

Brooke East Boston Charter School

New Construction Alongside Historic Buildings

Bolling Municipal Building



Collaborating with Brookline

(2) The Brookline community has multiple boards, committees, and individuals representing important constituencies who have approval authority and/or a vested interest in this project. Describe how you have collaborated with such committees and community groups successfully on other projects to disseminate information and help the District achieve consensus of design while keeping the project on track.

Collaborating with Brookline & Brookline Public Schools

Lawrence School Renovation/Expansion

- Preservation Commission
- Park & Recreation Commission
- Neighborhood
- Building Commission
- Tony Guigli, Project Manager

Heath School Renovation/Expansion

- Neighborhood
- Brookline Commission on Disability
- Building Commission
- Ray Masak, Project Manager

Engagement Philosophy

We believe engagement should be the nexus from which the entire design process emerges and revolves. For us, engagement is not merely a quick phase of an overall design process, but a holistic conversation that is woven into all aspects of design.

Faculty/ Staff

Parents/
Caregivers

Pierce Community

Educational
Leadership

Students

Educational
Working Group

Park Users

Town Hall Visitors

Residents

Brookline Community

Local
Businesses

Library Visitors

INTERIOR SCHOOL

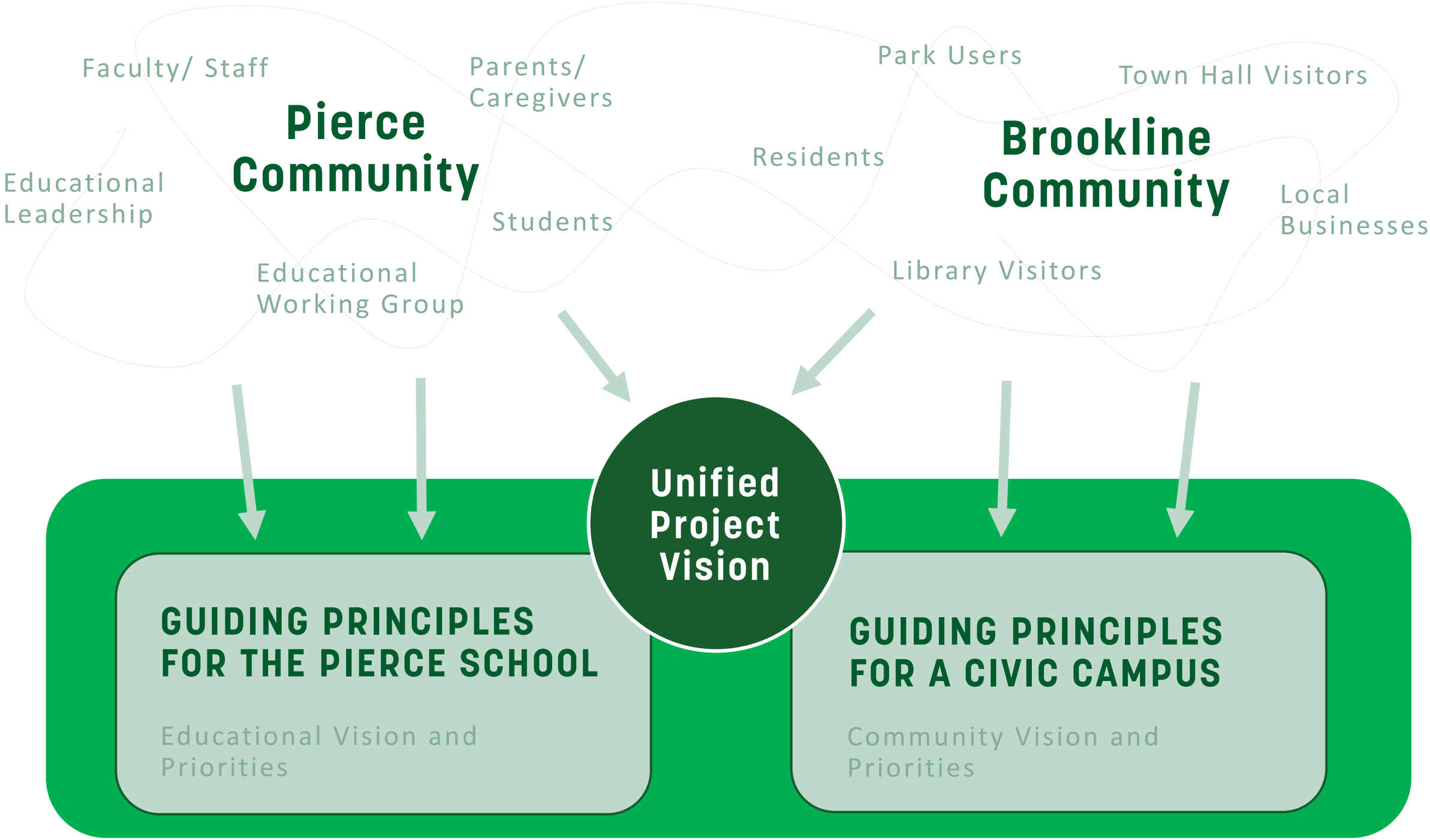
Learning Environment and Gathering Spaces

EXTERIOR SCHOOL CAMPUS

Outdoor Play and Learning Space

THE NEIGHBORHOOD

Streetscape, Community Park, Town Hall, Library


Faculty/ Staff
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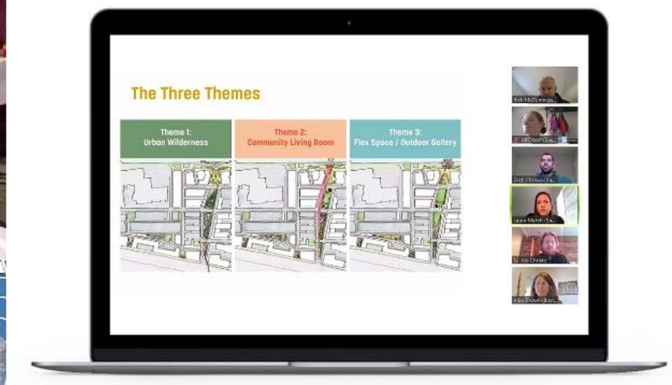
Leadership
Students
Educational
Working Group
Park Users
Town Hall Visitors
Residents
Brookline
Community
Local
Businesses
Library Visitors
Unified
Project
Vision
GUIDING PRINCIPLES
FOR THE PIERCE SCHOOL
Educational Vision and
Priorities
GUIDING PRINCIPLES
FOR A CIVIC CAMPUS
Community Vision and
Priorities

3 STRATEGIES FOR INCLUSIVE ENGAGEMENT:

1. Expand engagement from single workshops to “waves”

2. Provide more ways to engage

3. Make participation fun & meaningful



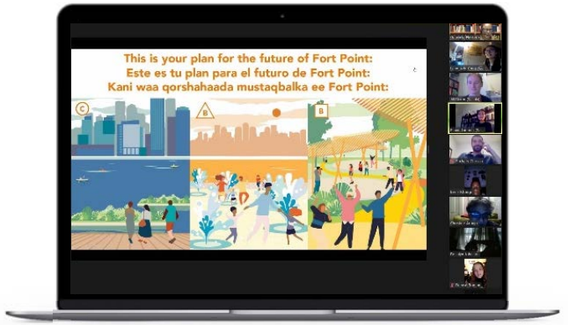
Engagement in COVID
Making it accessible

Synchronous
Participate live with others

Socially distanced conversations / intercept surveys*

Outdoor, de-densified public workshop*

Socially distanced walking tour*



Public Workshop Virtual Event

Attend virtual existing event

.

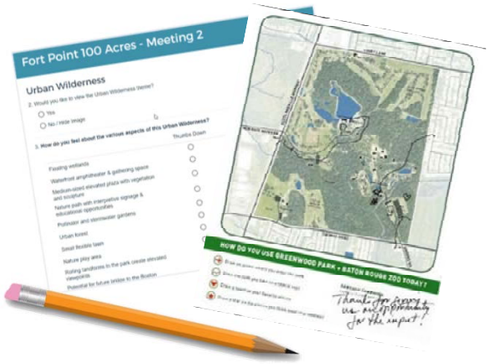
Virtual Focus Groups

No-tech required

Virtual

Distributed paper survey + mapping activity

Self-guided, unstaffed outdoor public workshop



Public Workshop Website

Online survey

Sasaki's CoMap

Asynchronous
Participate anytime

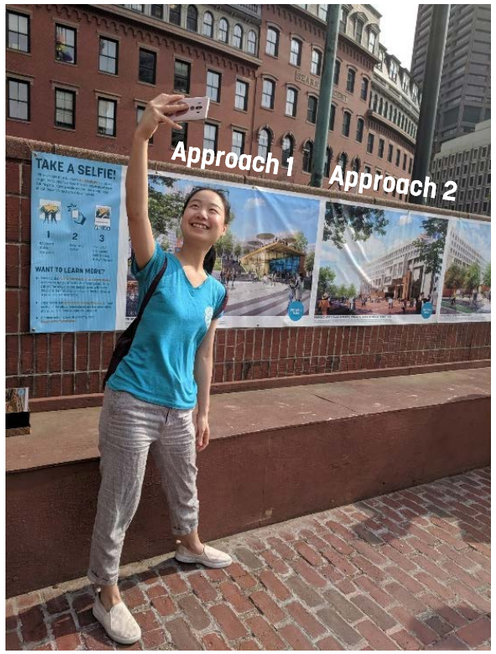
*pending COVID public health guidelines & best practices

Engagement in COVID
Making it meaningful and fun

Example early ideas

Visual Scavenger Hunt

Selfie Stations



Take it to the site

"Choose your own adventure"

Imagine a trip to the waterfront and what would make it even better!

Where do arrive at the waterfront?
(Gateway locations and mode of travel)

Where do you sit?
(Preferred bench / table style)

What type of trees and plants do you enjoy?
(Preferred planting style)

What outdoor places do you visit?
(Preferred new outdoor uses / program)

What indoor places to you visit?
(Preferred new ground floor uses)

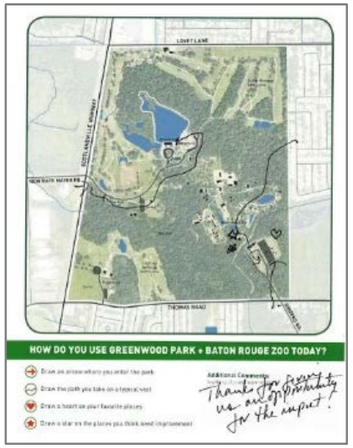
What sign best helps you find your way?
(Preferred signage type)

Sasaki's CoMap

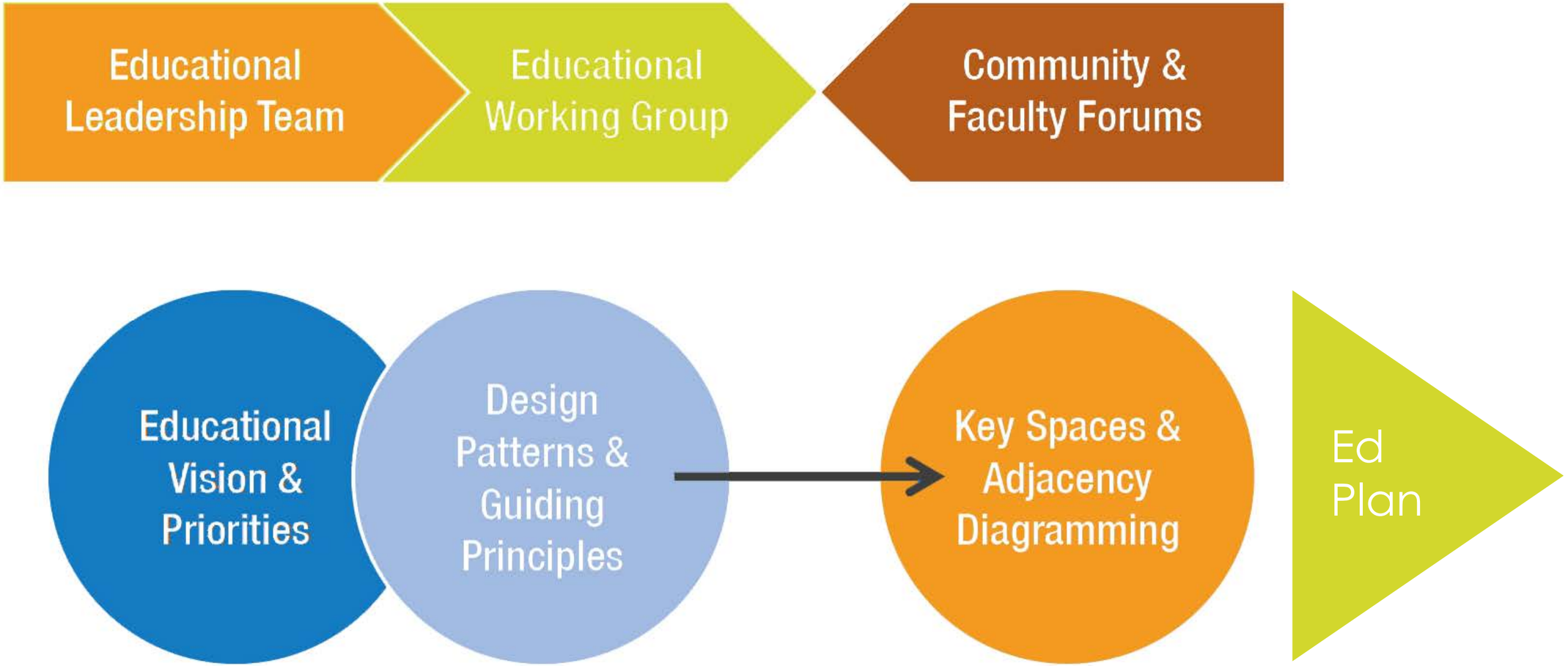
We will use customized mapping tools to gather specific feedback from school and community users.

Online + Paper versions

Indoor + Outdoor versions



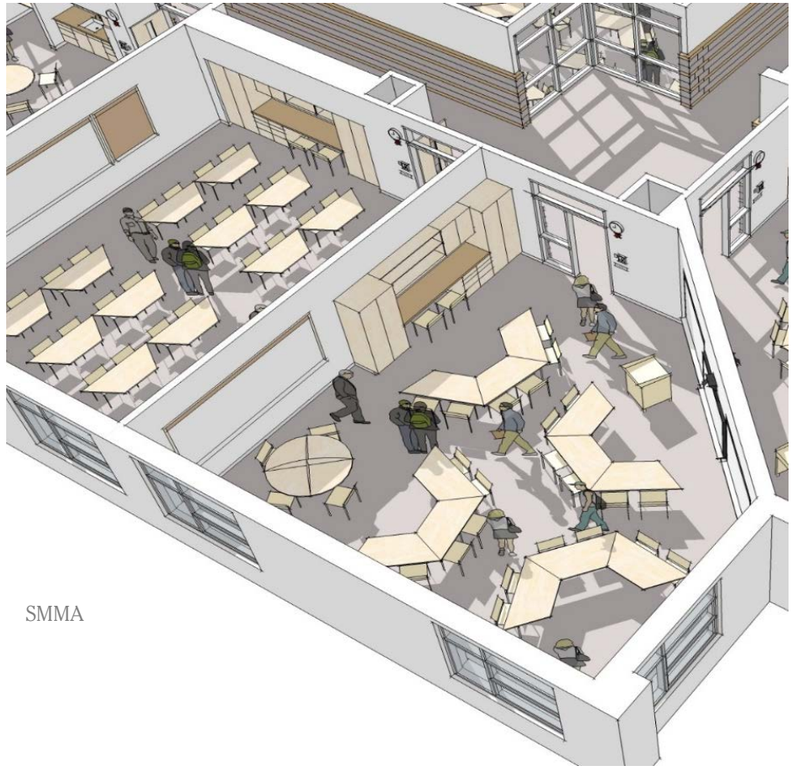
The Visioning Process



New School

Design Patterns

Agile Classrooms



SMMA

MLK Lower School - Perkins Eastman

New School
Design Patterns

Extended Learning Spaces

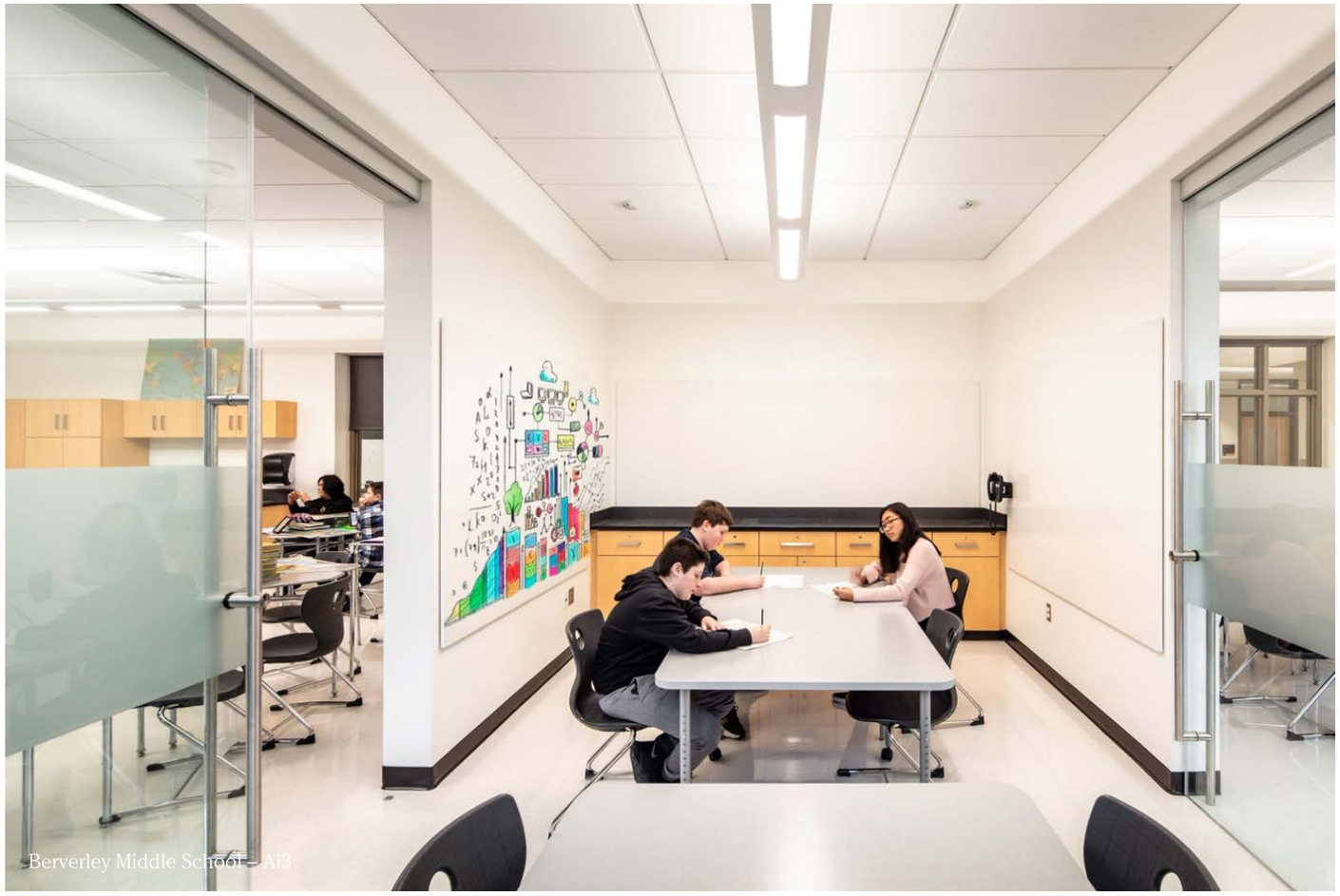
Birralee Primary School – Thompson Architects

Hunking K-8 – JCJ with New Vista

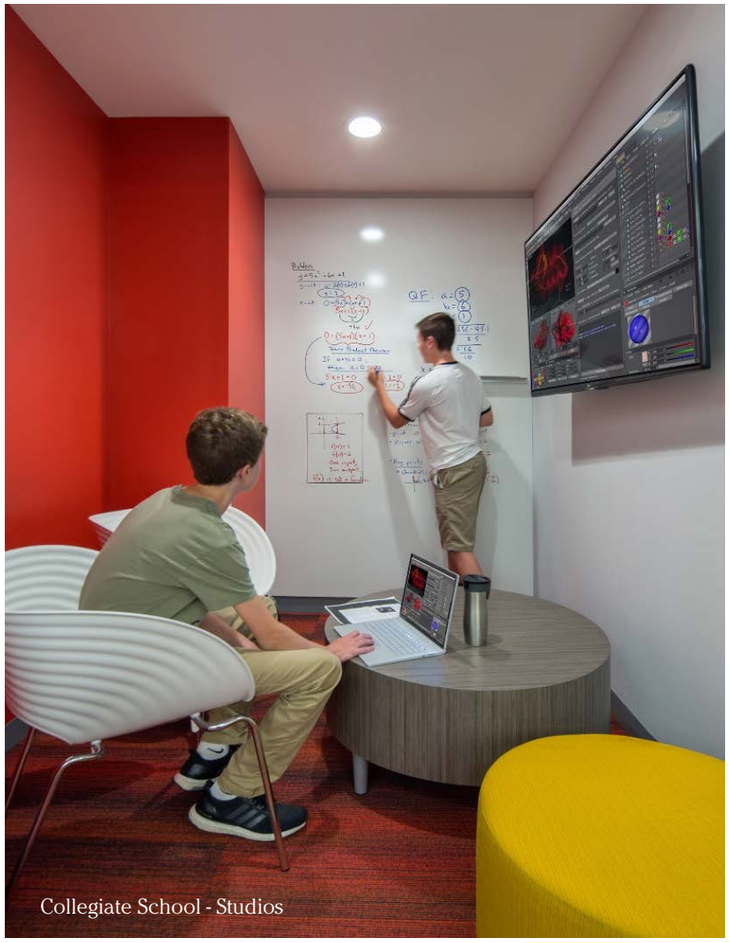
New School

Design Patterns

Breakout and “Pull Over” Spaces



Berverley Middle School – Ai3



Collegiate School - Studios

New School

Design Patterns

Nooks and Caves

Buckingham County Elementary - VMDO

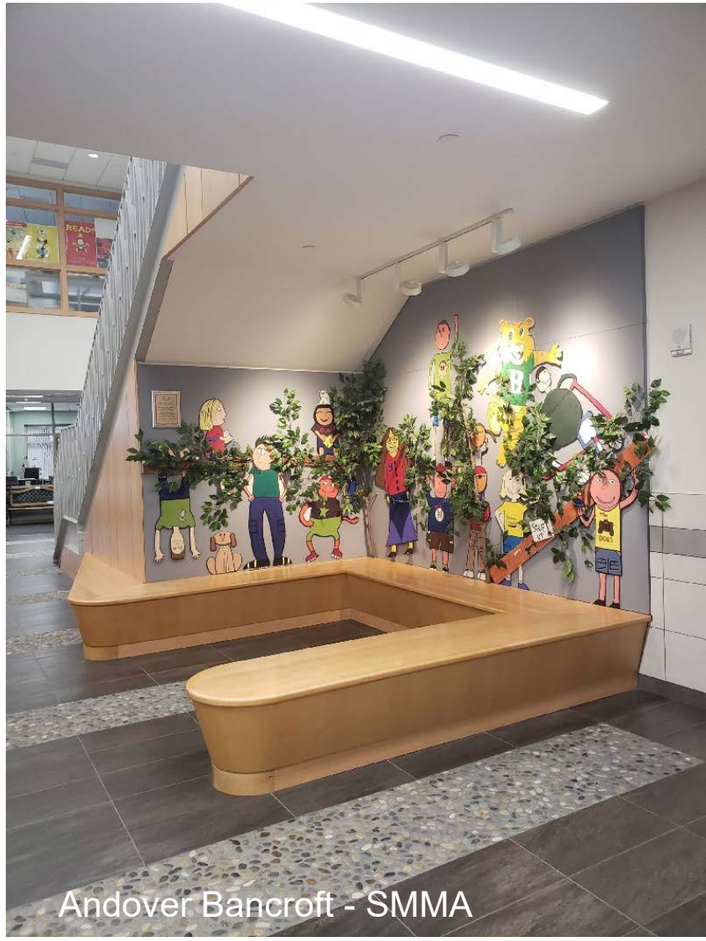
McAulliffe Elementary - HMFH

New School

Design Patterns

Anywhere, Anytime Learning

Collegiate School – Studios with New Vista



Andover Bancroft - SMMA

New School

Design Patterns

Engaged Outdoor Play

Bourne Intermediate School – Flansburgh with new Vista

Sustainable Design

(1) The District intends to investigate the feasibility of additional high-performance energy features beyond standard design and construction practices and minimum MSBA requirements, including “fossil fuel free” and/or “net zero energy.” What design elements would you suggest pursuing to further the community's increased environmental and sustainability goals? Discuss cost premiums, maintenance and pay-back aspects of each. Give examples of other project(s) where you have implemented these and describe the benefits to the community, and where these options had a larger upfront cost, how you communicated to the community the value of the upfront investment.

(5) Provide examples of choices you have made in specifying systems such as lighting, BMS, HVAC and/or auditorium controls that provide the “right” level of sophistication. Describe “lessons learned” from previous projects that you will implement in the proposed project.

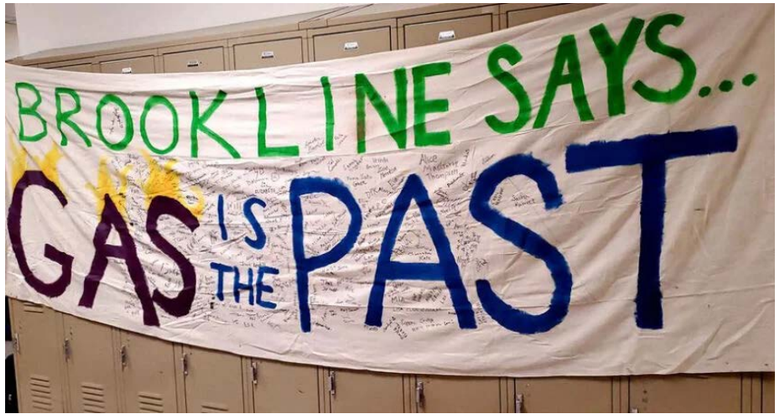
Model 21st Century Sustainable Design

PIERCE SCHOOL
Learning & Growing Together.

Brookline goals: Zero Carbon by 2050

Electrification is our best strategy!

- No fossil fuels
- Road Map to Net-Zero with renewables
- Grid is increasingly clean
- Reduced health risk from toxic fumes
- Potential to reduce costs



MSBA core values: Net Zero Energy, Fossil-Fuel Free

Recipe for Net-Zero: integrated design process

- Passive strategies to reduce loads
- High performance envelope
- Most efficient systems
- Renewable energy generation

Our Strategy:

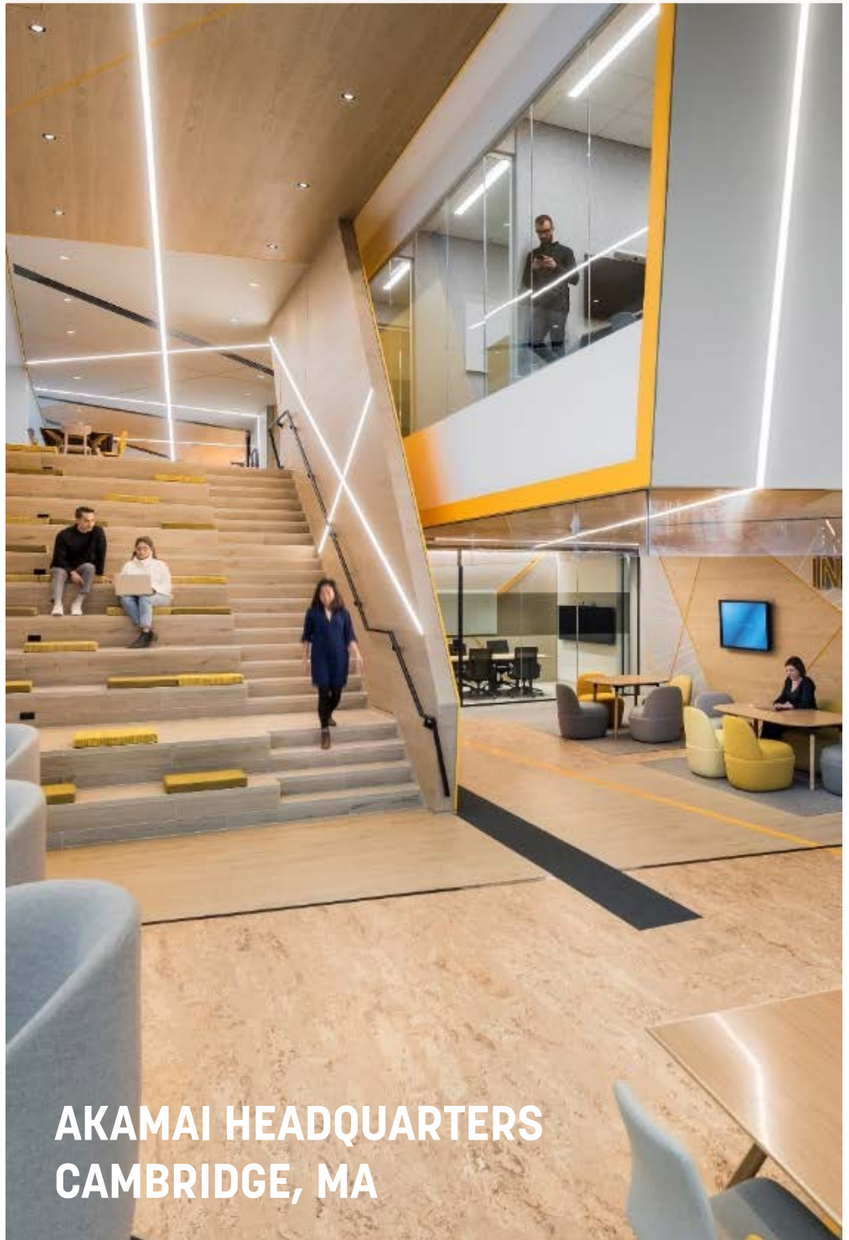
Sustainability integrated into design workflow

CHPS COLLABORATIVE FOR HIGH PERFORMANCE SCHOOLS

U.S. GREEN BUILDING COUNCIL USGBC

Net-Zero
5 Projects

WELL, Fitwel
Largest on East Coast



All-Electric, Carbon-Free
7 Projects

Leaders in Sustainable Design

Net-Zero Academic Buildings

BRISTOL COMMUNITY COLLEGE HEALTH SCIENCES BUILDING
HARVARD UNIVERSITY ARTLAB
PRINCETON UNIVERSITY RACQUET CENTER
SOUTHERN CONNECTICUT STATE UNIVERSITY BUSINESS SCHOOL
MASSACHUSETTS BAY COMMUNITY COLLEGE

All-Electric, Carbon-Free Buildings

HARVARD UNIVERSITY ARTLAB
PRINCETON UNIVERSITY RACQUET CENTER
PRINCETON SOCCER STADIUM
SOUTHERN CONNECTICUT STATE UNIVERSITY BUSINESS SCHOOL
MASSACHUSETTS BAY COMMUNITY COLLEGE
BOSTON CITY HALL PAVILION
AMHERST COLLEGE STUDENT CENTER AND DINING HALL

Embodied Carbon Reduction in Buildings

COLBY COLLEGE ATHLETIC CENTER
MICROSOFT AZURE OFFICES (2 PROJECTS)
PENN STATE UNIVERSITY BEHREND STUDENT CENTER
BOSTON CITY HALL PAVILION
PRINCETON UNIVERSITY ATHLETICS (3 PROJECTS)
MASSACHUSETTS BAY COMMUNITY COLLEGE
AMHERST COLLEGE STUDENT CENTER AND DINING HALL
EDGE ASSEMBLY SQUARE

And 30 + LEED Certified Buildings, 5 Platinum

Practice Projects People Voices

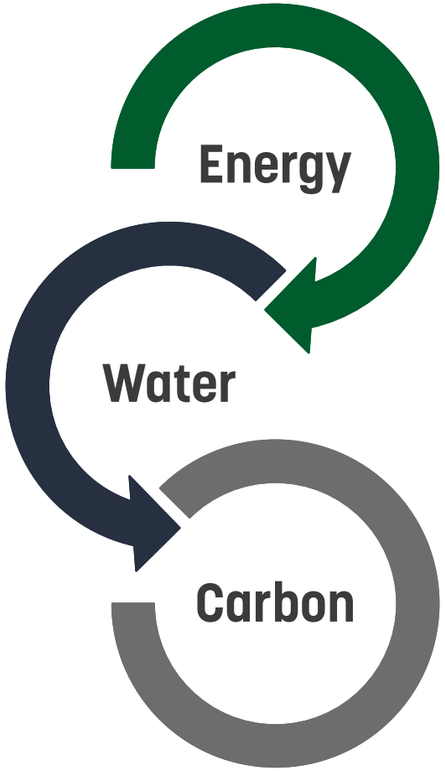
SASAKI

A real

Electrification of Buildings Taking Off

by Tamar Warburg

Sustainability Metrics: Whole Project Analysis

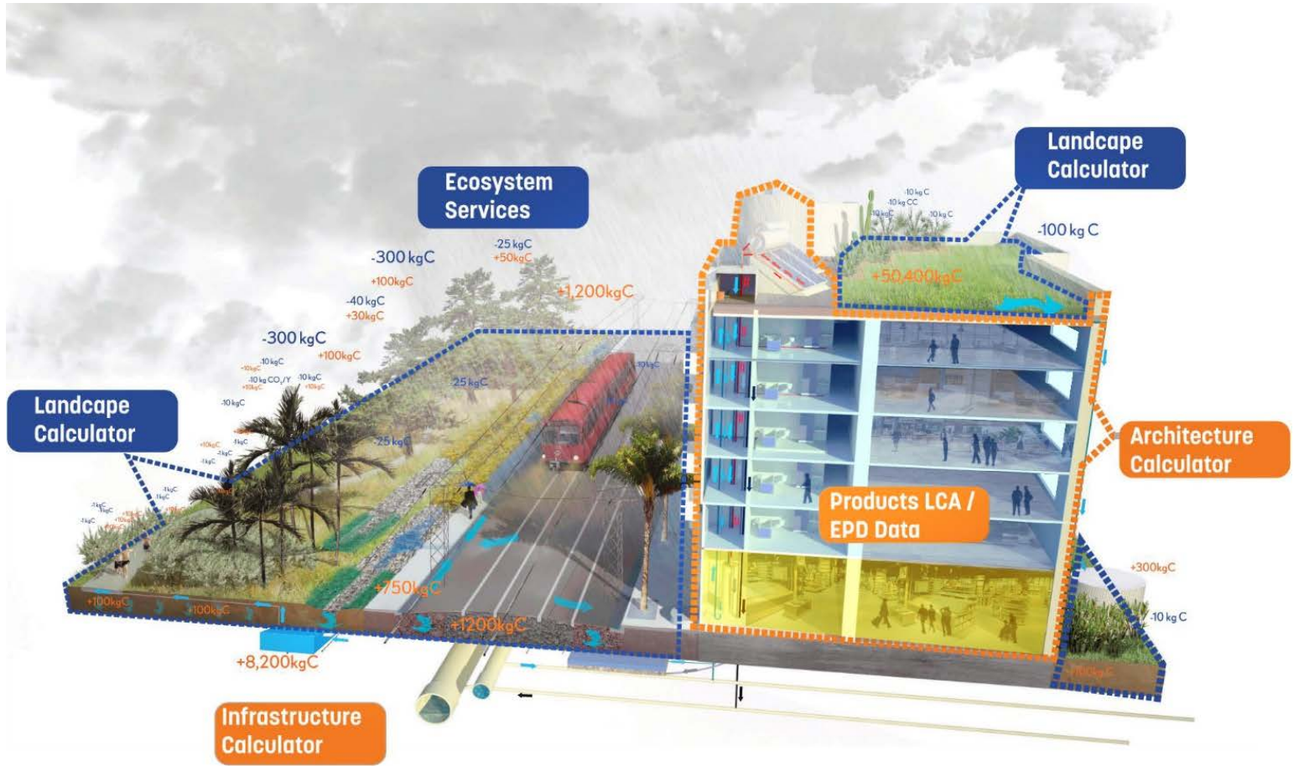


Whole-project energy use
EUI = kBtu/ft2/yr

Whole-project water use
WUI = gallons/ft2

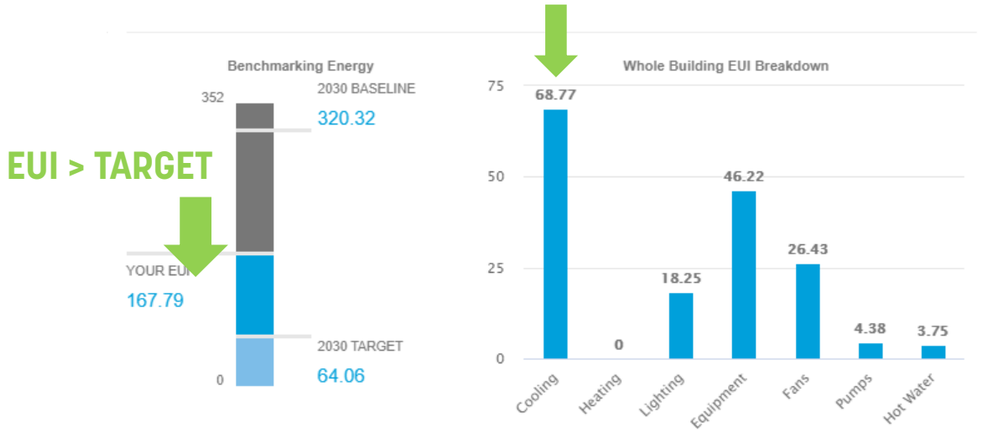
Whole-project carbon
CUI = kgCO2/m2

Sasaki's new Embodied Carbon Planning Calculator

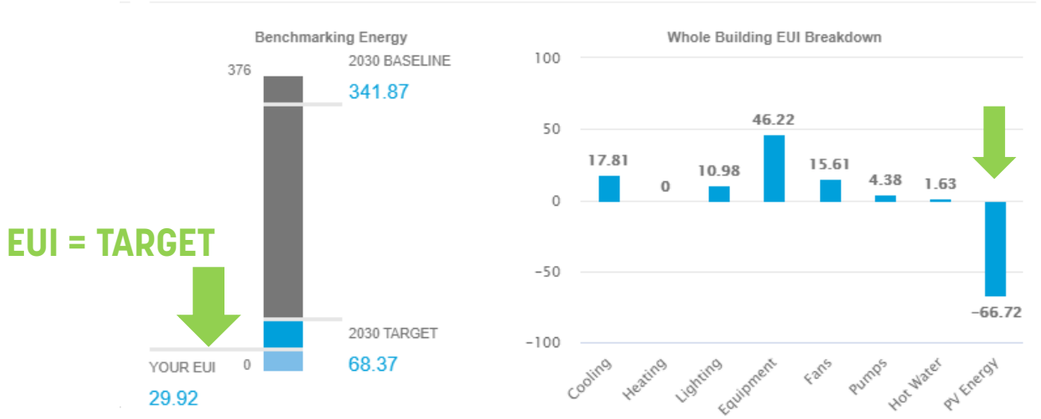


Road Map to Net Zero and All-Electric Buildings

Case Study: Energy Reductions of 83% from Baseline

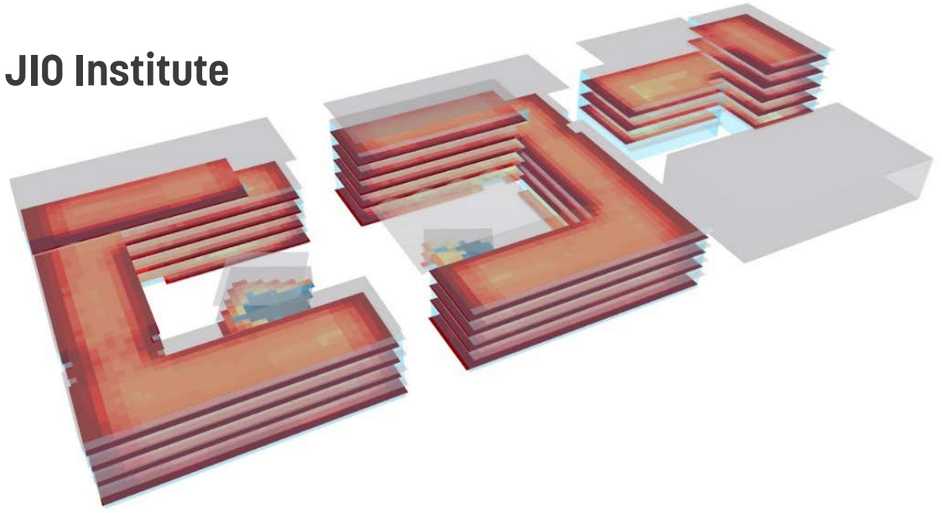


Baseline, Code Compliance

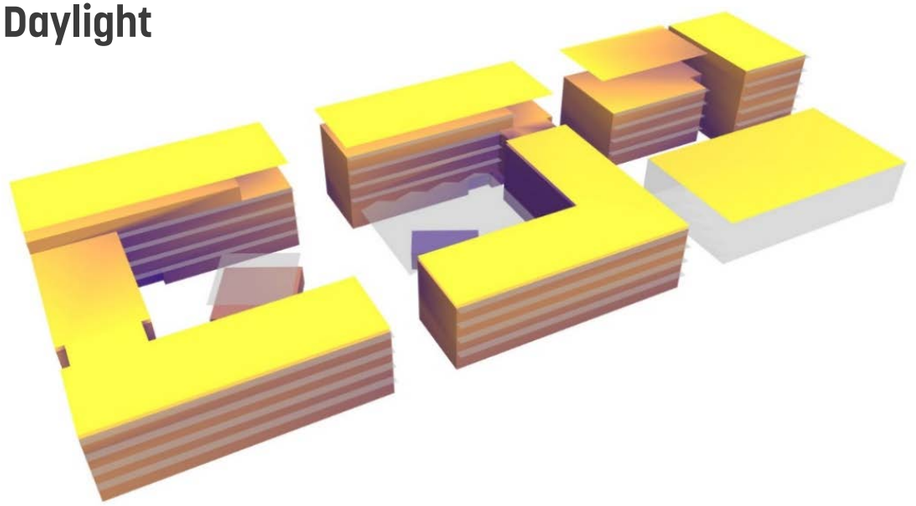


Proposed Design

JIO Institute



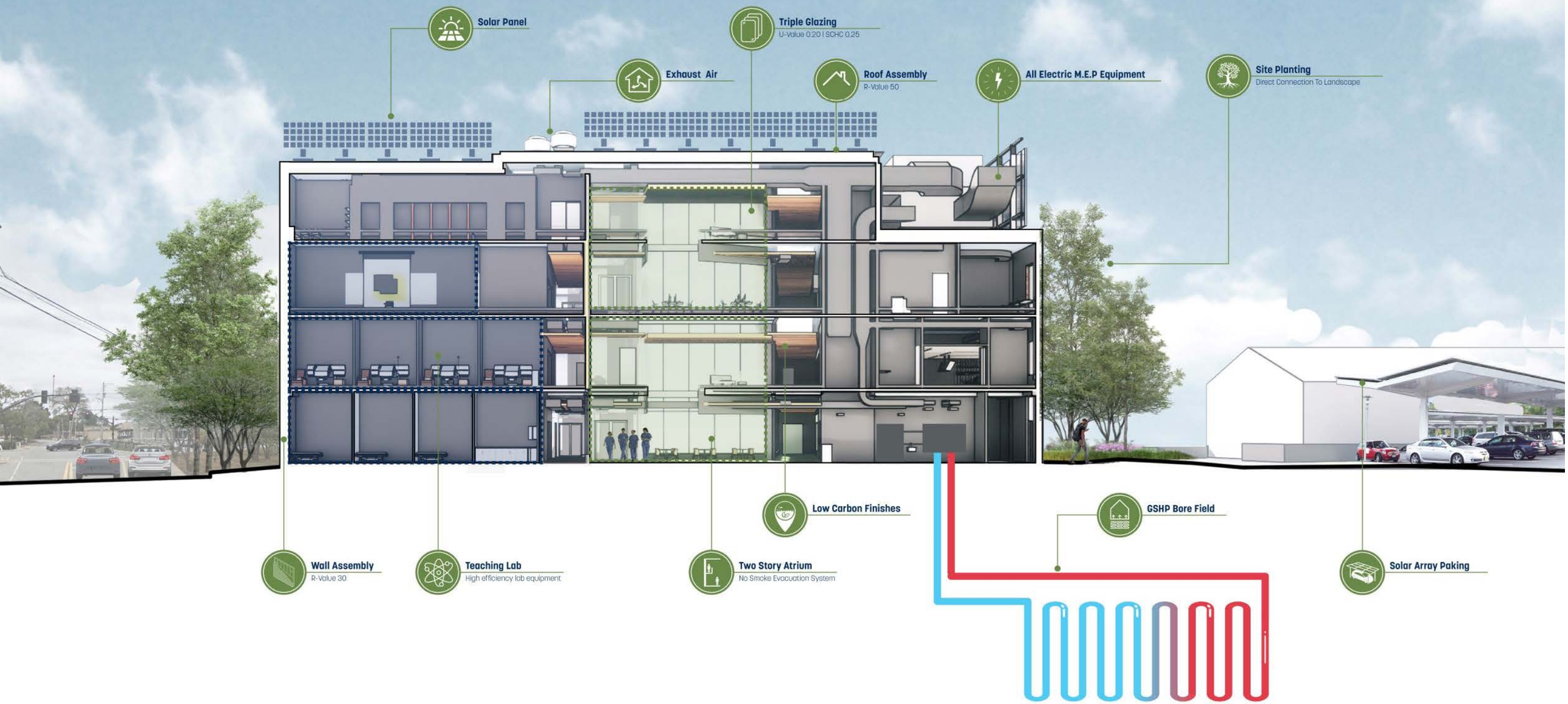
Daylight



Solar Radiation

Photovoltaics vs. Green Roof

Road Map to Net Zero and All-Electric Buildings



MASS BAY COMMUNITY COLLEGE HEALTH SCIENCES CENTER

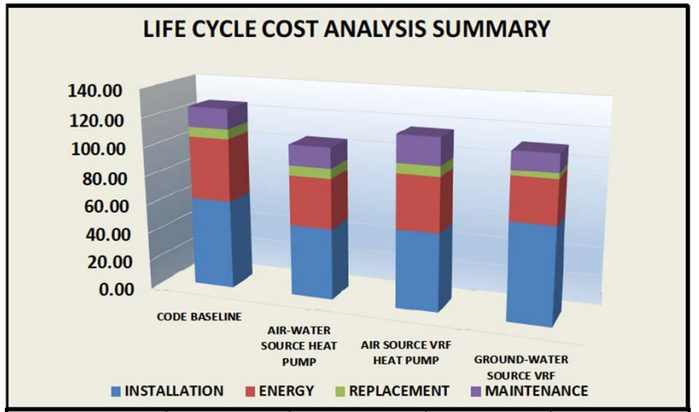
Road Map to Net Zero and All-Electric Buildings

MEP Systems Design for Fossil-Fuel Free, Carbon-Neutral Schools

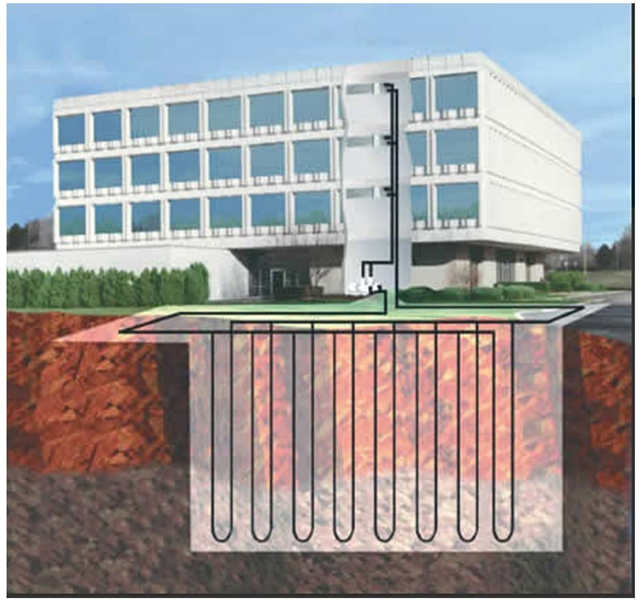
Water- or Air-Source Heat Pumps
- Water to Water (GS or cooling tower)
- Air to Refrigerant
- Air to Water

Onsite Renewable Energy
- Rooftop Solar
- Ground Source Heat Pump Feasibility

Life Cycle Analysis for Multiple Options:
- First Cost
- Operating Cost
- Energy Savings
- Maintenance
- Replacement Costs
- Payback



COSTS ($/SF)	CODE BASELINE	AIR-WATER SOURCE HEAT PUMP	AIR SOURCE VRF HEAT PUMP	GROUND-WATER SOURCE VRF
INSTALLATION	61.57	49.43	53.72	66.39
ENERGY	43.46	34.26	37.31	29.42
REPLACEMENT	7.03	7.03	7.03	3.51
MAINTENANCE	13.95	14.15	18.52	12.21



Road Map to Net Zero and All-Electric Buildings

Dispelling Myths

Myth #1: Are heat pumps reliable in cold weather?
Truth: Yes, new generation heat pumps are rated for extreme weather, and modular in design for redundancy

VS.

Combination Room Sensor

Multiple Individual Sensors

Myth #2: Are Net-Zero buildings challenging to operate?
Truth: No, we've learned to design BMS and control systems that streamline operations and are easy to use

Myth #3: Do we need gas for the kitchen?
Truth: No! All-electric commercial kitchens have induction ranges, e.g. Sasaki's Amherst College Student Center and Dining Hall for 1800 students

Sustainability in Project Workflow

In-House Modeling :

- Energy Use
- Water Use
- Embodied Carbon Emissions
- PV Capacity
- Outdoor Thermal Comfort

SALISBURY ACADEMIC COMMONS

LEED GOLD

RANKED IN TOP 39 COLLEGE AND UNIVERSITY LIBRARIES BY PRINCETON REVIEW 2021

Pierce School Design Opportunities

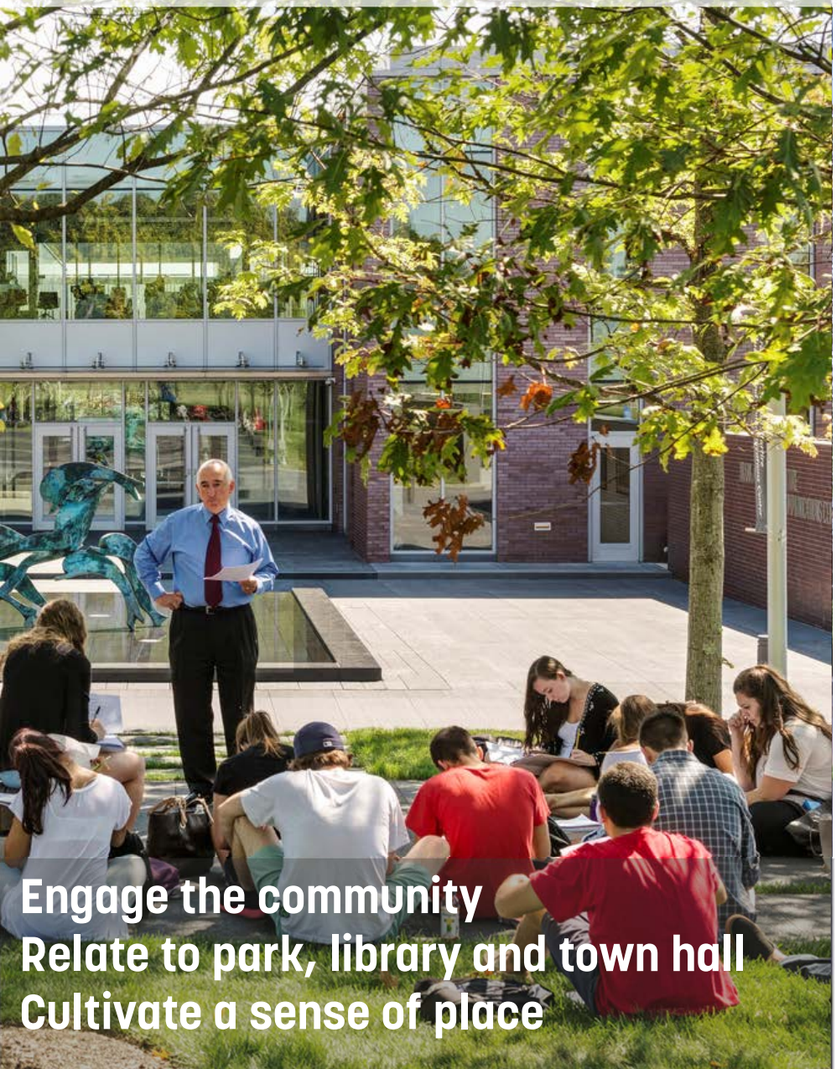
The Opportunity

Update a 1970's "Model School" to Reflect Brookline's Modern Values around 21st Century Learning and Community

A School and Neighborhood that have evolved together over time

Site Design Goals

A Civic Campus



Engage the community
Relate to park, library and town hall
Cultivate a sense of place

Playful + Educational

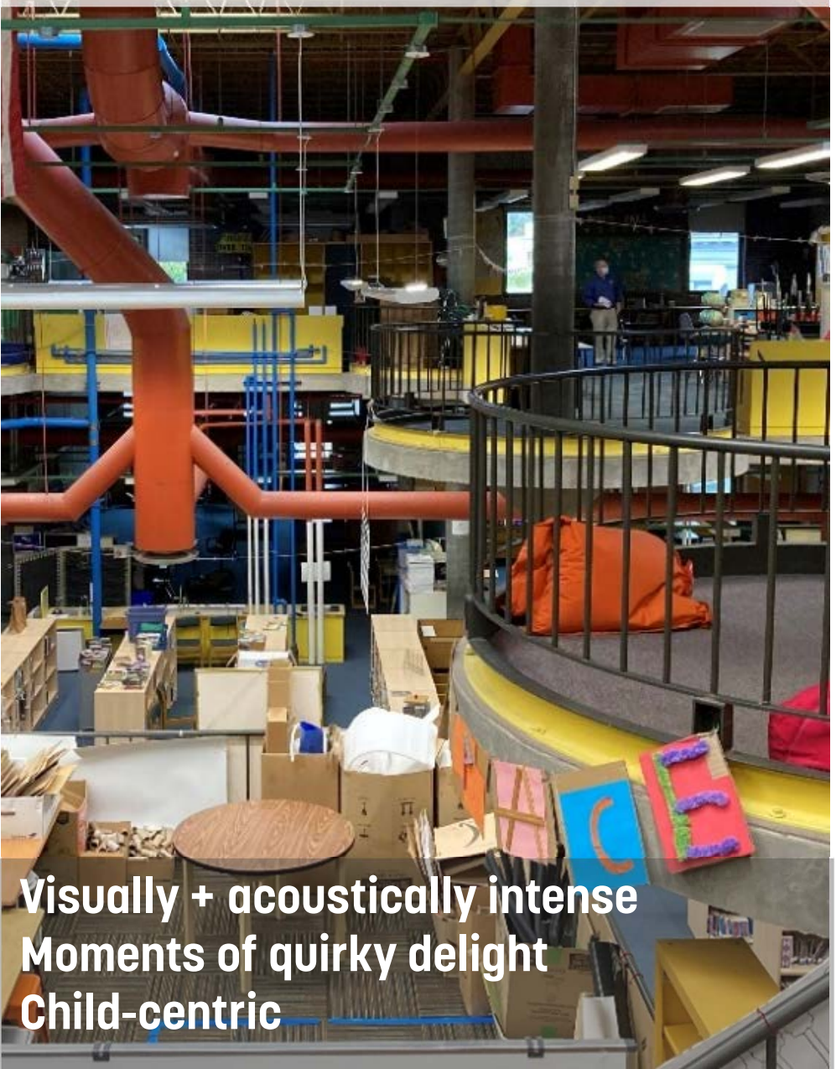
Age-appropriate
Inclusive
STEAM skills through play

Intentional Connections

Indoor-outdoor learning space
Microclimates and thermal comfort
Well-used is the goal

Existing Buildings Analysis

1974 Open School



Visually + acoustically intense
Moments of quirky delight
Child-centric

1854 Age of Reform

Generously proportioned
Quiet craft + quality
Now an island on the campus

Products of their Times

Inward-looking
Could be more inviting + accessible
Systems and envelope need upgrading

Building Design Goals

Pedagogy

Collaborative
Flexible
Acoustics

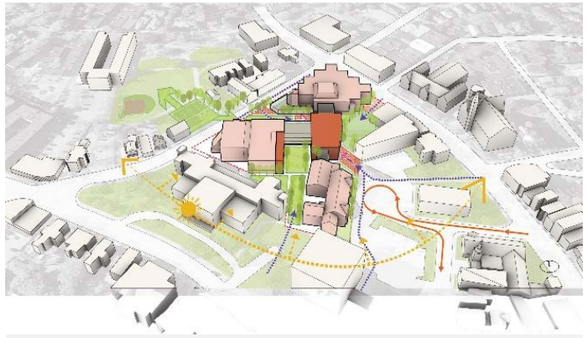
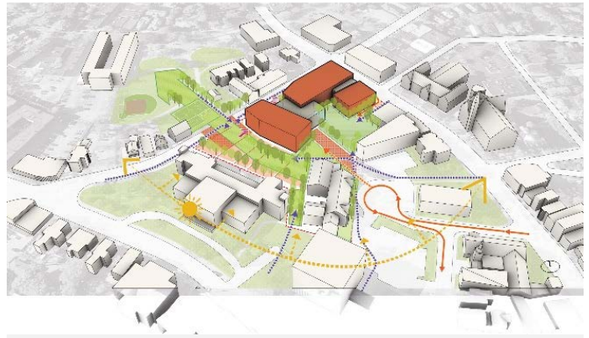
Student Experience

Sense of Ownership
Neighborhoods + Cohorts
Whole-Community Spaces

The Building

Daylight, acoustics, outdoor access
Durable, timeless, and smart
Seamlessly connected to site

Decision Matrix

Option A: Strategic Reno	**Option B:** Central Pavilion	**Option C:** A New Heart	**Option D:** A New School
			
Cost $$$	**Cost** $$	**Cost** $$	**Cost** $$
Schedule TBD	**Schedule** TBD	**Schedule** TBD	**Schedule** TBD
Pedagogy Strategic	**Pedagogy** Improved	**Pedagogy** Improved	**Pedagogy** Transformed
Student Life Strategic	**Student Life** Improved	**Student Life** Improved	**Student Life** Transformed
Campus Strategic	**Campus** Improved	**Campus** Transformed	**Campus** Transformed
1854 Building Renovated	**1854 Building** Renovated	**1854 Building** TBD	**1854 Building** to Town
Energy Use Baseline	**Energy Use** -20%	**Energy Use** -22%	**Energy Use** -67%
Embodied CO_2 Baseline	**Embodied CO_2** 6x	**Embodied CO_2** 10x	**Embodied CO_2** 18x

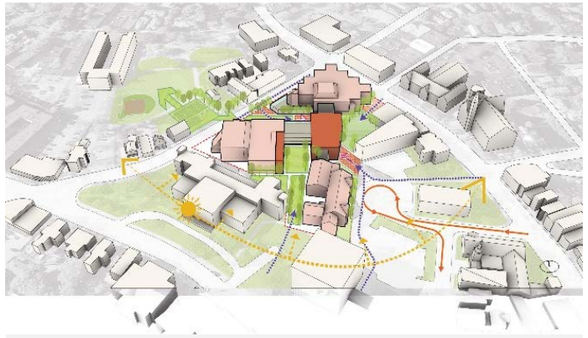
RENOVATION — NEW

Decision Matrix

Option A: Strategic Reno

Cost	$$$
Schedule	TBD
Pedagogy	Strategic
Student Life	Strategic
Campus	Strategic
1854 Building	Renovated
Energy Use	Baseline
Embodied CO_2	Baseline

Option B: Central Pavilion

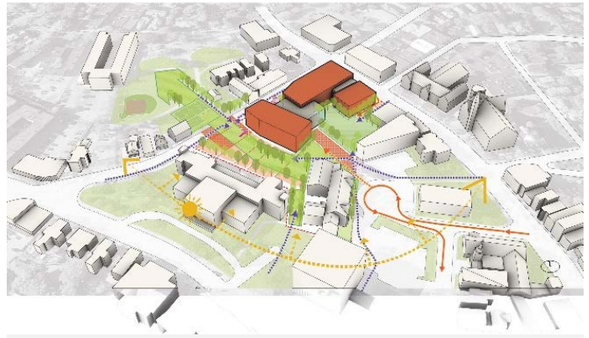


Cost	$$
Schedule	TBD
Pedagogy	Improved
Student Life	Improved
Campus	Improved
1854 Building	Renovated
Energy Use	-20%
Embodied CO_2	6x

Option C: A New Heart

Cost	$$
Schedule	TBD
Pedagogy	Improved
Student Life	Improved
Campus	Transformed
1854 Building	TBD
Energy Use	-22%
Embodied CO_2	10x

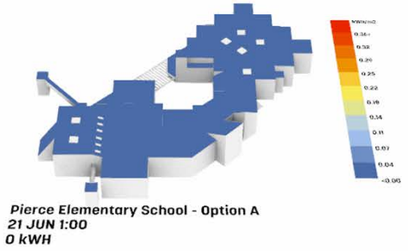
Option D: A New School

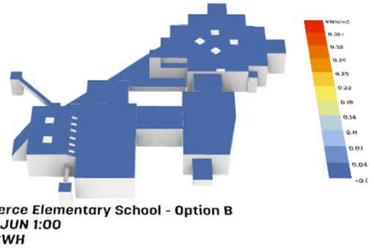


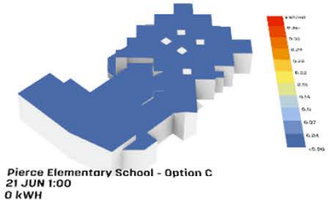
Cost	$$
Schedule	TBD
Pedagogy	Transformed
Student Life	Transformed
Campus	Transformed
1854 Building	to Town
Energy Use	-67%
Embodied CO_2	18x

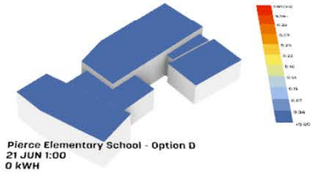
RENOVATION → NEW

Sustainable Design Analysis









Option A

EUI	Baseline
EUI w/ solar	-7%
Geothermal	TBD
Embodied CO_2	Baseline

Therm. Comfort +36 hrs

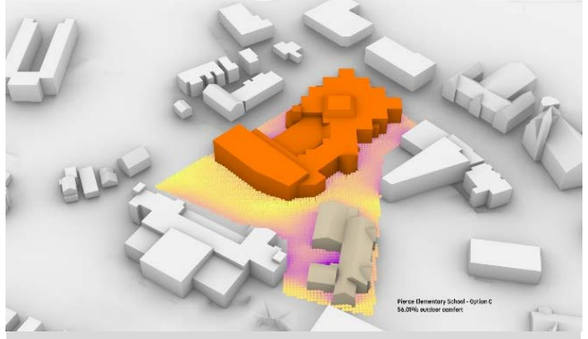
Option B

EUI	-20%
EUI w/ solar	-28%
Geothermal	TBD
Embodied CO_2	6x

Therm. Comfort -2 hrs

Option C

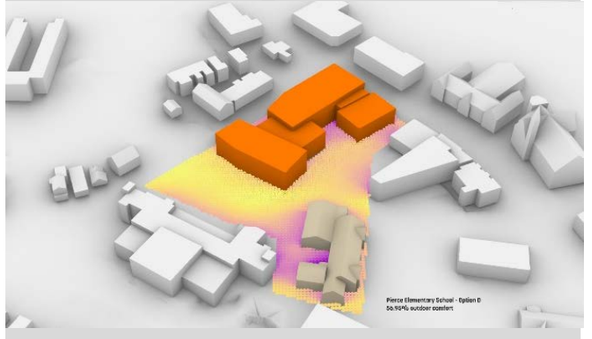
EUI	-22%
EUI w/ solar	-31%
Geothermal	TBD
Embodied CO_2	10x



Therm. Comfort +213 hrs

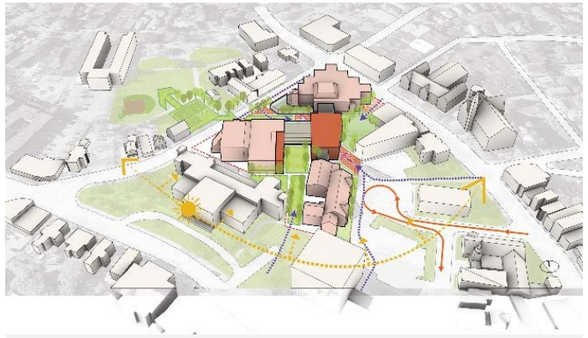
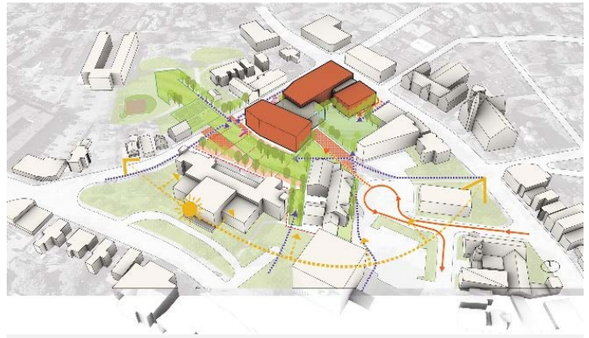
Option D

EUI	-67%
EUI w/ solar	-82%
Geothermal	TBD
Embodied CO_2	18x



Therm. Comfort +295 hrs

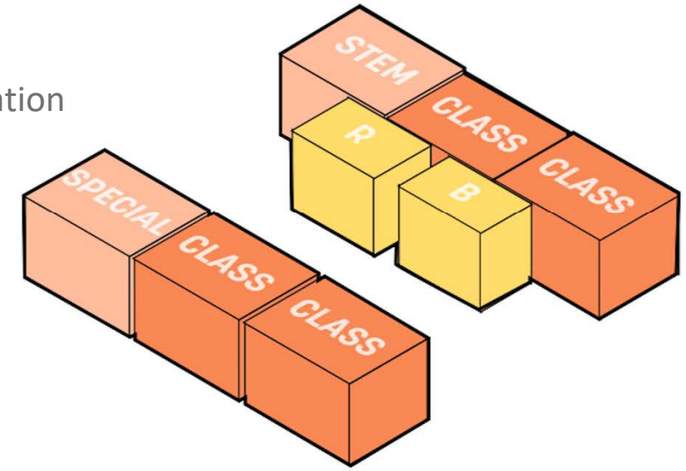
Decision Matrix

Option A: Strategic Reno	**Option B:** Central Pavilion	**Option C:** A New Heart	**Option D:** A New School
			
Cost $$$	**Cost** $$	**Cost** $$	**Cost** $$
Schedule TBD	**Schedule** TBD	**Schedule** TBD	**Schedule** TBD
Pedagogy Strategic	**Pedagogy** Improved	**Pedagogy** Improved	**Pedagogy** Transformed
Student Life Strategic	**Student Life** Improved	**Student Life** Improved	**Student Life** Transformed
Campus Strategic	**Campus** Improved	**Campus** Transformed	**Campus** Transformed
1854 Building Renovated	**1854 Building** Renovated	**1854 Building** TBD	**1854 Building** to Town
Energy Use Baseline	**Energy Use** -20%	**Energy Use** -22%	**Energy Use** -67%
Embodied CO_2 Baseline	**Embodied CO_2** 6x	**Embodied CO_2** 10x	**Embodied CO_2** 18x

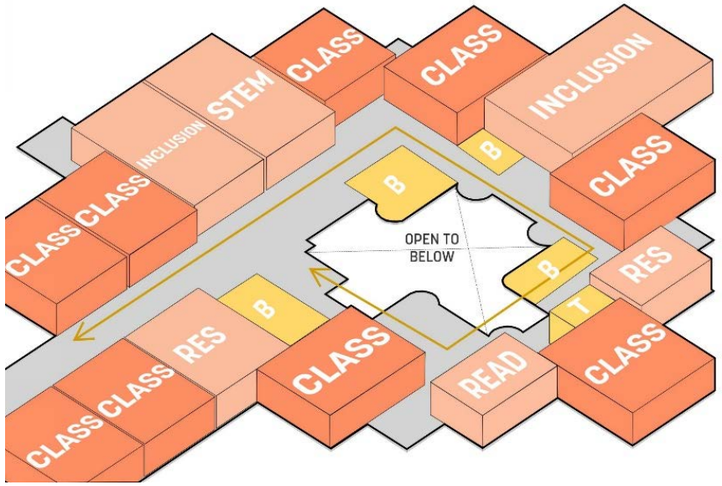
RENOVATION — NEW

Collaborative Learning

- Classroom
- Inclusion/Special Education
- Breakout/Resource
- Restrooms/Vertical



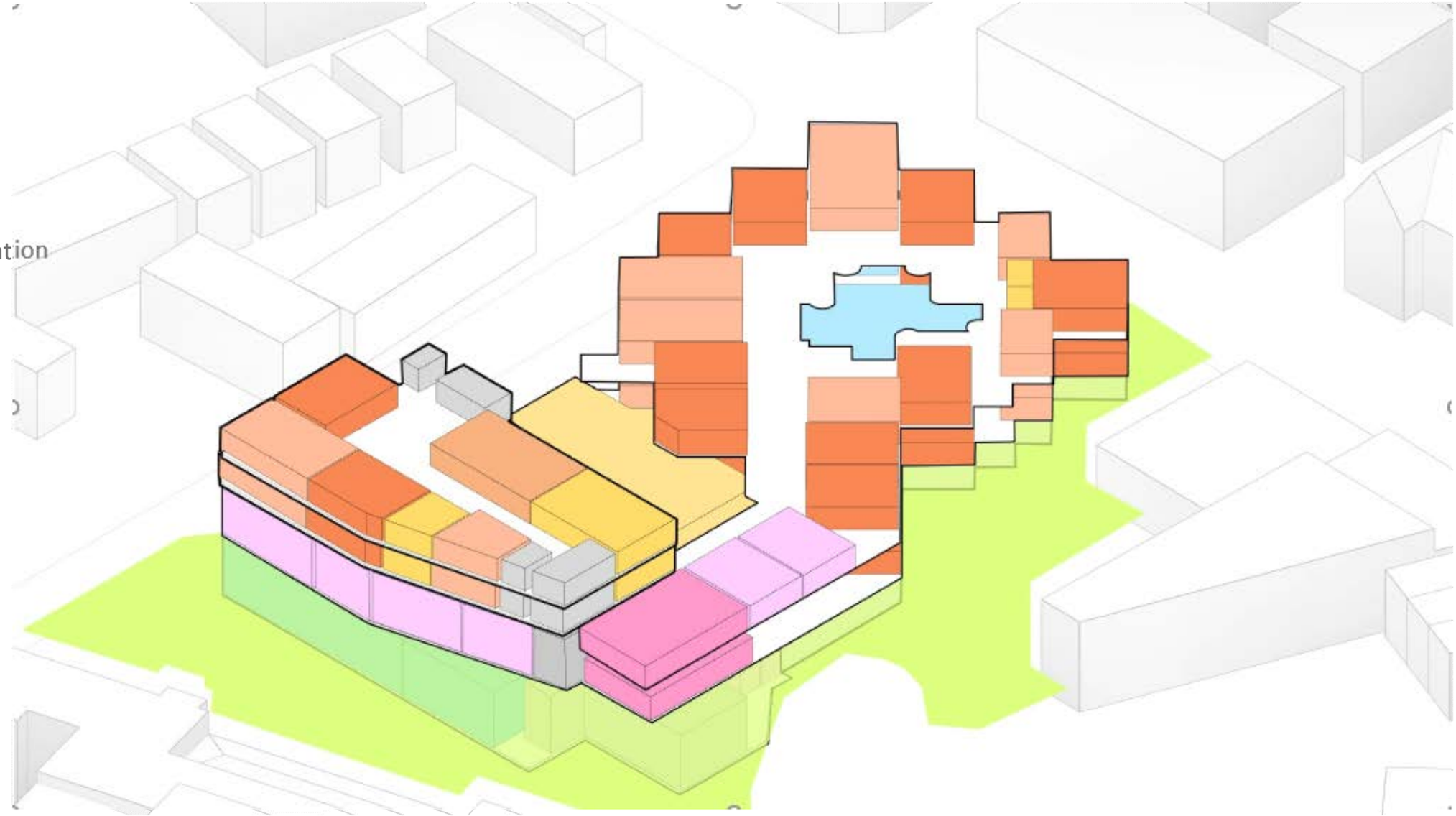
Collaborative Learning Cluster
New Construction



Collaborative Learning Cluster
Existing Building Renovation

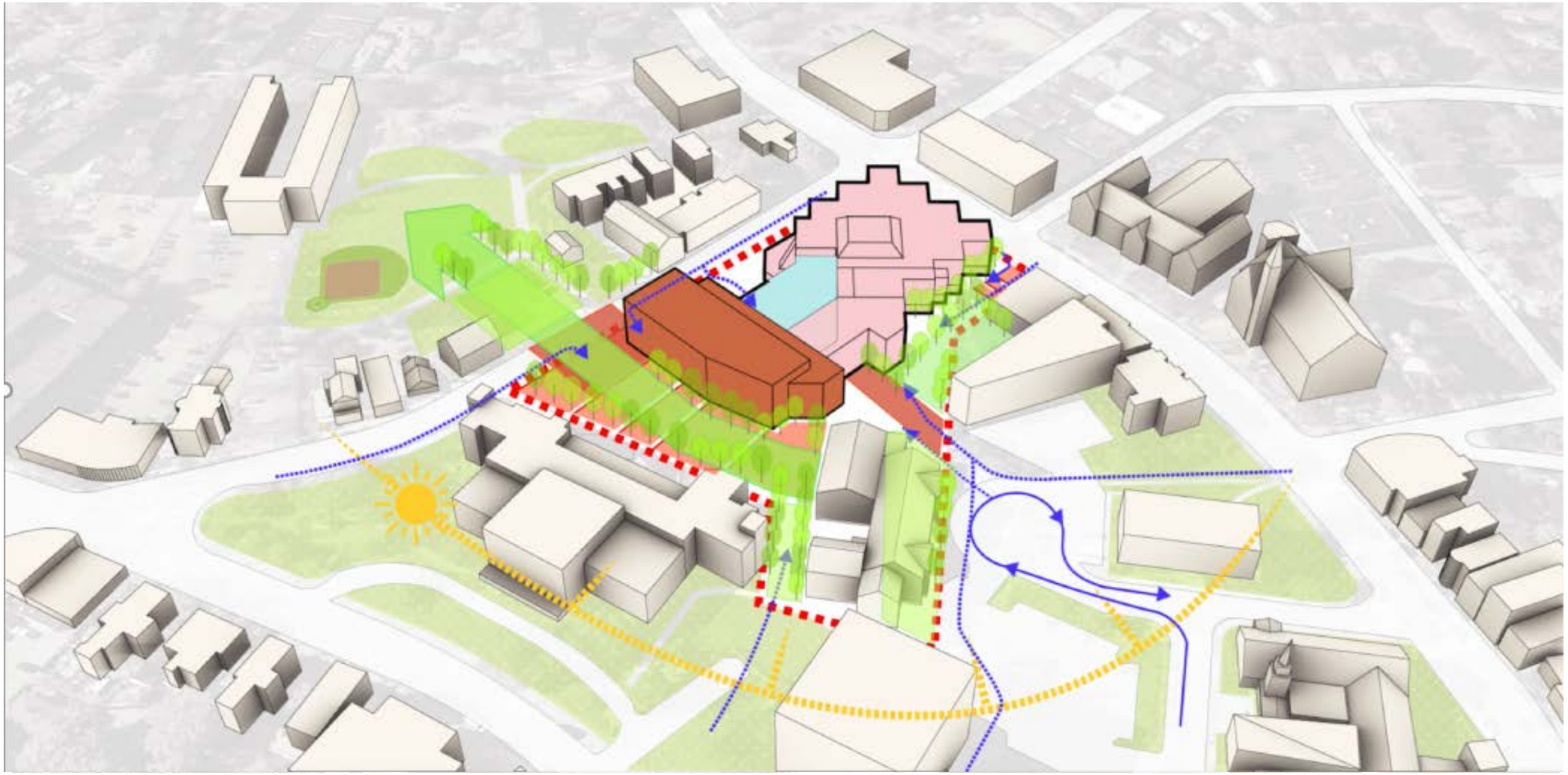
Option C A New Heart

- Cafeteria
- Special, Admin
- Gym
- Media Center
- Classroom
- Inclusion/Special Education
- Breakout/Resource
- Restrooms/Vertical



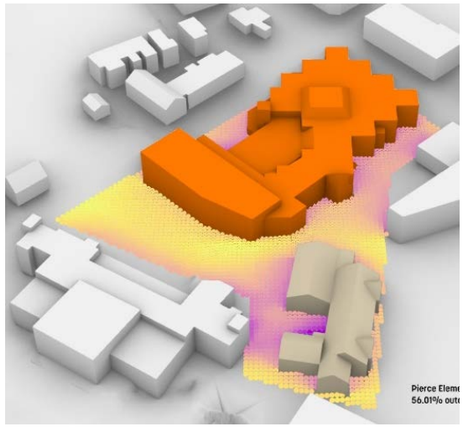
Option C A New Heart

- Main Entrance
- Secondary Entrance
- Major Green Space
- New
- Renovated



Option C A New Heart

- Main Entrance
- Secondary Entrance
- Major Green Space
- New
- Renovated

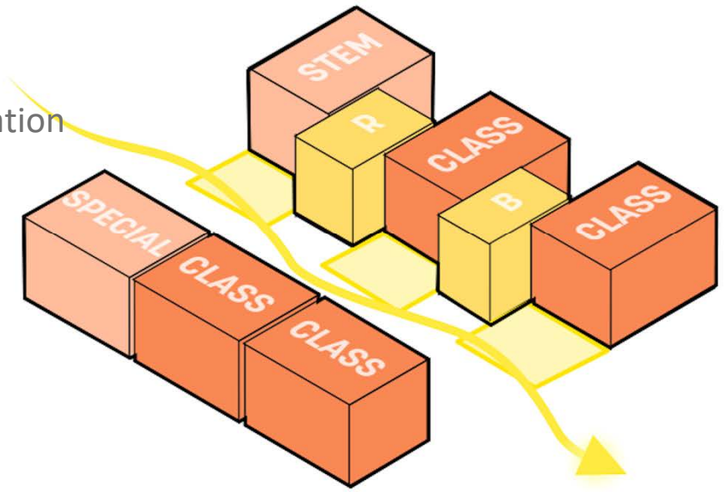


Thermal Comfort

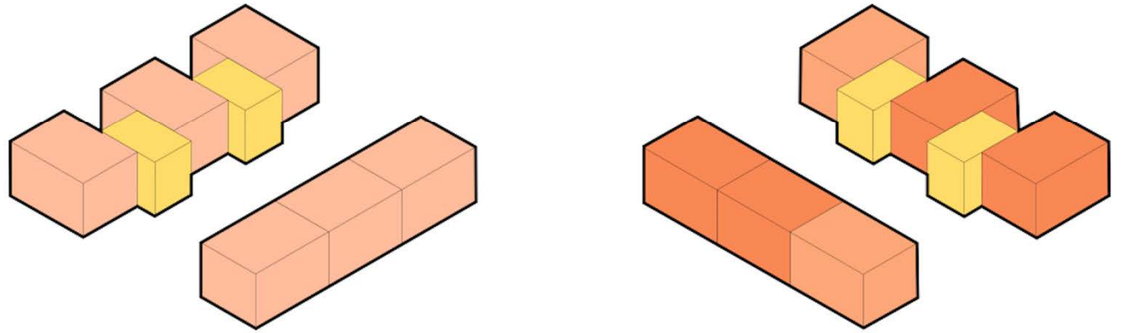
+200 hours/year

Collaborative Learning

Classroom
Inclusion/Special Education
Breakout/Resource
Restrooms/Vertical



Collaborative Learning Cluster



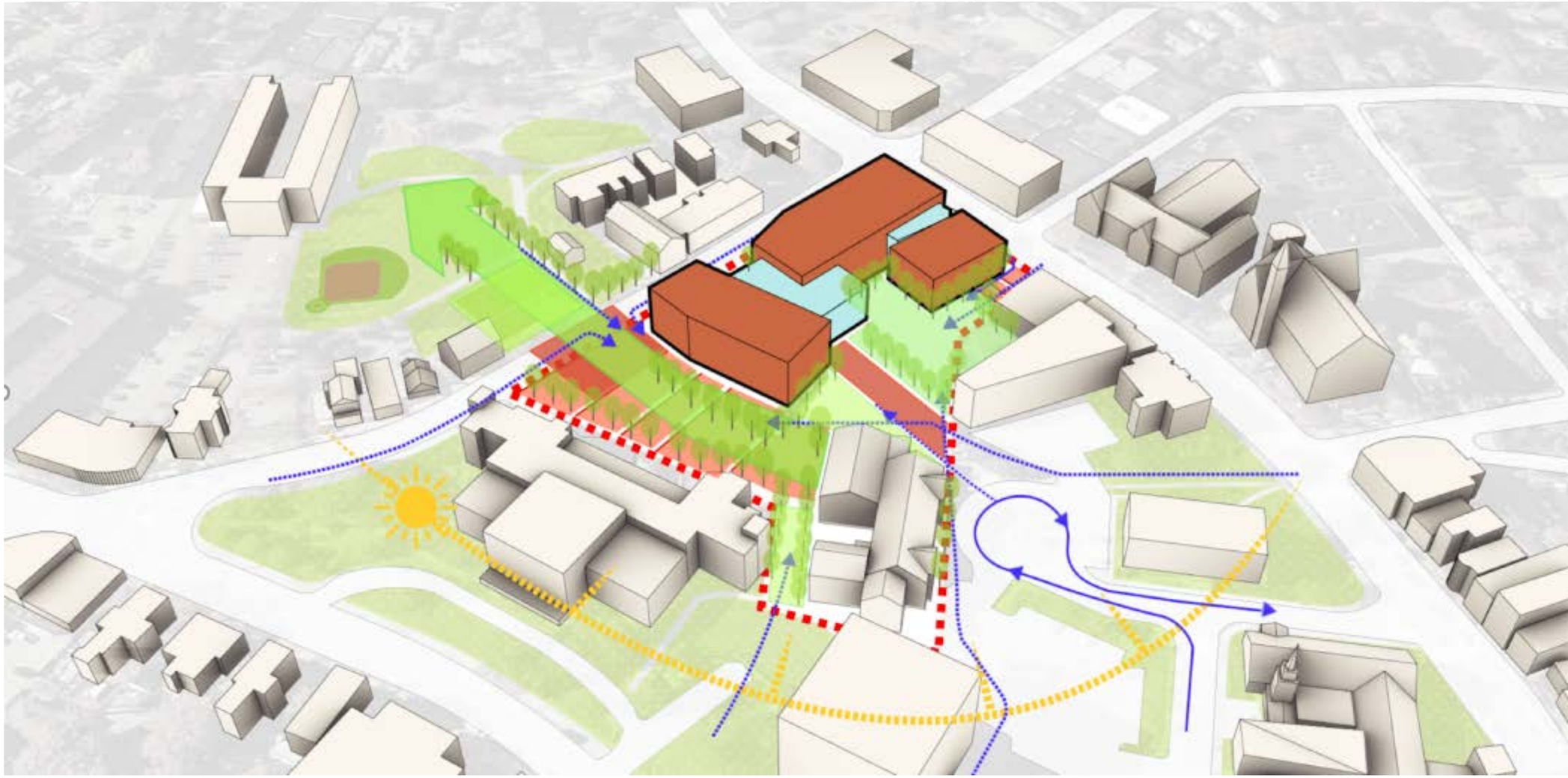
Neighborhood of Clusters

Option D A New School

- Cafeteria
- Special, Admin
- Gym
- Media Center
- Classroom
- Inclusion/Special Education
- Breakout/Resource
- Restrooms/Vertical

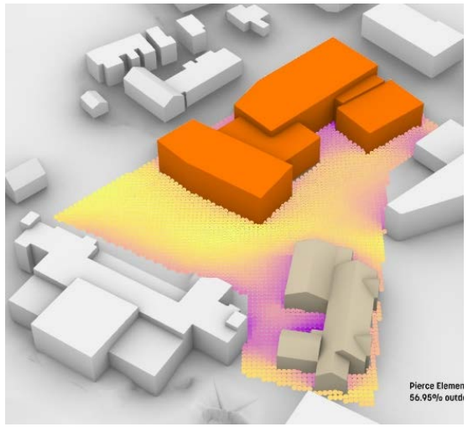
Option D A New School

- Main Entrance
- Secondary Entrance
- Major Green Space
- New
- Renovated



Option D A New School

- Main Entrance
- Secondary Entrance
- Major Green Space
- New
- Renovated



Thermal Comfort

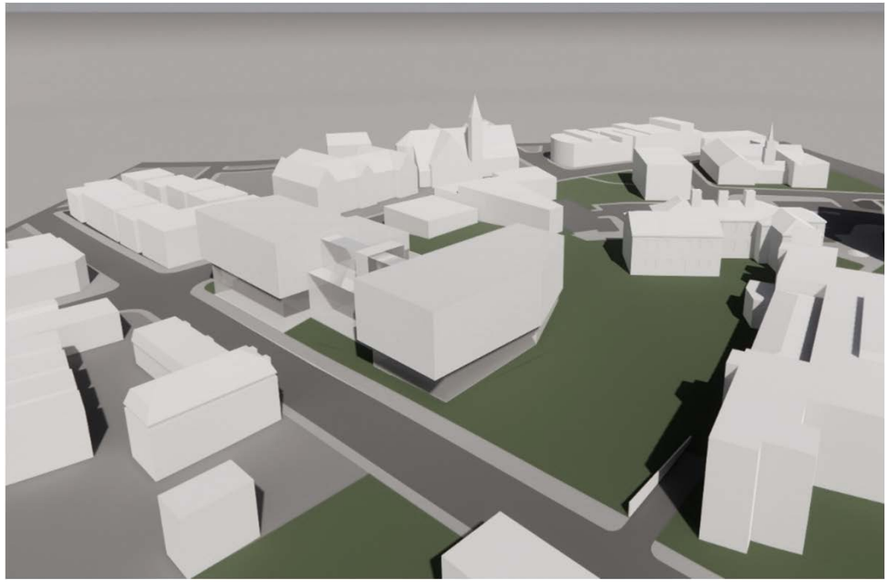
+300 hours/year

A New Pierce School

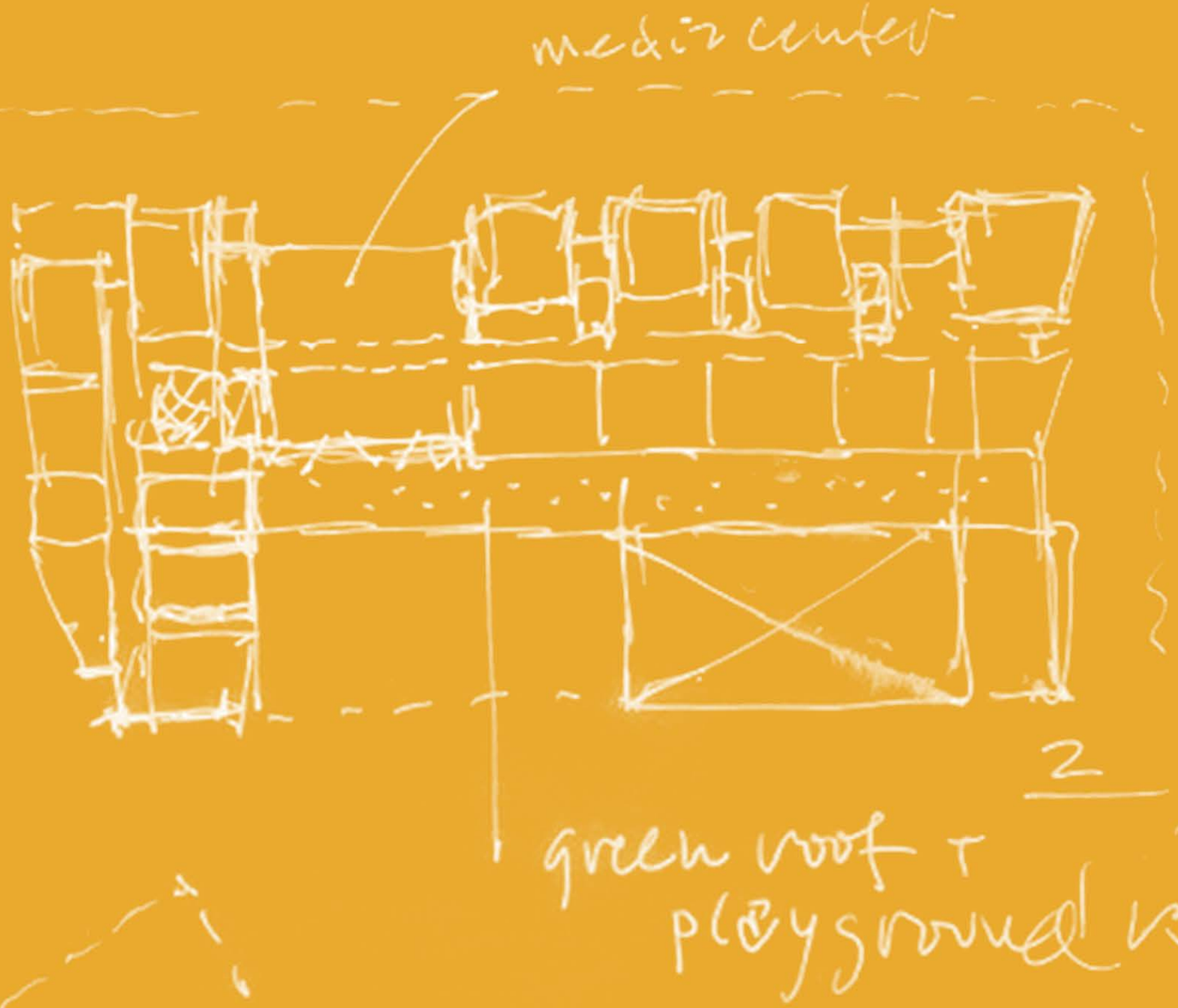
A New Pierce School

Team Strengths:

- **Exceptional level of service and familiarity with Brookline's culture and expectations**
- **Design excellence and craftsmanship founded on educational programming expertise**
- **National leaders in urban design, public space design, community outreach and sustainable design practices**



Thank you!



Massachusetts School Building Authority

Funding Affordable, Sustainable, and Efficient Schools in Partnership with Local Communities

Module 3

Feasibility Study

January 2015

INTRODUCTION

Module 3 – Feasibility Study:

If the District has completed all tasks defined in Module 1 – Eligibility Period and Module 2 – Forming the Project Team, the District may now proceed with the Feasibility Study as outlined in this Module. Module 3 – Feasibility Study is one of eight MSBA modules intended to provide a guide to the procedures and approvals needed to work collaboratively with the MSBA. (The Program Overview and listing of eight modules is provided in Appendix 3A for reference.)

Welcome to Module 3 – Feasibility Study

During the Feasibility Study, the District and its team collaborate with the MSBA to generate an initial space summary based on the District's educational program, document existing conditions, establish design parameters, develop and evaluate preliminary and final alternatives, and recommend the most cost effective and educationally appropriate solution to the MSBA Board of Directors. The MSBA Board of Directors must approve the preferred solution for a project before the preferred solution may advance into schematic design. See this Module for additional detail.

Module 3 has been provided as a general guide for Districts and their teams to plan their work in a collaborative effort in accordance with the MSBA's procedures and requirements. This Module is not intended to replace and/or supersede the services required by the OPM and/or Designer contracts. The Designer and OPM each shall be solely responsible for performing the services required by its contract with the District, respectively, and nothing in this Module shall be construed as relieving the Designer or OPM from its duties and responsibilities.

Feasibility Study Participants should include, at a minimum, the following:

- **The School Building Committee,** as submitted by the District and approved by the MSBA in its School Building Committee Approval form, as well as elected officials and other District representatives, as deemed necessary by the District to show the educational and financial support of the city/town/regional school district for the preferred solution.

- **The Owner's Project Manager, ("OPM")** as submitted by the District and approved by the MSBA in accordance with MSBA regulations and policies.

- **The Designer** as selected locally by the District and approved by the MSBA for projects estimated to cost less than $5 million or as selected through the MSBA's Designer Selection Panel for projects estimated to cost more than $5 million.

- **The MSBA,** through the assigned MSBA Project Manager and Project Coordinator.

Feasibility Study Submittal Procedures

All documents and materials submitted to the MSBA during the course of the Feasibility Study must be transmitted by the Owner's Project Manager ("OPM"). The OPM is required to compile and coordinate all submittals prior to delivery to the MSBA. This includes those items required to be provided by the OPM, as well as those of the Designer and the District.

For each submittal to the MSBA, the Designer and District must submit the required materials to the OPM. The OPM shall compile the submittal with the items indicated in the Designer and OPM Contracts, confirm that the District's School Building Committee has officially approved the submittal and verify its completeness and conformity to MSBA requirements. The OPM shall then forward this submittal to the assigned MSBA Project coordinator under a separate cover letter signed by the OPM, including a certification from the OPM that the OPM has reviewed and coordinated the materials, and the submittal is complete, and a confirmation that the District has approved the materials for submission to the MSBA, in accordance with the OPM Contract which requires the OPM to assist the Owner in the preparation of all information, material, documentation and reports that may be required or requested by the Authority.

Preliminary Design Program – Submit one (1) binder with a hard-copy of materials including one (1) electronic file in PDF format.

Preferred Schematic Report – Submit one (1) binder of materials per this Module including conceptual floor plans not exceeding 18" x 24", and one (1) electronic file in PDF format.

Incomplete submittals or submittals not reviewed by the OPM will not be accepted. Partial submittals will not be accepted without prior approval by the MSBA.

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APPENDICES

3.0 Feasibility Study

After all tasks defined in Module 1 – Eligibility Period and Module 2 – Forming the Team have been completed by the District and acknowledged by the MSBA, a District may proceed with the Feasibility Study. Please remember that an invitation from the MSBA's Board of Directors to collaborate on a Feasibility Study is ***not*** approval of a project. The purpose of the Feasibility Study is for the District, its Owner's Project Manager ("OPM") (for projects with estimated construction costs in excess of $1.5 million), its Designer, and the MSBA to explore potential solutions that meet the requirements of the District's Educational Program, and to determine the most cost effective and educationally appropriate solution to recommend to the MSBA Board of Directors for its consideration and approval to proceed into schematic design. Moving forward in the MSBA's process requires collaboration with the MSBA, and communities that "get ahead" of the MSBA without MSBA approval will not be eligible for grant funding. To qualify for any funding from the MSBA, local communities must follow the MSBA's statute and regulations, which require MSBA collaboration and approval at each step of the process.

Due to the variety and nature of proposed appropriate solutions (e.g., non-construction alternatives such as redistricting, grade reconfigurations, repairs to a single building system, renovations to the entire facility, an addition, or a new school), each Feasibility Study will vary slightly as to the specific requirements, scope, cost and schedule. The particular requirements, scope, cost and schedule of a Feasibility Study will be outlined in the Feasibility Study Agreement between the District and the MSBA. The requirements may be based on many factors including the MSBA's review and evaluation of any previous studies as well as any meetings and discussions between the District and the MSBA.

In order to ascertain MSBA input and approval throughout the Feasibility Study process, the District is required to secure MSBA concurrence and/or approval of each of the following study reports before finalizing and submitting the next report:

- Preliminary Design Program
- Preferred Schematic Report

The OPM shall prepare and provide a work plan to the Owner and Authority within twenty-one (21) days of Design Contract execution.

3.1 Preliminary Design Program

The purpose of the Preliminary Design Program is to define the programmatic, functional, spatial, and environmental requirements of the educational facility necessary to meet the District's educational program, and perform the review and investigation required to clearly define the existing building deficiencies. Based upon a review of the District's educational program, the Designer will identify and prepare in written and graphic form for review, clarification, and agreement regarding the educational goals and programmatic space needs for the subject school. The space needs along with an evaluation of existing conditions and site development requirements will form the basis of the Designer's recommendation for an evaluation of alternatives upon which the most educationally appropriate and cost effective solution may be recommended.

The Preliminary Design Program shall be provided in the form of a binder with the following clearly labeled tabs:

- Table of Contents
- Introduction
- Educational Program
- Initial Space Summary
- Evaluation of Existing Conditions
- Site Development Requirements
- Preliminary Evaluation of Alternatives
- Local Actions and Approval Certification
- Appendices

3.1.1 Introduction

The Introduction shall present a brief overview of the reason for the Feasibility Study, a list of all project participants, an outline of key data that informs the basis of the Study, and a summary of the process undertaken to examine, analyze, and conclude upon the findings of this Preliminary Design Program. The following shall be included:

- A brief summary of the facility deficiencies identified by the District in the Statement of Interest (SOI) at the time when the SOI was submitted. Include a copy of the most recent associated SOI in the Appendix of the submittal;
- The date of the invitation from the MSBA Board of Directors to conduct a Feasibility Study. Include a copy of the MSBA Board Action letter in the Appendix of the submittal;
- The agreed-upon design enrollment. (If the enrollment certification included multiple enrollments, then include the conditions associated with each enrollment). Include a copy of the executed study or design enrollment certification, as applicable, in the Appendix of the submittal;
- A brief narrative summary of the Capital Budget Statement indicating local available funding capacity, other ongoing and planned municipal projects, estimated budgets, and the target budget for the proposed project; The overall goal of the Capital Budget Statement is to document the total change in operational costs that the District expects as a result of the proposed project.
- A project directory with contact information for representatives of all District stakeholders (e.g., Mayor/Board of Selectmen, Superintendent, School Building Committee, School Committee, Local officials, and others involved in the project), Designer (point of contact and key support staff and sub-consultants) and OPM (and key support staff);
- Updated project schedule, including: 1) projected MSBA Board of Directors meeting for approval to proceed into Schematic Design, 2) projected MSBA Board of Directors meeting for approval of Project Scope and Budget Agreement, and 3) projected Town/City Vote for Project Scope and Budget Agreement. Identify any variances from the schedule outlined in the District's Feasibility Study Agreement with the MSBA. The Board of Directors meeting deadlines for submissions schedule is posted on the MSBA website and should be consulted

when developing the project schedule. A sample Project Schedule that includes major project milestones has been provided for reference in Appendix 3B.

3.1.2 Educational Program

The District will work with the Designer to document the existing educational program offered by the District and to define the proposed educational activities. The Preliminary Design Program must include documentation of the District's existing educational program, and new or expanded educational specifications if applicable. While developing the Educational Program, the District and the Designer should review the Educational Profile Questionnaire that was completed by the District during Eligibility Period. The Preliminary Design Program must include the process of collaboration, outcomes, and documentation of support among the stakeholders.

The Educational Program shall include a statement of the teaching philosophy and methods; a thorough, in-depth explanation of the District's curriculum goals; and, objectives of the program elements associated with the subject facility. Through the use of narratives, figures, and charts, the Educational Program shall describe and include, but not necessarily be limited to, the following as it relates to the current program, facility needs and proposed design features:

- Grade and school configuration policies;
- Class size policies;
- School scheduling method;
- Teaching methodology and structure (e.g., academies, departments, houses, teams, etc.);
- Teacher planning and room assignment policies;
- Pre-kindergarten (SPED only, tuition programs, locations, full day, half day, if applicable);
- Kindergarten (full day, half day, locations, if applicable);
- Lunch programs (number of servings, district kitchen, full service kitchens, warming kitchens, etc.);
- Technology instruction policies and program requirements (labs, in-classroom, media center, required infrastructure, etc.);
- Art programs (in-classroom, specialized area);
- Music/Performing Arts programs (in-classroom, specialized area);
- Physical Education programs;
- Special Education programs (in-house, collaborative, facility restrictions);
- Vocational Education programs;
- Transportation policies;
- Functional and spatial relationships;
- Key programmatic adjacencies; and
- Security and visual access requirements.

3.1.3 Initial Space Summary

Based upon the District's Educational Program as described above and the agreed-upon enrollment, the District, working with its Designer, must complete the Initial Space Summary to identify the educational spaces the District believes are needed to deliver its

educational program. Once agreed upon by the MSBA, this Initial Space Summary will help inform the development of alternatives to be studied, upon which the most educationally appropriate and cost effective solution may be recommended.

The Initial Space Summary must be based on the agreed-upon design enrollment, supported by the District's Educational Program and must include the following:

- An itemization of each existing educational space;
- The total gross square footage of the existing facility;
- An itemization of each proposed educational space; and
- A total gross square footage for the proposed renovated/added-to/new facility.

MSBA regulations, 963 CMR 2.00, establish allowable gross square footage per student for different types of school facilities of varying scale. To assist Districts and their design teams in developing proposed Initial Space Summaries, the MSBA has created space summary templates (in Excel format), one each for elementary, K-8, middle, and high schools. Each template includes three separate columns as follows:

- The first column documents existing conditions;
- The second column documents proposed spaces subdivided by existing spaces proposed to remain, new spaces, and total; and
- The third column is the MSBA's guidelines. Other than inserting the agreed upon enrollment at the bottom, this column is not to be altered.

Refer to Appendix 3C Space Summary Templates for additional information.

As an attachment to the Initial Space Summary, Districts must provide scaled floor plans of the existing facility and narrative descriptions of the reasons for any variance between the District's proposed program/educational spaces and the MSBA guidelines for each category of spaces. Districts and their teams should consider the following when completing the Initial Space Summary:

- The initial space summary does not have to differentiate between existing spaces to remain and new spaces when generating the proposed program;
- The values for allowable spaces within the MSBA Guidelines column must not be adjusted as this will prevent a clear understanding of how the proposed program compares to the guidelines and potential limitations on MSBA participation. If this column is adjusted or edited, the proposed Initial Space Summary will be returned, without MSBA review comments, for correction and resubmission;
- The spreadsheet may be expanded by adding rows within the appropriate category to include entries for existing programs and spaces as needed to accurately describe existing educational spaces;
- Categories of space or room type not included in the initial space summary template (e.g., ROTC, computer lab, etc.) should be listed under the "Other" category; and
- If the MSBA and the District agree that more than one design enrollment is to be considered (i.e., proposed grade reconfigurations or redistricting) as part of the Feasibility Study, a separate Initial Space Summary must be generated for each potential enrollment.

3.1.4 Evaluation of Existing Conditions

The Designer will analyze existing conditions of all buildings that comprise the school, site, and environment. The Designer will assemble sufficient information on the problems and opportunities with the existing school building(s) and site, so that any major implications for future requirements and design can be accurately judged. This information is required to be of a level sufficient enough to assist in the development of the preliminary alternatives to be evaluated and must include, at a minimum, an outline of the potential scope, budget, and schedule impacts. The information should include the following:

- Determination that the District has legal title to the property, or alternatively, the required actions necessary to obtain clear title or to control, in accordance with the provisions of 963 CMR 2.05(1), and operate the Assisted Facility and Project Site for the useful life of the Assisted Facility;
- Determination that the property is available for development;
- Determination of any historic registrations and/or potential local and/or state interest/requirements regarding historic preservation or infill construction within a historic district and the associated potential impact on scope and time;
- Determination of any development restrictions that may apply;
- Initial Evaluation of building code compliance for the existing facility;
- Initial Evaluation of Architectural Access Board Rules and Regulations and their application to a potential project;
- Preliminary Evaluation of significant structural, environmental, geotechnical or other physical conditions that may impact the cost and evaluation of alternatives;
- Determination for need and schedule for soils exploration and geotechnical evaluation;
- Environmental site assessments consisting of, at a minimum, a Phase I: Initial Site Investigation conforming to 310 CMR 40.00, et seq. performed by a licensed site professional. (Results of the Phase I investigation may require additional environmental testing); and
- Assessment of the school for the presence of any hazardous materials including, but not necessarily limited to, lead, lead paint, PCBs, mercury, radon, mold and asbestos. Destructive testing may be required where hazardous materials potentially exist behind and within existing construction.

The District will furnish the Designer with all available studies, drawings, surveys, photographs and subsoil exploration reports of the proposed project's existing buildings (if any) and the site or sites.

The Designer shall include in the Preliminary Design Program Report a clear, written statement of the methods and assumptions of, and limitations on the accuracy of, any information provided. The Designer shall recommend during the course of the Feasibility Study what further investigatory work should be carried out prior to recommending an option as the Preferred Solution and what work should be carried out prior to submittal of the Schematic Design.

3.1.5 Site Development Requirements

In narrative form, the Designer shall describe in general terms project requirements related to site development to be considered during the preliminary and final evaluation of alternatives and submit an existing site plan(s) including, but not limited to:

- Structures and fences;
- Site access and circulation;
- Parking and paving;
- Code requirements;
- Zoning setbacks and limitations;
- Accessibility requirements;
- Easements;
- Wetlands and/or flood restrictions;
- Emergency vehicle access;
- Safety and security requirements;
- Utilities;
- Athletic fields and outdoor educational spaces; and
- Site orientation and other location considerations and issues.

3.1.6 Preliminary Evaluation of Alternatives

Based upon the Educational Program, Initial Space Summary, evaluation of existing conditions, and site development requirements, the District, working with its Designer, shall perform a preliminary evaluation of alternatives. To ensure that the Feasibility Study determines the most cost effective and educationally appropriate solution that can be supported by the community and the MSBA Board of Directors, it is imperative that the preliminary evaluation of alternatives is sufficiently comprehensive in scope to initially consider all possible solutions. Each alternative should satisfy significant components of the Educational Program, Standards, Policies and Guidelines of the MSBA to the extent feasible, unless specifically authorized in writing by the MSBA.

The Preliminary Evaluation of Alternatives should include at least the following:

- Analysis of school district student school assignment practices and available space in other schools in the district;
- Tuition agreements with adjacent school districts (per MGL c.70B §8);
- Rental or acquisition of existing buildings that could be made available for school use (per MGL c.70B §8);
- Code Upgrade Option that includes repair of systems and/or scope required for purposes of code compliance; with no modification of existing spaces or their function (Please note that the MSBA would support a Code Upgrade Option that fulfilled the significant components identified by the district in its Statement of Interest and was reported to support delivery of the district's educational program);
- Renovation(s) and/or addition(s) of varying degrees to the existing building(s); and
- Construction of new building and the evaluation of potential locations.

The Preliminary Evaluation of Alternatives shall include for each alternative: a description of the alternative; an examination of the degree to which the alternative fulfills and does not fulfill the stated Educational Program requirements; a description of the variation in spaces identified in the Initial Space Summary; how it addresses site and facility goals and objectives; an assessment of the impact of construction phasing; and estimated preliminary construction and project costs. The level of detail provided for each alternative and the associated conceptual cost estimates must be suitable for a comparative cost analyses for the various alternatives.

The results of the Preliminary Evaluation of Alternatives shall be presented in narratives, figures, and tables to clearly demonstrate to the District and the MSBA the evaluation criteria (e.g., existing space issues, the educational program, site requirements, etc.), how each alternative did or did not address the criteria, the advantages and disadvantages of each alternative, and the comparative cost analyses.

The Preliminary Evaluation of Alternatives shall conclude with a list of at least three distinct alternatives (including at least one renovation and/or addition option that maximizes use of the existing facility) that are recommended for further development and evaluation during the Final Evaluation of Alternatives. Alternatives shall retain the same title and designation between PDP, PSR, and SD submittal, therefore maintaining clarity in the documentation.

If the Preliminary Design Program does not include conceptual cost estimates or a list of at least three district alternatives that are being recommended for further development the MSBA will consider the submittal incomplete and will withhold MSBA review comments until submitted.

3.1.7 Local Actions and Approvals

The Preliminary Design Program, as with other submittals to the MSBA, must be reviewed and approved locally for submittal to the MSBA, in accordance with the state open meeting law and any other local requirements. Public participation and local approval procedures and practices may vary by community and by project. Districts are encouraged to consult with their local counsel to ensure that all applicable requirements are satisfied. The District must document local approval of the Preliminary Design Program and its submittal to the MSBA. The MSBA requires Districts to provide a certified copy of Minutes of the School Building Committee ("SBC") meeting(s) where the Feasibility Study related submittals were approved for submittal to the MSBA. The Minutes must include the specific language of the vote and the results of the vote, stating the number of SBC members who voted in favor of submittal to the MSBA, the number opposed, and the number of abstentions, if any.

The District also must list the relevant SBC meeting dates; provide copies of the agendas of such meetings; briefly describe the materials presented, if applicable; list the names and affiliations of specific stakeholders in attendance (e.g., representatives of the local historic commission, school committee members beyond those in the SBC, local community group representatives, etc.); and, list what materials are available for public review and where those materials may be viewed. The MSBA also requires Districts to

provide similar information for public meetings and presentations conducted in connection with the proposed project, in addition to SBC meetings.

Refer to Appendix 3D Local Actions and Approvals Certification Template for additional information. A signed Local Actions and Approvals Certification on District letterhead is required for MSBA staff to provide review comments regarding the District's Preliminary Design Program or to consider inviting the District to present its proposed project to the MSBA Facilities Assessment Subcommittee.

3.2 MSBA Review of Preliminary Design Program

After a District has submitted a complete Preliminary Design Program that meets the requirements set forth above, the MSBA will review the Program to determine if it concurs with the Initial Space Summary, the preliminary evaluation of alternatives and if it accepts the District's recommendation of proposed preliminary alternatives to be further studied as part of the Final Evaluation of Alternatives.

Initial Space Summary:

The MSBA will provide a written response that: provides the MSBA's evaluation of the extent to which the initial space summary conforms to the MSBA guidelines and regulations; states the approval status of the proposed initial space summary; and, if applicable, lists the specific conditions that the MSBA will be monitoring as the Statement of Interest moves forward in the grant process.

The MSBA is committed to working with Districts to determine the most cost effective and educationally appropriate solution to meet their specific needs. To this end, the MSBA is willing to work with a District to better understand its Educational Program and any unique needs the District may have. As part of the Preliminary Design Program, the District should supply a sufficient description and substantiation of the educational program needs in order for the MSBA to consider variations to MSBA guidelines that are reasonable, required to deliver the educational curriculum and are likely to be financially supported by the community. To bolster the likelihood of success, foster a clear understanding of the MSBA's willingness to financially participate and define the conditions upon which alternatives will be developed, it is essential that the MSBA and the District reach agreement on the initial space summary. Therefore, MSBA approval of the initial space summary, or potentially a conditional approval, is required for the MSBA to continue working with the District on the Preferred Schematic Report. The MSBA may issue a conditional approval of the initial space summary solely for the purposes of evaluating the preliminary and final alternatives. The final approval of the space summary and the agreed upon square footages will be determined upon submission of the Preferred Schematic Report.

Preliminary Evaluation of Alternatives:

The MSBA will review the District's Preliminary Evaluation of Alternatives to determine if it is sufficiently comprehensive in scope to initially consider all appropriate solutions that could be supported by the community and the MSBA Board of Directors for a continued, more comprehensive, investigation during the Final Evaluation of Alternatives in the Preferred Schematic Report. The District and the MSBA must agree that the Preliminary Evaluation of Alternatives is sufficiently comprehensive and represents a scope of work that is mutually agreeable to both the MSBA and the District to continue working on the

Preferred Schematic Report. The MSBA review of the Preliminary Evaluation of Alternatives may or may not result in consideration of additional and/or refined alternatives.

Once the MSBA has accepted the Preliminary Design Program, the District and its Designer should proceed with the final evaluation of the proposed alternatives.

3.3 Preferred Schematic Report

The purpose of the Preferred Schematic Report is tosummarize the process and conclusions of the Preliminary and Final Evaluation of Alternatives and substantiate and document the District's selection and recommendation of a preferred solution. The Report should address all concerns and questions raised by the MSBA during its review of the Preliminary Design Program and clearly identify any changes incorporated by the District based on further evaluations and considerations.

The District, through its OPM, must submit the Preferred Schematic Report by the deadline established by the MSBA for a proposed Board action. This schedule is posted on the MSBA website and should have been incorporated as part of the updated schedule required in part 3.1.1 of the Preliminary Design Program.

The Preferred Schematic Report shall be provided in the form of a binder with the following clearly labeled tabs:

- Table of Contents;
- Introduction;
- Evaluation of Existing Conditions;
- Final Evaluation of Alternatives;
- Preferred Solution; and
- Local Actions and Approval Certification

The Preferred Schematic Report shall also be provided as an electronic file in PDF format. Conceptual Floor Plans and Existing Conditions Plans may be provided in half-sized (18" x 24") drawings for legibility when necessary.

3.3.1 Introduction

The Introduction shall summarize the process and conclusions of this Preferred Schematic Report and shall include:

- Overview of the process undertaken since submittal of the Preliminary Design Program that concludes with submittal of the Preferred Schematic Report, including any new information and changes to previously submitted information;
- Summary of updated project schedule including: 1) projected MSBA Board of Directors Meeting for approval of Project Scope and Budget Agreement, 2) projected Town/City vote for Project Scope and Budget Agreement, 3) anticipated start of construction, and 4) target move in date;
- Summary of the final evaluation of existing conditions;
- Summary of the final evaluation of alternatives;

- Summary of the District's preferred solution; and
- A copy of the MSBA Preliminary Design Program review and corresponding District response.

3.3.2 Evaluation of Existing Conditions

Refer to the Preliminary Design Program and describe in narratives and graphic form any changes resulting from additional evaluation or new information that informs the evaluation of the existing conditions and its impact on the final evaluation of alternatives. If the changes are substantive, provide an updated Evaluation of Existing Conditions and identify as final. Identify additional testing that is recommended during futures phases of the proposed project and indicate when the investigations and analysis will be completed.

3.3.3 Final Evaluation of Alternatives

The Final Evaluation shall include at least three potential alternatives. Unless specifically approved in writing by the MSBA, at least one of the three potential alternatives shall be renovation and/or addition to existing building(s) that maximizes use of the existing facility. Include the following for each alternative where appropriate:

- Provide an analysis of each prospective site including natural site limitations, building footprint(s), athletic fields, parking areas and drives, bus and parent drop-off areas, site access, and surrounding site features;
- Evaluation of the potential impact that construction of each option will have on students and measures required or recommended to mitigate impact, including, but not necessarily limited to, provision of temporary facilities, relocation requirements, phased construction, off-hour construction, etc.;
- Conceptual architectural and site drawings as required conveying a successful organization of spaces that will satisfy the spatial and organizational requirements of the Educational Program;
- An outline of the major building structural systems that are proposed for each alternative;
- The source, capacities, and method of obtaining all utilities. For additions and renovations, evaluate the impact on existing utilities;
- A narrative of the major building systems including plumbing, HVAC, electrical (including proposed information technology and/or multi-media systems) with estimated mechanical and electrical loads including applicable heating, cooling, domestic hot water and electrical block loads;
- A proposed total project budget and a construction cost estimate using the Uniformat II Elemental Classification format (to as much detail as the drawings and descriptions permit, but no less than Level 2);
- Permitting requirements including the estimated time to acquire each of the required permits; and
- Proposed project design and construction schedule including consideration of phasing of the proposed project.

The Final Evaluation of Alternatives shall be presented in detailed narratives and tables as appropriate to present clearly how and to what degree each alternative addresses each evaluation criteria and shall include a cost comparison table in the format presented below. This excel file will be provided to the OPM upon request and must be presented to MSBA in the original format shown below. All construction costs shall represent marked up construction costs, and costs not directly associated with building costs shall be described as to what is included (e.g., building demolition/take down, site costs, hazardous material abatement etc.).

Table 1 – Summary of Preliminary Design Pricing

Option (Description)	Total Gross Square Feet	Square Feet of Renovated Space (cost*/sf)	Square Feet of New Construction (cost*/sf)	Site, Building Takedown, Haz Mat. Cost*	Estimated Total Construction** (cost*/sf)	Estimated Total Project Costs
Option 1A (Repair)	XXX sf	XXX sf $/sf	XXX sf $/sf	$	$ $/sf	$
Option 2A (Renovation)	XXX sf	XXX sf $/sf	XXX sf $/sf	$	$ $/sf	$
Option 3A (Addition/ Renovation)	XXX sf	XXX sf $/sf	XXX sf $/sf	$	$ $/sf	$
Option 3B (Addition/ Renovation)	XXX sf	XXX sf $/sf	XXX sf $/sf	$	$ $/sf	$
Option 4A (New)	XXX sf	XXX sf $/sf	XXX sf $/sf	$	$ $/sf	$
Option4B (New)***	***XXX sf***	***XXX sf $/sf***	***XXX sf $/sf***	***$***	***$ $/sf***	***$***

** Marked Up Construction Costs*
*** Does not include Construction Contingency*
****** District's Preferred Solution***

- Option 1 (Code Upgrade Option) Includes repair of systems and/or scope required for purposes of code compliance; with no modification of existing spaces or their function. Please note that the MSBA would support a Code Upgrade Option that fulfilled the significant components identified by the district in its Statement of Interest and was reported to support delivery of the district's educational program);
- Option 2 (Renovation) – Internal modification of spaces to conform to space guidelines and/or educational program. May include code upgrades or repairs but does not include additional occupiable area in the form of new construction to the existing building;
- Option 3 (Addition/Renovation) – Includes renovations or upgrades to the existing building and additional occupiable area in the form of new construction to the existing building; and

- Option 4 (New) – All new construction; a new building.

3.3.4 Preferred Solution

Describe the District's preferred solution using narrative, figures, and charts including: how the preferred solution meets the District's educational program, key educational adjacencies, programmatic spaces, conceptual floor plan(s), site plan(s), and updated project schedule.

- Educational Program
    - Provide an updated Educational Program that addresses all questions and comments included in the MSBA Preliminary Design Program review.
    - Summary of key components of the District's Educational Program and how the preferred solution fulfills the stated Educational Program requirements.
    - If the District's preferred solution is based on a grade configuration that is different than the District's existing configuration this section of the Preferred Schematic Report must include a description of the following through the use of narratives, figures, and charts:
        - Current grade configuration and key program elements;
        - Proposed grade configuration and key program elements;
        - Variances between the current and proposed grade configurations;
        - Educational benefits of changing from the current grade configuration to the proposed configuration; and
        - Transition plan including major milestones, staffing, and community outreach.

    Additionally, if the District's preferred solution is based on a grade configuration that is different than the District's existing configuration or includes redistricting or the implementation of new districts, the proposed changes must be reviewed and approved locally. Public participation and local approval procedures and practices may vary by community and by project. Districts are encouraged to consult with their local counsel to ensure that all applicable requirements are satisfied.

- Preferred Solution Space Summary - Provide an updated space summary that is based on the agreed-upon enrollment, the District's Initial Space Summary, written comments provided by the MSBA as part of its review of the Preliminary Design Program, and the District's preferred solution. The Preferred Solution Space Summary must include the following:
    - An itemization of each existing educational space and the total net and gross square footage and grossing factor of the existing facility;
    - An itemization of each proposed educational space that is within existing building to remain or renovated space and the total net and gross square footage and grossing factor of the existing to remain or renovated space;
    - An itemization of each proposed educational space that is within new construction; and the total net and gross square footage and grossing factor of new construction;

  - An itemization of the total proposed educational space and the total net and gross square footage and grossing factor of the proposed facility; and
  - An itemization of the MSBA's guidelines and the total net and gross square footage, agreed upon student enrollment, and grossing factor. Other than inserting the agreed upon enrollment at the bottom, this column is not to be altered.
- Describe the reason for any variation between the Initial Space Summary and written comments provided by the MSBA as part of its review of the Preliminary Design Program.
- Sustainability Documents:
  - Completed sustainability scorecard from the Designer showing the attempted credits to be included in the final design; and
  - Signed letter from the Designer including the following statements:
    - "This is an acknowledgement that the _____School District has identified a goal of ____% additional reimbursement from the MSBA High Efficiency Green School Program. As their Designer, I have submitted a completed _____scorecard showing all prerequisites and ____ attempted points, which will meet that goal."
    - "The scope of work for this project will include the construction elements and performance tasks to achieve that goal, and all subsequent documents, including but not limited to, specifications, drawings, and cost estimates will match the scope of work indicated in the submitted scorecard."
- Building Plans - Provide conceptual floor plans of the preferred solution, in color that are clearly labeled to identify educational spaces in the preferred solution.
- Site Plans - Provide clearly labeled site plans of the preferred solution including, but not limited to:
  - Structures and boundaries;
  - Site access and circulation;
  - Parking and paving;
  - Zoning setbacks and limitations;
  - Easements and environmental buffers;
  - Emergency vehicle access;
  - Safety and security features;
  - Utilities;
  - Athletic fields and outdoor educational spaces (existing and proposed); and
  - Site orientation.
- Budget - Provide an overview of the Total Project Budget and local funding including the following:
  - Estimated total construction cost;
  - Estimated total project cost;
  - Estimated funding capacity;
  - List of other municipal projects currently planned or in progress;
  - District's not-to-exceed Total Project Budget;

  - Brief description of the local process for authorization and funding of the proposed project; and
  - Estimated impact to local property tax, if applicable.

- Complete and submit a budget statement for the preferred solution. The overall goal of the budget statement for preferred solution is to document the total change in operational costs that the District expects as a result of the proposed project. To assist in documenting this change the MSBA has developed an Excel template that includes two tabs, one for expenditures and one for revenues. Refer to Appendix 3E Budget Statement for Preferred Solution for additional information
- Provide an updated project schedule depicting all key tasks with durations. The schedule is to be updated and submitted by the OPM to MSBA as often as is required to reflect any changes, including any changes to milestone dates, but must be submitted with each submittal (Schematic Design, Design Development, 60% Construction Documents, 90% Construction Documents). The Schedule is to incorporate a minimum of 21 day required duration for MSBA review, and a minimum of 14 days for the project team to address or incorporate MSBA review comments into the project documents prior to the date of the next submission and before finalizing project documents for bidding. Thirty five days for each submission is the minimum acceptable duration; if the project team believes additional time is required for any or all of the submissions the durations for these activities are to be increased accordingly. The updated project schedule shall include as a minimum the following projected dates: (See Appendix 3B for a Sample Project Schedule)
  - MSBA Board of Directors meeting for approval to proceed into Schematic Design;
  - Schematic Design Submittal Date
  - MSBA Board of Directors meeting for approval of project scope and budget agreement and project funding agreement;
  - Town/City vote for project scope and budget agreement;
  - Design Development submittal date;
  - MSBA Design Development Submittal Review (include required 21-day duration)
  - 60% Construction Documents submittal date;
  - MSBA 60% Construction Documents Submittal Review (include required 21-day duration)
  - 90% Construction Documents submittal date;
  - MSBA 90% Construction Documents Submittal Review (include required 21-day duration)
  - Anticipated bid date/GMP execution date;
  - Construction start;
  - Move-in date; and
  - Substantial completion.

3.3.5 Local Actions and Approvals

The Preferred Schematic Report, as with other submittals to the MSBA, must be reviewed and approved locally for submittal to the MSBA, in accordance with the state

open meeting law and any other local requirements. Public participation and local approval procedures and practices may vary by community and by project. Districts are encouraged to consult with their local counsel to ensure that all applicable requirements are satisfied.

To document local approval of the Preferred Schematic Report and its submittal to the MSBA, the MSBA requires the District to provide:

- Certified copies of the Minutes of the School Building Committee ("SBC") meeting from the meeting(s) where the Feasibility Study related submittals were approved for submittal to the MSBA. The meeting minutes must include the specific language of the vote and the results of the vote, stating the number of SBC Members who voted in favor of submittal to the MSBA, the number of opposed and the number of abstentions; and
- A list SBC meeting dates, the agendas, briefly describe the materials presented, if applicable, specific stakeholders in attendance (e.g., representatives of the local historic commission, school committee members beyond those in the SBC, local community group representatives, etc.), what materials are available for public review and where those materials may be viewed. The MSBA also requires Districts to provide similar information for public meetings and presentations conducted in addition to school building committee meetings.

Refer to Appendix 3D Local Actions and Approvals Certification Template for additional information. A signed Local Actions and Approval Certification on District Letterhead is required for MSBA staff to forward the proposed project to the MSBA Board of Directors for its consideration and approval to proceed into schematic design.

3.4 Approval to Proceed into Schematic Design

In order for the MSBA Board of Directors to consider a District's preferred solution for approval to proceed into schematic design, the following must occur prior to the date of the Board meeting, in accordance with the deadlines established by the MSBA:

- The District, through its OPM, must submit its Preferred Schematic Report to the MSBA in accordance with the deadlines published on the MSBA's website (www.MassSchoolBuildings.org).
- MSBA staff must complete its review of the Report, and the District must submit responses to any questions or issues raised by the MSBA in a timeframe adequate to support the schedule for the Board's meetings.
- The District and its Designer may be required to present an overview of its Report at an MSBA Facilities Assessment Subcommittee meeting.
- The District and its Designer must respond to any concerns or issues identified at the MSBA Facilities Assessment Subcommittee in a timely fashion, prior to the deadline established by the MSBA.

3.4.1 MSBA Staff Review

The District and the MSBA shall work in collaboration to determine which of the solutions studied may be recommended to the MSBA Board of Directors as the preferred solution in the Preferred Schematic Report. The solution may be phased in order of

priority of need, if appropriate. It is possible, in some cases, that the study may recommend a "no-build" solution. If the MSBA and the District cannot agree upon a preferred solution, no preferred schematic design shall be forwarded to the Board for its consideration. The MSBA and the District will begin a review of the alternatives presented to determine if there are actions that can be taken to reach consensus on a final recommendation.

The MSBA review process for the Preferred Schematic Report includes:

- Written response comments based on staff review;
- Conference call with the District and its design team to discuss the Report; and
- Written responses from the District addressing staff comments as required.

3.4.2 Facility Assessment Subcommittee Review

Upon receipt and review of the Preferred Schematic Report, MSBA staff will schedule the District for presentation at a Facilities Assessment Subcommittee ("FAS") Meeting. The FAS meeting is an informational meeting only and is intended to provide an opportunity for Districts to further the MSBA's understanding of the proposed project. The FAS will not take any votes, and any formal actions required by the MSBA Board of Directors to fulfill MSBA procedures will be taken at the regularly scheduled Board meetings. FAS meeting dates are posted on the MSBA website and should be consulted when preparing the Feasibility Study work plan and schedule.

MSBA staff will notify the District, Designer, and OPM by e-mail of the scheduled FAS meeting. The e-mail will include an outline of the material that should be presented, which typically includes an overview of the project, the evaluation conducted to arrive at the recommended preferred solution, and if applicable, responses to specific questions regarding potential concerns noted during staff's review of the Preferred Schematic Report.

3.4.3 MSBA Board Approval

After the District has presented at the Facilities Assessment Subcommittee, if required, MSBA staff will present the preferred solution to the MSBA Board of Directors for its consideration and approval of a Preferred Schematic Design. If the Board approves a District to proceed into schematic design for its preferred solution, as described in the Preferred Schematic Report, the MSBA shall issue a Board Action Letter, summarizing the Board's actions. Upon receipt of the Board Action Letter, the District may proceed into Schematic Design – see Module 4.

APPENDIX 3A

Program Overview

Program Overview

The Massachusetts School Building Authority's ("MSBA") grant program for school building construction and renovation projects is a non-entitlement competitive program based on need. The MSBA's Board of Directors (the "Board") approves grants based on need and urgency, as expressed by the City, Town, Regional School District, or independent agricultural and technical school ("District") and validated by the MSBA. Once the MSBA Board of Directors invites a District to participate in the MSBA's grant program, the collaborative process includes the following eight Modules:

Module 1 – Eligibility Period: The MSBA Board of Directors votes to invite a District into the Eligibility Period which initiates a 270-day period for the District to complete preliminary requirements including a certification of the District's understanding of the grant program rules, the formation of a School Building Committee, a summary of the District's existing maintenance practices; determination of a design enrollment; development of an educational profile, community authorization and funding to proceed, and execution of the MSBA's standard Feasibility Study Agreement. Districts that are able to complete these requirements may receive an invitation to collaborate with the MSBA to Conduct a Feasibility Study.

Module 2 – Forming the Project Team: Upon receipt of an invitation to collaborate with the MSBA to Conduct a Feasibility Study the District procures the team of professionals utilizing MSBA specific procurement processes, standard Request for Services ("RFS") templates, and standard Contracts to work with the District as the proposed project advances through the MSBA's grant process.

Module 3 – Feasibility Study: Upon successful conclusion of procurement of Owner's Project Management ("OPM") and Designer services a Kick-Off meeting is held to begin collaboration with the MSBA to document their educational program, generate an initial space summary, document existing conditions, establish design parameters, develop and evaluate alternatives, and recommend the most cost effective and educationally appropriate preferred solution to the MSBA Board of Directors for its consideration. During this phase, the Owner's Project Manager will submit on behalf of the District and its Designer a Preliminary Design Program and a Preferred Schematic Report. Approval by the MSBA Board of Directors is required for all projects to proceed into schematic design.

Module 4 – Schematic Design: The District and its team develop a robust schematic design of sufficient detail to establish the scope, budget and schedule for the proposed project. The MSBA generates a Project Scope and Budget Agreement that documents the project scope, budget, schedule and MSBA financial participation to forward to the MSBA Board of Directors for their approval.

Module 5 – Funding the Project: Once the MSBA Board of Directors has authorized the MSBA Executive Director to enter into a Project Scope and Budget Agreement and a Project Funding Agreement with the District, the District completes steps necessary to secure community authorization and financial support for the proposed project and enters into a Project Funding Agreement with the MSBA. With an executed Project Funding Agreement the District engages OPM and Designer services, and updates project budgets in Pro - Pay.

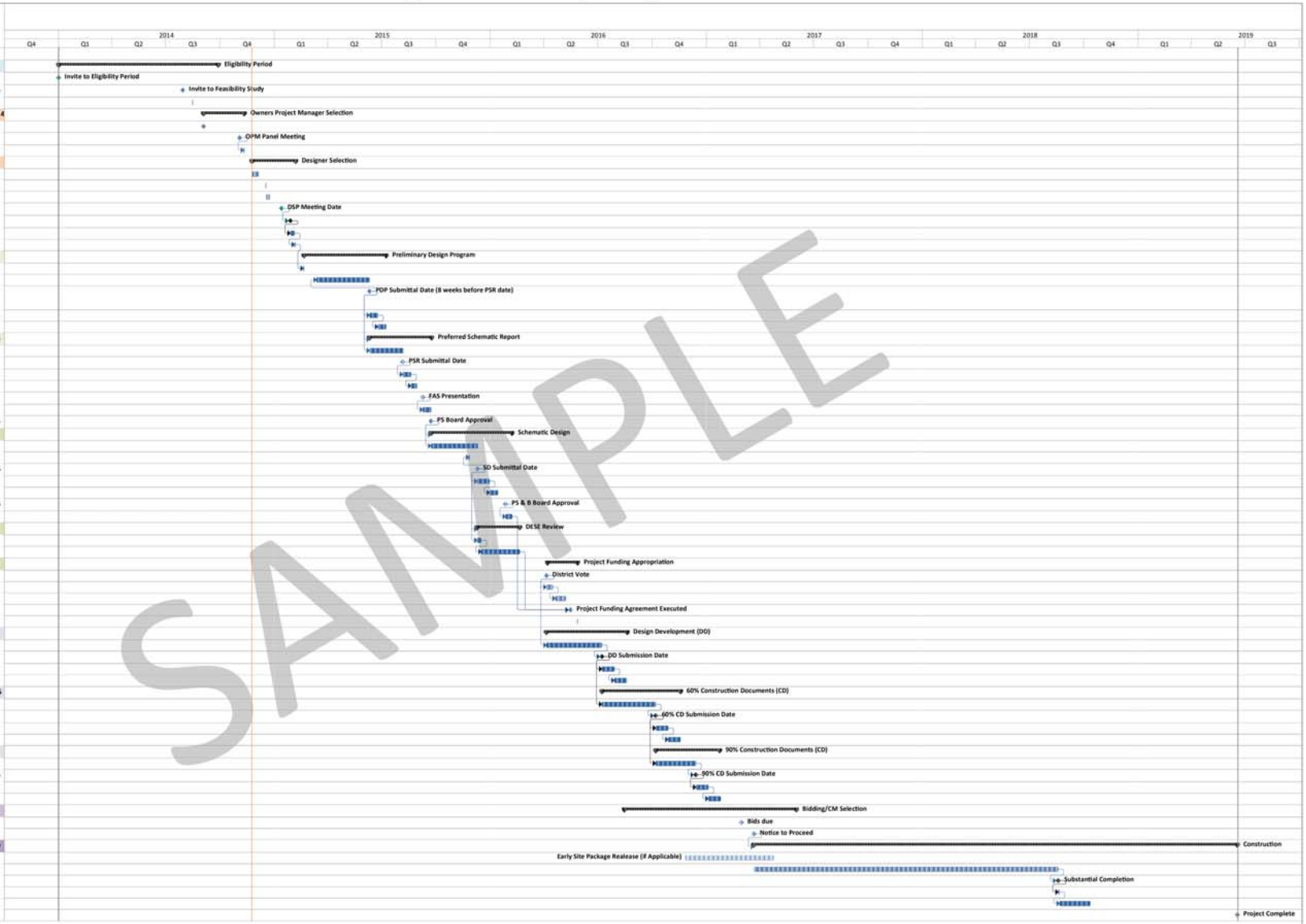
Module 6 – Detailed Design: Design Development, Construction Documentation & Bidding: The District and its team advance the design, generate construction documentation, procure bids and award a construction contract in accordance with the agreed upon project scope, budget and schedule as documented in the Project Funding Agreement, and the requirements contained in the MSBA's standard contracts for Owner's Project Management and Designer Services. The MSBA continues to monitor the project to ensure it remains on track and meets the expectation of both the District and the MSBA as defined in the Project Funding Agreement

Module 7 – Construction Administration: The MSBA continues to monitor progress of the project to confirm that it remains on track and meets the expectation of both the District and the MSBA as defined in the Project Funding Agreement.

Module 8 – Project Closeout: The MSBA performs a final audit to determine final total grant amounts and release final payment.

MSBA Module 3 Appendix 3B - Sample Project Schedule

ID	Ta	Task Name	Duration	Start	Finish
1					
2		**Eligibility Period Activity**	**270 days**	**Wed 1/1/14**	**Sat 9/27/14**
4		**Invite to Eligibility Period**	**0 days**	***Wed 1/1/14***	**Wed 1/1/14**
5		**Invite to Feasibility Study**	**0 days**	**Wed 7/30/14**	**Wed 7/30/14**
6		ProPay Training Date #1	1 day	Fri 8/15/14	Fri 8/15/14
7		**Owners Project Manager Selection**	**69 days**	**Wed 9/3/14**	**Mon 11/10/14**
9		RFS Ad Appears	0 days	Wed 9/3/14	Wed 9/3/14
10		OPM Panel Meeting	0 days	Mon 11/3/14	Mon 11/3/14
11		OPM Contract Executed	1 day	Mon 11/10/14	Mon 11/10/14
12		**Designer Selection**	**74 days**	**Mon 11/24/14**	**Thu 2/5/15**
14		RFS Ad Appears	11 days	Mon 11/24/14	Thu 12/4/14
15		Response Due	1 day	Wed 12/17/14	Wed 12/17/14
16		Materials Received by the MSBA	6 days	Thu 12/18/14	Tue 12/23/14
17		DSP Meeting Date	0 days	Tue 1/13/15	Tue 1/13/15
18		DSP Interviews Date	0 days	Tue 1/27/15	Tue 1/27/15
19		Designer Contract Executed	7 days	Wed 1/28/15	Tue 2/3/15
20		Designer Contract Received by the MSBA	1 day	Wed 2/4/15	Wed 2/4/15
21		**Preliminary Design Program**	**139 days**	**Thu 2/19/15**	**Wed 7/8/15**
23		Kick Off Meeting	1 day	Thu 2/19/15	Thu 2/19/15
24		PDP Submittal Development	90 days	Fri 3/13/15	Wed 6/10/15
25		PDP Submittal Date (8 weeks before PSR date)	0 days	Thu 6/11/15	Thu 6/11/15
26		MSBA PDP Review	14 days	Thu 6/11/15	Wed 6/24/15
27		Address PDP Comments	14 days	Thu 6/25/15	Wed 7/8/15
28		**Preferred Schematic Report**	**105 days**	**Thu 6/11/15**	**Wed 9/23/15**
30		PSR Submittal Development	57 days	Thu 6/11/15	Thu 8/6/15
31		PSR Submittal Date	0 days	Thu 8/6/15	Thu 8/6/15
32		MSBA PSR Review	14 days	Thu 8/6/15	Wed 8/19/15
33		Address PSR Comments	10 days	Thu 8/20/15	Sat 8/29/15
34		FAS Presentation	0 days	Wed 9/9/15	Wed 9/9/15
35		Address FAS Comments	14 days	Wed 9/9/15	Tue 9/22/15
36		**PS Board Approval**	**0 days**	**Wed 9/23/15**	**Wed 9/23/15**
37		**Schematic Design**	**137 days**	**Wed 9/23/15**	**Sat 2/6/16**
39		SD Submittal Development	79 days	Wed 9/23/15	Thu 12/10/15
40		SD Notification Email Sent	1 day	Thu 11/26/15	Thu 11/26/15
41		SD Submittal Date	0 days	Thu 12/10/15	Thu 12/10/15
42		MSBA SD Review Complete	21 days	Thu 12/10/15	Wed 12/30/15
43		Address SD Comments	14 days	Thu 12/31/15	Wed 1/13/16
44		**PS & B Board Approval**	**0 days**	**Wed 1/27/16**	**Wed 1/27/16**
45		PSB Agreement Executed	11 days	Wed 1/27/16	Sat 2/6/16
46		**DESE Review**	**72 days**	**Thu 12/10/15**	**Fri 2/19/16**
48		MSBA Review of DESE Submittal	7 days	Thu 12/10/15	Wed 12/16/15
49		DESE Review and Approval	65 days	Thu 12/17/15	Fri 2/19/16
50		**Project Funding Appropriation**	**51 days**	**Wed 4/6/16**	**Fri 5/27/16**
52		District Vote	0 days	Tue 4/5/16	Tue 4/5/16
53		Certifications of Votes sent to MSBA	11 days	Tue 4/5/16	Fri 4/15/16
54		Project Funding Agreement Sent	18 days	Wed 4/20/16	Sat 5/7/16
55		Project Funding Agreement Executed	0 days	Mon 5/16/16	Mon 5/16/16
56		ProPay Training Date #2	1 day	Fri 5/27/16	Fri 5/27/16
57		**Design Development (DD)**	**137 days**	**Tue 4/5/16**	**Fri 8/19/16**
59		Design Development	94 days	Tue 4/5/16	Thu 7/7/16
60		DD Submission Date	0 days	Thu 7/7/16	Thu 7/7/16
61		MSBA DD Review	21 days	Fri 7/8/16	Thu 7/28/16
62		Address DD Review Comments	21 days	Fri 7/29/16	Thu 8/18/16
63		**60% Construction Documents (CD)**	**133 days**	**Fri 7/8/16**	**Thu 11/17/16**
65		60% CD Development	91 days	Fri 7/8/16	Thu 10/6/16
66		60% CD Submission Date	0 days	Thu 10/6/16	Thu 10/6/16
67		MSBA 60% CD Review	21 days	Fri 10/7/16	Thu 10/27/16
68		Address 60% CD Review Comments	21 days	Fri 10/28/16	Thu 11/17/16
69		**90% Construction Documents (CD)**	**108 days**	**Fri 10/7/16**	**Sun 1/22/17**
71		90% CD Development	68 days	Fri 10/7/16	Tue 12/13/16
72		90% CD Submission Date	0 days	Tue 12/13/16	Tue 12/13/16
73		MSBA 90% CD Review	21 days	Wed 12/14/16	Tue 1/3/17
74		Address 90% CD Review Comments	21 days	Wed 1/4/17	Tue 1/24/17
75		**Bidding/CM Selection**	**291 days**	**Mon 8/15/16**	**Thu 6/1/17**
77		Bids due	0 days	Wed 3/1/17	Wed 3/1/17
78		Notice to Proceed	0 days	Wed 3/22/17	Wed 3/22/17
79		**Construction**	**818 days**	**Wed 3/22/17**	**Mon 6/17/19**
81		Early Site Package Realease (if Applicable)	150 days	Sat 11/26/16	Mon 4/24/17
82		Construction Phase	515 days	Wed 3/22/17	Sat 8/18/18
83		Substantial Completion	0 days	Sat 8/18/18	Sat 8/18/18
84		Move-In	2 days	Sun 8/19/18	Mon 8/20/18
85		Complete Demo - Existing Building	52 days	Tue 8/21/18	Thu 10/11/18
86		Project Complete	0 days	Tue 6/18/19	Tue 6/18/19



SAMPLE

Project: Project1
Date: Mon 11/24/14

Task | Split | Milestone | Summary | Project Summary | External Tasks | External Milestone | Inactive Task | Inactive Milestone | Inactive Summary | Manual Task | Duration-only | Manual Summary Rollup | Manual Summary | Start-only | Finish-only | Deadline | Progress

Schedule provided for reference only. Dates and task durations may vary by project

Proposed Space Summary- Elementary Schools

FILL IN SCHOOL NAME HERE	Existing Conditions			PROPOSED									MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
				Existing to Remain/Renovated			New			Total						
ROOM TYPE	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	Comments
CORE ACADEMIC SPACES			**0**			**0**			**0**			**0**		**0**	**0**	
(List classrooms of different sizes seperately)																
Pre-Kindergarten w/ toilet													1,200		-	1,100 SF min - 1,300 SF max
Kindergarten w/ toilet													1,200	0	-	1,100 SF min - 1,300 SF max
General Classrooms - Grade 1-6													950	0	-	900 SF min - 1,000 SF max
SPECIAL EDUCATION			**0**			**0**			**0**			**0**			**500**	
(List rooms of different sizes seperately)																
Self-Contained SPED													950	0	-	8% of pop. in self-contained SPED
Self-Contained SPED - toilet													60	0	-	
Resource Room													500	0	-	1/2 size Genl. Clrm.
Small Group Room / Reading													500	1	500	1/2 size Genl. Clrm.
ART & MUSIC			**0**			**0**			**0**			**0**			**0**	
Art Classroom - 25 seats													1,000	0	-	assumed schedule 2 times / week / student
Art Workroom w/ Storage & kiln													150	0	-	
Music Classroom / Large Group - 25-50 seats													1,200	0	-	assumed schedule 2 times / week / student
Music Practice/ Ensemble													75	0	-	
HEALTH & PHYSICAL EDUCATION			**0**			**0**			**0**			**0**			**6,300**	
Gymnasium													6,000	1	6,000	6000 SF Min. Size
Gym Storeroom													150	1	150	
Health Instructor's Office w/Shower & Toilet													150	1	150	
MEDIA CENTER			**0**			**0**			**0**			**0**			**2,020**	
Media Center/Reading Room													2,020	1	2,020	
DINING & FOOD SERVICE			**0**			**0**			**0**			**0**			**3,000**	
Cafeteria/Dining													0	1	-	2 seatings - 15SF per seat
Stage													1,000	1	1,000	
Chair/Table/Equipment Storage													200	1	200	
Kitchen													1,600	1	1,600	1600 SF for first 300 + 1 SF/student Add'l
Staff Lunch Room													200	1	200	20 SF/Occupant
MEDICAL			**0**			**0**			**0**			**0**			**310**	
Medical Suite Toilet													60	1	60	
Nurses' Office/Waiting Room													250	1	250	
Examination Room / Resting													100	0	-	
ADMINISTRATION & GUIDANCE			**0**			**0**			**0**			**0**			**1,865**	
General Office / Waiting Room/Toilet													300	1	300	
Teachers' Mail and Time Room													100	1	100	
Duplicating Room													150	1	150	
Records Room													110	1	110	
Principal's Office w/ Conference Area													375	1	375	
Principal's Secretary / Waiting													125	1	125	
Assistant Principal's Office													120	0	-	
Supervisory / Spare Office													120	1	120	
Conference Room													250	1	250	
Guidance Office													150	0	-	
Guidance Storeroom													35	1	35	
Teachers' Work Room													300	1	300	
CUSTODIAL & MAINTENANCE			**0**			**0**			**0**			**0**			**1,900**	
Custodian's Office													150	1	150	

Proposed Space Summary- Elementary Schools

FILL IN SCHOOL NAME HERE	Existing Conditions			PROPOSED									MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
				Existing to Remain/Renovated			New			Total						
ROOM TYPE	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	Comments
Custodian's Workshop													375	1	375	
Custodian's Storage													375	1	375	
Recycling Room / Trash													400	1	400	
Receiving and General Supply													200	1	200	
Storeroom													200	1	200	
Network/Telecom Room													200	1	200	
OTHER			0			0			0			0			0	
Other *(specify)*																
Total Building Net Floor Area (NFA)			0			0			0			0			15,895	
Proposed Student Capacity/Enrollment															-	
Total Building Gross Floor Area (GFA)[2]															-	
Grossing factor (GFA/NFA)			#DIV/0!									#DIV/0!			0.00	

[1] **Individual Room Net Floor Area (NFA)** Includes the net square footage measured from the inside face of the perimeter walls and includes all specific spaces assigned to a particular program area including such spaces as non-communal toilets and storage rooms.

[2] **Total Building Gross Floor Area (GFA)** Includes the entire building gross square footage measured from the outside face of exterior walls

Architect Certification

I hereby certify that all of the information provided in this "Proposed Space Summary" is true, complete and accurate and, except as agreed to in writing by the Massachusetts School Building Authority, in accordance with the guidelines, rules, regulations and policies of the Massachusetts School Building Authority to the best of my knowledge and belief. A true statement, made under the penalties of perjury.

Name of Architect Firm: _____

Name of Principal Architect: _____

Signature of Principal Architect: _____

Date: _____

Proposed Space Summary- Elementary - K-8 School

ELEMENTARY SCHOOL	Existing Conditions			PROPOSED									MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
				Existing to Remain/Renovated			New			Total						
ROOM TYPE	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	Comments
CORE ACADEMIC SPACES		**0**	**0**		**0**	**0**		**0**	**0**		**0**	**0**		**0**	**0**	
(List classrooms of different sizes seperately)																
Pre-Kindergarten w/ toilet			0			0			0	0	0	0	1,200		-	1,100 SF min - 1,300 SF max
Kindergarten w/ toilet			0			0			0	0	0	0	1,200	0	-	1,100 SF min - 1,300 SF max
General Classrooms - Grades 1-5			0			0			0	0	0	0	950	0	-	900 SF min - 1,000 SF max
General Classrooms - Grades 6-8			0			0			0	0	0	0	950	0	-	
Science Classroom / Lab			0			0			0	0	0	0	1,200	0	-	1 period / day / student
Science prep room			0			0			0	0	0	0	80	0	-	
SPECIAL EDUCATION			**0**			**0**			**0**			**0**			**500**	
(List rooms of different sizes seperately)																
Self-Contained SPED -Grades 6-8			0			0			0	0	0	0	950	0	-	8% of pop. in self-contained SPED
Self-Contained SPED -Grades 1-5			0			0			0	0	0	0	950	0	-	8% of pop. in self-contained SPED
Self-Contained SPED - Grades 1-5 toilet			0			0			0	0	0	0	60	0	-	
Self-Contained SPED - Grades 6-8 toilet			0			0			0	0	0	0	60	0	-	
Resource Room - Grades 6-8			0			0			0	0	0	0	500	0	-	
Resource Room - Grades 1-5			0			0			0	0	0	0	500	0	-	
Small Group Room / Reading			0			0			0	0	0	0	500	1	500	1/2 size Genl. Clrm.
ART & MUSIC			**0**			**0**			**0**			**0**			**200**	
Art Classroom - Grades 1-5			0			0			0	0	0	0	1,000	0	-	assumed schedule 2 times / week / student
Art Classroom - Grades 6-8			0			0			0	0	0	0	1,200	0	-	assumed use - 50% population 2 times / week
Art Workroom w/ Storage & kiln			0			0			0	0	0	0	150	0	-	
						0			0	0	0	0				
Band / Chorus - 100 seats			0			0			0	0	0	0	1,500	0	-	
Music Classroom / Large Group - 25-50 seats			0			0			0	0	0	0	1,200	0	-	assumed schedule 2 times / week / student
Music Practice/ Ensemble - Grades 1-5			0			0			0	0	0	0	75	0	-	
Music Practice/ Ensemble - Grades 6-8			0			0			0	0	0	0	200	1	200	
VOCATIONS & TECHNOLOGY			**0**			**0**			**0**			**0**			**0**	
Tech. Clrm. - (E.G. Drafting, Business)			0			0			0	0	0	0	1,200	0	-	Assumed use - 25% Population - 5 times/week
Tech. Shop - (E.G. Consumer, Wood)			0			0			0				2,000	0	-	Assumed use - 25% Population - 5 times/week
HEALTH & PHYSICAL EDUCATION			**0**			**0**			**0**			**0**			**#DIV/0!**	
Gymnasium			0			0			0	0	0	0	6,000	1	6,000	6000 SF Min. Size
Gym Storeroom			0			0			0	0	0	0	150	1	150	
Health Instructor's Office w/Shower & Toilet			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
Locker Rooms - Boys/Girls w/Toilets			0			0			0	0	0	0	1,000	2	2,000	
MEDIA CENTER			**0**			**0**			**0**			**0**			**#DIV/0!**	
Media Center/Reading Room			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
DINING & FOOD SERVICE			**0**			**0**			**0**			**0**			**3,600**	
Cafeteria/Dining			0			0			0	0	0	0	0	1	-	2 seatings - 15SF per seat
Kitchen			0			0			0	0	0	0	1,600	1	1,600	1600 SF for first 300 + 1 SF/student Add'l
Chair/Table/Equipment Storage			0			0			0	0	0	0	200	1	200	200 SF for first 300 + .333 SF/student Add'l
Staff Lunch Room			0			0			0	0	0	0	200	1	200	200 SF for first 400 + .25 SF/student Add'l
Stage			0			0			0	0	0	0	1,600	1	1,600	
MEDICAL			**0**			**0**			**0**			**0**			**310**	
Medical Suite Toilet			0			0			0	0	0	0	60	1	60	
Nurses' Office/Waiting Room			0			0			0	0	0	0	250	1	250	
Examination Room / Resting			0			0			0	0	0	0	100	0	-	
ADMINISTRATION & GUIDANCE			**0**			**0**			**0**			**0**			**#DIV/0!**	
Principal's Office w/ Conference Area			0			0			0	0	0	0	375	1	375	

Proposed Space Summary- Elementary - K-8 School

ELEMENTARY SCHOOL	Existing Conditions			PROPOSED									MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
				Existing to Remain/Renovated			New			Total						
ROOM TYPE	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	Comments
Principal's Secretary / Waiting			0			0			0	0	0	0	125	1	125	
Assistant Principal's Office - AP1			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
Assistant Principal's Office - AP2			0			0			0	0	0	0	#DIV/0!	0	#DIV/0!	
General Office / Waiting Room/Toilet			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
Conference room			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
Teachers' Mail and Time Room			0			0			0	0	0	0	100	1	100	
Duplicating Room			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
Records Room			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
Supervisory / Spare Office			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
Guidance area																
General Waiting Room			0			0			0	0	0	0	100	1	100	
Guidance Office			0			0			0	0	0	0	150	1	150	
Guidance Storeroom			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
Teachers' Work Room			0			0			0	0	0	0	300	1	300	
CUSTODIAL & MAINTENANCE			**0**			**0**			**0**			**0**			**#DIV/0!**	
Custodian's Office			0			0				0	0	0	150	1	150	
Custodian's Workshop			0			0				0	0	0	#DIV/0!	1	#DIV/0!	
Custodian's Storage			0			0				0	0	0	375	1	375	
Storeroom			0			0				0	0	0	200	1	200	
Recycling Room / Trash			0			0				0	0	0	400	1	400	
Receiving and General Supply			0			0				0	0	0	200	1	200	
Network/Telecom Room			0			0				0	0	0	200	1	200	
OTHER			**0**			**0**			**0**			**0**			**0**	
Other *(specify)*			0			0			0	0	0	0				
Total Building Net Floor Area (NFA)			**0**			**0**			**0**			**0**			**#DIV/0!**	
Proposed Student Capacity/Enrollment												0			-	Enter grade enrollments to the right
Total Building Gross Floor Area (GFA)[2]					GSF of existing			GSF new	0			0			**#DIV/0!**	
Grossing factor (GFA/NFA)			**#DIV/0!**								(estimate)				**1.50**	

Grades K-5	
	#DIV/0!
Grades 6-8	
	#DIV/0!

[1] **Individual Room Net Floor Area (NFA)** Includes the net square footage measured from the inside face of the perimeter walls and includes all specific spaces assigned to a particular program area including such spaces as non-communal toilets and storage rooms.

[2] **Total Building Gross Floor Area (GFA)** Includes the entire building gross square footage measured from the outside face of exterior walls

Architect Certification

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Name of Architect Firm: _____

Name of Principal Architect: _____

Signature of Principal Architect: _____

Date: _____

Proposed Space Summary - Middle Schools

FILL IN SCHOOL NAME HERE	Existing Conditions			PROPOSED									MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
				Existing to Remain/Renovated			New			Total						
ROOM TYPE	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	Comments
CORE ACADEMIC SPACES			0			0			0			0			0	
(List classrooms of different sizes seperately)																
Classroom - General													950	0	-	850 SF min - 950 SF max
Small Group Seminar (20-30 seats)/ Resource													500	0	-	
Science Classroom / Lab													1,200	0	-	1 period / day / student
Prep Room													80	0	-	
SPECIAL EDUCATION			0			0			0			0			500	
(List classrooms of different sizes seperately)																
Self-Contained SPED													950	0	-	assumed 8% of pop. in self-contained SPED
Self-Contained SPED Toilet													60	0	-	
Resource Room													500	0	-	1/2 size Genl. Clrm.
Small Group Room / Reading													500	1	500	1/2 size Genl. Clrm.
ART & MUSIC			0			0			0			0			200	
Art Classroom													1,200	0	-	assumed use - 50% population 2 times / week
Art Workroom w/ Storage & kiln													150	0	-	
Band / Chorus - 100 seats													1,500	0	-	assumed use - 50% population 2 times / week
Music Practice / Ensemble													200	1	200	
VOCATIONS & TECHNOLOGY			0			0			0			0			0	
Tech. Clrm. - (E.G. Drafting, Business)													1,200	0	-	Assumed use - 25% Population - 5 times/week
Tech. Shop - (E.G. Consumer, Wood)													2,000	0	-	Assumed use - 25% Population - 5 times/week
HEALTH & PHYSICAL EDUCATION			0			0			0			0			8,400	
Gymnasium													6,000	1	6,000	
Gym Storeroom													150	1	150	
Health Instructor's Office w/Shower & Toilet													250	1	250	
Locker Rooms - Boys/Girls w/Toilets													1,000	2	2,000	
MEDIA CENTER			0			0			0			0			2,680	
Media Center/Reading Room													2,680	1	2,680	
DINING & FOOD SERVICE			0			0			0			0			3,600	
Cafetorium/Dining													0	1	-	2 seatings - 15SF per seat
Stage													1,600	1	1,600	
Chair/Table/Equipment Storage													200	1	200	
Kitchen													1,600	1	1,600	1600 SF for first 300 + 1 SF/student Add'l
Staff Lunch Room													200	1	200	20 SF/Occupant
MEDICAL			0			0			0			0			310	
Medical Suite Toilet													60	1	60	
Nurses' Office/Waiting Room													250	1	250	
Examination Room / Resting													100	0	-	
ADMINISTRATION & GUIDANCE			0			0			0			0			2,400	
General Office / Waiting Room/Toilet													300	1	300	
Teachers' Mail and Time Room													100	1	100	
Duplicating Room													200	1	200	
Records Room													200	1	200	
Principal's Office w/ Conference Area													375	1	375	
Principal's Secretary / Waiting													125	1	125	
Assistant Principal's Office - AP1													150	1	150	
Assistant Principal's Office - AP2													150	0	-	
Supervisory / Spare Office													150	1	150	
Conference Room													350	1	350	

Proposed Space Summary - Middle Schools

FILL IN SCHOOL NAME HERE	Existing Conditions			PROPOSED									MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
				Existing to Remain/Renovated			New			Total						
ROOM TYPE	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	Comments
Guidance Office													150	0	-	
Guidance Waiting Room													100	1	100	
Guidance Storeroom													50	1	50	
Teachers' Work Room													300	1	300	
CUSTODIAL & MAINTENANCE			**0**			**0**			**0**			**0**			**1,775**	
Custodian's Office													150	1	150	
Custodian's Workshop													250	1	250	
Custodian's Storage													375	1	375	
Recycling Room / Trash													400	1	400	
Receiving and General Supply													200	1	200	
Storeroom													200	1	200	
Network/Telecom Room													200	1	200	
OTHER			**0**			**0**			**0**			**0**			**0**	
Other *(specify)*																
Total Building Net Floor Area (NFA)			**0**			**0**			**0**			**0**			**19,865**	
Proposed Student Capacity/Enrollment															**0**	
Total Building Gross Floor Area (GFA)[2]															**0**	
Grossing factor (GFA/NFA)			**#DIV/0!**									**#DIV/0!**			**0.00**	

[1] **Individual Room Net Floor Area (NFA)** Includes the net square footage measured from the inside face of the perimeter walls and includes all specific spaces assigned to a particular program area including such spaces as non-communal toilets and storage rooms.

[2] **Total Building Gross Floor Area (GFA)** Includes the entire building gross square footage measured from the outside face of exterior walls

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Name of Architect Firm: _____

Name of Principal Architect: _____

Signature of Principal Architect: _____

Date: _____

Proposed Space Summary - High Schools

FILL IN SCHOOL NAME HERE	Existing Conditions			PROPOSED									MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
				Existing to Remain/Renovated			New			Total						
ROOM TYPE	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	Comments
CORE ACADEMIC SPACES			0			0			0			0			2,100	
(List classrooms of different sizes seperately)																
Classroom - General													850	2	1,700	825 SF min - 950 SF max
Teacher Planning													100	2	200	
Small Group Seminar (20-30 seats)													500	0	-	
Science Classroom / Lab													1,440	0	-	3 x85% ut=20 Seats-1 per /day/student
Prep Room													200	0	-	
Central Chemical Storage Rm													200	1	200	
SPECIAL EDUCATION			0			0			0			0			0	
(List classrooms of different sizes seperately)																
Self-Contained SPED													950	0	-	assumed 8% of pop. in self-contained SPED
Self-Contained SPED Toilet													60	0	-	
Resource Room													500	0	-	1/2 size Genl. Clrm.
Small Group Room													500	0	-	1/2 size Genl. Clrm.
ART & MUSIC			0			0			0			0			3,625	
Art Classroom - 25 seats													1,200	0	-	Assumed use - 25% Population - 5 times/week
Art Workroom w/ Storage & kiln													150	0	-	
Band - 50-100 seats													1,500	1	1,500	Assumed use - 25% Population - 5 times/week
Chorus - 50-100 seats													1,500	1	1,500	
Ensemble													200	1	200	
Music Practice													75	-1	(75)	
Music Storage													500	1	500	
VOCATIONS & TECHNOLOGY			0			0			0			0			-3,200	
Tech Clrm. - (E.G. Drafting, Business)													1,200	-1	(1,200)	Assumed use - 50% Population - 5 times/week
Tech Shop - (E.G. Consumer, Wood)													2,000	-1	(2,000)	Assumed use - 50% Population - 5 times/week
HEALTH & PHYSICAL EDUCATION			0			0			0			0			16,200	
Gymnasium													12,000	1	12,000	
PE Alternatives													3,000	1	3,000	
Gym Storeroom													300	1	300	
Locker Rooms - Boys/Girls w/Toilets													0		-	5.6 sf/student total
Phys. Ed. Storage													500	1	500	
Athletic Director's Office													150	1	150	
Health Instructor's Office w/Shower & Toilet													250	1	250	
MEDIA CENTER			0			0			0			0			3,650	
Media Center/Reading Room													3,650	1	3,650	
AUDITORIUM / DRAMA			0			0			0			0			2,650	
Auditorium													0	1	-	2/3 Enrollment @ 10 SF/Seat - 750 seats MAX
Stage													1,600	1	1,600	
Auditorium Storage													250	1	250	
Make-up / Dressing Rooms													300	2	600	
Controls / Lighting / Projection													200	1	200	
DINING & FOOD SERVICE			0			0			0			0			2,900	
Cafeteria / Student Lounge/ Break-out													0	1	-	3 seatings - 15SF per seat
Chair / Table Storage													300	1	300	
Scramble Serving Area													600	1	600	
Kitchen													1,600	1	1,600	1600 SF for first 300 + 1 SF/student Add'l
Staff Lunch Room													400	1	400	20 SF/Occupant
MEDICAL			0			0			0			0			210	
Medical Suite Toilet													60	1	60	
Nurses' Office/Waiting Room													250	1	250	
Interview Room													100	-1	(100)	
Examination Room / Resting													100	0	-	
ADMINISTRATION & GUIDANCE			0			0			0			0			2,920	
General Office / Waiting Room/Toilet													300	1	300	

Proposed Space Summary - High Schools

FILL IN SCHOOL NAME HERE	Existing Conditions			PROPOSED									MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
				Existing to Remain/Renovated			New			Total						
ROOM TYPE	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	Comments
Teachers' Mail and Time Room													100	1	100	
Duplicating Room													200	1	200	
Records Room													200	1	200	
Principal's Office w/ Conference Area													375	1	375	
Principal's Secretary / Waiting													125	1	125	
Assistant Principal's Office - AP1													150	1	150	
Assistant Principal's Office - AP2													150	0	-	
Supervisory / Spare Office													120	1	120	
Conference Room													450	1	450	
Guidance Office													150	0	-	
Guidance Waiting Room													100	1	100	
Guidance Storeroom													100	1	100	
Career Center													300	1	300	
Records Room													100	1	100	
Teachers' Work Room													300	1	300	
CUSTODIAL & MAINTENANCE			**0**			**0**			**0**			**0**			**2,075**	
Custodian's Office													150	1	150	
Custodian's Workshop													250	1	250	
Custodian's Storage													375	1	375	
Recycling Room / Trash													400	1	400	
Receiving and General Supply													300	1	300	
Storeroom													400	1	400	
Network/Telecom Room													200	1	200	
OTHER			**0**			**0**			**0**			**0**			**0**	
Other *(specify)*																
Total Building Net Floor Area (NFA)			**0**			**0**			**0**			**0**			**33,130**	
Proposed Student Capacity/Enrollment															**0**	#N/A
Total Building Gross Floor Area (GFA)[2]															**#N/A**	
Grossing factor (GFA/NFA)			**#DIV/0!**									**#DIV/0!**			**#N/A**	

[1] **Individual Room Net Floor Area (NFA)**

I hereby certify that all of the information provided in this "Proposed Space Summary" is true, complete and accurate and, except as agreed to in writing by the Massachusetts School Building Authority, in accordance with the guidelines, rules, regulations and policies of the Massachusetts School Building Authority to the best of my knowledge and belief. A true statement, made under the penalties of perjury.

[2] **Total Building Gross Floor Area (GFA)**

Includes the entire building gross square footage measured from the outside face of exterior walls

Architect Certification

I hereby certify that all of the information provided in this "Proposed Space Summary" is true, complete and accurate and, except as agreed to in writing by the Massachusetts School Building Authority, in accordance with the guidelines, rules, regulation

Name of Architect Firm: _____

Name of Principal Architect: _____

Signature of Principal Architect: _____

Date: _____

Appendix 3D

Module 3 Local Actions and Approval Certification Template

Instructions: Complete the letter and certification set forth below and print on (City/Town/Regional School District) letterhead. Please submit one original, signed version of the letter and certification and one electronic version to the MSBA.

[Letterhead of City/Town/Regional School District]

[Date]

Ms. Diane Sullivan
Senior Capital Program Manager
40 Broad Street
Boston, Massachusetts 02109

Dear Ms. Sullivan:

The (*City/Town/Regional School District*) School Building Committee ("SBC") has completed its review of the Feasibility Study [*Preliminary Design Program or Preferred Schematic Report*] for the (*insert school name*) school project (the "Project"), and on (*insert date of school building committee during which the vote to submit was conducted*), the SBC voted to approve and authorize the Owner's Project Manager to submit the Feasibility Study related materials to the MSBA for its consideration. A certified copy of the SBC meeting minutes, which includes the specific language of the vote and the number of votes in favor, opposed, and abstained, are attached.

Since the MSBA's Board of Directors invited the District to conduct a Feasibility Study on (*insert date of the MSBA Board of Directors meeting*), the SBC has held (*insert number of SBC meetings*) meetings regarding the proposed project, in compliance with the state Open Meeting Law. These meetings include:

[Insert a complete list of SBC meetings held to discuss and/or present to the public material related to the Project and include the following information for each meeting: the time and location of the meeting, who presented (if applicable), a summary of the concerns and comments presented, a list of the materials discussed or made available for public review, a list of votes taken and the results, and when and where notice of each meeting was posted.]

In addition to the SBC meetings listed above, the District held (*insert number of public meetings*) public meetings, which were posted in compliance with the state Open Meeting Law, at which the Project was discussed. These meetings include:

[Insert a complete list of all public meetings held to discuss and/or present to the public material related to the Project and include the following information for each meeting: who hosted the meeting (e.g., School Committee, Board of Selectmen), the time and location of the meeting who presented (if applicable), a brief summary of the concerns and comments presented, a list of the materials discussed or made available for public review, a list of votes taken and the results, and when and where notice of each meeting was posted.

The presentation materials for each meeting, meeting minutes, and summary materials related to the Project are available locally for public review at (*insert location of materials (e.g. website, town hall, superintendent's office etc)*).

To the best of my knowledge and belief, each of the meetings listed above complied with the requirements of the Open Meeting Law, M.G.L. c. 30A, §§ 18-25 and 940 CMR 29 *et seq*.

If you have any questions or require any additional information, please contact (*insert name, title, and contact information*).

By signing this Local Action and Approval Certification, I hereby certify that, to the best of my knowledge and belief, the information supplied by the District in this Certification is true, complete, and accurate.	By signing this Local Action and Approval Certification, I hereby certify that, to the best of my knowledge and belief, the information supplied by the District in this Certification is true, complete, and accurate.	By signing this Local Action and Approval Certification, I hereby certify that, to the best of my knowledge and belief, the information supplied by the District in this Certification is true, complete, and accurate.
_____	_____	_____
By:	**By:**	**By:**
Title: Chief Executive Officer	**Title: Superintendent of Schools**	**Title: Chair of the School Committee**
Date:	**Date:**	**Date:**

Budget Statement for Preferred Schematic - Expenditures

As reported on the school district's most recent three end of year information, please updated to the 3 latest fiscal year periods and complete the fields below.

Category	20##-20## FY20## Staff (FTE)	20##-20## FY20## Budget	20##-20## FY20## Staff (FTE)	20##-20## FY20## Budget	20##-20## FY20## Staff	20##-20## FY20## Budget	Change from Previous Year Staff (FTE)	Change from Previous Year Budget	Post-Constuction Budget Staff	Post-Constuction Budget Budget	New Facility vs. Current Staff (FTE)	New Facility vs. Current Budget
Salaries												
Administration												
Admin. Secretary	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Assistant Principal	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Business Office	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Curriculum Director/Coord.	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Custodians/Maintenance Staff	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Executive Secretary	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Facilities Manager	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Guidance	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Adjustment Counselor	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Guidance Counselors	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Guidance Director	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Legal	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Nurse	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Other	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Principal	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Special Education Admin	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Superintendent/Asst. Superintendent	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Transportation	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Treasurer	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Total Administration	**0.00**	**-**	**0.00**	**-**	**0.00**	**-**	**0.00**	**-**	**0.00**	**-**	**0.00**	**-**
Instruction - Teaching Services												
Arts	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Business	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Communications	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Coping Instructor	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Culinary Arts	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
ELL	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
English Language	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Family Consumer Services	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Foreign Language	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Health Services	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
History & Social Science	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Instructional Assistant/Paraprofessionals	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Library/Media	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Mathematics	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
MCAS	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Music	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Other	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Physical Education	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Reading	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
School Adjustment Counselor	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Science												
Biology	0.00	-	0.00		0.00		0.00	-	0.00	-	0.00	-
Botany	0.00	-	0.00		0.00		0.00	-	0.00	-	0.00	-
Chemistry	0.00	-	0.00		0.00		0.00	-	0.00	-	0.00	-
Geology	0.00	-	0.00		0.00		0.00	-	0.00	-	0.00	-
Physics	0.00	-	0.00		0.00		0.00	-	0.00	-	0.00	-
Special Education	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Substitute Teachers	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Technology	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Vocational Tech.	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Total Instruction - Teaching Services	**0.00**	**-**	**0.00**	**-**	**0.00**	**-**	**0.00**	**-**	**0.00**	**-**	**0.00**	**-**
Total Salaries Administration & Instruction	**0.00**	**-**	**0.00**	**-**	**0.00**	**-**	**0.00**	**-**	**0.00**	**-**	**0.00**	**-**
Employee Benefits												
All employee-related fringe (health insurance, retirement etc)		**-**		**-**		**-**		**-**		**-**		**-**
Materials & Services												
Materials												
Audio-Visual Materials		-		-		-		-		-		-
Culinary Arts Materials		-		-		-		-		-		-

Budget Statement for Preferred Schematic - Expenditures

Category	20##-20## FY20## Staff (FTE)	20##-20## FY20## Budget	20##-20## FY20## Staff (FTE)	20##-20## FY20## Budget	20##-20## FY20## Staff	20##-20## FY20## Budget	Change from Previous Year Staff (FTE)	Change from Previous Year Budget	Post-Constuction Budget Staff	Post-Constuction Budget Budget	New Facility vs. Current Staff (FTE)	New Facility vs. Current Budget
General Office Supplies		-		-		-		-		-		-
Information technology		-		-		-		-		-		-
Hardware		-		-		-		-		-		-
Software		-		-		-		-		-		-
Library Materials		-		-		-		-		-		-
Non info-tech equipment		-		-		-		-		-		-
Testing Materials & Supplies		-		-		-		-		-		-
Textbooks		-		-		-		-		-		-
Vocational Program Materials		-		-		-		-		-		-
Total Materials		-		-		-		-		-		-
Services												
Athletics		-		-		-		-		-		-
Attendance		-		-		-		-		-		-
Food Service		-		-		-		-		-		-
Health Services		-		-		-		-		-		-
Other Student Activities		-		-		-		-		-		-
Psychological Services		-		-		-		-		-		-
School Security		-		-		-		-		-		-
Student Transportation		-		-		-		-		-		-
Total Services		-		-		-		-		-		-
Total Material & Services		-		-		-		-		-		-
Facility Costs & Capital Improvements												
Facility Costs												
Custodial Supplies		-		-		-		-		-		-
Electricity		-		-		-		-		-		-
Heating Oil		-		-		-		-		-		-
Maintenance												
Building Security Maintenance		-		-		-		-		-		-
Elevator		-		-		-		-		-		-
Equipment Maintenance		-		-		-		-		-		-
Exterminating		-		-		-		-		-		-
Facility Maintenance		-		-		-		-		-		-
Fire Alarm		-		-		-		-		-		-
Fire Extinguisher Inspection		-		-		-		-		-		-
Generator		-		-		-		-		-		-
HVAC Maintenance		-		-		-		-		-		-
Other		-		-		-		-		-		-
Site Maintenance (Grouds)		-		-		-		-		-		-
Technology		-		-		-		-		-		-
Trash Removal		-		-		-		-		-		-
Natural Gas		-		-		-		-		-		-
Snow Removal		-		-		-		-		-		-
Telephone		-		-		-		-		-		-
Water/Sewer		-		-		-		-		-		-
Total Facility Costs		-		-		-		-		-		-
Captial Improvements												
Captial Improvements		-		-		-		-		-		-
Total Facility Costs & Capital Improvements		-		-		-		-		-		-
Debt Service												
Short-term		-		-		-		-		-		-
Long-term		-		-		-		-		-		-
Total Debt Service		-		-		-		-		-		-
Total Budget & Staff	0.00	-	0.00	-	0.00	-	0	-	0	-	0	-

January 2014

Budget Statement for Preferred Schematic - Revenue

As reported on the school district's most recent three End of Year Pupil and Financial Reports schedule 1, please update to the 3 latest fiscal year periods and report sources of revenue in the fields below.

	FY## End of Year Financial Report							FY## End of Year Financial Report							FY## End of Year Financial Report						
	Regular Day	Special Education	C74 Occupational Day	Adult Education	Other Programs	Un-distributed	Total	Regular Day	Special Education	C74 Occupational Day	Adult Education	Other Programs	Un-distributed	Total	Regular Day	Special Education	C74 Occupational Day	Adult Education	Other Programs	Un-distributed	Total
A. Revenue from Local Sources																					
Assessments received by Regional Schools	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
E&D Fund Appropriations	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tuition from Individuals	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tuition from Other Districts in Comm.	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tuition from Districts in Other States	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Previous Year Unexpended Encumbrances (Carry Forward)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Transportation Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Earnings on Investments	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Rental of School Facilities	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Revenue	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Medical Care and Assistance	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Non Revenue Receipts	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Revenue From Local Sources	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
B. Revenue from State Aid	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
School Aid (Chapter 70)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Mass School Building Authority - Construction Aid	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Pupil Transportation (Ch. 71, 71A,71B,74)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Charter Tuition Reimbursements & Charter Facilities Aid	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Circuit Breaker	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Foundation Reserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Revenue From State Aid	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
C. Revenue from Federal Grants																					
ESE Administered Grants	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Direct Federal Grants	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Revenue Federal Grants	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
D. Revenue from State Grants																					
ESE Administered Grants	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other State Grants	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Revenue From State Grants	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
E. Revenue - Revolving & Special Funds																					
School Lunch Receipts	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Athletic Receipts	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tuition Receipts - School Choice	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tuition Receipts - Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Local Receipts	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Private Grants	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Revenue Revolving & Special Funds	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Revenue All Sources	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Appendix 3F

Module 3 Feasibility Study Checklist

The following checklist has been provided as a general guide for Districts and consultants in the performance of work associated with the requirements of the Feasibility Study Agreement, Module 3 – Feasibility Study, OPM and Designer Contracts, practices, policies, and Project Advisories and is **not** to be submitted to the MSBA. This checklist is not intended to supersede the requirements of these documents or statutory and regulatory requirements.

Item	Date
Copy of executed OPM Contract forwarded to MSBA	
Copy of executed Designer Contract forwarded to MSBA	
Work Plan approved by School Building Committee ("SBC")	
Kick-Off Meeting with MSBA	
Processed Budget Revision Request to align ProPay Budget Line Items to executed OPM and Designer Contracts submitted to MSBA	
Reviewed Project Advisories	
SBC Vote to approve Preliminary Design Program ("PDP") Submittal and Local Actions and Approval Certification signed.	
PDP submitted to the MSBA	
District Response to PDP review comments submitted to MSBA	
School Committee Vote to approve Grade Reconfiguration and/or Districting and Grade Reconfiguration and Districting Approval Certification signed (if applicable)	
SBC Vote to approve Preferred Schematic Report ("PSR") Submittal and Local Actions and Approval Certification signed.	
PSR submitted to the MSBA	
District Response to PSR review comments submitted to MSBA	
Facilities Assessment Subcommittee ("FAS") Meeting	
District Response to FAS comments submitted to MSBA	
Updates to SBC submitted to MSBA (if applicable)	
Updates to OPM and Designer Org Charts submitted to MSBA (if applicable)	
Copies of executed OPM and Designer Contract amendments (if applicable) submitted to the MSBA	
ProPay Budget Revision Request(s) submitted to MSBA (if applicable)	
Work plan updated and approved by SBC (if applicable)	
Preferred Schematic Conference Call	
MSBA Board Approval to Proceed into Schematic Design	
MSBA Board Action Letter denoting approval of authorization to proceed to schematic design	

Massachusetts School Building Authority

Deborah B. Goldberg
Chairman, State Treasurer

James A. MacDonald
Chief Executive Officer

John K. McCarthy
Executive Director / Deputy CEO

Module 4

Schematic Design

September 2018

INTRODUCTION

Module 4 – Schematic Design:

If the District has completed all tasks defined in Module 1 – Eligibility Period, Module 2 – Forming the Project Team, and Module 3 – Feasibility Study and received approval from the MSBA's Board of Directors (the "Board") to proceed into Schematic Design the District may now proceed with Schematic Design as outlined in this Module. Module 4 – Schematic Design is one of eight modules developed by the Massachusetts School Building Authority ("MSBA") that are intended to provide a guide to the procedures and approvals needed to work collaboratively with the MSBA. The "Program Overview" and listing of eight modules is provided in Appendix 4A for reference.

Welcome to Module 4 – Schematic Design

During Schematic Design, the District and its team collaborate with the MSBA to develop a robust schematic design of sufficient detail to establish the scope, budget, and schedule upon which to evaluate the basis for a proposed project, secure approval of the Proposed Project by the Board, receive Department of Elementary and Secondary Education approval of the Proposed Project for delivery of the District's special educational program, and obtain local authorization and financial support.

Module 4 begins with the Board's approval of the District's preferred solution and concludes with the Board's authorization of the MSBA's Executive Director to enter into a Project Scope and Budget Agreement and a Project Funding Agreement with the District for a specific project scope, budget and schedule. See this Module for additional detail.

Module 4 has been provided as a general guide for Districts and their teams to plan their work in a collaborative effort in accordance with the MSBA's procedures and requirements. This Module is not intended to replace and/or supersede MSBA regulations, agreements, or the services required by the Owner's Project Manager ("OPM") and/or Designer contracts. The Designer and OPM each shall be solely responsible for performing the services required by its contract with the District, respectively, and nothing in this Module shall be construed as relieving the Designer or OPM from its duties and responsibilities.

Schematic Design Participants should include, at a minimum, the following:

- **The School Building Committee,** as presented by the District and approved by the MSBA in its School Building Committee Approval form, along with elected officials and other District representatives that the District determines are necessary to demonstrate the educational and financial support of the city, town, or regional school district for the Proposed Project.

- **The Owner's Project Manager, ("OPM")** as selected by the District and approved by the MSBA in accordance with MSBA regulations and policies.

- **The Designer,** as selected locally by the District and approved by the MSBA for projects under $5 million, or as selected through the MSBA's Designer Selection Panel for projects over $5 million.

- **The MSBA,** through the assigned MSBA Project Manager and Project Coordinator.

Schematic Design Submittal Procedures

All documents and materials submitted to the MSBA during the course of Schematic Design must be transmitted by the OPM. The OPM is required to compile and coordinate all submittals, including those items required to be provided by the OPM and also those required to be provided by the Designer and/or the District.

For each submittal to the MSBA, the Designer and District must transmit the required materials to the OPM. The OPM shall compile the submittal with the items indicated in the Designer and OPM Contracts, confirm that the District's School Building Committee has officially approved the submittal, and verify its completeness and conformity to MSBA requirements. The OPM shall then forward this submittal to the assigned MSBA Project Coordinator along with a separate cover letter signed by the OPM. The cover letter shall include a certification from the OPM that (1) the OPM has reviewed and coordinated the materials, (2) the submittal is complete, (3) the Proposed Project as documented within the Schematic Design Submittal is within the District's budget, and (4) the District has approved the materials for submission to the MSBA.

Schematic Design Submittal– Submit two (2) binders of materials per this Module including two (2) sets of Schematic Design Drawings not exceeding 18" x 24", two (2) Schematic Design Project Manuals, and one (1) electronic file in PDF format.

The MSBA will not accept incomplete submittals, submittals that have not been reviewed by the OPM, or Schematic Design submittals for which the estimated project costs exceed the District's project budget. Updates to the Total Project Budget that do not reflect the scope and schedule represented in the Schematic Design Submittal will not be accepted. All value engineering activities must be complete, and the results incorporated into the Schematic Design Submittal documentation, prior to being submitted to the MSBA.

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APPENDICES

4.0 Schematic Design

With the Board's authorization, a District may proceed into Schematic Design of the preferred solution. Please remember that an authorization to proceed into Schematic Design is ***not*** an approval of a project and is limited to development of a robust schematic design that is based on the preferred solution, by the District, its OPM (for projects with estimated construction costs in excess of $1.5 million), and its Designer. The Schematic Design Submittal, for which the content is described below, must be of sufficient detail to clearly define and document the scope, budget, and schedule. The Schematic Design Submittal informs the basis of the approved project scope, schedule, and Estimated Maximum Total Facilities Grant and Maximum Total Facilities Grant. The Schematic Design Submittal can also be used by the District to secure local authorization and financial support to allow the project to move forward. Invitation is not guaranteed for any particular Board Meeting; it is based on a mutual agreement between the District and its consultants and MSBA staff that the project proposed in the Schematic Design Submittal is ready for approval by both the Board and the local community. To qualify for any funding from the MSBA, local communities must follow the MSBA's statute and regulations, which require MSBA collaboration and approval at each step of the process. Moving forward in the MSBA's process requires collaboration with the MSBA, and communities that "get ahead" of the MSBA without MSBA approval will not be eligible for grant funding.

Due to the variety and nature of proposed solutions (e.g., repairs to a single building system, renovations to the entire facility, an addition, or a new school) each Schematic Design may vary slightly as to the specific requirements, scope, cost, and schedule. The particular requirements, scope, cost, and schedule of a Schematic Design will be outlined in the Feasibility Study Agreement between the District and the MSBA and in the Designer's proposed design work plan that is developed in accordance with the MSBA Standard Contract for Designer Services. The requirements may be based on many factors including the MSBA's review and evaluation of any previous studies, previous collaboration during Feasibility Study as well as any meetings and discussions between the District and the MSBA.

In order for the MSBA to enter into a Project Scope and Budget Agreement with the District, the District must:

- Submit a Schematic Design Submittal for the Proposed Project as described in Section 4.1 of this Module and by the deadline for the anticipated MSBA Board meeting as shown on the MSBA's website, and respond to any questions raised by MSBA staff;
- Attend a Project Scope and Budget Conference as described in Section 4.2 of this Module;
- Receive approval from the Board for its Proposed Project; and
- Return three (3) signed copies of the Project Scope and Budget Agreement as described in Module 5.

In order for the MSBA to enter into a Project Funding Agreement with the District, the District must secure local authorization and funding within 120 days of the Board's vote. In addition, the Commissioner of Education must certify that adequate provisions have

been made in the Proposed Project for children with disabilities. In order to establish that adequate provisions are included in the Proposed Project, the District, through its OPM, must provide to the MSBA a Department of Elementary and Secondary Education ("DESE") Submittal for the Proposed Project as described below.

4.1 Schematic Design Submittal

The purpose of the Schematic Design, which must be based on the preferred solution approved by the MSBA's Board of Directors, is to document in detail the scope, budget and schedule of the proposed project.

The Schematic Design Submittal shall include the following:

- Department of Elementary and Secondary Education (DESE) Submittal;
- Schematic Design Binder;
- Schematic Design Project Manual; and
- Schematic Design Drawings.

At least 10 business days prior to the MSBA deadline for District submittals, the OPM shall provide the following information via email to the MSBA as set forth in the Schematic Design Submittal Notification Template (refer to Appendix 4C):

- Designer's estimated construction cost;
- OPM's estimated construction cost;
- The estimated project cost;
- The District's project budget;
- Confirmation that the District and its consultants intend to submit the Schematic Design Submittal on or by the established MSBA deadline for District submittals, and that the submittal will include a completed Total Project Budget that reflects the project scope and reconciled project schedule as documented in the Schematic Design Submittal.

The MSBA will not accept Schematic Design Submittals for which the estimated project costs exceed the District's project budget. Updates to the Total Project Budget that do not reflect the scope and schedule represented in the Schematic Design Submittal documentation will not be accepted or if determined after submittal is returned. All value engineering activities must be complete, and the results incorporated into the Schematic Design Submittal documentation, prior to submitting to the MSBA.

4.1.1 Department of Elementary and Secondary Education (DESE) Submittal

Pursuant to G.L. c. 70B, § 6, the Massachusetts School Building Authority ("MSBA") shall make certain findings in order to designate a school project as an approved school project, one of which is that the Commissioner of Education has certified that "…adequate provisions have been made in the school project for children with disabilities, as defined in section 1 of chapter 71B." Proposed repair projects that do not include changes to the numbers or size of educational spaces or substantive changes in the grade configuration may not be required to provide a DESE Submittal. Refer to the District's Feasibility Study Agreement for clarification.

Without prior written approval by the MSBA, the MSBA will not execute a Project Funding Agreement with a District until the DESE has agreed in writing that the Proposed Project provides adequate provisions for school children with disabilities.

To meet this DESE requirement, the District must prepare a DESE Submittal, which the OPM shall submit to the MSBA. The MSBA will review for completeness and consistency before forwarding to the Department of Elementary and Secondary Education for review.

The DESE submittal shall be included in the tabbed Schematic Design binder as a removable "stand alone" submittal and shall include the following:

- Cover Letter;
- Special education delivery methodology;
- Signed Educational Space Summary and separate narrative;
- Floor Plans; and
- Adjacency Table

Refer to Appendix 4B for additional information regarding the DESE submittal.

4.1.2 Schematic Design Binder

In preparing the Schematic Design Submittal for the MSBA, the OPM shall compile the following information in the Schematic Design Binder tabbed to correspond to the Table of Contents:

- Introduction that presents a brief overview of the process undertaken to advance the preferred solution through Schematic Design. The following shall be included:
    - A brief summary of the preferred solution approved by the MSBA Board of Directors;
    - An overview of the process undertaken locally to educate the community, including key community outreach activities, committee meetings, and key votes and decisions;
    - The District's Total Project Budget for the proposed project and the steps necessary for the District to secure local funding;
    - An updated description of the project including grades to be served, size of the site, gross square feet of the proposed building (include gross square feet of both new construction and renovated areas as appropriate), Total Project Budget, list of alternates (if none, indicate as such), and construction delivery methodology (design/bid/build or Construction Manager at Risk); and
    - Any Visual Aids that may be suitable for presentation at the Board of Meeting of the following: Site Plan, Floor Plans, and an elevation. The plans shall also be submitted electronically as separate files for potential incorporation into the Board presentation; and
    - A copy of the MSBA Preferred Schematic Report review and corresponding District response.

- Final Design Program, including:
    - General and specific architectural characteristics desired;
    - Two signed copies of the educational space summary that reflects the current design (11" x 17" prints). The educational space summary shall delineate: all spaces with related square footage within the current school building, as applicable; all spaces associated with square footage planned in the new, replacement, or renovated areas of the proposed school building; and MSBA's guidelines that are unadulterated and based on the agreed upon design enrollment. If the educational space summary is different than the educational space summary submitted as part of the Preferred Schematic Report, include a separate narrative description of all changes and identify the reason for each change, e.g., minor adjustment resulting from building design efforts, adjusted floor plan, or programmatic change. Provide a space measurement analysis and Designer certification for the design verifying that the sum of all programmed floor areas plus all other floor areas equal the gross floor area of the Final Design Program;
    - Narrative describing how the proposed project supports each component of the District's educational program;
    - Instructional technology (existing and proposed);
    - Functional relationships and critical adjacencies that informed the basis of design;
    - Security and visual access requirements;
        - Confirmation that the persons responsible for implementation of the District's emergency procedures, and responding emergency medical, fire protection, and police agency representatives have been consulted in the planning process and any associated requirements have been included in the project.
        - Identification of any security related items particular to the District and/or the proposed project.
        - Verification that the following safety and security related issues have been reviewed and are in accordance with the District's procedures as noted above:
            - Main entrance design – describe District protocol for visitor entry and check-in related to the current design for visitors to remain in the vestibule versus a side sub-vestibule;
            - Classroom lockset hardware - confirm hardware functions are compatible with the District's protocols related to lockdown;
            - Classroom / Instructional spaces visibility - confirm that the inclusion of sidelights at entrance locations is compatible with the District's current standards related to visibility from corridors and whether any related vision control option measures are to be incorporated; and
            - Alternative entry locations - confirm project includes site and building signage, as may be required by District's emergency procedures, to identify locations where first responders may more directly reach a person needing

medical attention; Knox Boxes; and provisions for building plans to be delivered to local fire and response agencies.
        - Confirm optimal surveillance of building and site.
    - Site development requirements – Provide a description of the total number of parking spaces, how they are distributed, and how the quantities were derived; and
    - Desired visual or aesthetic focal point or features of the school.
- Traffic Analysis – Provide an evaluation of existing traffic patterns, both on-site and off-site areas likely to be impacted by the project; congestion and safety concerns; identifies critical traffic issues to be addressed in the proposed project; and addresses changes in traffic volume and patterns anticipated as a result of the proposed project. Confirm that the findings and recommendations of the analysis are accounted for in the site plan(s), project budget, and project schedule. Describe any offsite work resulting from the proposed project and indicate if this work is to be performed by the District as part of the proposed project (please note that associated costs of off-site work will be deemed ineligible for reimbursement) or if the work is to be performed separately from the proposed project (e.g. under separate procurements and contracts). If the District and its consultants have determined that a traffic analysis is not required because there are no existing traffic issues to be addressed and the proposed project will not impact existing conditions provide a written description of the assessment and analysis used to make this determination.;
- Environmental and existing building assessment – Describe the additional site and building assessments that quantified the presence of unsuitable materials and scope of remediation efforts. Identify the estimated costs of the results of the testing in the cost estimate;
- Geotechnical and geo-environmental analysis – Describe the additional geotechnical analysis as may be required to establish soil conditions, remediation requirements and appropriate foundation requirements. Identify the estimated costs of the results of the testing in the cost estimate;
- Code analysis – Identify and determine the impact of all applicable federal, state, regional and local codes, regulations and ordinances, including a listing of permitting and other regulatory filing requirements;
- Utility analysis and soils analysis for on-site septic/sewage treatment facilities – Determine the availability and capacity of all required building utilities. Provide soils analysis and preliminary design for on-site septic/sewage treatment facilities, if required;
- Massing study – An analysis of the building's integration into its surroundings and neighborhood with drawings, models, or photographs;
- Narrative building systems descriptions – Describe basic information relative to:
    - Sustainable design elements;
    - Building structure;
    - Plumbing & HVAC (Provide a preliminary life cycle cost analysis pursuant to the criteria of M.G.L. c. 149, § 44(m);
    - Fire Protection (verify adequate water capacity for new system and confirm if a fire pump will be required);
    - Electrical (including power, lighting, communications, fire alarm, video/CATV, security/surveillance); and
    - Information Technology.

- Sustainable Building Design Guideline documents:
    - Refer to the MSBA website for MSBA's current Sustainable Design Guidelines;
    - Completed Sustainable Building Design Guideline scorecard from the Designer showing the attempted credits to be included in the final design; and
    - Signed letter from the Designer including the following statement:
        - "This is an acknowledgement that the _____School District has identified a goal of ____% additional reimbursement from the MSBA High Efficiency Green School Program. As their Designer, I have submitted a completed _____scorecard showing all prerequisites and ____ attempted points, which will meet that goal."; and
        - "The scope of work for this project will include the construction elements and performance tasks to achieve that goal, and all subsequent documents, including but not limited to, specifications, drawings, and cost estimates will match the scope of work indicated in the submitted scorecard.";
- Analysis of the design's compliance with the Americans with Disabilities Act (ADA) and the Massachusetts Architectural Access Board requirements (MAAB);
- Room Data Sheets (Refer to Sample Room Data Sheets in Appendix 4D), including, but not limited to, the following:
    - Utility requirements – Include the number of electrical outlets needed and their desired locations. Identify specific water, gas, compressed air, and dry and wet waste disposal requirements, as applicable to the specific space;
    - Acoustic and lighting requirements;
    - Security Features – Lockdown hardware, concealment and escape options, operable shades or blinds, hardening materials, ventilation controls, alarm and communication systems interface as applicable to the occupancy;
    - Surface material performance requirements for floors, walls and ceilings (mounting height should be specific for size of students);
    - Bulletin case, writing board, and tack board requirements;
    - Wall maps, projection screens, chart rails, and other fixed teaching aids together with utilities, communications and control features, and teacher demonstration areas, if required;
    - Environmental requirements such as special ventilation/exhaust, natural lighting, special heating, and heat control;
    - Safety and health features, gas, compressed air, water, and automatic shut-off to specialized equipment. Include features such as:
        - emergency eyewash stations,
        - fume hoods, or ventilation in shops and laboratories.
        - instructor gas controls,
        - compressed air, and
        - water;
    - Note where automatic shutoff to specialized equipment is required, e.g.:
        - saws,
        - lathes,

        - planers, and
        - grinders;
    - Audio-visual, television access, and public address requirements as well as computer equipment and stations;
    - Equipment, furnishings, and casework;
    - Internal areas and support spaces needed, including general storage requirements for each space;
    - Special graphics, colors, textures, and shapes (this is of particular importance for kindergarten, special education, pre-school, and primary classrooms);
    - Provisions for storage of staff and/or student garments and personal property;
    - Area needed for display of student projects and large and small project storage; and
    - Identify and describe any other requirement that may be unique to the activity setting.
- Proposed Construction Methodology – Describe the criteria and analysis used by the Owner's Project Manager, in conjunction with the Designer, to compare the construction delivery methods provided in M.G.L. Chapters 149 and 149A for the Proposed Project. Include the relative advantages and disadvantages associated with each of the construction delivery methods and describe the key items that led to the District's selection. If the District elected to proceed with the CM at Risk construction delivery method indicate when the application to proceed with the CM at Risk construction delivery method is to be submitted to the Office of the Inspector General and anticipated notice to proceed issued by the Office of the Inspector General. Confirm that the cost estimates, proposed project schedule, estimated reimbursement rate, and Total Project Budget Spreadsheet reflect the selected construction delivery method.
- District's anticipated reimbursement rate with incentive points (see Appendix 4E).
- Total Project Budget spreadsheet (see Appendix 4F), to as much detail as the drawings and specifications permit, as required by the contract, and a summary of the cost reconciliation between the cost estimate of the Designer's and the OPM's estimates, as applicable. Identify separate costs for:
    - Existing facility demolition;
    - In-building hazardous material abatement;
    - Abatement of asbestos containing floor material;
    - Abatement of hazardous materials located outside of the building;
    - Site costs;
    - Off-site costs; and
    - Alternates.
- Designer's construction cost estimate – Uniformat II, Level 3 format with aggregated unit rates and quantities supporting each item and the CSI MasterSpec format to Summary Level;
- Independent OPM construction cost estimate – Uniformat II, Level 3 format with aggregated unit rates and quantities supporting each item and the CSI MasterSpec format to Summary Level;
- Updated Project Work Plan indicating changes or expansions associated with:
    - Project Directory
    - Roles and Responsibilities

- Communications and Document Control Procedures
- Designer's Work Plan
- Project schedule – The OPM shall provide a schedule in the form of a graphic representation (Gantt Chart) of the duration of all tasks, activities and phases of the design and construction processes against the progression of time from Feasibility Study through design, construction, substantial completion, occupancy, final completion and project close-out. Dependencies between activities and tasks shall be delineated. Individual tasks and activities shall be rolled up to the major project milestones. Highlight priority actions and activities that may have a major impact on the schedule. The project schedule must allow adequate time for document review by the Owner and the Authority. As a minimum, the schedule must include the following:
  - Local Appropriation/Execution of PS&B Agreement and Final PFA;
  - Sustainable Design Building milestones:
    - Project Registration
    - Provisional Review Submittal
    - Final Review Submission
  - Prequalification of Bidders/Selection of CM atRisk;
  - Design Development phase and submittal date;
  - 60% construction documents phase and submittal date;
  - 90% construction documents phase and submittal date;
  - Release of early packages, if applicable;
  - Release/advertisement of filed sub-bids;
  - Receipt of filed sub-bids;
  - Receipt of general contractor bids or execution of the guaranteed maximum price (GMP);
  - Notice to proceed for construction;
  - Key construction milestone dates and project phases;
  - Occupancy date;
  - Start and completion dates for demolition of the existing building;
  - Substantial completion;
  - Final Completion; and
  - Project Close-out.

- Local Actions and Approvals - as with other submittals to the MSBA, the Schematic Design Submittal must be reviewed and approved locally in accordance with the State Open Meeting Law prior to submittal to the MSBA. Public participation and local approval procedures and practices may vary by community and by project. The District must document local approval of the Schematic Design Submittal. The MSBA requires Districts to provide a certified copy of the School Building Committee Meeting ("SBC") Minutes from the meeting(s) at which the Schematic Design submittals were approved for submission to the MSBA. The Meeting Minutes must include the specific language of the vote and the results of the vote, stating the number of SBC Members who voted in favor of submittal to the MSBA, the number of opposed, and the number of abstentions. The District must also list SBC meeting dates, provide agendas, list specific stakeholders in attendance, provide a description of materials available for public review, and where those materials may be viewed. The MSBA also requires Districts to provide similar information for public

meetings and presentations conducted in addition to School Building Committee meetings. Refer to Appendix 4G "Local Actions and Approvals Certification Template" for additional information. A signed Local Actions and Approvals Certification on District Letterhead is required for MSBA staff to present the Proposed Project to the MSBA's Board of Directors for its consideration and approval.

4.1.3 Schematic Design Project Manual

The Schematic Design Project Manual shall be bound, (8.5" x 11") and include outline specifications in Uniformat Divisions that clearly define the scope of construction and establish the quality of materials, finishes, products, equipment and workmanship, and the special or unique conditions of construction. Provide a list identifying all proprietary items, if any, with an explanation for each item, how it is in the public interest that proprietary items are selected over non-proprietary equivalent items, and certification that local authorization for the use of proprietary items has complied with all state laws and local regulations, policies, and guidelines. If proprietary items are included in the Schematic Design to clarify the scope of work for the purposes of cost estimating, but are not intended to be incorporated into the final design, clearly identify this in the submittal within both the outline specifications and drawings as applicable.

4.1.4 Schematic Design Drawings

The Schematic Design drawings shall be bound 18" x 24" drawings and shall include the following:

- Existing Site Plan at a minimum scale of 1"=40' including:
  - Context
  - Property lines with bearings and distances
  - Site access
  - Existing paved areas and parking
  - Existing proposed parent and bus pick up and drop off lanes
  - Existing topography
  - Existing utilities locations
- Site development plan at a minimum scale of 1"=40' including:
  - Zoning setbacks
  - Site acreage
  - Wetlands information
  - Proposed topography
  - Proposed buildings and site features
  - Proposed paved areas and parking layout
  - Proposed parent and bus pick up and drop off areas
  - Ground floor elevations for all buildings
  - Proposed utilities and utility connections
  - Emergency equipment access
  - Future areas of expansion
- Schematic building floor plans of all floors and roof plans at a minimum scale of 1/8"=1'-0" with overall dimensions, gross square footage of each floor, and net

square footage of each space, response to functional requirements of program, major and minor access, and circulation
- Interior elevations of a typical general classroom, and typical Pre-K/K classroom and typical Science classroom/lab as applicable
- Schematic exterior building elevations for all sides and orientations indicating all exterior finishes and fenestration.

4.2 Review and Approval of Schematic Design Submittal

4.2.1 MSBA Staff Review

After receiving a complete Schematic Design Submittal, the District and the MSBA shall work in collaboration to establish a proposed project scope, Total Project Budget, Estimated Basis of Total Facilities Grant, Estimated Maximum Total Facilities Grant, and schedule that may be recommended to the Board for approval. If the MSBA and the District cannot reach agreement, no Schematic Design will be forwarded to the Board for its consideration. The MSBA and the District will review the Proposed Project as documented in the Schematic Design Submittal to determine if there are actions that can be taken to reach consensus on a scope, budget, and schedule for the Proposed Project.

The MSBA review process for the Schematic Design Submittal includes:

- Written response comments based on staff review;
- Project Scope and Budget Conference with the District and their design team to discuss the project; and
- Written responses from the District addressing staff comments as required.

MSBA staff must complete its review of the submittal, and the District must submit responses to any questions or issues raised by the MSBA in a timeframe adequate to support the schedule for the Board meeting.

4.2.2 Facilities Assessment Subcommittee Review

At the MSBA's sole discretion, the District and its consultants may be required to present the proposed project at a Facilities Assessment Subcommittee meeting or to prepare additional project documentation should significant layout, educational program, or design changes arise during the Schematic Design process.

4.2.3 Project Scope and Budget Conference

The District will be invited to participate in a Project Scope and Budget Conference to review the status of all submittals, compliance with MSBA regulations and policies, discuss the scope, budget and schedule for the proposed project, and discuss the MSBA's Estimated Basis of Total Facilities Grant. If all concerns raised by the MSBA are addressed and the District understands and has no objection to the Estimated Basis of Total Facilities Grant and the Estimated Maximum Total Facilities Grant, the MSBA will proceed with a recommendation to the Board for Approval and provide the District with copies of the Project Scope and Budget Agreement to sign. If the District has any

questions, the District should contact the MSBA assigned Project Coordinator. Refer to Module 5 – Project Scope and Budget and Project Funding Agreements for additional information.

4.2.4 MSBA Board Approval

If all concerns raised by the MSBA are addressed and the District has confirmed understanding of, and has no objection to the Estimated Basis of Total Facilities Grant and the Estimated Maximum Total Facilities Grant MSBA staff will present the Proposed Project to the Board for its consideration and approval. If the Board approves the Proposed Project, MSBA staff will issue a Board Action Letter summarizing the Board's actions. For additional information on Project Scope and Budget and Project Funding Agreements – see Module 5.

4.3 Conclusion of Module 4

The District shall address any unresolved issues and submit any outstanding deliverables as directed by the MSBA. The District should maintain the Schematic Design Completion Checklist throughout the Schematic Design process as each step is submitted, reviewed and completed.

APPENDIX 4A

Program Overview

Program Overview

The Massachusetts School Building Authority's ("MSBA") grant program for school building construction and renovation projects is a non-entitlement competitive program based on need. The MSBA's Board of Directors (the "Board") approves grants based on need and urgency, as expressed by the City, Town, Regional School District, or independent agricultural and technical school ("District") and validated by the MSBA. Once the MSBA Board of Directors invites a District to participate in the MSBA's grant program, the collaborative process includes the following eight Modules:

Module 1 – Eligibility Period: The MSBA Board of Directors votes to invite a District into the Eligibility Period which initiates a 270-day period for the District to complete preliminary requirements including a certification of the District's understanding of the grant program rules, the formation of a School Building Committee, a summary of the District's existing maintenance practices; determination of a design enrollment; development of an educational profile, community authorization and funding to proceed, and execution of the MSBA's standard Feasibility Study Agreement. Districts that are able to complete these requirements may receive an invitation to collaborate with the MSBA to Conduct a Feasibility Study.

Module 2 – Forming the Project Team: Upon receipt of an invitation to collaborate with the MSBA to Conduct a Feasibility Study the District procures the team of professionals utilizing MSBA specific procurement processes, standard Request for Services ("RFS") templates, and standard Contracts to work with the District as the proposed project advances through the MSBA's grant process.

Module 3 – Feasibility Study: Upon successful conclusion of procurement of Owner's Project Management ("OPM") and Designer services a Kick-Off meeting is held to begin collaboration with the MSBA to document their educational program, generate an initial space summary, document existing conditions, establish design parameters, develop and evaluate alternatives, and recommend the most cost effective and educationally appropriate preferred solution to the MSBA Board of Directors for their consideration. During this phase, the Owner's Project Manager will submit on behalf of the District and its Designer a Preliminary Design Program and a Preferred Schematic Report. Approval by the MSBA Board of Directors is required for all projects to proceed into schematic design.

Module 4 – Schematic Design: The District and its team develop a robust schematic design of sufficient detail to establish the scope, budget and schedule for the proposed project. The MSBA generates a Project Scope and Budget Agreement that documents the project scope, budget, schedule and MSBA financial participation to forward to the MSBA Board of Directors for their approval.

Module 5 – Funding the Project: Once the MSBA Board of Directors has authorized the MSBA Executive Director to enter into a Project Scope and Budget Agreement and a Project Funding Agreement with the District, the District completes steps necessary to secure community authorization and financial support for the proposed project and enters into a Project Funding Agreement with the MSBA. With an executed Project Funding Agreement the District engages OPM and Designer services, and updates project budgets in Pro - Pay.

Module 6 – Detailed Design: Design Development, Construction Documentation & Bidding: The District and its team advance the design, generate construction documentation, procure bids and award a construction contract in accordance with the agreed upon project scope, budget and schedule as documented in the Project Funding Agreement, and the requirements contained in the MSBA's standard contracts for Owner's Project Management and Designer Services. The MSBA continues to monitor the project to ensure it remains on track and meets the expectation of both the District and the MSBA as defined in the Project Funding Agreement

Module 7 – Construction Administration: The MSBA continues to monitor progress of the project to confirm that it remains on track and meets the expectation of both the District and the MSBA as defined in the Project Funding Agreement.

Module 8 – Project Closeout: The MSBA performs a final audit to determine final total grant amounts and release final payment.

APPENDIX 4B

Department of Elementary and Secondary Education Submittal

Pursuant to Section 6 of G.L. c. 70B, the Massachusetts School Building Authority ("MSBA") shall make certain findings in order to designate a school project as an approved school project. In accordance with G.L. c. 70B, § 6(6) the Commissioner of Education must certify that "… adequate provisions have been made in the school project for children with disabilities, as defined in section 1 of chapter 71B." Repair projects without changes to the location, number, or size of educational spaces in the proposed project may not be required to provide a Department of Elementary and Secondary Education ("DESE") Submittal; please refer to the project Feasibility Study Agreement for clarification.

Without prior written approval by the MSBA, the MSBA will not execute a Project Funding Agreement with a District until the DESE has agreed in writing that the proposed project provides adequate provisions for school children with disabilities.

The Owner's Project Manager is required to compile and submit three complete hard copies and one electronic copy on a compact disc of the DESE Submittal to the MSBA. This submittal is to be included with the Distict's Schematic Design Submittal and shall not be submitted directly to the DESE. The MSBA will review for completeness and consistency before forwarding to the DESE for review.

The DESE submittal shall include the following:

- Cover Letter
- Special Education Delivery Methodology Letter
- Signed Educational Space Summary
- Floor Plans
- Special Education Adjacency Table

4B.1 Cover Letter

The cover letter, which is directed to the MSBA Director of Capital Planning and signed by the OPM, shall present a brief overview of the contents of the submittal and shall include the following:

- Name of the District and project school(s);
- Current District enrollment;
- Projected District enrollment as presented in the MSBA enrollment letter;
- Total School Enrollment, current, and MSBA agreed upon design enrollment;
- Grades served by the project school, current and proposed; and
- The date of the MSBA Board of Directors' meeting at which the District anticipates Board Approval of a Project Scope and Budget.

4B.2 Special Education Delivery Methodology Letter

The District must describe its Special Education delivery methodology in a letter that is directed to Matthew Deninger, Director of Resource Allocation Strategy and Planning, Department of Elementary and Secondary Education and signed by the Superintendent of Schools, the Principal of the subject school, and the Special Education Director for the District. The letter shall include descriptions of the following:

- Current program
- Proposed Program
- Specialized Programs

4B.2.1 Current Program

- Briefly describe the District's special education programs and methodology district-wide, including the number of special education students currently served;
- Specifically describe all special education programs serving an age range of students that would be appropriate to the grade range of the subject school building. Include a description of all special education services provided in the subject school building or other school buildings within the school district that serve the same grade levels; and
- Describe any deficiencies in the existing program that may have been identified locally or through state review.

4B.2.2 Proposed Program

- Describe any programs/services that will continue, those that will be eliminated and those that will be added or enhanced as a result of the proposed project. Include programs or services that will be moved within the District as a result of this construction plan and include the number of special education students that will be served in the subject school building;
- Identify any program/service needs that the District hopes to address in the proposed project;
- Provide the date of the last Coordinated Review Program and list any issues and/or problems identified in that review;
- Provide the current status and/or remedy of those issues identified as part of the review;
- Describe the local review process leading to the decision as to the number, type, and location of special education spaces within the planned building;
- Describe any special circumstances that led to the decision to locate self-contained special education classrooms and other support spaces in certain areas of the building; and
- Describe the grade and school configuration policies.

4B.2.3 Specialized Program

- Provide a description of all specialized programs that the District currently provides or participates in, both in and out of the District. Also describe any programs the District is planning to add to its current programs as part of the proposed school building project.
- Identify Collaborative(s) that the District currently participates in and how many students from the subject District are served by the Collaborative(s). If the District provides space for the Collaborative(s), identify District schools where collaborative space is currently housed, describe the spaces, programs, age span of the students for each, and any additional collaborative programs and spaces being planned as part of the proposed project. If the District does not currently house collaborative programs, or plan to house collaborative programs within the proposed project, describe the reason for this decision and any discussion had with the Collaborative Director.
- Describe alternative education programs that the District currently provides or participates in, and whether the programs will continue or be supported in the proposed project.
- Describe if and how the District delivers Pre-K or Early Childhood Special Education Programs, the location of these services, how or if these programs or services are offered to non - special education eligible students, how they are accessed, and whether these services are or will be accommodated in the proposed project.
- Describe any programs with other private or public entities and the relationships that exist with other entities that may impact the District's Special Educational Programs and if they are to be accommodated in the proposed project.

4B.3 Educational Space Summary

Provide an 11x17 signed-copy of the Educational Space Summary as preliminarily approved by the MSBA. The Educational Space Summary shall delineate all spaces by name with related square footage within the current school building, and, as applicable, all spaces associated with square footage planned in the new, replacement, or renovated areas of the proposed school building. The Educational Space Summary shall also match the floor plans and adjacency table referenced below. The MSBA's guidelines column of the Educational Space Summary spreadsheet shall not be altered and shall be based on the agreed upon design enrollment. The Educational Space Summary must reflect the schematic design being submitted to the MSBA for consideration as a proposed project. Septem

Submit a separate narrative description of all differences from the recommended preferred solution Educational Space Summary upon which the MSBA Board of Director's based its approval to proceed into Schematic Design and identify the reason for each change (e.g., minor adjustment resulting from building design efforts, adjusted floor plan, or programmatic change, etc.). If the space summary has not changed through subsequent design efforts, indicate as such.

4B.4 Floor Plans

Provide proposed floor plans that clearly identify the locations of all spaces within the planned school building. Only special education spaces must be highlighted in color and identified with a legend. Floor plans are to be submitted on 11x17 sheets minimum and electronic versions should be submitted as PDF documents. All spaces on the floor plan should be clearly labeled by name and/or grade level, as appropriate, and correlate to the spaces and square footage presented on the Educational Space Summary and special education adjacency table. For clarity, all special education spaces must also be designated with a large-font, capital letter, (e.g., A, B, C…). Include all self-contained classrooms and planned spaces for ancillary services for special needs school population within the planned building, (e.g., resource rooms, small group, therapy, life skills, adaptive physical education, etc.). Describe any additional accommodations within the planned spaces (e.g., partitions, self-contained bathrooms, sinks, etc.), that may be different from general classrooms.

If through design efforts and subsequent to the MSBA's Board of Director approval to proceed into schematic design, the conceptual floor plans change, include a separate narrative description of all changes and identify the reason for each (e.g., minor adjustment resulting from building design efforts, adjusted floor plan, or programmatic change, etc.).

4B.5 Special Education Adjacency Table

Complete and submit a Special Education Adjacency Table.. Each special education space must be listed and correspond to the room names and designations shown on the floor plans and Space Summary as well as be consistent with the special education narrative. Programs or spaces not offered on the MSBA space summary and/or unique to the District may be added to the Space Summary and to the Special Education Adjacency Table respectively, by inserting additional rows. The District must indicate the reasons for the locations and adjacencies and indicate how the proposed location supports the delivery of the proposed special education program. The Special Education Adjacency Table is to be completed on 8.5x11 sheets and in the format provided by the MSBA. The electronic version is to be submitted to the MSBA as a PDF document.

End

Department of Elementary and Secondary Education Submittal Cover Letter

Template

Instructions: Complete and print cover letter onto OPM firm letterhead and submit two original signed versions of the cover letter and one electronic version to the MSBA for review and sign off. The MSBA will perform a review of the DESE submittal. If we have no questions regarding the submittal, the MSBA will forward the complete DESE package to the Massachusetts Department of Elementary and Secondary Education. Do not submit directly to the Massachusetts Department of Elementary and Secondary Education.

[Date]

Ms. Mary Pichetti
Director of Capital Planning
Massachusetts School Building Authority
40 Broad Street, Suite 500
Boston, Massachusetts 02109

Dear Ms. Pichetti:

The District is pursuing execution of a Project Scope and Budget Agreement for the MSBA approved schematic design of **[insert brief project scope]**. The District's **[insert year]** enrollment is **[insert #]**. The design enrollment for the proposed school project is **[insert # see executed design enrollment certification]**. The existing **[insert name]** school currently serves grades **[insert grades]** and is proposed to serve grades **[insert grades].**

In accordance with G.L. c. 70 B, MSBA staff has assembled the documents required for the review of the special education program at [insert school name]. The following are attached per the 'Submittal Requirements':

1. A letter from Superintendent **[insert name]** of **[insert school district]** describing its special education program.
2. Proposed space summary that includes the existing facility, proposed spaces, and MSBA guidelines based on the agreed upon design enrollment. The first page of this summary indicates a total of **[insert #]** square feet of space dedicated to the delivery of special education.
3. The floor plans for the proposed **[insert #]** square foot **[insert school name]**.
4. A completed Special Education Adjacency Table

I have reviewed the attached documents and confirm that the District's School Building Committee has officially approved the attached submittal on (insert date of SBC meeting

that approval was granted) and verify that the space summary match the floor plan and is complete and conform to the MSBA requirements as described in Module 4 – Schematic Design Guidelines.

Sincerely,

[Insert OPM]
[Insert OPM Title]

Appendix 4C

Schematic Design Submittal Notification Template

Instructions: Compose an email containing the following statement:

Dear (*MSBA Project Coordinator*):

The Owner's Project Manager ("the OPM") has received the two *Schematic Design* construction cost estimates for the (*insert school name*) school project (the "Project"), and offers the following:

Designer's Estimated Construction Cost: $_____

OPM's Independent Estimated Construction Cost: $_____

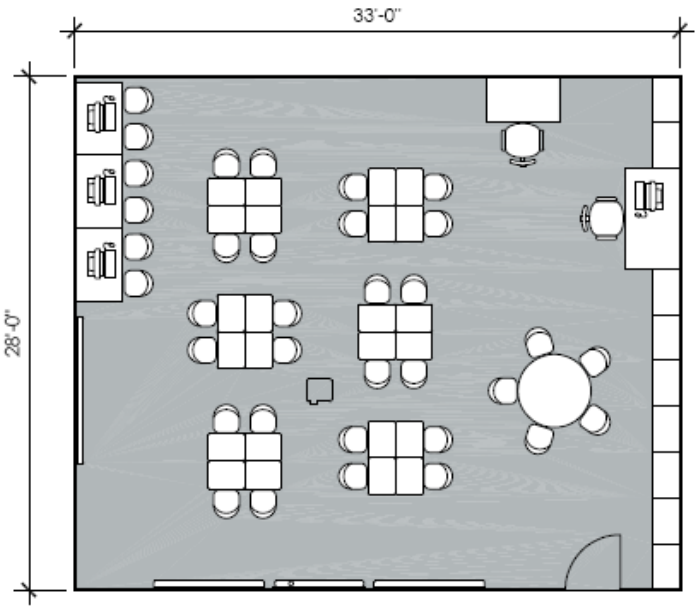
OPM's Estimate of Project Cost: _____

District's Project Budget: _____

The estimated project cost is within the District's project budget and the District and its consultant will be forwarding a reconciled and complete Schematic Design Submittal, for which the Total Project Budget is based, on the schematic design documentation to the MSBA on _____, in anticipation of consideration at the MSBA Board of Directors Meeting scheduled for _____.

The District and its consultants understand that the MSBA will not accept Schematic Design Submittals for which the estimated project costs exceed the District's budget or Total Project Budget updates that do not reflect the project scope included in the Schematic Design Submittal documentation. The District and its consultants further understand that all value engineering activities must be complete and the results incorporated into all of the Schematic Design Submittal documentation prior to submitting to the MSBA.

CLASSROOM – Grades 1 through 5



FUNCTIONAL CRITERIA

Description:	General instructional classrooms for grades 1-5
Area:	925 SF net
Quantity:	24
Occupant Load:	26 (1 teacher, 1 aid, 24 students)

LOCATIONAL CRITERIA

Users:	teachers, students
Adjacency:	grades grouped
Orientation/Views:	

TECHNICAL CRITERIA

Floor:	VCT
Walls:	Painted
Ceiling:	Acoustical
Acoustical:	
Doors:	
Lockset Hardware:	Confirm hardware functions are compatible with the District's protocols related to lockdown.
Windows:	required
Mechanical:	low noise
Plumbing/FP:	
Lighting:	
Electrical:	clock system
Communication:	telephone, Internet access

FIXTURES/FURNISHINGS

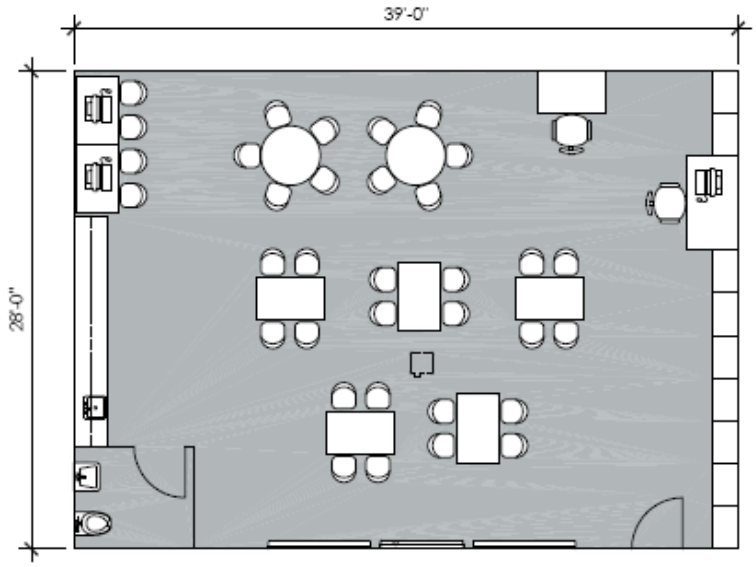
Casework/Specialties:	
Furnishings:	1 teacher's desk, 1 aid's desk, 2 task chairs, 24 student desks, 30 stacking chairs, 3 computer tables, small group tables
Equipment:	1 teacher's computer, 3 student computers, 1 printer, white boards, telephone
Shelving/Storage:	

OTHER INFORMATION

Visibility:	Confirm that the inclusion of sidelights at entrance locations is compatible with the District's current standards related to visibility from corridors and whether any related vision control option measures are to be incorporated.

Note: Include additional content as indicated in the MSBA Final Design Program criteria.

CLASSROOM – Kindergarten and Pre-Kindergarten



FUNCTIONAL CRITERIA

Description:	Instructional classrooms Pre-K & Kindergarten
Area:	1,100 SF net
Quantity:	4
Occupant Load:	22 (1 teacher, 1 aid, 20 students)

LOCATIONAL CRITERIA

Users:	teachers, students
Adjacency:	grades grouped, ground floor
Orientation/Views:	

TECHNICAL CRITERIA

Floor:	VCT
Walls:	Painted
Ceiling:	Acoustical
Acoustical:	
Doors:	
Lockset Hardware:	Confirm hardware functions are compatible with the District's protocols related to lockdown.
Windows:	required
Mechanical:	low noise
Plumbing/FP:	CR sink, toilet room (lavatory & water closet)
Lighting:	
Electrical:	clock system
Communication:	telephone, Internet access

FIXTURES/FURNISHINGS

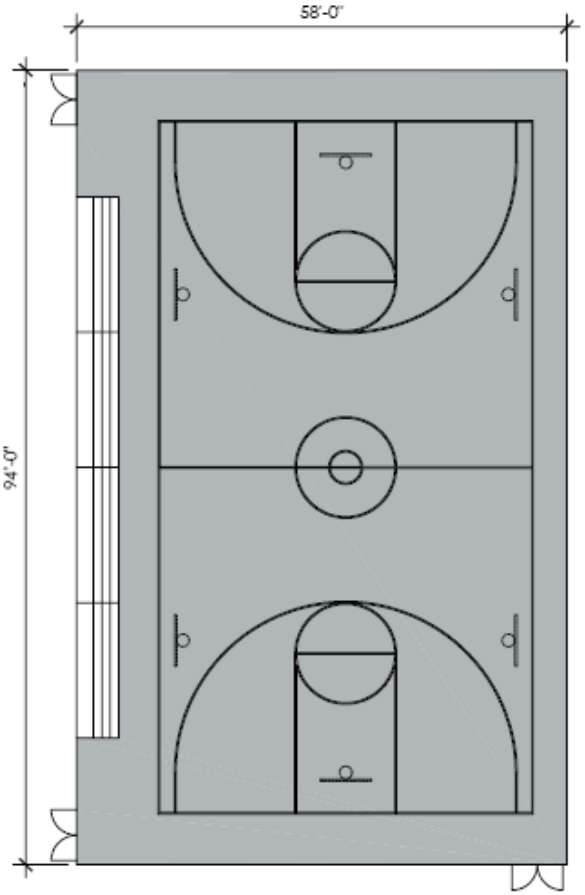
Casework/Specialties:	
Furnishings:	1 teacher's desk, 1 aid's desk, 2 task chairs, 20 student desks, 24 stacking chairs, 2 computer tables, small group tables
Equipment:	1 teacher's computer, 2 student computers, 1 printer, white boards, telephone
Shelving/Storage:	

OTHER INFORMATION

Visibility:	Confirm that the inclusion of sidelights at entrance locations is compatible with the District's current standards related to visibility from corridors and whether any related vision control option measures are to be incorporated.

Note: Include additional content as indicated in the MSBA Final Design Program criteria.

GYMNASIUM



FUNCTIONAL CRITERIA

Description:	Physical education, Sports activities space, occasional assemblies, community use
Area:	5,400 SF net
Quantity:	1
Occupant Load:	

LOCATIONAL CRITERIA

Users:	gym teacher, students, community, school teams, adaptive PE
Adjacency:	Gym office, gym storage, OT/PT, playground, public toilets, night entry, ground floor
Orientation/Views:	visual connection from corridor

TECHNICAL CRITERIA

Floor:	wood or epoxy
Walls:	Painted block with some mats
Ceiling:	
Acoustical:	
Doors:	
Windows:	clerestory, glare control
Mechanical:	
Plumbing/FP:	drinking fountain
Lighting:	
Electrical:	clock system
Communication:	

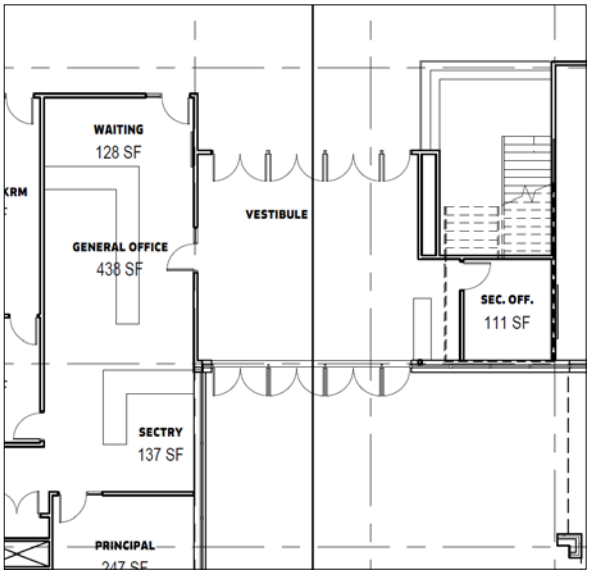
FIXTURES/FURNISHINGS

Casework/Specialties:	pull-out bleachers
Furnishings:	
Equipment:	retractable basketball backboards, divider curtain
Shelving/Storage:	

OTHER INFORMATION separate access for night use

Note: Include additional content as indicated in the MSBA Final Design Program criteria.

MAIN ENTRANCE



FUNCTIONAL CRITERIA

Description:	Main approach and entrance, security area
Area:	575 SF
Quantity:	1
Occupant Load:	N/A

LOCATIONAL CRITERIA

Users:	Staff and students; visitors
Adjacency:	Administration suite, security
Orientation/Views:	Visitor parking, reception

TECHNICAL CRITERIA

Floor:	ceramic tile, recessed mat
Walls:	GWB, painted
Ceiling:	GWB, painted
Acoustical:	N/A
Doors:	storefront / aluminum and glass
Windows:	hollow metal
Mechanical:	
Plumbing/FP:	
Lighting:	recessed cans
Electrical:	
Communication:	security and voice

FIXTURES/FURNISHINGS

Casework/Specialties:	security desk
Furnishings:	
Equipment:	
Shelving/Storage:	

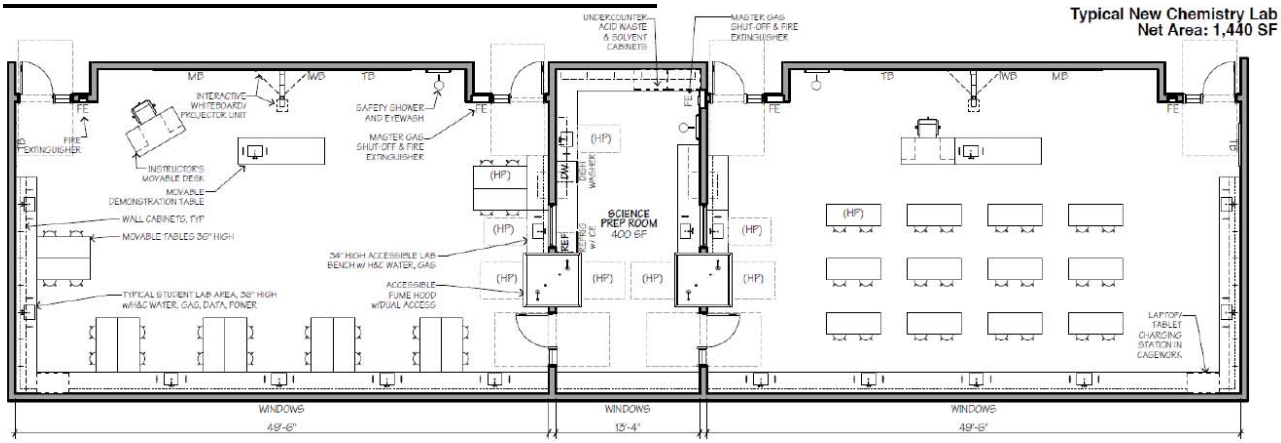
SECURITY FEATURES

Lockdown hardware: Confirm hardware functions are compatible with the District's protocols related to lockdown.
Concealment / Escape Options: Operable shades or blinds, hardening materials, ventilation controls, alarm and communication systems interface or applicable to the occupancy
Building signage
Knox box / Rapid entry system
Fire alarm control panel

OTHER INFORMATION

Note: Include additional content as indicated in the MSBA Final Design Program criteria.

SCIENCE LAB – CHEMISTRY



FUNCTIONAL CRITERIA

Description:	Chemistry classroom with lecture and lab desks.
Area:	1,440 SF / Prep room – 400 SF (200 SF per class)
Quantity:	4
Occupant Load:	1 teacher, 24 students (60 SF per student)

LOCATIONAL CRITERIA

Users:	
Adjacency:	First Floor main corridor, prep room, near central chemical storage room.
Orientation/Views:	

TECHNICAL CRITERIA

Floor:	Rubber tile.
Walls:	Painted.
Ceiling:	
Acoustical:	Sound-absorptive ceiling tiles.
Doors:	
Lockset Hardware:	Confirm hardware functions are compatible with the District's protocols related to lockdown.
Windows:	
Mechanical:	(HVAC) Heating and cooling purge fan.
Plumbing/FP:	Sprinklered.
Lighting:	Indirect fluorescent lighting.
Electrical:	
Communication:	
Power	Convenience outlets per code.
Security:	Normal. (Extension of existing system to new addition.)
Utility Shut-Offs:	Gas, lab bench power, and water.

FIXTURES/FURNISHINGS - FIXED

Casework/Specialties:	
Furnishings:	
Equipment:	
Shelving/Storage:	
Other:	

- Perimeter counters with base cabinets, including 7 lab stations (one accessible), each with:

- Sink, sized 18”x15”x6” deep (18”x15”x5” deep at HP location), with hot and cold water, connected to acid waste system.
- Gas turret with two nozzles each (total of 13 turrets required.)
- 120V power.
- Wall cabinets above with locking glass doors.
- One lab station shall be accessible with sink and single gas turret.

- Fume hood, double sided (shared with prep room with sink, gas, and power.
- Safety shower/eye wash with floor drain.
- Safety goggle sterilizer unit.

FIXTURES/FURNISHINGS - MOVABLE

Casework/Specialties:
Furnishings:
Equipment:
Shelving/Storage:
Other:

- Teacher demonstration counter with locking casters, portable services: gas and power.
- Teacher’s desk, chair and storage.
- Counter height (36”) student tables with epoxy tops for two (24”x60”) with power strips and locking casters with stools (one accessible/adjustable table) – total: 12 tables, 24 stools.

FIXTURES/FURNISHINGS – PREP ROOM

Casework/Specialties:
Furnishings:
Equipment:
Shelving/Storage:
Other:

- Base cabinets with 2 sinks 18”x15” (one 10” deep, one 5” deep at HP station) with hot and cold water, gas, acid waste.
- Power at counter tops.
- Undercounter dishwasher.
- Access to shared fume hood.
- Safety shower/eye was with floor drain.
- Countertop distilled water generator.
- Undercounter acid and solvent storage cabinets.

OTHER INFORMATION

Visibility: Confirm that the inclusion of sidelights at entrance locations is compatible with the District’s current standards related to visibility from corridors and whether any related vision control option measures are to be incorporated.

TECHNOLOGICAL CRITERIA

Telephone: Wall phone on teaching wall.
Data: Wi-Fi and lab bench mounted data outlets.
A/V: Presentation via interactive whiteboard/projector unit.
Clock/Speaker: Master clock and intercom systems. (Extensions of existing to new addition.)
Student Computers: 24 Tablet/laptop computers running Windows 8.
Docking/charging station located in classroom casework.

Note: Include additional content as indicated in the MSBA Final Design Program criteria.

APPENDIX 4E

MSBA Reimbursement Rate Calculation

M.G.L. c. 70B, §10 ("Chapter 70B") establishes the calculation of the reimbursement percentage to be used by the Massachusetts School Building Authority ("MSBA") to reimburse school districts for spending on approved school building projects.

Reimbursement Rate before Incentives

Pursuant to Chapter 70B, all approved projects are eligible for a base reimbursement rate of 31 percentage points. In addition to the base percentage points, the reimbursement formula includes the calculation of "ability-to-pay percentage points," which determines if a school district qualifies for any additional reimbursement percentage points being added to the base percentage, before any applicable incentive percentage points are factored into the reimbursement rate percentage. The ability-to-pay factors set forth in statute measure income (per capita income), property wealth (equalized property valuation per capita), and low income students (federal eligibility for free or reduced price lunch) in a district relative to the statewide average for each category. The ability-to-pay data is provided by the Department of Revenue (DOR) and the Department of Elementary and Secondary Education (DESE). Chapter 70B specifically allocates applicable reimbursement percentage points for the ability-to-pay factors, depending on the district's relation to the statewide average calculated for each category, as follows:

- EQV Property Wealth – between 0-28 percentage points (Source: DOR)
- Median Income Comparison – between 0-12 percentage points (Source: DOR)
- % of Students in Federal Free/Reduced Lunch – between 0-17 percentage points (Source: DOE)

The reimbursement rate included in the Feasibility Study Agreement is based on the reimbursement rate (not including any incentive points) in effect at the time the MSBA Board of Directors votes to invite the district to collaborate on a Feasibility Study for the proposed project.

Incentive Points

In addition to the base percentage and the "ability-to-pay percentage points," the MSBA, in its sole discretion, may award incentive percentage points in fractional amounts under one or more of the following categories as applicable:

- **Maintenance (0-2 points)** – Based on MSBA review of district provided materials regarding routine and capital maintenance programs. Contact the MSBA assigned Project Manager for incentive points associated with this category.
- **CM @ Risk (0 or 1 point)** – District will conditionally receive one (1) for the Construction Manager at Risk construction delivery method, subject to the District receiving approval from the Office of the Inspector General to utilize this method. If the project fails to secure this approval or elects to switch to the traditional Design-Bid Build Construction methodology, the MSBA will adjust the reimbursement amounts during its audit to reflect a reimbursement grant without the conditionally awarded point..

- **Newly Formed Regional School District (0-6 points)** – Up to Six (6) incentive percentage points may be allocated for a project at the site of a school facility that is a member of a Regional School District that was either (a) newly created as a result of working with the MSBA or (b) whose membership changed as a result of working with the MSBA and the MSBA determines that a project was avoided as a result of either the newly created district or a change in a district's membership. Also, the MSBA may award one (1) incentive percentage point per grade, up to a maximum of three (3) incentive percentage points, for an existing Regional School District that adds grades to the existing regional grade structure. In order for the incentive points to be awarded all required authorizations must be documented.
- **Major Reconstruction or Reno/Re - use (up to 5 points)** – Up to five (5) incentive percentage points may be allocated for a renovation project that requires no new construction. Less than five (5) incentive percentage points may be allocated on a sliding scale that relates the percentage of gross square feet of renovated space to the total gross square feet of the total project. For example, if 50% of the total gross square feet of the complete project is renovated area, 2.5 incentive percentage points would be awarded.
- **Overlay Zoning District (0 or 1 point)** - District will receive one (1) incentive percentage point if the proposed project is located in an area that the Community has adopted a "smart growth zoning district" pursuant to M.G.L. c. 40R or c. 40S. In order to confirm eligibility for 1 Overlay Zoning District incentive point, a district must submit to the MSBA copies of the following items within the Schematic Design Binder:
  - A copy of the District's application, as submitted to the Department of Housing and Community Development pursuant to M.G.L. c.40R §4, seeking a Letter of Eligibility confirming eligibility for financial incentives prior to the pursuit of local votes on a proposed smart growth zoning ordinance or bylaw, and;
  - A copy of the Letter of Eligibility (if applicable) as provided by the Department of Housing and Community Development pursuant to M.G.L. c.40R §4, and;
  - A copy of the local vote approving the smart growth zoning ordinance or bylaw, and;
  - A copy of the confirmation of approval of the smart growth zoning ordinance or bylaw as issued by the Department of Housing and Community Development pursuance to M.G.L. c.40R §4, and;
  - A copy of the most recent Certificate of Compliance (if the smart growth zoning ordinance or bylaw was approved more than one year previous to the MSBA review for incentive point eligibility) as issued by the Department of Housing and Community Development pursuant to M.G.L. c.40R §7.
- **Overlay Zoning 100 Units or 50% of units for one, two, or three family structures (0 or 0.5 point)** – One Half (0.5) incentive percentage point may be allocated if the zoning district provides 100 units or more of housing in one, two, or three family structures, or if 50% of the total housing units in the overlay zoning district are designated for one, two, or three family structures. To be eligible for the additional one half (0.5) incentive percentage point, a district must submit the following items within the Schematic Design Binder:
  - A copy of the local vote authorizing the number of total number of units in one, two or three family structures within the smart growth zoning district having

received both local and Dept. of Housing and Community Development approval under M.G.L. c. 40R, and;
  - The percentage of units that one, two and three family structures represent of the total number of housing units authorized pursuant to the local vote approving the smart growth zoning district, and;
  - A status update on construction activity within the approved smart growth zoning district, including, but not limited to, the status of construction or occupancy of completed residential units within the approved smart growth zoning district.
- **Energy Efficiency – "Green Schools" (up to 2 points)** – Two (2) incentive percentage points will be conditionally awarded if the project targets building sustainable design levels contained in the MSBA's Sustainable Building Design Policy, refer to MSBA web site for current guidelines. If the project fails to achieve the stated goals, the MSBA will adjust the reimbursement amounts during its audit to reflect a reimbursement grant without the conditionally awarded points.
- **Model Schools (up to 5 points)** – Requires invitation and approval to participate in MSBA's Model School Program by MSBA Board of Directors. Upon approval, a District may receive up to five (5) incentive percentage points for participating in the Model School Program.

Anticipated Reimbursement Rate with Incentive Points
Provide the District's anticipated reimbursement rate with incentive points in the following format. Incentive points are NOT applicable with repair projects.

Category	**Reimbursement Points**
Reimbursement Rate before Incentives (provided by the MSBA)	
Maintenance (provided by the MSBA)	
CM @ Risk	
Newly Formed Regional School District	
Major Reconstruction or Reno/Reuse	
Overlay Zoning District – c. 40R or c. 40S	
Overlay Zoning 100 Units or 50% units for one, two, and three family units	
Energy Efficiency – "Green Schools"	
Model Schools	
Total Incentive Points	
Anticipated MSBA Reimbursement Rate with Incentives	

Total Project Budget

Insert City/Town
Insert School Name

School Building Committee Reviewed on:

Insert Date of SBC Review Date

	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]
1	Feasibility Study Agreement				
2	*OPM Feasibility Study*	$0	$0	$0	
3	*A&E Feasibility Study*	$0	$0	$0	
4	*Environmental & Site*	$0	$0	$0	
5	*Other*	$0	$0	$0	
6	**Feasibility Study Agreement Subtotal**	**$0**	**$0**	**$0**	**$0**
7	Administration				
8	**Legal Fees**	$0	$0	$0	**$0**
9	**Owner's Project Manager**				
10	*Design Development*	$0	$0	$0	
11	*Construction Contract Documents*	$0	$0	$0	
12	*Bidding*	$0	$0	$0	
13	*Construction Contract Administration*	$0	$0	$0	
14	*Closeout*	$0	$0	$0	
15	*Extra Services*	$0	$0	$0	
16	*Reimbursable & Other Services*	$0	$0	$0	
17	*Cost Estimates*	$0	$0	$0	
18	*Advertising*	$0	$0	$0	
19	*Permitting*	$0	$0	$0	
20	*Owner's Insurance*	$0	$0	$0	
21	*Other Administrative Costs*	$0	$0	$0	
22	**Administration Subtotal**	**$0**	**$0**	**$0**	**$0**
23	**Architecture and Engineering**				
24	**Basic Services**				
25	*Design Development*	$0	$0	$0	
26	*Construction Contract Documents*	$0	$0	$0	
27	*Bidding*	$0	$0	$0	
28	*Construction Contract Administration*	$0	$0	$0	
29	*Closeout*	$0	$0	$0	
30	*Other Basic Services*	$0	$0	$0	
31	**Basic Services Subtotal**	**$0**	**$0**	**$0**	
32	Reimbursable Services				
33	*Construction Testing*	$0	$0	$0	
34	*Printing (over minimum)*	$0	$0	$0	
35	*Other Reimbursable Costs*	$0	$0	$0	
36	*Hazardous Materials*	$0	$0	$0	
37	*Geotech & Geo-Env.*	$0	$0	$0	
38	*Site Survey*	$0	$0	$0	
39	*Wetlands*	$0	$0	$0	
40	*Traffic Studies*	$0	$0	$0	
41	**Architectural/Engineering Subtotal**	**$0**	**$0**	**$0**	**$0**
42	**CM & Risk Preconstruction Services**				
43	Pre-Construction Services	$0	**$0**	$0	**$0**
44	Site Acquisition				
45	Land / Building Purchase	$0	$0	$0	
46	Appraisal Fees	$0	$0	$0	
47	Recording fees	$0	$0	$0	
48	**Site Acquisition Subtotal**	**$0**	**$0**	**$0**	**$0**
49	Construction Costs				
50	SUBSTRUCTURE				
51	Foundations	$0	$0		
52	Basement Construction	$0	$0		
53	SHELL				
54	SuperStructure	$0	$0		
55	Exterior Closure	$0	$0		
56	Exterior Walls	$0	$0		
57	Exterior Windows	$0	$0		
58	Exterior Doors	$0	$0		
59	Roofing	$0	$0		

Soft Cost Reimbursement

Estimated Budget	Excluded	Eligible Soft Costs	Category
$0	$0	$0	-Administration
$0	$0	$0	-A/E Services
	Ineligible therefore not included in calculation		-Site Acquisition
$0	$0	$0	-Miscellaneous Proj Costs
$0	$0	$0	FFE
		Not included in this calculation	Owners Contingency
		$0	Total Eligible Soft Costs

ProRated 20% Exclusion

$0	-Administration
$0	-A/E Services
$0	-Miscellaneous Proj Costs
$0	Sum of Three Soft Costs

Construction Costs associated with Soft Cost Cap Calculation

Estimated Budget	Construction Costs	Category
$0	$0	-CM Preconstruction services
$0	$0	-Construction Cost
	Not included in this calculation	-Construction Contingency
	$0	Total Construction Cost
	20%	Soft Cost Allowance
	$0	Reimbursable Soft Cost
	$0	Eligible minus Reimbursable

-If Eligible minus Reimbursable is negative OK.
-If Eligible minus Reimbursable is positive enter value into Soft Costs that exceed 20% of Construction Cost below in the Ineligible column.

Construction Budget $0

OPM Services		Eligible Fees	% of Total Construction	OPM Value @ 3.50%	Value > 3.5%
Basic Services	$0	$0	#DIV/0!	$0	$0
Extra Services	$0		#DIV/0!		

Designer Services				Designer Value @ 10.00%	Value > 10%
Basic Services	$0	$0	#DIV/0!	$0	$0
Extra Services	$0		#DIV/0!		

Insert City/Town
Insert School Name

School Building Committee Reviewed on:

Insert Date of SBC Review Date

	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	$0		
62	Staircases	$0	$0		
63	Interior Finishes	$0	$0		
64	SERVICES				
65	Conveying Systems	$0	$0		
66	Plumbing	$0	$0		
67	HVAC	$0	$0		
68	Fire Protection	$0	$0		
69	Electrical	$0	$0		
70	EQUIPMENT & FURNISHINGS				
71	Equipment	$0	$0		
72	Furnishings	$0	$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 Cont'g Floor Mat'l Abatement	$0	$0		
78	Other Hazardous Material Abatement	$0	$0		
79	BUILDING SITEWORK				
80	Site Preparation	$0	$0		
81	Site Improvements	$0	$0		
82	Site Civil / Mechanical Utilities	$0	$0		
83	Site Electrical Utilities	$0	$0		
84	Other Site Construction	$0	$0		
85	Scope Excluded Site Cost		$0		
86	**Construction Trades Subtotal**	$0	$0		
87	Contingencies (Design and Pricing)	$0	#DIV/0!		
88	D/B/B Sub-Contractor Bonds	$0	#DIV/0!		
89	D/B/B Insurance	$0	#DIV/0!		
90	D/B/B General Conditions	$0	#DIV/0!		
91	D/B/B Overhead & Profit	$0	#DIV/0!		
92	GMP Insurance	$0	#DIV/0!		
93	GMP Fee	$0	#DIV/0!		
94	GMP Contingency	$0	#DIV/0!		
95	Escalation to Mid-Point of Construction	$0	#DIV/0!		
96	Overall Excluded Construction Cost		$0		
97	**Construction Budget**	**$0**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**
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	
102	**Subtotal to be Included in Total Project Budget**	**$0**	**$0**	**$0**	**$0**
103	Miscellaneous Project Costs				
104	*Utility Company Fees*	$0	$0	$0	
105	*Testing Services*	$0	$0	$0	
106	*Swing Space / Modulars*	$0	$0	$0	
107	*Other Project Costs (Mailing & Moving)*	$0	$0	$0	
108	**Misc. Project Costs Subtotal**	**$0**	**$0**	**$0**	**$0**
109	*Furnishings and Equipment*				
110	*Furnishings*	$0	$0	$0	
111	*Equipment*	$0	$0	$0	
112	*Computer Equipment*	$0	$0	$0	
113	**FF&E Subtotal**	**$0**	**$0**	**$0**	**$0**
114					
115	Soft Costs that exceed 20% of Construction Cost		$0		

Site Cost Reimbursement = 8.0%

Direct Site Cost	Excluded	Eligible Site Costs	
$0	$0	$0	Eligible Site Costs
Direct Building Cost			
$0		$0	Reimbursable Site Cost
	Scope Excluded Site Cost	**$0**	Eligible minus Reimbursable

If Eligible minus Reimbursable is negative OK. No ineligible needed
If Eligible minus Reimbursable is positive enter value into Scope Excluded Site Cost

Construction Cost Reimbursement

$0	Eligible Demo			
$0	Eligible Abatement			
$0	Total Eligible Demo & Abatement			
#DIV/0!	D&P	#DIV/0!	% of Trades	#DIV/0! Total $/sf
#DIV/0!	Bonds	#DIV/0!	% of Trades	#DIV/0! Eligible $/sf
#DIV/0!	Insurance	#DIV/0!	% of Trades	
#DIV/0!	Gen Cond	#DIV/0!	% of Trades	
#DIV/0!	O&P	#DIV/0!	% of Trades	
#DIV/0!	GMP Ins	#DIV/0!	% of Trades	
#DIV/0!	GMP Fee	#DIV/0!	% of Trades	
#DIV/0!	GMP cont	#DIV/0!	% of Trades	
#DIV/0!	Escalation	#DIV/0!	% of Cumulative sum of Trades and Markups	
#DIV/0!	Marked Up Demo & Abatement			
#DIV/0!	**Eligible Construction Cost**			
-	**Proposed GSF; Manually enter eligible area if less than total area**			
$ 287	Reimbursable Construction Cost **for New Construction** $/sf (subject to change)			
$ -	Reimbursable Construction Cost			
#DIV/0!	Marked Demo & Abatement			
#DIV/0!	**Reimbursable Construction Cost**			
#DIV/0!	**Eligible Minus Reimbursable**			

If Eligible minus Reimbursable is negative OK. No ineligible entry needed
If Eligible minus Reimbursable is positive enter value into Overall Excluded Construction Cost

FFE Reimbursement

$0	Eligible FFE
0	Design Enrollment
$2,400	Reimbursable / Student (Subject to change)
$0	Reimbursable Cost
$0	**Eligible Minus Reimbursable**

If Eligible minus Reimbursable is negative OK.
If Eligible minus Reimbursable is positive enter value into Scope Excluded FFE Cost

0.00 (0-2) Maintenance
0.00 (0-1) CM @ Risk

Insert City/Town
Insert School Name

School Building Committee Reviewed on:

Insert Date of SBC Review Date

	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]
116	**Project Budget**	**$0**	**#DIV/0!**	**#DIV/0!**	**#DIV/0!**

117	**Board Authorization**	
118	Design Enrollment	0
119	Total Building Gross Floor Area (GSF)	0
120	Total Project Budget (excluding Contingencies)	$0
121	Scope Items Excluded or Otherwise Ineligible	#DIV/0!
122	Third Party Funding (Ineligible)	$0
123	Estimated Basis of Maximum Total Facilities Grant[1]	#DIV/0!
124	Reimbursement Rate	0.00%
125	Est. Max. Total Facilities Grant (before recovery)[1]	#DIV/0!
126	Cost Recovery[2]	$0
127	Estimated Maximum Total Facilities Grant[1]	#DIV/0!

128	Construction Contingency[3]	$0
129	Ineligible Construction Contingency[3]	$0
130	"Potentially Eligible" Construction Contingency[3]	$0
131	Owner's Contingency[3]	$0
132	Ineligible Owner's Contingency[3]	$0
133	"Potentially Eligible" Owner's Contingency[3]	$0
134	Total Potentially Eligible Contingency[3]	$0
135	Reimbursement Rate	0.00%
136	Potential Additional Contingency Grant Funds[3]	$0
137	Maximum Total Facilities Grant	#DIV/0!
138	Total Project Budget	$0

0.00	Reimbursement Rate Before Incentive Points
0.00	Total Incentive Points
0.00%	MSBA Reimbursement Rate

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.

0.00	(0-6) Newly Formed Regional School District		
0.00	(0-5) Major Reconstruction or Reno/Reuse type in rounded to 2 decimal places		
		#VALUE!	0 gsf Renovated or Existing to Remain
			1 gsf Total at Conclusion of Project
0.00	(0-1) Overly Zoning 40R and 40S		
0.00	(0-0.5) Overlay Zoning 100 units or 50% of units 1,2, or 3 family structures		
0.00	(0-2) Energy Efficiency - "Green Schools"		
0.00	(5) Model Schools		
0.00	**Total Incentive Points**		

Appendix 4G

Module 4 Local Actions and Approval Certification Template

Instructions: Complete and print cover letter onto (City/Town/Regional School District) letterhead and submit one original signed version of the cover letter and one electronic version to the MSBA.

[Letterhead of City/Town/Regional School District]

[Date]

Ms. Diane Sullivan
Director of Program Management
40 Broad Street, Suite 500
Boston, Massachusetts 02109

Dear Ms. Sullivan:

The (*City/Town/Regional School District*) School Building Committee ("SBC") has completed review of the Schematic Design Submittal for the (*insert school/project name*) school project and voted to approve and authorize the OPM to submit the Schematic Design related submittals to the MSBA for consideration on (*insert date of school building committee during which the vote to submit was conducted*). A certified copy of the SBC meeting minutes, which includes the specific language of the vote and the number of votes in favor, opposed and abstained, are attached.

The SBC held (*insert number of SBC meetings*) meetings regarding the (*insert school/project name*) school project since the MSBA Board of Directors approved the District to proceed into Schematic Design on (*insert date of MSBA Board of Directors Meeting date*).

Insert a bulleted list of SBC meetings held to discuss and/or present to the public material related to the school project, and include the following information: who presented (if applicable), the time and location of the meeting, a summary of the concerns presented, and a list of the materials discussed or made available for public reviewed.

In addition to the SBC meetings listed above, the District held (*insert number of public meetings*) public meetings, which were posted in compliance with the Open Meeting Law, at which the (*insert school/project name*) school project was discussed.

Insert a bulleted list of all public meetings held to discuss and/or present to the public material related to the school project, and include the following information: who hosted

the meeting (e.g., school committee, board of selectman), who presented (if applicable), the time and location of the meeting, a brief summary of the concerns presented, and a list of the materials discussed or made available for public review.

The meeting presentation materials, meeting minutes and summary materials as they relate to the (*insert school/project name*) school project are available locally for public review at (*insert location of materials (e.g. website, town hall, superintendent's office etc)*).

To the best of my knowledge the meetings listed above comply with the requirements of the Open Meeting Law, M.G.L. c. 30A, §§18-25 and 940 CMR 29.00: Open Meetings.

The District has named (*insert name and title*) as the local point of contact to receive questions.

By signing this Local Action Certification, I hereby certify that, to the best of my knowledge and belief, that the information supplied by the District is true, complete and accurate.	By signing this Local Action Certification, I hereby certify that, to the best of my knowledge and belief, that the information supplied by the District is true, complete and accurate.	By signing this Local Action Certification, I hereby certify that, to the best of my knowledge and belief, that the information supplied by the District is true, complete and accurate.
_____	_____	_____
By:	**By:**	**By:**
Title: Chief Executive Officer	**Title: Superintendent of Schools**	**Title: Chair of the School Committee**
Date:	**Date:**	**Date:**

Appendix 4H

Module 4 Schematic Design Checklist

The following checklist has been provided as a general guide for Districts and consultants in the performance of work associated with the requirements of the Feasibility Study Agreement, Module 4 – Schematic Design, OPM and Designer Contracts, practices, policies, and Project Advisories and is **not** to be submitted to the MSBA. This checklist is not intended to supersede the requirements of these documents or statutory and regulatory requirements.

Item	Date
Updated Work Plan approved by School Building Committee ("SBC")	
Reviewed Project Advisories	
Evaluation of Construction Delivery Method complete and District selected to proceed through Traditional Design-Bid-Build or CM at Risk construction delivery method	
District Response to PSR review comments submitted to MSBA	
Confirmed all DESE Submittal components align	
Schematic Design Submittal Notification email sent to MSBA assigned project coordinator	
SBC Reviewed and voted to approve submittal of the Total Project Budget to the MSBA	
SBC Vote to approve Schematic Design ("SD") Submittal and Local Actions and Approval Certification signed.	
Schematic Design Submittal submitted to the MSBA	
District Response to Schematic Design review comments submitted to MSBA	
Vote Language submitted to MSBA for review	
Updates to SBC submitted to MSBA (if applicable)	
Updates to OPM and Designer Organization Charts submitted to MSBA (if applicable)	
Copies of executed OPM and Designer Contract amendments (if applicable) submitted to the MSBA	
ProPay Budget Revision Request(s) submitted to MSBA (if applicable)	
Work plan updated and approved by SBC	
Project Scope and Budget Conference Complete	
District understands and agrees with Total Project Budget Template	
MSBA Board Approval	
MSBA Board Action Letter denoting approval of proposed project	

ATTACHMENT C

PARTICIPATION SCHEDULE FOR DESIGNER CONTRACTS
BY THE SUPPLIER DIVERSITY OFFICE

This form shall be submitted to the Owner by the Designer upon execution of the Contract for Designer Services attached hereto.

Owner Town of Brookline

Project No: _____

Name of Company	Description of Work	M/WBE	Dollar Value Participation
1. Miller Dyer Spears Inc.	Architecture	WBE	$ 467,640
2. Lahlaf Geotechnical Consulting, Inc.	Geotechnical Engineering	MBE	$ 38,155
3. PEER Consultants, PC	Geo-environmental Engineering & Hazardous Materials Consulting	MBE	$ 72,820
4. Pamela Perini, PSP	Security Consulting	WBE	$ 7,000

Dollar Value of MBE Commitment: $ 110,975

Dollar Value of WBE Commitment: $ 474,640

Total Dollar Value Commitment: $ 585,615

Original Fee for Basic Services Amount $ 1,067,191

DESIGNER CERTIFICATION

The undersigned certifies under the penalties of perjury that (1) it intends to subcontract with the above listed firms for the identified work and dollar amounts and (2) certifies that he/she has read the terms and conditions of the Designer Contract with regards to MBE/WBE participation and is authorized to bind the Designer to the commitment set forth above.

Date January 12, 2021

Miller Dyer Spears Inc.
Name of Architect/Engineer

Authorized Signature

99 Chauncy Street, 8th Floor
Address

Boston, MA 02111
City, State & Zip Code

ATTACHMENT D

January 4, 2021

Anthony Guigli, Project Administrator
Town of Brookline
333 Washington Street
Brookline, MA 02445

RE: John R. Pierce School Feasibility Study

Dear Mr. Guigli:

This Statement of Internal Accounting Controls is being submitted in accordance with Article 17.5.3 of the Contract for Design Services for the above captioned project. Please be advised that our firm, the Designer under the Contract, has a system of internal accounting controls which assures that:

1. transactions are executed in accordance with management's general and specific authorization;

2. transactions are recorded as necessary, to permit preparation of financial statements in conformity with generally accepted accounting principles, and to maintain accountability for assets;

3. access to assets is permitted only in accordance with management's general or specific authorization; and

4. the recorded accountability for assets is compared with the existing assets at reasonable intervals and appropriate action was taken with respect to any difference.

Sincerely,
MILLER DYER SPEARS INC.

James Loftus, RA
Principal and Treasurer

ACCOUNTING • TAX • ADVISORY

ATTACHMENT E

December 29, 2020

Anthony Guigli, Project Administrator
Town of Brookline
333 Washington Street
Brookline, MA 02445

RE: John R. Pierce School Feasibility Study

Dear Mr. Guigli:

Please be advised that we have read the Statement of Internal Accounting Controls prepared by Miller Dyer Spears, Inc. ("MDS" or the "Company") in connection with the above-captioned project. This statement is required under M.G.L. c.30 §39R.

Section 39R includes the following requirements:

1) Representations of management are consistent with the result of management's evaluation of the system of internal accounting controls; and
2) Representations of management are reasonable with respect to transactions and assets in the amount which would be material when measured in relation to the Company's financial statements.

We were engaged, as independent accountants, to review the Company's financial statements for the year ended December 31, 2019. Our review was conducted in accordance with Statements on Standards for Accounting and Review Services issued by the American Institute of Certified Public Accountants.

Based on our review, except for the recognition of the cost of its deferred compensation plan, we are not aware of any material modifications that should be made to MDS' financial statements in order for them to be in accordance with accounting principles generally accepted in the United States of America.

Please feel free to call me with any questions at 781-937-5376.

Sincerely,

DiCicco, Gulman & Company LLP

Chad J. DaGraca, CPA
Partner

ATTACHMENT F

CONTRACT FOR DESIGNER SERVICES

AMENDMENT NO. _____

WHEREAS, the Town of Brookline ("Owner") and Miller Dyer Spears Inc., (the "Designer") (collectively, the "Parties") entered into a Contract for Designer Services for the John R. Pierce School Feasibility Study Project (Project Number _____) at the John R. Pierce School on _____. "Contract"; and

WHEREAS, effective as of _____, the Parties wish to amend the Contract:

NOW, THEREFORE, in consideration of the promises and the mutual covenants contained in this Amendment, and other good and valuable consideration, the receipt and legal sufficiency of which are hereby acknowledged, the Parties, intending to be legally bound, hereby agree as follows:

1. The Owner hereby authorizes the Designer to perform services for the Design Development Phase, the Construction Phases, and the Final Completion Phase of the Project, pursuant to the terms and conditions set forth in the Contract, as amended.

2. For the performance of services required under the Contract, as amended, the Designer shall be compensated by the Owner in accordance with the following Fee for Basic Services:

Fee for Basic Services: Amendment	Original Contract	After this
Feasibility Study Phase	$ _____	$ _____
Schematic Design Phase	$ _____	$ _____
Design Development Phase	$ _____	$ _____
Construction Document Phase	$ _____	$ _____
Bidding Phase	$ _____	$ _____
Construction Phase	$ _____	$ _____
Completion Phase	$ _____	$ _____
Total Fee	$ _____	$ _____

This Amendment is a result of:

_____

_____

_____

3. The Construction Budget shall be as follows:

   Original Budget: $_____

   Amended Budget $_____

4. The Project Schedule shall be as follows:

   Original Schedule: $_____

   Amended Schedule $_____

5. This Amendment contains all of the terms and conditions agreed upon by the Parties as amendments to the original Contract. No other understandings or representations, oral or otherwise, regarding amendments to the original Contract shall be deemed to exist or bind the Parties, and all other terms and conditions of the Contract remain in full force and effect.

IN WITNESS WHEREOF, the Owner, with the prior approval of the Authority, and the Designer have caused this Amendment to be executed by their respective authorized officers.

OWNER

_____
(print name)

_____
(print title)

By _____
(signature)

Date_____

DESIGNER

William C. Spears
(print name)

Principal
(print title)

By _____
(signature)

Date January 12, 2021