



City of Newton

Owner's Project Manager – Franklin School Redevelopment

May 4, 2023



May 4, 2023

Purchasing Department
Room 108, Newton City Hall
1000 Commonwealth Ave.
Newton, MA 02459



Dear Selection Committee:

The opportunity to affect true change in an educational environment is rare. The City of Newton is now presented with that moment for educators, the Building Committee, and community members. It is a chance to take collective aspirations and turn them into reality. It would be a privilege for us to help the City of Newton develop a solution that most efficiently reflects your beliefs on sustainability, creativity, life-long learning and flexibility, and serves your community for generations to come.

CHA Consulting, Inc. (CHA) has provided outstanding OPM services to clients from our Boston office since 1989 (previously under the name Daedalus Projects). Our niche is providing outstanding service, quality assurance, and the necessary experience to manage projects of all sizes with transparency, leadership, exceptional communication, and skill. We represent you, and you can rely on us to deliver outstanding services every day with dedication, expertise, and diligence. Our singular focus is on successful job completion based on schedule, cost, and quality. CHA brings several unique advantages to this project:

Experienced OPM Team: CHA is a locally-based OPM team that has provided project management services to municipalities and state agencies for over 30 years. Our team of experts has successfully completed more than \$1.5 billion in construction across the Commonwealth and throughout the Northeast. We understand Commonwealth design, procurement, and construction laws and regulations, but more importantly, we know what's important to you, and that is what's important to us. When you hire CHA, we become a partner in the success of your project.

Tom Gatzunis will be the project director responsible for project oversight and quality assurance. Amanda Sawyer will be the project manager responsible for daily management of your project, and will be the primary contact point between CHA and the city. With a combined 60+ years of experience in Massachusetts construction projects, Tom and Amanda have an in-depth knowledge of public construction laws and regulations. Both are Massachusetts Certified Public Purchasing Officials.

Expertise in K-12 School Construction: CHA has overseen over 75 school building design and construction projects across the Commonwealth. A significant part of the success of our past and current projects includes a strong working relationship with the owner and an in-depth understanding of school design and construction, as well as state requirements. Our proposed team all have prior experience overseeing

a variety of school design and construction projects and have a keen understanding of educational programming requirements, best practices for school design, cost conscience and efficient bidding and procurement options, construction delivery methodology, and risk management.

The team we have assembled have successfully overseen complex renovation/addition and new construction projects for K-12 schools throughout Massachusetts. Tom Gatzunis is overseeing the Belmont Middle and High School project, a \$298 million, phased/occupied renovation and expansion of the existing building, which will be completed on schedule for the start of the 2023-24 school year. Amanda Sawyer recently completed a phased, occupied renovation and expansion project for the Lincoln School (K-8).

In-house Cost Estimators: CHA is one of the only OPM firms in Massachusetts with a dedicated team of in-house cost estimators. Our locally based cost estimators stay apprised of current construction market pricing and work hand-in-hand with our project managers on a daily basis to provide value engineering suggestions from feasibility study through programming and design, negotiate change orders, and verify questions during construction.

Our in-house cost estimating team will provide detailed cost estimates used to assist in value engineering, quantify requests for change orders, and verify monthly applications for payment. We will also define cost expectations and provide a clear means of identifying causes of deviance in spending.

Depth of Resources: We offer the specialized expertise of our niche OPM team with the support of a national A/E firm. Firm-wide, CHA is a team of over 1,700 multi-disciplined staff. We have engineering and architectural experts at our fingertips who we can consult on a regular basis, many of whom have extensive experience on similar projects.

Our support team includes structural engineer and code expert Tom Gatzunis, who will oversee building code and design review services; Derek Richardson, who will provide commissioning services for the new fire station; Sidni Bragg, who will oversee project budget and schedule control; and Christina Opper, who will lead public outreach strategy efforts. Our core team is also supported by additional multi-disciplined staff as needed.

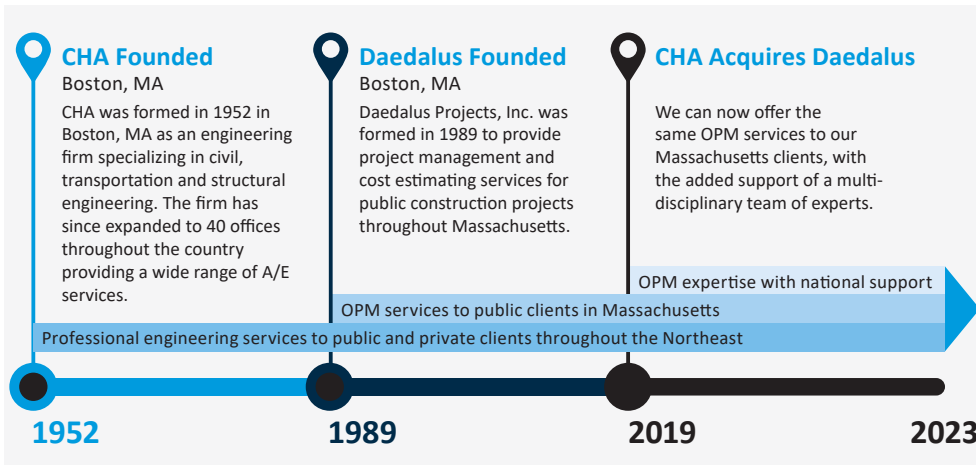
One Washington Mall, Suite 1500, Boston, MA 02108

T 617.451.2717 • F 617.451.2679 • www.chacompanies.com/opm

Firm Background

CHA was founded in 1952 as a professional engineering firm in Boston, Massachusetts. Originally known as Clarkeson Engineering Company, the firm specialized in traditional civil, transportation, and structural engineering. CHA has since expanded and diversified, undergoing several name changes, and has grown into an innovative, full-service consulting firm working to responsibly improve the world we live in.

In 2019, CHA acquired the Boston-based firm, Daedalus Projects, Inc., a well-respected OPM firm with over three decades of experience serving owners and municipalities across the Commonwealth. Together, we provide unparalleled service to our clients, old and new. We live and work in Massachusetts and are connected to this region by history, experience, and deep caring for our local communities.



Compliance with Minimum Requirements

Project Director: CHA is in full compliance with the minimum requirements identified in Item 4 of this Request for Services (RFS). Project director, Tom Gatzunis is MCPPO certified (#040611) and is a licensed Professional Engineer in the Commonwealth of Massachusetts (#33993). Copies of both certifications can be found on the following pages. Tom has more than 35 years of experience in the construction and supervision of construction and design of public buildings throughout Massachusetts.

Exceptions: Our team has read the Request for Services (RFS) in detail and the contract for project management services included in the RFS. If awarded a contract, CHA would respectfully request the opportunity to negotiate industry-standard changes to the city’s contract and the proposed scope of services, to the extent necessary, prior to execution.

Addenda: We acknowledge receipt of Addendum #1 issued April 28.

We are thrilled with the opportunity to work with the City of Newton on this project. Please contact me directly at (617) 932-5438 or ssweeney@chacompanies.com if you have any questions or require any additional information. We thank you for your consideration of our submission.

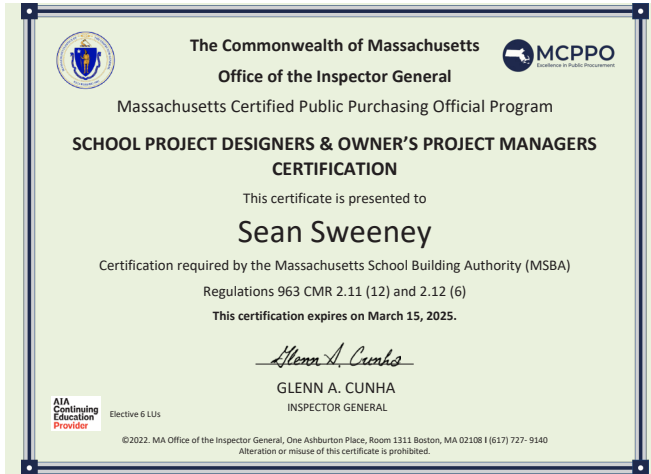
Sincerely,

Sean Sweeney, CCM, MCPPO
Senior Vice President

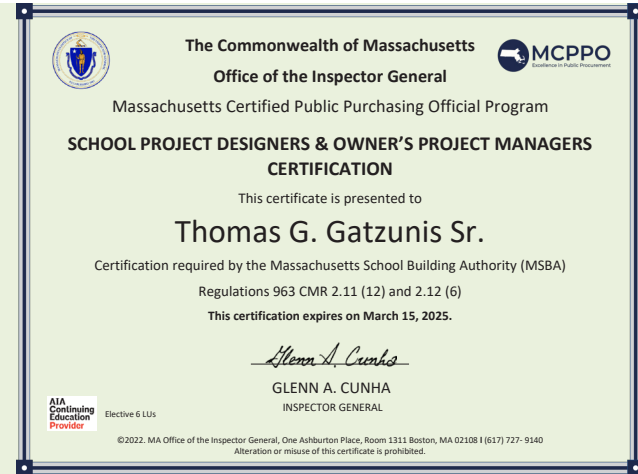


MCPPO Certifications

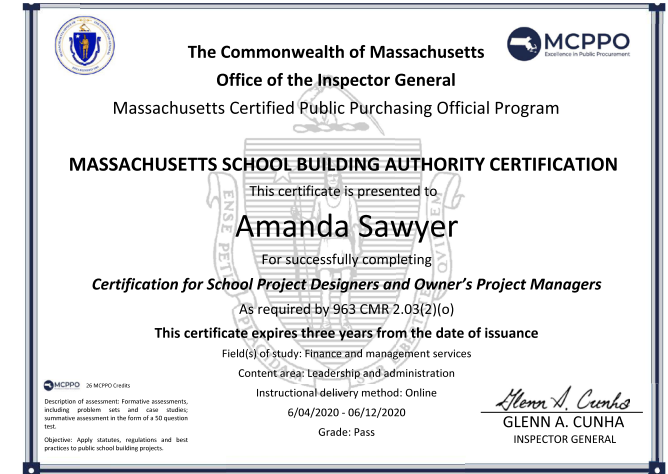
Sean Sweeney, Project Executive



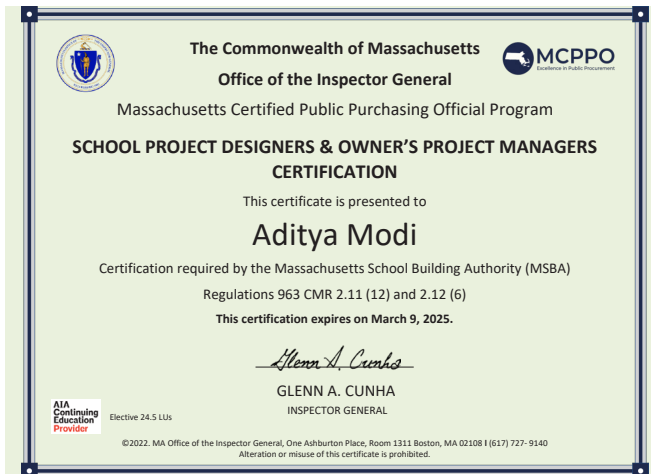
Tom Gatzunis, Sr., Project Director



Amanda Sawyer, Project Manager



Aditya Modi, Assistant Project Manager



Sidni Bragg, Project Controls

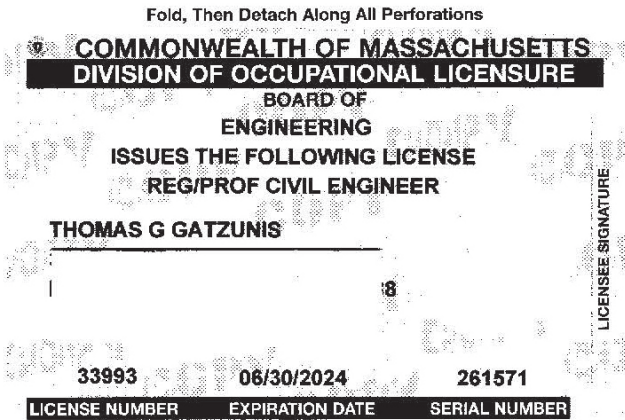


Christina Opper, Communications Specialist

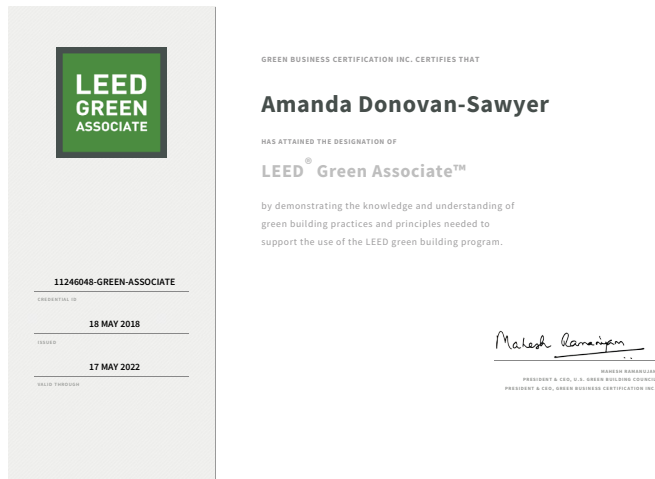
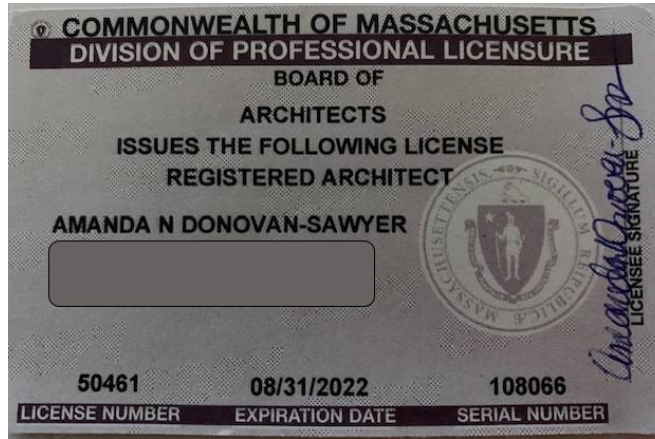


Professional Registrations/Certifications

Tom Gatzunis, Sr., Project Director



Amanda Sawyer, Project Manager



Derek Richardson, Commissioning Advisor



Table of Contents

Cover Letter

MCPPO Certifications & Professional Registrations/Certifications

Section 1

Selection Criteria Page 1

Section 2

OPM Application Form Page 9

Section 3

Supplemental Information..... Page 23

Section 4

Required Certifications Page 29

CHA's most recent confidential financial statement and a sample Certificate of Insurance are enclosed in this proposal in a separate, sealed envelope.

Section 1
Selection Criteria



Selection Criteria

Project Understanding

We understand that the City of Newton, the Newton Public Schools, and the Franklin School Building Committee (SBC) have completed an initial feasibility study and study of conceptual design options for the Franklin Elementary School project. We acknowledge that this project is not MSBA-funded and that the city and district engaged HMFH Architects in 2022 to prepare an existing conditions report and conduct an initial feasibility study and develop conceptual design options for both renovation and addition, as well as new construction on the existing site located at 125 Derby Street.

A member of our team attended the informational briefing and site tour on April 26th and we have reviewed the documentation made available on the project web page, including the existing conditions report and study of options prepared by HMFH. We understand that the project's design and construction will need to consider several factors, including:

- Space needs for all existing and required educational programs
- Full compliance with Massachusetts state building codes and ADA requirements
- Redundant building systems and conversion to all electric
- Addressing the preference to coordinating access from both Cherry and Derby Streets, if possible
- Accommodating anticipated site traffic and flow, including students that walk to school (approx 2/3 of enrolled students), buses, parent drop off, staff access, and parking
- Improved outdoor educational and recreational spaces

We also understand that several factors are being considered in the conceptual design options and ultimately, the preferred schematic design, including:

- Continuous operation of the school (either in existing building or in swing space)
- Availability and use of swing space at other locations in the city and the impact on other ongoing projects (e.g. Countryside)
- Significant grade changes across the site
- Building elevations and site lines impacting abutting properties
- Coordination with and approval of the Newton Historical Commission
- Sustainable design goals (e.g. positioning building to maximize potential solar energy generation)
- Consideration of project design, bidding, and construction schedule to maximize cost efficiency with consideration of financial and schedule impacts to other ongoing projects within the city

For the feasibility study, each potential option will be studied **quantitatively**- through program, cost, and schedule analysis, and **qualitatively** – looking at the impact on and delivery of education program requirements. The process will be detailed and transparent, and we will regularly report on progress to the School Building Committee and all necessary stakeholders. We participate in all project meetings, including presentations for local committees, boards, and commissions, and municipal departments. We will also assist the SBC with community outreach and presentations to all local committees, boards, stakeholders, and agencies as needed.

Many of our public school buildings are not just places of learning but also a resource and place of pride for our communities. Additionally, we are keenly aware of the complexities of current market

conditions and supply chain issues and their impacts on public projects. We will work closely with the city and SBC to identify and study all potential options to deliver the most educationally appropriate and cost-efficient solution to meet the needs of the school and community.

Management Approach

CHA will approach the Franklin School project as a partnership with the City of Newton, the Newton Public Schools, and the SBC. We facilitate collaboration between the designer, consultants, the contractor, and all other project team members and actively lead and support the city and school district through every step of the process through closeout.

CHA has extensive owner's project management expertise in construction across the Commonwealth of Massachusetts. During all phases of study, design, and construction, we actively participate in all project meetings to monitor cost, quality, efficiency, progress, schedule, and budget adherence so that the project complies with the owner's standards and requirements.

Our team will serve as a trusted and experienced advisor to the SBC and the city throughout the completion of the development of the preferred schematic design, funding, detailed design, and construction phases. Our project management services include detailed design review, cost estimating, value engineering, scheduling, budget control, quality assurance, risk management, and full adherence to local and state regulations.

A key factor to keeping this project on track will be close and proactive management of the designer's deliverables, and a comprehensive plan for stakeholder communications and engagement will help build understanding and support across all local constituents.

Project Management Systems

The most effective approach to collaboration with the owner, designer, and contractor on each project is to implement comprehensive project standards and establish accountability for all parties. CHA employs the following methods on all of our OPM projects:

Project Budget: We will establish, update, and maintain a comprehensive project budget that details both construction costs and soft costs to give the project team a full understanding of the total cost of the project. We will also provide updated cash flow reports throughout the project.

Design Review and Risk Management: Risk is inherent in any construction project. As your project manager, our job is to manage that risk by driving the appropriate design from the outset- maximizing efficiencies realized through comprehensive development of the program during the design process. This close oversight, coordinating subconsultants, and working to avoid ‘scope creep’ positions us to offer creative solutions. Additionally, we manage procurement risk by conducting a thorough prequalification process with contractors and field trade subcontractors.

We have also developed internal processes and systems to mitigate potential issues that include risk management logs and tools, RACI charts, and Purchase and Delivery logs to identify possible impacts to the project, recommend solutions, and hold all project team members accountable and invested in the success of the project.

Value Engineering: Our cost management process includes working with architects and contractors to proactively manage project costs during the design phase and through construction. We perform monthly reviews throughout the design to identify and address issues as they arise, rather than waiting until the end of each phase.

Project and Construction Schedule: Our team will create, update, and monitor a project schedule and closely monitor the construction schedule and establish accountability for each milestone and task to see that all project objectives and deliverables are met.

Procurement, Bidding, and Contract Management: We will provide oversight and management of the procurement of goods and services (including surveys, peer reviews, testing, and all other required consulting services) and monitor tasks against contractual requirements. Our team will also manage all facets of the bidding process including encouraging bidder interest to increase competitive pricing, prequalification, bidding, construction contract negotiation, and completion of contractor evaluations upon completion of the project.

Change Order Management: Changes to a project during construction will have an impact on final construction cost and can be initiated by the owner, designer, contractor, or as a result of site conditions. The CHA change order process will protect the owner from the cost of excessive changes. Our Change Order Log keeps track of the movement of the changes through the system, and regular reminders will be issued to the contractor and the designers to prompt their action. Our project team will work with our in-house cost estimating team to verify and reconcile all proposed change orders. This service allows our project team to negotiate fair pricing more effectively. With our in-house mechanical and electrical experts, we review these trades in detail. Several of our new construction projects have come in under 2% total change orders.

On Site Representation and Reporting: Our project representatives will manage all daily site activities and compile detailed reports on all facets of the construction phase. Their responsibilities

will include identifying and managing workforce requirements, verifying prevailing wage compliance, capturing project progress through photos and written documentation, and providing oversight and management of the city’s consultants. Our project management team will provide a comprehensive monthly progress report to all necessary project stakeholders.

Cost and Claims Management: The prevention of claims is best managed by identifying areas of potential conflict that may give rise to a claim. Through comprehensive budget tracking, design review, and value engineering, our team will proactively monitor and anticipate any constructibility issues, identify long-lead items, and establish bidding alternates to reduce costs associated with unforeseen conditions and the potential for claims. Our firm has managed more than \$1.5 billion in construction without a single claim from a general contractor or subcontractor.

Communication and Monthly Reporting: Our team encourages transparency between all project stakeholders and carefully documents each project with written and electronic documentation. CHA will prepare a detailed monthly progress report that summarizes all activities. The report will include updates on the budget/costs and schedule, cash flow projections, designer’s progress, any issues that could result in additional time and/or additional costs, and any anticipated problems/concerns with recommended solutions.

Field Observation and Management: The project management team will regularly walk the site and perform quality control on-site. They will also look at the schedule at a “macro” and “micro” level and consider issues such as sufficient staffing, appropriate sequence of work, and whether materials have been ordered and are located or stored on site.

Document Review: Our team will carefully examine all drawings and specifications for adherence to the building program and city requirements. We will perform:

- Detailed review of plans and specifications to identify errors, omissions, and “constructibility” issues to make certain that the design meets all project requirements and is cost-effective
- Detailed cost estimates at each design milestone for all necessary trades, and a list of potential value engineering items for review as necessary
- Evaluate materials specified by the designer
- Provide and maintain an updated project budget and schedule based on design milestones



Sidni Bragg will monitor project controls including scheduling, cost reporting, cash flow management and contract management.

Management Tools

CHA invests in the most advanced industry software to increase productivity and accuracy. Our progressive training program keeps staff proficient with the latest tools and methodologies. CHA’s OPM team utilizes the following tools to most efficiently manage our projects:

Northspyre: Northspyre is a cloud-based project and asset intelligence platform that leverages the power of automation, data analytics, and insights to achieve predictable outcomes, capable of saving 30% of a project team’s time, leading to up to 2-8% savings per project.

RAKEN: Our project management and on-site representative teams use Raken for documenting daily construction reports. Detailed information is captured including weather conditions, workforce, equipment, materials storage, and progress photos. Raken reports can be distributed daily to all project stakeholders.

State Codes and Regulations

CHA has extensive working knowledge of the Massachusetts State Building Code, Massachusetts Stretch Energy Code, Commonwealth Construction Procurement Laws, regulations, policies, and procedures (as amended), regulations related to the Massachusetts Architectural Access Board and Americans with Disabilities Act, and all other pertinent codes and regulations, and all services set forth in Articles 8.1 & 8.3-8.8 of the Standard Contract for OPM Services. We keep up to date on all code changes.



Former Massachusetts Commissioner of Public Safety, Tom Gatzunis will provide engineering and code compliance review.

Cost Estimating, Value Engineering, and Life-Cycle Cost Analysis

A major benefit that CHA brings to each project is our in-house team of professional cost estimators. Our estimators understand the goal of Life-Cycle Cost Analysis (LCCA) is to identify the most cost-efficient design and construction strategies over the life of the building.

CHA’s cost-estimating team includes specialists in the architectural, structural, mechanical, and electrical trades who are very familiar with the cost of key building materials and the current market value of construction projects. They will comprehensively review all filed trade bids to quantify and qualify construction bid pricing.

During construction, our estimates can be used to assist in value engineering, quantify requests for change orders, and verify monthly applications



Chief cost estimator Delwyn Williamson will develop cost efficient solutions and identify cost saving measures throughout the project.

for payment. They also facilitate project budget tracking by defining cost expectations and providing a clear means of identifying causes of deviance in spending.

Building Commissioning

Our team has extensive experience working with and providing oversight of independent Commissioning Agents for public projects for peer review and quality control of the documents during the design and construction phases.

CHA’s experience with energy auditing and commissioning will give the city and other team members insight into methods to maximize space, decrease life cycle costs, and increase the mechanical, electrical, and plumbing systems’ energy efficiency. Additionally, our experience with estimating, design, and commissioning will ensure that a Life-Cycle Cost Analysis includes options for new system installation and the anticipated operations and maintenance budget to maintain the selected equipment throughout the life of the building.



Commissioning expert Derek Richardson will provide additional oversight and feedback on the design and construction of your school.

Communications and Public Outreach

The success of public projects is inexorably tied to a comprehensive and consistent communications plan. Our team is well-versed in assisting building committees with the organization and dissemination of information across all necessary channels, including municipal committees, staff and impacted community groups.

We will provide oversight of strategy and planning sessions and can assist in the execution of engagement, education, and outreach campaigns, including public presentations, project website,

community surveys, digital and print informational flyers and newsletters, and coordinating with local print and digital media.



Christina Opper has 20+ years of project management and communications experience and will assist in public outreach initiatives.

Working Relationships with Designers, Contractors, Owner and Local Officials

CHA has worked with and developed strong professional relationships with many of the design firms, contractors, subcontractors, and local officials in New England. Our team has worked with many of the design and construction teams that have experience with Massachusetts K-12 school projects and understand the programming, design, and construction of elementary school projects.

We will leverage our experience and knowledge of the industry and our connections with respected firms to increase bidder interest and competition so that the project is completed with the strongest possible team.

Project Team/Commitments/Availability

The CHA team has the staff resources and senior management experience for the Franklin School Redevelopment project. We have established procedures and programs in place to allow us to continually monitor our personnel and resources and provide supplemental support whenever necessary.

We actively manage our internal resources to make certain that we have the capacity to provide outstanding oversight and management of each project from conception through completion. Please refer to Section 8 of the OPM Application Form for a comprehensive list of our ongoing and projected workload.

Commonwealth Construction and Public Procurement

Our team has completed more than 100 public construction projects across the Commonwealth under Chapter 149 and 149A laws, the Construction Reform Law of 2004, and the reforms enacted under the Municipal Modernization Act of 2016 and Chapter 218 of the Acts of 2016.

CHA has successfully completed public projects using traditional Design/Bid/Build (c. 149) and Construction Manager at Risk (c. 149A) delivery methods. Our team will provide detailed comparisons and advice on selecting the delivery method. Additionally, we have developed a comprehensive prequalification process to bring the most qualified contractors to the project.

Projects completed using the M.G.L. c. 149A Alternative Delivery method for public construction include:

Project	Location	Type	Value
Belmont Middle and High School	Belmont, MA	Reno/Addition	\$295 million
Lincoln School	Lincoln, MA	Reno/Addition	\$98 million
John W. Rogers Middle School and Rockland High School	Rockland, MA	Reno/Addition & New Construction	\$86 million
Tisbury School	Vineyard Haven, MA	New Construction	\$78 million
Dearborn STEM Academy	Boston, MA	New Construction	\$73 million
Leominster High School	Leominster, MA	Reno/Addition	\$50 million
Worcester State University Sheehan Hall	Worcester, MA	New Construction	\$60 million
Lawrence Police Headquarters	Lawrence, MA	New Construction	\$59 million
Tufts University Central Energy Plant	Medford, MA	New Construction	\$46 million
Sharon Public Safety Complex	Sharon, MA	New Construction	\$25 million
Sharon Town Hall	Sharon, MA	New Construction	\$16 million



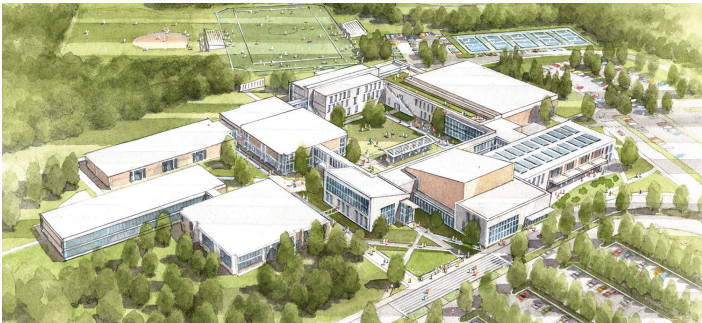
Belmont Middle and High School

At Belmont Middle School and High School, the CMAR process made it possible for senior project manager Tom Gatzunis and his OPM team to fast-track several early bid packages, which enabled a phased construction of the High School and Middle School sections of the building. Our team took advantage, phasing occupancy at the High School building, which eliminated the need for temporary trailers and kept the Middle School section on track for occupancy for the 2023 school year.

Sustainable Design and Construction

CHA has helped our clients identify and take advantage of federal and state funding wherever possible by working with state agencies to pursue subsidies, grants, and rebate programs that target capital projects, central plant improvements, and renewable energy options. Many of our public projects have received New England Certified High Performance Schools (NE-CHPS) certification or LEED certification and met increased efficiency standards. Project manager Amanda Sawyer is a LEED Green Associate and recently completed a \$98 million school renovation and expansion project in Lincoln that was designed and constructed to be Net Zero Ready. Some recent examples include:

Project	Location	Type	LEED	MA/NE-CHPS	Net Zero Ready
Belmont Middle School and High School	Belmont, MA	Reno/Addition & New Construction	•		•
Lincoln School	Lincoln, MA	Renovation/Addition			•
Leroy L. Wood Elementary School	Fairhaven, MA	New Construction		•	
Goodnow Brothers Elementary School	Marlborough, MA	New Construction	•	•	
Nauset Regional High School	Eastham, MA	Renovation/Addition	•		•
Willard Elementary School	Concord, MA	New Construction		•	
Dearborn 6-12 STEM Academy	Boston, MA	New Construction	•		
Lester J. Gates Middle School	Scituate, MA	Reno/Addition & New Construction	•	•	
John W. Rogers Middle School and Rockland High School	Rockland, MA	Reno/Addition & New Construction		•	
Westport Middle-High School	Westport, MA	New Construction	•		
Irwin M. Jacobs Elementary School	New Bedford, MA	New Construction		•	
J. Henry Higgins Middle School	Peabody, MA	New Construction	•	•	



Nauset Regional School District, Nauset Regional High School

CHA is serving as the OPM beginning with the feasibility study phase to determine the type of construction needed and the site location, among numerous options. MSBA-funded construction is expected to include new additions totaling 106,000 SF and renovations to more than 110,000 SF of the existing school buildings. The project is being designed and constructed Net-Zero Ready and to U.S. Green Building Council (USGBC) LEED Ratings System LEED v4 BD+C: Schools.

Experience on Similar Projects

CHA has extensive owner’s project management expertise in construction across the Commonwealth of Massachusetts. During all phases of study, design, and construction, we actively participate in all project meetings to monitor cost, quality, efficiency, progress, schedule, and budget adherence so that the project complies with the owner’s standards and requirements.

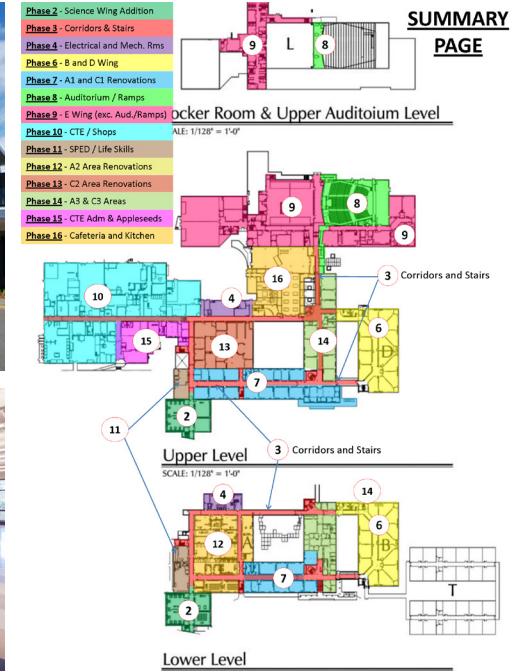
Our team has extensive experience with the study phase as well as the design and construction phase of public school projects that range from complex, phased/occupied renovations to new construction. The table on the following page summarizes our K-12 experience in the last 10 years.

Project	Location	Grades	Size	Project Value	Complete	New Construction	Renovation/ Addition
Nauset Regional High School	Eastham, MA	9-12	110,000 SF Renovations 106,000 SF Addition	\$170 million	2026 est.		•
Elizabeth G. Lyons Elementary School	Randolph, MA	PreK-5	74,720 SF	\$50 million	2025	•	
Tisbury School	Vineyard Haven, MA	K-8	76,000 SF	\$78 million	2024 est.		•
City on a Hill Charter Public School	Roxbury, MA	9-12	30,000 SF Addition	\$11 million	TBD		•
Lowell Collegiate Charter School	Lowell, MA	K-9	Unknown	\$10 million	TBD		•
Belmont Middle School and High School	Belmont, MA	7-12	445,100 SF	\$295 million	2023		•
Chilmark School HVAC Replacement	Chilmark, MA	K-5	N/A (HVAC Replacement)	TBD	2023		•
Benjamin Franklin Classical Charter School	Franklin, MA	K-8	75,000 SF	\$23 million	2022	•	
George H. Mitchell Elementary School	Bridgewater, MA	PreK-2	132,045	\$68 million	2022	•	
Lincoln School	Lincoln, MA	K-8	127,528 SF Renovation 37,500 SF Addition	\$94 million	2022		•
West Tisbury School Roof Replacement	West Tisbury, MA	K-8	N/A (Roof Replacement)	TBD	2022		•
Martha's Vineyard Regional High School	Vineyard Haven, MA	9-12	N/A (HVAC Replacement)	\$5 million	2021		•
Westport Middle-High School	Westport, MA	5-12	188,400 SF	\$97 million	2021	•	
Goodnow Brothers Elementary School	Marlborough	K-5	111000 SF	\$54 million	2020	•	
Sunita L. Williams Elementary School	Needham, MA	K-5	90,702 SF	\$43 million	2019	•	
Dearborn 6-12 STEM Academy	Boston, MA	6-12	128,00 SF	\$73 million	2018	•	
Irwin M. Jacobs Elementary School	New Bedford	K-5	74,000 SF	\$36 million	2017	•	
J. Henry Higgins Middle School	Paebody, MA	6-8	230,000 SF	\$87 million	2017	•	
King Philip Regional High School	Wrentham, MA	9-12	80,000 SF Renovations 150 SF Addition	\$36 million	2017		•
Lester J. Gates Middle School	Scituate, MA	6-8	132915 SF	\$69 million	2017	•	
Franklin High School	Franklin, MA	9-12	306543 SF	\$99 million	2015	•	
Leominster High School	Leominster, MA	9-12	283,000 SF Renovations 14,000 SF Addition	\$46 million	2013	•	•
Dr. Elmer S. Bagnall Elementary School	Groveland, MA	K-6	7,125 SF Renovations 18,990 SF Addition	\$8 million	2013		•
Leroy L. Wood Elementary School	Farihaven, MA	PreK-5	78,000 SF	\$18 million	2013	•	
John W. Rogers Middle School and Rockland High School	Rockland, MA	6-12	115,931 SF New MS 162,281 SF HS Renovations	\$86 million	2013	•	•

Phased, Occupied School Renovations

The CHA team has successfully completed numerous public school projects with complex phasing schedules, including many that maintained occupied campuses during construction.

For any renovation or renovation/addition options, safety as well as continuous operation of the school, will be the highest priority. In the past, successful management approaches included the use of modular classrooms while renovating quadrants of a school in phased increments and utilization of school vacations as a time to perform major renovations and hazardous materials removal.



Lincoln School

Lincoln, MA | 127,528 SF Reno, 37,500 SF Construction | \$98 Million | 2022

The CHA team worked with the Lincoln School on a \$98 million phased, occupied renovation and expansion. The goal of the school's Board of Selectman was to provide a year-round comfortable learning environment. The current K-8 facility was in dire need of maintenance and upgrades. However, the community felt that the existing building held significance within the community and identified the need to renovate the school and expand.

Modular classrooms were used for swing space as the renovations were underway.

Providing flexibility in the design of educational areas to support future educational models and practices, including flexibility in regards to student groupings for collaborative and creative work, was central to the project's design.

Leominster High School

Leominster, MA | 283,000 SF Reno, 14,000 SF Construction | \$45.9 Million | 2013

CHA provided OPM services for a complex, multi-phase renovation and expansion of the school building, which included a full replacement of all mechanical systems, hazardous materials remediation, interior renovations, and new construction of a small 14,000 SF addition to an occupied school over the course of two years.

A "temporary wing" was constructed adjacent to the building to create swing space.

Early construction packages to address repairs and temporary classrooms in advance were used to reduce the impact on school operations and keep the overall project schedule on time.

New Construction on Occupied Sites

The CHA team has extensive experience overseeing the construction of new buildings located on tight sites within residential neighborhoods, similar to the Franklin School site.

Several of our new school building projects involved construction adjacent to an existing operational school and our team is well-versed in the challenges that this presents. Our experience will allow us to help identify potential disruptions and develop strategies to minimize them.



George H. Mitchell Elementary School

Bridgewater, MA | 132,045 SF New Construction | \$72.6 Million | 2022

CHA served as OPM from feasibility study through the design, construction and close-out of a new three-story, L-shaped 132,045 SF school building. The new school is a steel frame and concrete-on-metal deck structure with masonry, glass, and aluminum skin.

The project included a district-wide grade configuration, enrollment, and site options study and identified the location of the existing building as the preferred solution. The existing building was demolished and a new school building was designed to maximize the building layout and site circulation on a site with significant changes in grade.

In 2022, the new school building was completed on time and **more than \$8 million under budget.**

Abraham Lincoln Elementary School

New Bedford, MA | 94,000 SF New Construction | \$26.4 Million | 2010

CHA provided OPM services for constructing a new 94,000 SF elementary school, including demolishing the existing building on the site.

It was determined, due to a lack of alternate sites and the desire to maintain the 'neighborhood school' location, that that preferred solution would be to construct a new school on the existing site. Through close coordination with the project team and the city, the new school was constructed in a dense residential neighborhood on the existing site adjacent to the occupied school throughout construction.

Safety, security, reduced impact on ongoing school operations, and coordination with abutters were priorities. Our team successfully completed the school project on time and on budget.


Section 2
OPM Application Form



Owner's Project Manager Application Form – March 2017

1. Project Name/Location for Which Firm is Filing:
Franklin School Redevelopment, Newton, MA

1a. MSBA Project Number:
N/A

2a. Project Name/Location for Which Firm is Filing: CHA Consulting, Inc. One Washington Mall Suite 1500 Boston, MA 02108		2b. Name And Address Of Other Participating Offices Of The Prime Applicant, If Different From Item 3a Above: N/A
--	---	---

2c. Date Present And Predecessor Firms Were Established: 1952	2d. Name And Address Of Parent Company, If Any: CHA Consulting, Inc. 575 Broadway, Suite 301 Albany, NY 12207
--	--

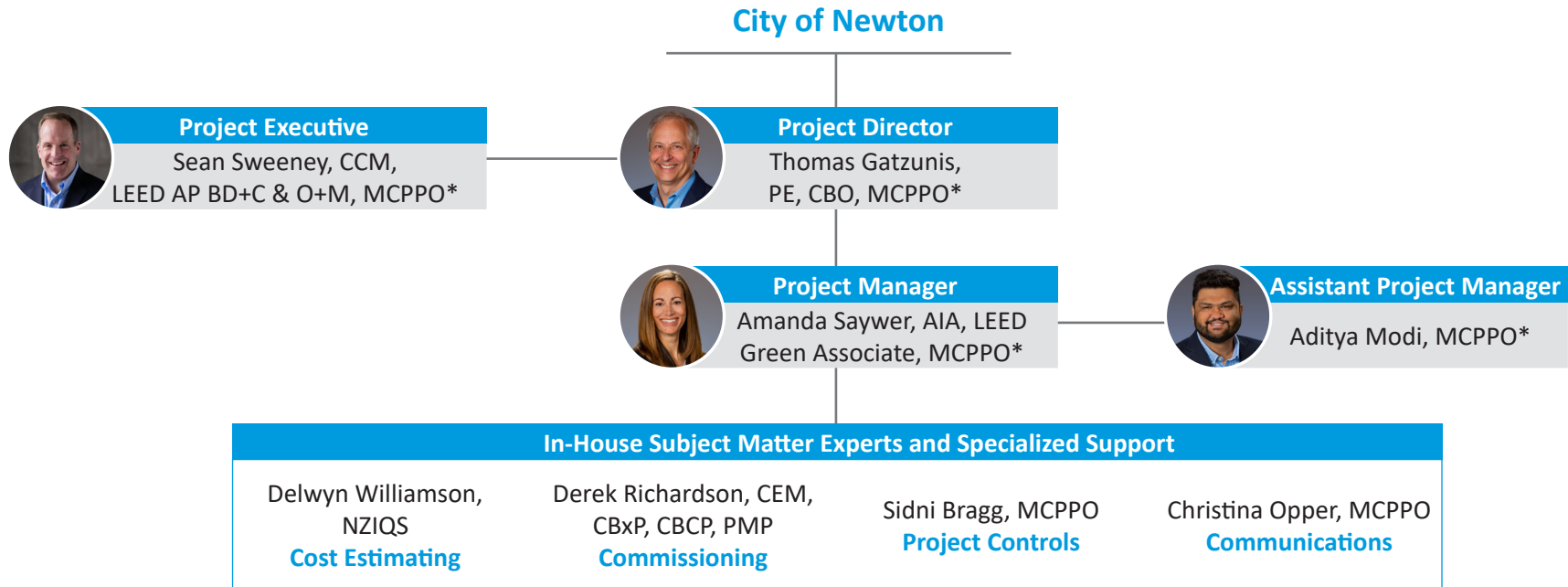
2e. Federal ID #: 16-0966259	2f. Name of Proposed Project Director: Thomas G. Gatzunis, Sr., PE, CBO, MCPPO
---------------------------------	---

3. **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	25	Ecologists	_____	Licensed Site Profs.	1	On-Site Reps	13
Architects	23 [8]	Electrical Engineers	24 [4]	Mechanical Engrs.	30 [2]		_____
Acoustical Engineers	_____	Environmental Engineers	35	Planners: Urban./Reg.	15		_____
Civil Engineers	263 [20]	Fire Protection Engineers	_____	Specification Writers	_____		_____
Code Specialists	_____	Geotech. Engineers	7	Structural Engrs.	50 [15]	Other	977 [13]
Construction Inspectors	34 [11]	Industrial Hygienists	_____	Surveyors	5 [3]		_____
Cost Estimators	7	Interior Designers	4	Project Managers	161		_____
Drafters	_____	Landscape Architects	14 [1]	Asst. Project Managers	12	Total	1700

4. Has this Joint-Venture previously worked together? N/A Yes No

5. List ONLY Those Prime and Sub-Consultant Personnel identified as Key personnel in the Response to Request for Services. This Information Should Be Presented Below In The Form Of An Organizational Chart modified to fit the firm's proposed management approach. Include Name of Firm And Name Of The Person:



*Key team member - resume included on the following pages. Please see more comprehensive resumes of all team members in Section 3: Supplemental Information.

Support Staff

Delwyn Williamson, NZIQS • Cost Estimating

Delwyn has more than 35 years of experience in the A/E/C industry. She is affiliated with the New Zealand Institute of Quantity Surveyors, where she received her registration in Quantity Surveying. Her expertise in vertical cost consulting encompasses all design phases for buildings of all types.

Derek Richardson, CBCP, BCxP, CEM, PMP • Commissioning

Derek has managed hundreds of projects including commercial energy audits, commissioning, retro-commissioning, recommissioning, building enclosure commissioning, measurement and verification (M&V), design and energy modeling, and other energy projects.





Sidni Bragg, MCPPO • Project Controls

Sidni has overseen the management of project controls and project administration, including protocols, submissions, bid document distribution, contract management, and project accounting on more than \$1.5 billion in publicly-funded projects.





Christina Opper, MCPPO • Communications

Christina has over 20 years of experience as a communications specialist for public projects across the Commonwealth. She manages the planning and execution of public communications efforts, including print and digital outreach and project websites.

6. 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.

 <p>a. Name and Title Within Firm: Sean Sweeney, CCM, LEED AP BD+C & O+M, MCPPO Senior Vice President</p>	 <p>a. Name and Title Within Firm: Thomas Gatzunis, Sr., PE, CBO, MCPPO Senior Project Manager</p>
<p>b. Project Assignment: Project Executive</p>	<p>b. Project Assignment: Project Director</p>
<p>c. Name and Address Of Office In Which Individual Identified In 7a Resides: CHA Consulting, Inc. One Washington Mall, Suite 1500 Boston, MA 02108</p> 	<p>c. Name and Address Of Office In Which Individual Identified In 7a Resides: CHA Consulting, Inc. One Washington Mall, Suite 1500 Boston, MA 02108</p> 
<p>d. Years Experience: With This Firm: <u> 2 </u> With Other Firms: <u> 33 </u></p>	<p>d. Years Experience: With This Firm: <u> 8 </u> With Other Firms: <u> 32 </u></p>
<p>e. Education: Degree(s)/Year/Specialization University of Massachusetts at Lowell, MA, B.S. / 1990 / Civil Engineering Babson College, MA, M.B.A. / 1994 / Finance Suffolk University Law School, MA / 1999 / Law</p>	<p>e. Education: Degree(s)/Year/Specialization University of Massachusetts at Lowell, MA, B.S. / 1983 / Civil Engineering</p>
<p>f. Date of MCPPO Certification: 2022</p>	<p>f. Date of MCPPO Certification: 2022</p>
<p>g. Applicable Registrations and Certifications: MA Licensed Construction Supervisor (#054751)</p>	<p>g. Applicable Registrations and Certifications: MA Registered Professional Engineer (#33993), MA Licensed Construction Supervisor (040611), Certified Building Officer- Building Commissioner (#0699)</p>
<p>h. Current Work Assignments And Availability For This Project: As of 5/1, 10% available Lincoln School, Lincoln, MA • Belmont Middle School and High School, Belmont, MA • Nauset Regional High School, Eastham, MA</p>	<p>h. Current Work Assignments And Availability For This Project: As of 5/1, 20% available Elizabeth G. Lyons Elementary School, Randolph, MA • Belmont Middle School and High School, Belmont, MA • Marlborough Public Library, Marlborough, MA • Lawrence Police Headquarters, Lawrence, MA</p>
<p>i. Other experience and qualifications relevant to the proposed project: (identify OPM firm by which employed, if not current firm. Please distinguish between OPM work and any design work performed by the firm):</p>	<p>i. Other experience and qualifications relevant to the proposed project: (identify OPM firm by which employed, if not current firm. Please distinguish between OPM work and any design work performed by the firm):</p>
<ul style="list-style-type: none"> • Town of Belmont, Belmont Middle School and High School • Bridgewater-Raynham Regional School District, George H. Mitchell Elementary School • Nauset Public School District, Nauset Regional High School • Town of Lincoln, Lincoln School • Town of Westport, Westport Middle-High School • Tufts University, University Veterinary Facilities Condition Assessment • UMASS Dartmouth, OPM Staff Augmentation <p><i>Please see page 24 for a more comprehensive resume</i></p>	<ul style="list-style-type: none"> • City of Marlborough, Goodnow Brothers Elementary School • Town of Randolph, Elizabeth G. Lyons Elementary School • Town of Belmont, Belmont Middle School and High School • Town of Lincoln, Lincoln School • Town of Belmont, Belmont Public Library • Town of Stoughton, Stoughton Public Library • Town of Belmont, Belmont Fire Stations Repairs • Town of Belmont, Belmont DPW and Police Station Renovations <p><i>Please see page 25 for a more comprehensive resume</i></p>

6. 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.

 <p>a. Name and Title Within Firm: Amanda Sawyer, AIA, LEED Green Associate, MCPPO Senior Architect</p>	 <p>a. Name and Title Within Firm: Aditya Modi, MCPPO Assistant Project Manager</p>
<p>b. Project Assignment: Project Manager</p>	<p>b. Project Assignment: Assistant Project Manager</p>
<p>c. Name and Address Of Office In Which Individual Identified In 7a Resides: CHA Consulting, Inc. One Washington Mall, Suite 1500 Boston, MA 02108</p> 	<p>c. Name and Address Of Office In Which Individual Identified In 7a Resides: CHA Consulting, Inc. One Washington Mall, Suite 1500 Boston, MA 02108</p> 
<p>d. Years Experience: With This Firm: <u>4</u> With Other Firms: <u>22</u></p>	<p>d. Years Experience: With This Firm: <u>2</u> With Other Firms: <u>3</u></p>
<p>e. Education: Degree(s)/Year/Specialization University of Massachusetts at Lowell, MA, B.S. / 1990 / Civil Engineering Babson College, MA, M.B.A. / 1994 / Finance Suffolk University Law School, MA / 1999 / Law</p>	<p>e. Education: Degree(s)/Year/Specialization Northeastern University, MA, M.S. / 2019 / Civil Engineering Mukesh Patel School of Technology Management and Engineering, India, B.T. / 2017 / Civil Engineering</p>
<p>f. Date of MCPPO Certification: 2020</p>	<p>f. Date of MCPPO Certification: 2022</p>
<p>g. Applicable Registrations and Certifications: MA Registered Architect (#50461)</p>	<p>g. Applicable Registrations and Certifications: MA Registered Professional Engineer (#33993), MA Licensed Construction Supervisor (040611), Certified Building Officer- Building Commissioner (#0699)</p>
<p>h. Current Work Assignments And Availability For This Project: As of 5/1, 25% available Lincoln Elementary School, Lincoln, MA • Nauset Regional High School, Eastham, MA • Chilmark Elementary School, Chilmark, MA • Chilmark Firehouse and EMS Headquarters, Chilmark, MA</p>	<p>h. Current Work Assignments And Availability For This Project: As of 5/1, 30% available Tisbury School, Vineyard Haven, MA • Millbury Fire Headquarters, Millbury, MA • Chilmark School, Chilmark, MA • Chilmark Firehouse and EMS Headquarters, Chilmark, MA</p>
<p>i. Other experience and qualifications relevant to the proposed project: (identify OPM firm by which employed, if not current firm. Please distinguish between OPM work and any design work performed by the firm):</p>	<p>i. Other experience and qualifications relevant to the proposed project: (identify OPM firm by which employed, if not current firm. Please distinguish between OPM work and any design work performed by the firm):</p>
<ul style="list-style-type: none"> • Town of Lincoln, K-8 Lincoln School • Town of Tisbury, Tisbury School • Benjamin Franklin Classical Charter School, Gym Addition • Nauset Regional School District, Nauset Regional High School • Martha’s Vineyard Community Services, Early Childhood Center • Martha’s Vineyard Regional School District, Regional High School • Up-Island Regional School District, West Tisbury School • Up-Island Regional School District, Chilmark Public School <p><i>Please see page 26 for a more comprehensive resume</i></p>	<ul style="list-style-type: none"> • Town of Lincoln, Lincoln School • Town of Tisbury, Tisbury School • Up-Island Regional School District, Chilmark Public School • Up-Island Regional School District, West Tisbury School • Town of North Attleborough, North Attleborough High School Sports Complex • Town of Chilmark, Chilmark Fire Station and Tri-Town EMS Headquarters • Town of Millbury, Millbury Fire Headquarters <p><i>Please see page 27 for a more comprehensive resume</i></p>

7a/b. Past Performance: List all Completed Projects, in excess of \$1.5 million, for which the Prime Applicant has performed, or has entered into a contract to perform Owner's Project Management Services for all Public Agencies within the Commonwealth within the past 10 years. Note: 7a & 7b have been grouped to prevent excessive document length.

Project Name and Location Project Director		Brief Description Of Project and Services (Include Reference To Areas Of Similar Experience)	Project Dollar Value	Completion Date (Actual Or Estimate)	On Time (Yes Or No)	Original Construction Contract Value	Change Orders	# of Accidents/ Safety Violations	Dollar Value of any Safety Fines	Number & Outcome Of Legal Actions
			Original Project Budget	Final Project Budget	If different, provide reason(s) for variance		Original Project Completion	On Time? (Yes or No)	If different, provide reason(s) for variance	
1.	Lincoln School Lincoln, MA Project Director: Amanda Sawyer, AIA , LEED Green Associate	OPM services for additions and renovations project	\$98 M	9/22	Yes	\$82 M	19 \$5 M	None	N/A	None
			\$93 M	\$98 M			9/22	Yes		
2.	North Attleborough Sports Complex North Attleborough, MA Project Director: Joe Sullivan	OPM services for new bleachers and track at town sports facility	\$3.5 M	12/22	Yes	\$2.8 M	0 \$0	None	N/A	None
			\$3.5 M	\$3.5 M			12/22	Yes		
3.	George H. Mitchell Elementary School Bridgewater, MA Project Director: Joe Sullivan	OPM services for new elementary school	\$67.6 M	9/22	Yes	\$51.6 M	16 \$960k	None	N/A	None
			\$80.6 M	\$67.6 M			9/22	Yes		
4.	Maynard Fire Station Maynard, MA Project Manager: Alicia Monks, AIA, LEED AP	OPM services for new fire station	\$14.2 M	9/22	Yes	\$10.4 M	6 \$382k	None	N/A	None
			\$14.2 M	\$14.0 M			9/22	Yes		
5.	Salisbury Comfort Station Salisbury, MA Project Manager: Alicia Monks, AIA, LEED AP	OPM services for new welcome center	\$5.2 M	9/22	No	\$4 M	12 \$1 M	None	N/A	None
			\$5.2 M	\$6.2 M	COVID impacts		9/21	No		
6.	Police and DPW Facility Belmont, MA Project Director: Thomas Gatzunis, PE, CBO	OPM services for police & DPW improvements	\$11.9 M	12/2021	No	\$7.7 M	21 \$1.1 M	None	N/A	None
			\$12 M	\$11.8 M	Added scope by Owner		9/2021	No		
7.	Lowell Collegiate Charter School, Phase II, Lowell, MA Project Manager: Michael McNulty	OPM services for a high school addition to a charter school	\$14.6 M	4/2021	Yes	\$9.2 M	19 \$5.4 M	None	N/A	None
			\$10.2 M	\$14.6 M	Added scope by Owner		9/2020	Yes		

8.	Fire Department Repairs Belmont, MA Project Director: Thomas Gatzunis, PE, CBO	OPM services for repairs to multiple district facilities	\$1.6 M	11/2021	Yes	\$1.2 M	None	None	N/A	None
			\$1.6 M	\$1.6 M			11/2021	Yes		
9.	Benjamin Franklin Classical Charter Public School, Phase II Franklin, MA Project Manager: Amanda Saw- yer, AIA, LEED Green Associate	OPM services for a pre-engineered metal gymnasium building addition	\$23 M	3/2022	No	\$19 M	19 \$4.2 M	None	N/A	None
			\$19 M	\$23 M			3/2021	No		
10.	District Fire HQ Onset, MA Project Executive: Joe Sullivan	OPM services for new fire station	\$13.3 M	5/2021	Yes	\$8.2 M	None	None	N/A	None
			\$13.3 M	\$13.3 M			5/2021	Yes		
11.	Westport Middle and High School, Westport, MA Project Manager: Laura Jolly, RA, NCARB	OPM services for middle-high school additions and renovations	\$96 M	8/2021	Yes	\$73.7	24 \$3.21 M	None	N/A	None
			\$94 M	\$96 M			8/2021	Yes		
12.	South Public Safety Facility, New Bedford, MA Project Manager: Alicia Monks, AIA, LEED AP	OPM services for new combined public safety facility	\$19.5 M	9/2021	No	\$17 M	12 \$766,287	None	N/A	None
			\$19.5 M	\$19.5 M			3/2021	No		
13.	Martha's Vineyard Community Services Vineyard Haven, MA Project Manager: Amanda Saw- yer, AIA, LEED Green Associate	OPM services for new early education center	\$7.4 M	10/2021	Yes	\$6.4 M	7 \$243,000	None	N/A	None
			\$7.2 M	\$7.4 M			10/2021	Yes		
14.	Middleborough DPW Middleborough, MA Project Director: Joe Sullivan	OPM services for a new public works facility	\$15.3 M	4/2021	Yes	\$12.3 M	6 \$235,579	None	N/A	None
			\$15.1 M	\$15.3 M			4/2021	Yes		
15.	Carver Police Station Carver, MA Project Director: Joe Sullivan	OPM services for new construction of a 12,000 SF police station	\$9.5 M	3/2021	Yes	\$7.3 M	8 \$759,915	None	N/A	None
			\$8.9 M	\$9.5 M			4/2021	Yes		

16.	Goodnow Brothers Elementary School, Marlborough, MA Project Director: Thomas Gatzunis, PE, CBO	OPM services for new construction of a new 111,437 SF elementary school	\$54.3 M	8/2020	Yes	\$47.8 M	9 \$868,000	None	N/A	None
			\$54.3 M	\$54.3 M			9/2020	Yes		
17.	Medford Police Station, Medford, MA Project Director: Richard Marks	OPM services for a new 40,000 SF Net Zero Ready police station	\$22 M	2020	Yes	\$18.4 M	15 \$460,000	None	N/A	None
			\$22 M	\$22 M			12/2020	Yes		
18.	Sharon Town Hall Sharon, MA Project Director: Richard Marks	OPM services for a new two-story town hall on the site of the town's former fire station	\$13.5 M	12/2019	Yes	\$9.7 M	13 \$126,271	None	N/A	None
			\$13.5 M	\$13.5 M			2019	Yes		
19.	Bourne Police HQ Bourne, MA Project Director: Richard Marks	OPM services for construction of a new three-story, 29,000 SF police headquarters	\$21 M	9/2019	Yes	\$13.8 M	None	None	N/A	None
			\$18 M	\$18 M			9/2019	Yes		
20.	Gladys E. Kelly Public Library, Webster, MA Project Director: Richard Marks	OPM services for a new 20,385 SF public library	\$11.9 M	2018	Yes	\$7.76 M	9 \$533,000	None	N/A	None
			\$11.9 M	\$11 M	Completed under budget		2018	Yes		
21.	Stoughton Public Library, Stoughton, MA Project Director: Richard Marks	OPM services for a challenging expansion and renovations project with a very limited site	\$14.48 M	2018	Yes	\$11.6 M	18 \$519,603	None	N/A	None
			\$14.5 M	\$14.48 M	Completed under budget		2018	Yes		
22.	Benjamin Franklin Classical Charter Public School, Franklin, MA Project Director: Richard Marks	OPM services for new construction of a pre-engineered, steel-frame building	\$25 M	2019	Yes	\$21 M	8 \$204,590	None	N/A	None
			\$25 M	\$25 M			2018	Yes		
23.	Dearborn STEM/6-12 Academy, Boston, MA Project Director: Richard Marks	OPM services for new construction on the site of an existing 118,600 SF school	\$71.9 M	2018	Yes	\$60.25 M	15 \$1.49 M	None	N/A	None
			\$70.7 M	\$71.9 M			2018	Yes		
24.	Middleborough Police Station, Middleborough, MA Project Director: Richard Marks	OPM services for new construction of a 17,391 SF police station	\$9.1 M	2018	Yes	\$7.3 M	5 \$34,540	None	N/A	None
			\$9.5 M	\$9.1 M	Completed under budget		2018	Yes		

25.	Irwin Jacobs Elementary School, New Bedford, MA Project Director: Richard Marks	OPM services for new construction of a 74,056 SF school on existing site	\$35.6 M	2017	Yes	\$27.2 M	9 \$250,000	None	N/A	None
			\$36.3 M	\$35.6 M	Completed under budget		2017	Yes		
26.	Sharon Public Safety Facility, Sharon, MA Project Director: Joe Sullivan	OPM services for new construction of a combined police and fire facility	\$24.8 M	2017	Yes	\$18.8 M	14 \$381,978	None	N/A	None
			\$24.8 M	\$24.8 M	Completed under budget		2017	Yes		
27.	Franklin Public Library Franklin, MA Project Director: Shane Nolan	OPM services for renovations to the historic building and anew addition	\$9.7 M	2017	Yes	\$6.4 M	13 \$900,000	None	N/A	None
			\$10.5 M	\$9.7 M	Completed under budget		2017	Yes		
28.	Gates Middle School Scituate, MA Project Director: Shane Nolan	OPM services for new construction of a 74,056 SF middle school	\$68.8 M	2017	Yes	\$52.6 M	18 \$2 M	None	N/A	None
			\$75.8 M	\$68.8 M	Completed under budget		2017	Yes		
29.	Intergenerational Community Center Randolph, MA Project Director: Alicia Monks, AIA, LEED AP	OPM services for new construction of a 33,000 SF community center	\$12.2 M	2017	Yes	\$10.3 M	7 \$402,000	None	N/A	None
			\$11.5 M	\$12.2 M	Unforeseen site conditions		2017	Yes		
30.	Scituate Town Library Scituate, MA Project Director: Joe Sullivan	OPM services for renovation of an existing, 24,745 SF library and 7,534 SF addition	\$11.7 M	2017	Yes	\$8.5 M	14 \$1.04 M	None	N/A	None
			\$12.1 M	\$11.7 M			2017	Yes		
31.	J. Henry Higgins Middle School, Peabody, MA Project Director: Richard Marks	OPM services for new construction of a 230,000 SF middle school	\$86.6 M	2017	Yes	\$68.8 M	54 \$1.1 M	None	N/A	None
			\$92.6 M	\$86.6 M	Completed under budget		2017	Yes		
32.	Carver Central Fire Station & Training Facility Carver, MA Project Director: Richard Marks	OPM services for new construction of a 21,830 SF fire station and training facility	\$9.1M	4/2017	Yes	\$7.3 M	10 \$487,191	None	N/A	None
			\$9.8M	\$9.1M			4/2017	Yes		

33.	Lowell Collegiate Charter School, Lowell, MA Project Director: Shane Nolan	OPM services for renovation & fit-out of existing building for a 46,789 SF school	\$10.1M	3/2017	Yes	\$8.5 M	None	None	N/A	None
			\$9.9M	\$10.1M			3/2017	Yes		
34.	Medfield Public Safety Medfield, MA Project Director: Richard Marks	OPM services for new construction of a 42,834 SF public safety complex	\$19.5M	12/2016	Yes	\$15.2 M	17 \$645,000	None	N/A	None
			\$20.1M	\$19.5M			12/2016			
35.	E. Bridgewater Public Library, E. Bridgewater, MA Project Director: Richard Marks	Study for addition and renovations for grant application. Project is on MBLC waiting list.	\$17.7M	9/2016	Yes	N/A (study only)	None	None	N/A	None
			\$10.3 M	\$17.7 M			9/2016	Yes		
36.	Salisbury Public Library Salisbury, MA Project Director: Richard Marks	OPM services for new construction of a 16,000 SF library	\$10 M	10/2015	Yes	\$6.2 M	12 \$195,117	None	N/A	None
			\$10 M	\$10 M			9/2015	Yes		
37.	Franklin High School Franklin, MA Project Director: Richard Marks	OPM services for new construction of a 306,543 SF high school.	\$99 M	8/2015	Yes	\$87.9 M	23 \$1.15 M	None	N/A	None
			\$99 M	\$99 M	Owner requested change orders		8/2015	Yes		
38.	Town Hall & Police Station Monson, MA Project Director: Richard Marks	OPM services for new 26,000 SF combined police station and town hall	\$10.6 M	11/2014	Yes	\$7.4 M	20 \$1.15 M	None	N/A	None
			\$10.8 M	\$10.6 M	Owner requested change orders		11/2014	Yes		
39.	West Tisbury Free Public Library West Tisbury, MA Project Director: Richard Marks	OPM services for partial demolition and renovation to existing library with new 2-story addition (14,000 SF)	\$6.42 M	3/2014	Yes	\$5.13 M	16 \$103,650	None	N/A	None
			\$6.42 M	\$6.5 M	Owner requested change orders		2/2014	Yes	Completed ahead of schedule	

8. Capacity: Identify all current/ongoing Work by Prime Applicant, Joint-Venture Members or Sub-consultants. Identify project participants and highlight any work involving the project participants identified in the response.

a. Project Name And Location Project Director / Project Manager	b. Brief Description of Project and Services (Include reference to areas of Similar Experience)	c. Original Project Budget	d. Current Project Budget	e. Project Completion Date	f. Current Forecast completion date On Time (Yes or No)	g. Original Construction Contract Value	h. Number and dollar value of change orders	i. Number and dollar value of claims
1. Dennis Fire Station No. 2 Dennis, MA Project Manager: Joseph Sullivan	OPM services for a new fire station	\$16 M (est)	\$14.7 M (est)	2023 (est)	2023 (est) Yes	\$13.7 M (est)	N/A	N/A
2. Northbridge Fire Station Northbridge, MA Project Manager: Joseph Sullivan	OPM services for new fire station	\$14.0 M (est)	\$14.0 M (est)	2023 (est)	2023 (est)	\$11.5 M (est)	N/A	N/A
3. Belmont Middle School and High School, Belmont, MA Project Director: Thomas Gatzunis, PE, CBO	OPM services for middle-high school additions and renovations, MSBA-funding	\$295 M	\$295 M	2023 (est)	2023 (est) Yes	\$240.3 M	30 \$12.5 M	N/A
4. Chilmark Firehouse and Tri-Town EMS Headquarters Chilmark, MA Project Manager: Michael Owen, FCSI, CDT, CSC	OPM services for new firehouse and EMS station	\$10.1 M (est)	\$11.1 M (est)	2023 (est)	2023 (est) Yes	TBD	TBD	N/A
5. Marlborough Public Library Marlborough, MA Project Director: Thomas Gatzunis, PE, CBO	OPM services for additions and renovations to library	\$25.5 M (est)	\$25.5 M (est)	2023 (est)	2023 (est) Yes	\$18.4 M (est)	1 \$1,608	N/A
6. Leominster Police Station Leominster, MA Project Manager: Alicia Monks, AIA, LEED AP	OPM services for new police station	\$32 M (est)	\$32 M (est)	2023 (est)	2023 (est) Yes	\$23.8 M (est)	TBD	TBD
7. Tisbury School Vineyard Haven, MA Project Manager: Michael Owen, FCSI, CDT, CSC	OPM services for renovation and addition (74,349 SF) for a K-8 school including sitework and new playfields	\$55 M (est)	\$78 M (est)	2024 (est)	2024 (est) Yes	\$64 M (est)	N/A	N/A

8.	Abbott Library Marblehead, MA Project Director: Thomas Gatzunis, PE, CBO	OPM services for library renovations and improvements	\$11.8 M (est)	\$11.8 M (est)	2024 (est)	2024 (est) Yes	\$8.7 M (est)	N/A	N/A
9.	DCAMM Shattuck Hospital Relocation, Newton Pavilion Boston, MA Project Manager: Frances Hughes	On-Call OPM services	\$N/A (Scope expanded during Study)	\$382 M	2024 (est)	2024 (est) Yes	TBD	N/A	N/A
10.	Lawrence Police Station Lawrence, MA Project Manager: Lawrence Gill	OPM services for new police station	\$59 M (est)	\$59 M (est)	2024 (est)	2024 (est) Yes	\$44 M (est)	N/A	N/A
11.	Millbury Fire Headquarters Millbury, MA Project Director: Joseph Sullivan	OPM services for new fire headquarters	\$20 M (est)	\$20 M (est)	2024 (est)	2024 (est) Yes	TBD	TBD	TBD
12.	Elizabeth G. Lyons Elementary School Randolph, MA Project Director: Thomas Gatzunis, PE, CBO	OPM services for new elementary school, MSBA-funding	\$50 M (est)	\$50 M (est)	2025 (est)	2025 (est) Yes	\$42 M (est)	None	N/A
13.	Brockton Public Safety Complex Brockton, MA Project Manager: Joseph Sullivan	OPM services for new combined public safety facility	\$108 M (est)	\$108 M (est)	2025 (est)	2025 (est) Yes	\$74 M (est)	None	N/A
14.	Everett Police Station Everett, MA Project Director: Thomas Gatzunis, PE, CBO	OPM services for new police station	\$54 M (est)	\$54 M (est)	2025 (est)	2025 Yes	\$42.4 (est)	N/A	N/A
15.	Nantucket Memorial Airport Terminal Space Optimization Nantucket, MA Project Director: Joseph Sullivan	OPM services for terminal improvements	\$14 M	\$14 M (est)	2025 (est)	2025 (est) Yes	TBD	N/A	N/A

16.	Nantucket Memorial Airport Crew Quarters Nantucket, MA Project Director: Joseph Sullivan	OPM services for housing for airport staff	\$4.2 M	\$4.2 M (est)	2025 (est)	2025 (est) Yes	\$3.2 M (est)	N/A	N/A
17.	Nauset Regional High School Eastham, MA Project Director: Joseph Sullivan	OPM services for additions and renovations, MSBA-funding	\$134 M (est)	\$170 M (est)	2026 (est)	2026 (est) Yes	\$132 M (est)	TBD	TBD
18.	DCAMM Soldiers' Home in Holyoke Holyoke, MA Project Manager: Mike McNulty	OPM services for new long-term veterans care facility	\$375 M	\$375 M	2026 (est)	2026 (est) Yes	TBD	TBD	TBD
19.	Plymouth DPW Facilities Plymouth, MA Project Director: Joseph Sullivan	OPM services for new DPW facilities	\$120 M (est)	\$120 M (est)	2027 (est)	2027 (est) Yes	\$92 M (est)	N/A	N/A
20.	Ipswich Public Safety Building Ipswich, MA Project Director: Joseph Sullivan	OPM services for new public safety facility	\$27.5 M (est)	\$27.5 M (est)	2027 (est)	2027 (est) Yes	TBD	N/A	N/A
21.	Duxbury DPW Facility Duxbury, MA Project Director: Joseph Sullivan	OPM services for new DPW facilities	TBD	TBD	TBD	TBD	TBD	N/A	N/A
22.	Up Island Regional School District Vineyard Haven, MA Amanda Sawyer, AIA, LEED Green Associate	On-call OPM services	TBD	TBD	TBD	TBD	TBD	N/A	N/A

9. References: Provide the following information for completed and current Projects listed above in 7 and 8 for which the Prime Applicant has performed, or has entered into a contract to perform Owner's Project Management Services for all Public Agencies within the Commonwealth within the past 10 years. **Note: We have included only a select group of relevant project references, for the sake of meeting page limitations. If you would like the contact information for any other project, we would be happy to provide it upon request. Please note that some of these projects were completed when CHA was known as Daedalus Projects, Inc. Some clients may still recognize our team by that name. We are the same team operating under a different name.**

a. Project Name And Location Project Director	b. Client's Name, Address and Phone Number. Include Name of Contact Person	a. Project Name And Location Project Director	b. Client's Name, Address and Phone Number. Include Name of Contact Person	a. Project Name And Location Project Director	b. Client's Name, Address and Phone Number. Include Name of Contact Person
1. Lincoln School Lincoln, MA Project Director: Amanda Sawyer, AIA , LEED Green Associate, MCPPO	Buckner Creel Administrator of Business and Finance Ballfield Road Lincoln MA 01773 (781) 259-9401	2. Belmont Middle School and High School Belmont, MA Project Director: Thomas Gatzunis, Sr., PE, CBO, MCPPO	Bill Lovallo Chair, Building Committee Belmont Town Offices 455 Concord Avenue Belmont, MA 02478 (617) 699-9724	3. Tisbury School Vineyard Haven, MA Project Director: Amanda Sawyer, AIA , LEED Green Associate, MCPPO	Michael Watts Chair, Tisbury School Building Committee Vineyard Haven, MA 02568 (617) 838-1228
4. Goodnow Brothers Elementary School Marlborough, MA Project Director: Thomas Gatzunis, Sr., PE, CBO, MCPPO	Mary Murphy Superintendent of Schools 25 Union Street Marlborough, MA 01752 (508) 460-3509 x13801	5. Nauset Regional High School, Eastham, MA Project Director: Joseph Sullivan, MCPPO	Greg Levasseur Chair, Building Committee 78 Eldridge Parkway, RR#2 Orleans, MA 02653 (508) 896-3023	6. Elizabeth G. Lyons Elementary School Randolph, MA Project Director: Thomas Gatzunis, Sr., PE, CBO, MCPPO	Thea Stovell Superintendent of Schools Randolph Public Schools 60 Vesey Road Randolph, MA 02368 (781) 961-6200
7. Benjamin Franklin Classical Charter School, Franklin, MA Project Manager: Amanda Sawyer, AIA , LEED Green Associate, MCPPO	Don Tappin President, Board of Trustees 201 Main Street Franklin, MA 02038 (508) 320-8554	8. Irwin M. Jacobs Elementary School New Bedford, MA Project Manager: Joseph Sullivan, MCPPO	Molly Gilfeather Director of Purchasing 455 County Street New Bedford, MA 02740 (508) 979-1432	9. Leroy L. Wood Elementary School Fairhaven, MA Project Manager: Joseph Sullivan, MCPPO	Christopher Bunnell Chair, Building Committee 128 Washington Street Fairhaven, MA 02719 (401) 275-3000 x1515
10. George H. Mitchell Elementary School Bridgewater, MA Project Director: Joseph Sullivan	Derek Swenson Superintendent of Schools 166 Mt. Prospect Street Bridgewater, MA 02324 (508) 279-2140	11. UIRSD, West Tisbury School Vineyard Haven, MA Project Director: Amanda Sawyer, AIA , LEED Green Associate, MCPPO	Mark Friedman School Business Administrator 4 Pine Street Vineyard Haven, MA 02568 (508) 693-2007	12. UIRSD, Chilmark School Chilmark, MA Project Director: Amanda Sawyer, AIA , LEED Green Associate, MCPPO	Mark Friedman School Business Administrator 4 Pine Street Vineyard Haven, MA 02568 (508) 693-2007
13. J. Henry Higgins Middle School Peabody, MA Project Director: Richard Marks	Dan Doucette City Purchasing Agent 24 Lowell Street Peabody, MA 01960 (978) 538-5700	14. Westport Middle and High School Westport, MA Project Director: Joseph Sullivan, MCPPO	Antonio Viveiros Chair, Building Committee 816 Main Road Westport, MA 02790 (508) 496-1538	15. Franklin High School Franklin, MA Project Director: Richard Marks	Mike D'Angelo Facilities Director 355 East Central Street Franklin, MA 02038 (508) 553-4802

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 1/2" X 11" Supplementary Sheets Will Be Accepted. **APPLICANTS ARE ENCOURAGED TO RESPOND SPECIFICALLY IN THIS SECTION TO THE APPLICATION EVALUATION - PROJECT EXPERIENCE REQUESTED IN THE ADVERTISEMENT**

What makes our team unique?

Choosing the right partner to work alongside you will lead to the successful completion of your project. In summary, here are four reasons you can select the CHA team with the highest level of confidence:

1

Experienced OPM Team

We are a locally-based OPM team with more than 30 years of experience managing public projects in Massachusetts.

Proactive Project Management

Our experienced team can proactively identify problems and recommend solutions that avoid impacting cost, schedule or quality.

2

Expertise in K-12 School Construction

CHA has overseen the successful completion of more than 75 school projects across the Commonwealth including complex renovation/addition projects and multi-million dollar new construction projects.

A Smoother Process

CHA's experience with public school projects allows us to bring expertise and lessons learned to mitigate risks and help to deliver projects on time and on budget.

3

In-house Cost Estimators

CHA is one of the only OPM firms with a dedicated team of in-house cost estimators, who stay constantly apprised of current construction market pricing.

More Opportunities for Cost Savings

Our in-house team will provide suggestions for cost savings during design, stringently negotiate change orders, and verify contractor questions during construction.

4

Depth of Resources

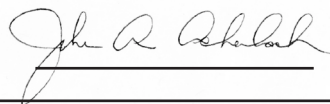
We offer the specialized expertise of our niche OPM team with the support of a national A/E firm. Firm-wide, CHA is a team of over 1,700 multi-disciplined staff.

Solutions Close at Hand

We have readily-available multidisciplinary experts who we can consult on a regular basis, many of whom have extensive experience on similar projects.

11. 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, Section 44 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

John A. Achenbach, Buildings Sector President

Date

5/4/2023

Section 3
Supplemental Information





Tisbury School, Tisbury, MA

CHA is providing OPM services for the renovation and expansion of the K-8 Tisbury School, the oldest elementary school building on Martha’s Vineyard. In response to community input, the project will preserve, renovate, and add to the landmark 1929 brick building in the town center to meet school and community needs.

The construction project will modernize the structure and grow the footprint from 56,000 SF to 76,000 SF, with a new gymnasium and a preschool on campus.



Nauset Regional High School, Eastham, MA

CHA is serving as the OPM beginning with the feasibility study phase to determine the type of construction needed and the site location. Construction will include new additions totaling 106,000 SF and renovations to more than 110,000 SF of the existing school buildings.

The project is being designed and constructed Net-Zero Ready and to U.S. Green Building Council LEED Ratings System LEED v4 BD+C: Schools certification specifications.



Lincoln School, Lincoln, MA

CHA provided OPM services for new construction and renovations totaling more than 165,000 SF. The K-8 school is being designed and constructed Net Zero Ready. The school is anticipated to generate as much electricity as it consumes and will be the first community in the Commonwealth to achieve this level of sustainability in a public school renovation project.

The school includes a central entrance, dining commons, kitchen, flexible learning commons, media center (library), and centralized administration.



George H. Mitchell Elementary School, Bridgewater, MA

CHA served as OPM from feasibility study through the design, construction and close-out of a new three-story, L-shaped 132,045 SF school building. The new school is a steel frame and concrete-on-metal deck structure with masonry, glass, and aluminum skin.

The new school project was completed below the original project budget and on-time for the start of the fall 2022 school year.



Belmont Middle and High School, Belmont, MA

CHA is providing OPM services for a \$295 million project consisting of over 445,100 SF of extensive phased and occupied renovation and the construction of an addition to include added facilities and incorporate grades seven and eight.

The project is being designed and constructed Net Zero Ready and to U.S. Green Building Council LEED Ratings System LEED v4 BD+C: Schools certification specifications.



Irwin Jacobs Elementary School, New Bedford, MA

CHA served as OPM from feasibility study through design and construction of a new 74,000 SF, three-story elementary school. CHA assisted the city in receiving MSBA-funding for the new school, built on the former Hannigan School site in the city’s South End.

The Jacobs School has spacious modern classrooms, a 21st-century library/media center, SPARKS Science Lab, rooftop garden, community reading room, piano lab, full-size indoor gym, and a parent resource room.



Sean Sweeney, CCM, LEED AP BD+C & O+M, MCPPO

Project Executive

Sean has more than 30 years of experience providing clients with solutions for project challenges in government, healthcare, higher education, municipal and pharmaceutical sectors. Sean provides leadership for owner’s project management services, construction management, capital program management, project controls, and advisory services for clients to help them steward their built assets. He has extensive knowledge of emerging technologies, advanced construction techniques, program development, and execution. Representative project experience includes:

Bridgewater-Raynham Regional School District, George H. Mitchell Elementary School. Project executive responsible for overseeing OPM services for design and construction of a new three-story, L-shaped 132,045 SF school building. The building features a simple and efficient floor plan layout that takes advantage of almost all interior space for learning and support service for 740 K-2 students and up to 240 Pre-K students. CHA assisted the district in securing MSBA funding for the project. The new school project, which features an expansive playground and natural outdoor activity area, was completed below the original project budget and on-time for the start of the fall 2022 school year.

Town of Belmont, Belmont Middle School and High School. Project executive responsible for overseeing OPM services for a 445,100 SF, \$295 million project consisting of an extensive phased and occupied renovation and the construction of an addition to include added facilities and incorporate grades 7-8. The project is being designed and constructed Net-Zero Ready and to USGBC LEED Ratings System LEED v4 BD+C: Schools certification specifications. The design includes a comprehensive strategy involving 304 geothermal wells and roof-top photovoltaic panels.

Nauset Public School District, Nauset Regional High School. Project executive responsible for overseeing OPM services beginning with the feasibility study phase to determine the type of construction needed and the site location, among numerous options. MSBA-funded construction is expected to include new additions totaling 106,000 SF and renovations of more than 110,000 SF. The project includes new additions and buildings to accommodate a performing arts center with a 750-seat auditorium, a dining hall, new science and academics building, and a centrally located administration building. Renovated spaces

include the school’s research center, TV studio, black box theater, robotics/innovation labs, and updated academic classrooms. The facility is being designed and constructed Net Zero Ready and to U.S. Green Building Council LEED Ratings System LEED v4 BD+C: Schools.

Town of Lincoln, Lincoln School. Project executive responsible for overseeing OPM services for the renovation of a 127,528 SF K-8 school and an addition of 37,550 SF. The school is designed to meet Net Zero class B standards sustainability in a public school renovation. The school is anticipated to generate as much electricity as it consumes and will be the first community in the Commonwealth to achieve this level of sustainability in a public school renovation project.

Town of Westport, Westport Middle-High School. Project executive responsible for overseeing OPM services for the construction of a new 188,400 SF school for grades 5-12, including hazardous materials abatement, demolition of an existing building, and extensive site improvements. The feasibility study included a detailed review of 18 options, ranging from code compliance upgrades through new construction options on alternate sites for four potential grade configurations. The project included a complex, phased construction schedule to limit the disruption to occupied elementary school and library buildings adjacent to the construction area. The project was designed and constructed for sustainability to achieve LEED Silver certification as determined by USGBC LEED Ratings System LEED BD+C: Schools-v4- LEED v4.

Education

Suffolk University, MA, J.D. in Law
Babson College, MA, M.B.A. in Finance
University of Massachusetts Lowell, MA, B.S. in Civil Engineering

Registrations & Certifications

MA Licensed Construction Supervisor (#054751)
Massachusetts Certified Public Purchasing Official (MCPPO) for School Project Designers and Owner’s Project Managers
LEED Accredited Professional, BD+C & O+M, U.S. Green Building Council
OSHA: 501 Trained

Memberships & Affiliations

Certified Construction Manager, Construction Management Association of America (CMAA)



Thomas Gatzunis, PE, CBO, MCPPO

Project Director

Tom has more than 30 years of experience as an engineer, building commissioner, and project manager. He joined the CHA team after serving as the Commissioner of Public Safety for the Commonwealth of Massachusetts from 2004 to 2015, where he oversaw the update and release of three editions of the state building code. Previously, Tom served for 11 years as the Town Engineer and Building Commissioner for the Town of Belmont. In his tenure with the Town of Belmont, Tom was a part of the Owner’s Team on the Building Committee for the renovations to the Town Hall, Town Hall Annex Building, and several school buildings. Tom has been responsible for public projects across the Commonwealth, of all building types and in all phases of design and construction. Representative project experience includes:

Education

University of Massachusetts Lowell, MA, B.S. in Civil Engineering

Registrations & Certifications

MA Registered Professional Engineer (#33993)

MA Certified Building Commissioner (#0699)

MA Licensed Construction Supervisor (#040611)

Massachusetts Certified Public Purchasing Official (MCPPO) for School Project Designers and Owner’s Project Managers

Memberships & Affiliations

American Society of Civil Engineers

Massachusetts Building Commissioners and Inspectors Association

Town of Belmont, Belmont Middle School and High School.

Senior project manager providing OPM services for a 445,100 SF, \$295 million project consisting of an extensive phased and occupied renovation and the construction of an addition to include added facilities and incorporate grades 7-8. The project is being designed and constructed Net-Zero Ready and to USGBC LEED Ratings System LEED v4 BD+C: Schools certification specifications. The design includes a comprehensive strategy involving 304 geothermal wells and roof-top photovoltaic panels.

City of Marlborough, Goodnow Brothers Elementary

School. Senior project manager providing OPM services for the construction of a new 111,000 SF K-5 school building with a design enrollment of 610 students. The city conducted an extensive feasibility study, including site selection, and ultimately decided to use the MSBA Model School Program. The construction project was completed approximately \$10 million under budget and one full month ahead of schedule.

Town of Randolph, Elizabeth G. Lyons Elementary School.

Senior project manager providing OPM services for a new 74,720 SF elementary school building. CHA assisted the Town of Randolph and the Randolph Public School District in securing MSBA funding for the project. The project aims to create modern, engaging, and flexible spaces for Pre-K to 5 learning. The new school campus increases instructional classrooms and specialized teaching space and improves vehicle parking and site circulation.

Town of Lincoln, Lincoln School. Senior project manager providing OPM services for the renovation of a 127,528 SF K-8 school and an addition of 37,550 SF. The school is designed to

meet Net Zero class B standards sustainability in a public school renovation. The school is anticipated to generate as much electricity as it consumes and will be the first community in the Commonwealth to achieve this level of sustainability in a public school renovation project.

Town of Belmont, Belmont Public Library. Senior project manager providing OPM services for a project to construct a new town library building. The project has included developing cost estimates for systems upgrades/renovation versus cost estimates for a new build. An updated development budget was also created. The current Schematic Design shows the new 41,000 SF library constructed on the site of the existing library. The existing library is well-supported in the town, but needs additional space for gathering, quiet study, and meeting spaces that are not available in the current building. The new library will be better suited to meet the demands of the community.

References

1. Thea Stovell, Superintendent
Randolph Lyons Elementary
(508) 944-9665, stovell@randolph.k12.ma.us
2. Bill Lovallo, Belmont High School Building Committee Chair
LeMessurier Consultants
(617) 868-1200, wlovallo@lemessurier.com
3. Doug Dias, Director of Finance
Marlborough Public Schools
(508) 460-3509, ddias@mpu-edu.org



Amanda Sawyer, AIA, LEED Green Associate, MCPPO

Project Manager

Amanda has more than 20 years of experience delivering architectural and construction projects on time, within budget, and in strict accordance with established specifications. Her project portfolio comprises small to large-scale commercial, public, and residential properties. She has repeatedly identified and acted upon untapped opportunities to deliver substantial cost savings and achieve stakeholder satisfaction. Amanda is well versed in building/design codes and permit acquisition processes. Representative project experience includes:

Town of Lincoln, Lincoln School. Project director providing OPM services for the renovation of a 127,528 SF K-8 school and an addition of 37,550 SF. The school is designed to meet Net-Zero class B standards sustainability in a public school renovation. The school is anticipated to generate as much electricity as it consumes and will be the first community in the Commonwealth to achieve this level of sustainability in a public school renovation project.

Martha’s Vineyard Community Services, Early Childhood Center. Project manager providing OPM services for a new 6,000 SF building to replace the existing outdated facility. The new building houses infant to preschool classrooms, outdoor play areas, a kitchen, and support offices. The outdoor play area includes spaces and playground equipment specifically designed for the ages of children attending the daycare facility. Martha’s Vineyard Community Services (MVCS) hosts an array of social services to meet the community’s needs.

Town of Tisbury, Tisbury School. Project manager providing OPM services for the renovation and expansion of the existing K-8 Tisbury School. Located in Vineyard Haven, it is the oldest elementary school building on Martha’s Vineyard. In response to community input, the project will preserve, renovate, and add to the landmark 1929 brick building in the town center to meet school and community needs. The construction project will modernize the structure and grow the footprint from 56,000 SF to 76,000 SF, with a new gymnasium and a preschool on campus.

Nauset Public School District, Nauset Regional High School. Project executive responsible for overseeing OPM services beginning with the feasibility study phase to determine the type of construction needed and the site location, among numerous

options. Construction is expected to include new additions totaling 106,000 SF and renovations of more than 110,000 SF. The facility is being designed and constructed Net Zero Ready and to USGBC LEED Ratings System LEED v4 BD+C: Schools.

Up-Island Regional School District, Chilmark Public School. Project director overseeing OPM services for renovating and modernizing Chilmark School’s HVAC system, and building envelope improvements including removing existing abandoned attic equipment, installing insulation in roof and gable walls, and new thermostats in classrooms and common spaces. The project includes door and window replacements and installation of an emergency generator.

Up-Island Regional School District, West Tisbury School. Project director overseeing OPM services for the replacement of the West Tisbury School’s existing flat roof, which had outlived its useful life span. The project included improving insulation rating, air barrier/sealing, and overall detailing of envelope components.

Education

University of North Carolina, NC
Bachelor of Architecture and
Bachelor of Arts in Architecture

Registrations & Certifications

Registered Architect, MA (#50461)

LEED Green Associate, United
States Green Building Council
(USGBC)

Massachusetts Certified Public
Purchasing Official (MCPPO) for
School Project Designers and
Owner’s Project Managers

Memberships & Affiliations

American Institute of Architects

Boston Society of Architects

Old Kings Highway Historic District
Committee Member

Sandwich STEM Academy Arts
and Humanities Advisory Board
Member

References

1. Buck Creel, Business Manager
Lincoln School
(781) 259-2623, bcreel@lincnet.org
2. Brooke Clenchy, Superintendent
Nauset Regional High School
(508) 255-8800, clenchyb@nausetschools.org
3. Heather Zolnowski, Executive Director
Benjamin Franklin Classical Charter Public School
(508) 541-3434, hzolnowski@bfccps.org



Aditya Modi, MCPPO

Assistant Project Manager

Adi has more than five years of experience working in the civil/construction industry. He has experience working in many facets of the industry, combining his hands-on fieldwork with his passion as a civil designer, preparing design documents, and managing permitting with local authorities. His portfolio includes a range of public and private projects, including occupied, phased renovation K-12 school projects, municipal, and public safety facilities. Representative project experience includes:

Town of Lincoln, Lincoln School. Assistant project manager providing OPM services for the renovation of a 127,528 SF K-8 school and an addition of 37,550 SF. The school is designed to meet Net Zero class B standards sustainability in a public school renovation. The school is anticipated to generate as much electricity as it consumes and will be the first community in the Commonwealth to achieve this level of sustainability in a public school renovation project.

Town of Tisbury, Tisbury School. Assistant project manager providing OPM services for the renovation and expansion of the existing K-8 Tisbury School. Located in Vineyard Haven, it is the oldest elementary school building on Martha's Vineyard. In response to community input, the project will preserve, renovate, and add to the landmark 1929 brick building in the town center to meet school and community needs. The construction project will modernize the structure and grow the footprint from 56,000 SF to 76,000 SF, with a new gymnasium and a preschool on campus.

Up-Island Regional School District, Chilmark Public School. Assistant project manager providing OPM services for renovating and modernizing Chilmark School's HVAC system, and building envelope improvements including removing existing abandoned attic equipment, installing insulation in roof and gable walls, and new thermostats in classrooms and common spaces. The project includes door and window replacements and installation of an emergency generator.

Up-Island Regional School District, West Tisbury School. Assistant project manager providing OPM services for the replacement of the West Tisbury School's existing flat roof, which had outlived its useful life span. The project included improving insulation rating, air barrier/sealing, and overall detailing of envelope components.

Town of North Attleborough, North Attleborough High School Sports Complex. Assistant project manager providing OPM services for the renovation of the running tracks, home and away bleachers, press box, and perimeter fencing.

Town of Millbury, Millbury Fire Headquarters. Assistant project manager providing OPM services for constructing a new town fire headquarters. In its OPM role, CHA is assisting the town Building Committee with the final design specification, project bidding, award, and project construction. Initial designs show a new facility of approximately 22,000 SF, consisting of a structural steel frame, concrete slab on grade and decks, brick masonry exterior walls, and concrete masonry interior walls at the apparatus bays.

Town of Chilmark, Chilmark Fire Station and Tri-Town EMS Headquarters. Assistant project manager providing OPM services for design and construction of a new fire station for Chilmark and a new Tri-Town EMS headquarters. The town's historic nature was taken into consideration when designing the aesthetic features of the buildings.

References

1. Buck Creel, Business Manager
Lincoln School
(781) 259-2623, bcreel@lincnet.org
2. Michael Watts, Tisbury School Building Committee Chair
Town of Tisbury
(508) 696-4220, michael.watts@mvyps.org
3. Mark Friedman, School Business Administrator
Martha's Vineyard Public Schools
(508) 693-2007, mfriedman@mvyps.org

Education

Northeastern University, MA,
M.S. in Civil Engineering;
Concentration in Construction
Management

Mukesh Patel School of
Technology Management
and Engineering, Mumbai,
India, M.B.A in Technology
Management, Bachelor of
Technology in Civil Engineering

Registrations & Certifications

Massachusetts Certified Public
Purchasing Official (MCPPO) for
School Project Designers and
Owner's Project Managers

OSHA 10- and 30-Hour
Construction Health and Safety
Training

LAI Lean Academy
Certification Course, 2019



Delwyn Williamson, NZIQS
Cost Estimator

Delwyn has more than 35 years of experience in the A/E/C industry. She is affiliated with the New Zealand Institute of Quantity Surveyors, where she received her registration in Quantity Surveying. Her expertise in vertical cost consulting encompasses all project phases for buildings of all types and she specializes in conceptual estimating. Representative project experience includes:

- Town of Lincoln, Lincoln School
- Bridgewater-Raynham Regional School District, George H. Mitchell Elementary School
- Town of Randolph, Elizabeth G. Lyons Elementary School
- Town of Tisbury, Tisbury School
- Town of Fairhaven, Leroy J. Wood Elementary School
- City of Marlborough, Goodnow Brothers Elementary School
- Fitchburg Public Schools, Crocker Elementary School
- Town of Mansfield, Mansfield Elementary School
- Watertown Public Schools, Hosmer Elementary School



Sidni Bragg, MCPPO
Project Controls

Sidni has overseen the management of project controls and project administration, including protocols, submissions, bid document distribution, contract management, and project accounting on more than \$1 billion in publicly funded projects. Representative project experience includes:

- Bridgewater-Raynham Regional School District, George H. Mitchell Elementary School
- Town of Fairhaven, Leroy J. Wood Elementary School
- Town of Fairhaven, East Fairhaven Elementary School
- City of Marlborough, Goodnow Brothers Elementary School
- City of New Bedford, Irwin M. Jacobs Elementary School
- Town of Randolph, Elizabeth G. Lyons Elementary School
- Town of Tisbury, Tisbury School
- Town of Belmont, Middle and High School Expansion/Renovation
- City of Boston, Dearborn 6-12 STEM Academy
- Town of Franklin, Franklin High School
- City of Peabody, J. Henry Higgins Middle School



Derek Richardson, CEM, CBCP, BCxP, PMP
Commissioning Advisor

Derek has almost 10 years of experience in commissioning and facilities engineering. Recently, he managed 85 active commissioning, retro-commissioning, and recommissioning projects throughout New England and New York. His work has involved supervising and completing functional testing of mechanical, electrical, plumbing, fire protection, and building enclosure systems within the public safety, municipal, academic, energy, infrastructure, technology, laboratory, and commercial markets. Representative project experience includes:

- Massachusetts School Building Authority, Commissioning Agent for the following schools:
 - City of Gloucester, West Parish Elementary School
 - City of Newburyport, Bresnahan Elementary School
 - City of Newton, Angier Elementary School and Carr Elementary School
 - Town of Westborough, Fales Elementary School
 - Town of Northbridge, Balmer Elementary School
 - Town of Templeton, Templeton Elementary School



Christina Opper, MCPPO
Communications Specialist

Christina has more than 20 years of experience as a project manager and communications specialist for public projects across the Commonwealth. She is certified by the Massachusetts Certified Public Purchasing Official program. In addition to serving on the project management team, Christina manages the strategic planning and execution of public outreach and communications efforts for our projects. Representative project experience includes:

- Bridgewater-Raynham Regional School District, George H. Mitchell Elementary School
- Town of Tisbury, Tisbury School
- Town of Randolph, Elizabeth G. Lyons Elementary School
- Nauset Regional High School
- City of Leominster, Leominster High School
- City of Peabody, J. Henry Higgins Middle School
- Town of Westport, Westport Middle-High School
- Town of Littleton, Littleton Middle School
- Up Island Regional School District, West Tisbury School

Section 4

Required Certifications



ATTACHMENT D.1
CITY OF NEWTON

BIDDER'S QUALIFICATIONS AND REFERENCES FORM

All questions must be answered, and the data given must be clear and comprehensive. Please type or print legibly. If necessary, add additional sheet for starred items. This information will be utilized by the City for purposes of determining bidder responsiveness and responsibility with regard to the requirements and specifications of the Contract.

- 1. FIRM NAME: CHA Consulting, Inc.
- 2. WHEN ORGANIZED: 1952
- 3. INCORPORATED? YES NO DATE AND STATE OF INCORPORATION: 1/7/1927, New York State
- 4. IS YOUR BUSINESS A MBE? YES NO WBE? YES NO or MWBE? YES NO
- * 5. LIST ALL CONTRACTS CURRENTLY ON HAND, SHOWING CONTRACT AMOUNT AND ANTICIPATED DATE OF COMPLETION:

Please see Section 6 of the attached OPM Application Form.

- * 6. HAVE YOU EVER FAILED TO COMPLETE A CONTRACT AWARDED TO YOU?
 YES NO

IF YES, WHERE AND WHY?
While we have had clients suspend or abandon projects unrelated to any performance issues on the part of CHA, CHA has never failed or refused to complete a contract due to an unwillingness or inability to perform the services or otherwise in breach of contract.

- * 7. HAVE YOU EVER DEFAULTED ON A CONTRACT? YES NO

IF YES, PROVIDE DETAILS.
CHA has never had a contract terminated for cause or default on the part of CHA. Although CHA has occasionally had legal claims asserted against it, some of which have been based on an alleged breach of contract, no such claims have ever resulted in a judgment against CHA.

- * 8. LIST YOUR VEHICLES/EQUIPMENT AVAILABLE FOR THIS CONTRACT:

This contract is for professional services, and as such vehicles and equipment are not a significant factor in performance of the services. To the extent required to perform the contract, CHA owns and will make available all required vehicles and equipment.

- * 9. IN THE SPACES FOLLOWING, PROVIDE INFORMATION REGARDING CONTRACTS COMPLETED BY YOUR FIRM SIMILAR IN NATURE TO THE PROJECT BEING BID. A MINIMUM OF FOUR (4) CONTRACTS SHALL BE LISTED. PUBLICLY BID CONTRACTS ARE PREFERRED, BUT NOT MANDATORY.

PROJECT NAME: Lincoln School
OWNER: Town of Lincoln
CITY/STATE: Lincoln, Massachusetts
DOLLAR AMOUNT: \$ 98 million DATE COMPLETED: July 2022
PUBLICLY BID? YES NO
TYPE OF WORK?: Phased, occupied renovations and new construction

RFQ for Owner's Project Management Services
Franklin Elementary School

CONTACT PERSON: Buckner Creel TELEPHONE #: 781) 259-9401
CONTACT PERSON'S RELATION TO PROJECT?: Lincoln Public Schools Administrator for Business and Finance
(i.e., contract manager, purchasing agent, etc.)

PROJECT NAME: Tisbury School
OWNER: Town of Tisbury
CITY/STATE: Vineyard Haven, Massachusetts
DOLLAR AMOUNT: \$ 78 million (estimated) DATE COMPLETED: 2024 (estimated)
PUBLICLY BID? YES NO
TYPE OF WORK?: Phased, occupied renovations and new construction
CONTACT PERSON: Michael Watts TELEPHONE #: (617) 838-1128
CONTACT PERSON'S RELATION TO PROJECT?: Chair, Tisbury School Building Committee
(i.e., contract manager, purchasing agent, etc.)

PROJECT NAME: Nauset Regional High School
OWNER: Nauset Regional School District
CITY/STATE: Eastham, Massachusetts
DOLLAR AMOUNT: \$ 170 million (estimated) DATE COMPLETED: 2026 (estimated)
PUBLICLY BID? YES NO
TYPE OF WORK?: Phased, occupied renovations and new construction
CONTACT PERSON: Greg Levasseur TELEPHONE #: (508) 896-3023
CONTACT PERSON'S RELATION TO PROJECT?: Chair, School Building Committee
(i.e., contract manager, purchasing agent, etc.)

PROJECT NAME: George H. Mitchell Elementary School
OWNER: Bridgewater-Raynham Regional School District
CITY/STATE: Bridgewater, Massachusetts
DOLLAR AMOUNT: \$ 67.6 million DATE COMPLETED: September 2022
PUBLICLY BID? YES NO
TYPE OF WORK?: New construction
CONTACT PERSON: Gene S. Raymond, Jr. AIA, LEED AP, NCARB TELEPHONE #: (781) 561-5270
CONTACT PERSON'S RELATION TO PROJECT?: Project Architect
(i.e., contract manager, purchasing agent, etc.)

10.

The undersigned certifies that the information contained herein is complete and accurate and hereby authorizes and requests any person, firm, or corporation to furnish any information requested by the City in verification of the recitals comprising this statement of Bidder's qualifications and experience.

DATE: May 4, 2023 BIDDER: CHA Consulting, Inc.


SIGNATURE: 

PRINTED NAME: John A. Achenbach TITLE: Buildings Sector President

ATTACHM3NT D.2

CERTIFICATE OF AUTHORITY – BUSINESS CORPORATIONS

As duly authorized meeting of the Board of Directors of CHA Consulting, Inc.
(name of corporation)
held on February 9, 2022 at which all Directors were present or waived notice, it
was voted that, John A. Achenbach, Buildings Sector President (name) of this company be and hereby is
authorized to execute contracts and bonds in the name and behalf of said company, and affix
its Corporate Seal thereto, and such execution of any contract of obligation in this
company's name on its behalf by such Officer under seal of the company, shall be valid and
binding upon this company.

A TRUE COPY 
ATTEST (clerk or secretary)
Thomas D. Titsworth
Assistant Secretary
CHA Consulting, Inc.

Place of Business



ATTACHMENT D.3

CERTIFICATION OF VOTE

I hereby certify that I am the ^{Assistant Secretary}~~clerk/secretary~~ of the CHA Consulting, Inc.
(name of company)
John A. Achenbach
that is the duly elected Buildings Sector President of said company, and the
above vote has not been amended or rescinded and remains in full force and
effect as of the
4th day of May, 2023, date on which the corporation's
authorized representative, named above, affixed his/her signature to this contract.

Assistant Secretary
~~Clerk or Secretary~~
(Corporate Seal)

Theresa D. Tiller



ATTACHMENT D.4

SATISFACTION OF STATE TAX REQUIREMENTS

ATTEST FORM

Pursuant to M.G.L. Chapter 49A, I certify under the penalties of perjury that I, to my best knowledge and belief, have filed all state tax returns and paid all state taxes required under law.

16-0966259

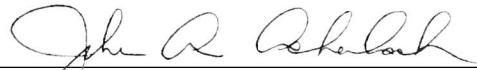
Social Security Number or
Federal Identification Number

CHA Consulting, Inc.

Signature of Individual
or Corporate Name

May 4, 2023

Date:



Corporate Officer (if applicable)

ATTACHMENT D.5

CERTIFICATE OF FOREIGN CORPORATION

The undersigned hereby certifies that it has been duly established, organized, or chartered as a corporation under the laws of:

The State of New York

(Jurisdiction)

The undersigned further certifies that it has complied with the requirements of M.G.L. c. 30, §39L (if applicable) and with the requirements of M.G.L. c. 156D, §15.03 relative to the registration and operation of foreign corporations within the Commonwealth of Massachusetts.

John A. Achenbach, Buildings Sector President

Name of person signing proposal



Signature of person signing proposal

CHA Consulting, Inc.

Name of Business (Please Print or Type)

Affix Corporate Seal here



ATTACHMENT D.6

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person, business, partnership, corporation, union committee, club or other organization, entity or group of individuals.



Signature of individual submitting bid or proposal

John A. Achenbach
Buildings Sector President
CHA Consulting, Inc.

Name of Business

ATTACHMENT D.7

City of Newton



Mayor
Ruthanne Fuller

Purchasing Department
Nicholas Read *Chief Procurement Officer*
1000 Commonwealth Avenue
Newton Centre, MA 02459-1449
purchasing@newtonma.gov

Telephone
(617) 796-1220
Fax:
(617) 796-1227
TDD/TTY
(617) 796-1089

Date:

Vendor

Re: Debarment Letter for Invitation For Bid # 23-98

As a potential vendor on the above contract, the City requires that you provide a debarment/suspension certification indicating that you are in compliance with the below Federal Executive Order. Certification can be done by completing and signing this form.

Debarment:

Federal Executive Order (E.O.) 12549 "Debarment and Suspension" requires that all contractors receiving individual awards, using federal funds, and all sub-recipients certify that the organization and its principals are not debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal department or agency from doing business with the Federal Government.

I hereby certify under pains and penalties of perjury that neither I nor any principal(s) of the Company identified below is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency.

John A. Achenbach, Buildings Sector President _____ (Name)

CHA Consulting, Inc. _____ (Company)

575 Broadway, Suite 301 _____ (Address)

Albany, NY 12207 _____ (Address)

PHONE (518) 453-2817 _____ FAX

(518) 458-1735 _____

EMAIL JAchenbach@chacompanies.co, _____

 _____ Signature

May 4, 2023 _____ Date

If you have questions, please contact Nicholas Read, Chief Procurement Officer at (617) 796-1220.

Request for Taxpayer Identification Number and Certification

**Give Form to the
 requester. Do not
 send to the IRS.**

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	<p>1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. CHA Consulting Inc</p> <p>2 Business name/disregarded entity name, if different from above</p>	
	<p>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.</p> <p><input type="checkbox"/> Individual/sole proprietor or single-member LLC</p> <p><input checked="" type="checkbox"/> C Corporation</p> <p><input type="checkbox"/> S Corporation</p> <p><input type="checkbox"/> Partnership</p> <p><input type="checkbox"/> Trust/estate</p> <p><input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____</p> <p>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.</p> <p><input type="checkbox"/> Other (see instructions) ▶ _____</p>	<p>4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from FATCA reporting code (if any) _____</p> <p><small>(Applies to accounts maintained outside the U.S.)</small></p>
	<p>5 Address (number, street, and apt. or suite no.) See instructions. III Winners Circle</p> <p>6 City, state, and ZIP code Albany, NY 12205</p>	<p>Requester's name and address (optional)</p>
	<p>7 List account number(s) here (optional)</p>	

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									
1	6		-	0	9	6	6	2	5
9									

Part II Certification

Under penalties of perjury, I certify that:

- 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
- 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
- I am a U.S. citizen or other U.S. person (defined below); and
- 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 ▶	Date ▶
------------------	----------------------------	--------

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-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.

ATTACHMENT D.9

Business Category Information Form*

IFB No. 23-98

Owner's Project Manager Franklin School

Business Type Categories*	Select All That Apply
MBE: Minority-Owned Business Enterprise	n/a
WBE: Women-Owned Business Enterprise	n/a
VBE: Veteran Business Enterprise	n/a
SDVOBE: Service-Disabled Veteran-Owned Business Enterprises	n/a
DOBE: Disability-Owned Business Enterprise	n/a
LGBTBE: Lesbian, Gay, Bisexual, Transgender Business Enterprise	n/a

*Information is being collected as part of a City initiative to open contract opportunities to underrepresented vendors.

I do not wish to complete this form.

There is no penalty for persons who do not complete this Form, and whether or not the Form is completed will not be taken into consideration in awarding a bid.

I certify that the foregoing information is true and correct.

John A. Achenbach, Buildings Sector
President
CHA Consulting, Inc.

By:  _____

Date: May 4, 2023

Exceptions

If awarded a contract as a result of this RFQ, CHA would respectfully request the opportunity to negotiate mutually acceptable changes to the proposed contract terms and conditions consistent with industry standards for professional OPM services, including the following proposed revisions to the sample Contract included in the RFQ as Attachment B:

Section	Requested Revision
4.3	In the fourth line of Section 4.3, insert the phrase, "or for supervising, monitoring or enforcing such safety precautions or programs," after the phrase, "in connection with the Project,".
4.4	Insert the phrase, "Upon written notice thereof to Owner's Project Manager," at the beginning of the first sentence of the Section; delete the phrase, "without any additional compensation" at the end of the first sentence and replace it with the phrase, "insofar as applicable to the Owner's Project Manager's Services." In the second sentence, delete the phrase, "prior to such Services being performed" and replace it with the phrase, "at the time of execution of this Contract".
8.1.2.1	Add a new sentence at the end of the Section that reads, "Notwithstanding anything to the contrary in this Section or in this Contract, the Owner's Project Manager shall not be responsible or liable for cost overruns incurred by the CM at Risk, any Contractor, Designer, or any other Project participant other than Owner's Project Manager, or for ensuring that actual Project costs do not exceed the Project Budget."
8.1.3	Delete the phrase, "Contractor's or CM at Risk's safety performance," and the phrase, "Contractor's or CM at Risk's environmental compliance" in the last sentence of the Section, and insert the phrase, "Owner's Project Manager believes" before the phrase, "could result" in the last sentence of the Section.
12.3.1	Please add a reasonable notice and cure period prior to any termination for cause. Add at the end of the last sentence in the section, ", and Owner's Project Manager shall be reimbursed for expenses properly incurred, and paid for Services properly performed, prior to the date of termination, less any additional costs and damages incurred by the Owner by reason of any breach of this Contract by Owner's Project Manager."
14.1	Delete the word, "defend" in the second line of the Section.
14.4	Add a new provision that reads, "In no event shall the Owner be liable to the Owner's Project Manager, or the Owner's Project Manager to the Owner, for consequential or indirect damages, including but not limited to, loss of profits or revenue, loss of use of equipment, loss of production, additional expenses incurred in the use of the equipment and facilities and claims of customers of the Owner. This disclaimer shall apply to consequential damages based upon any cause of action whatsoever asserted including ones arising out of any breach of contract, warranty, guarantee, products liability, negligence, tort, strict liability, or any other cause pertaining to the performance or non-performance of the Contract by the Owner and/or the Owner's Project Manager."