



COUNTRYSIDE ELEMENTARY SCHOOL PROJECT

COUNTRYSIDE
SCHOOL BUILDING
COMMITTEE



Countryside School Building Committee Meeting

January 18, 2022



Agenda

January 18, 2022

**COUNTRYSIDE
SCHOOL BUILDING
COMMITTEE**

Part 1

Welcome and Introduction- Liam Hurley

Cs-SBC Committee Members

Highlights of 8 MSBA Modules- Alex Valcarce

Project Timeline- Josh Morse

Role & Integration of SBC- Alex Valcarce

Part 2

Committee Organization

Committee Authorizations

Next Steps 3-6 Months



Cs-SBC Committee Members

COUNTRYSIDE SCHOOL BUILDING COMMITTEE

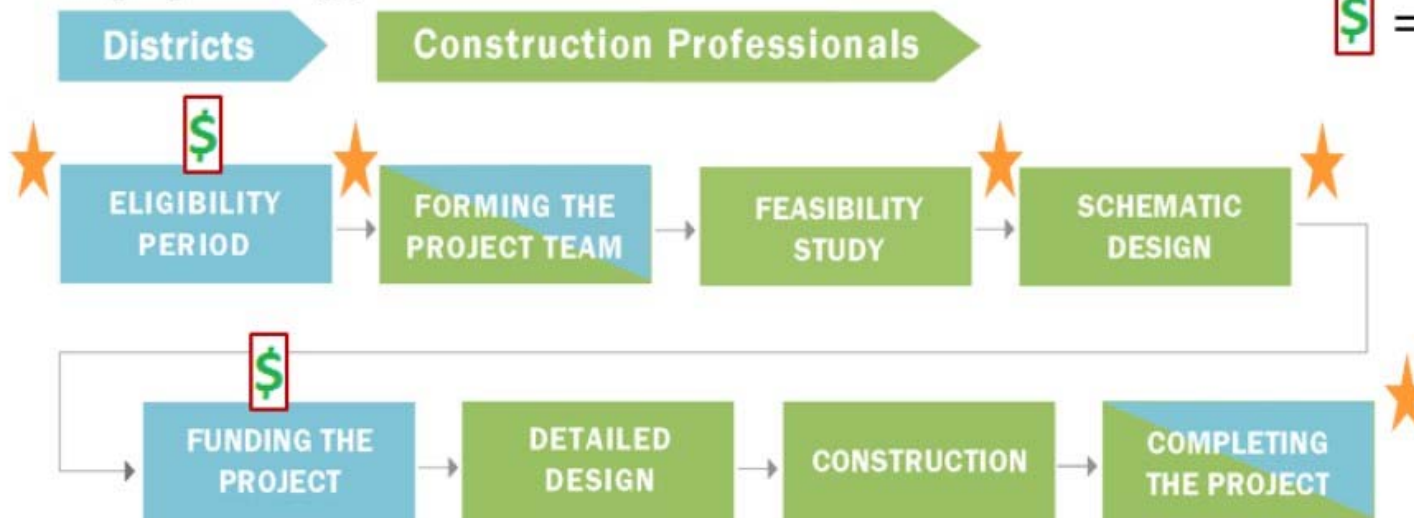
Name	CsSBC Voting Member	Working Group
Jonathan Yeo	X	X
Ruthann Fuller		
Emily Prenner	X	X
David Fleishman		
Josh Morse	X	X
Beth Herlihy	X	X
Ayesha Farag	X	
Maureen Lemieux	X	
Peter Barrer		
Ellen Light		
Tamika Olszewski		
Cove Davis	X	
Liam Hurley	X	X
Andreae Downs	X	X
David Kalis	X	
Patricia Byrne	X	
Lori Zinner	X	
Andrew Lee		
Stephanie Gilman		X
David Stickney		
Alex Valcarce		X
Maura Tynes		X

MSBA Building Process

★ = Board Vote

🇺🇸 = Funding Vote

Steps primarily for:

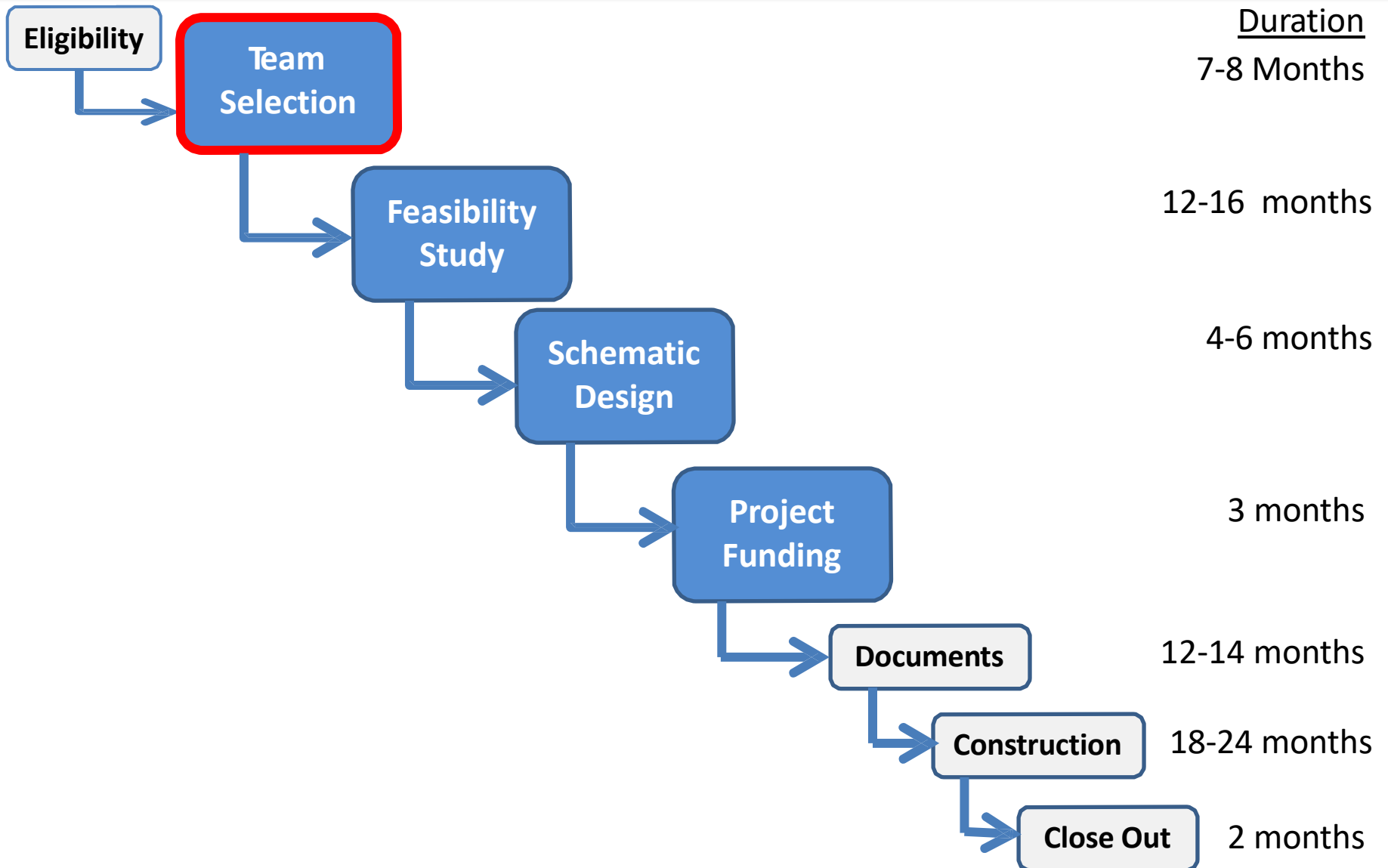


For more on Module 2 – Forming the Team go to
<https://www.massschoolbuildings.org/building/team>

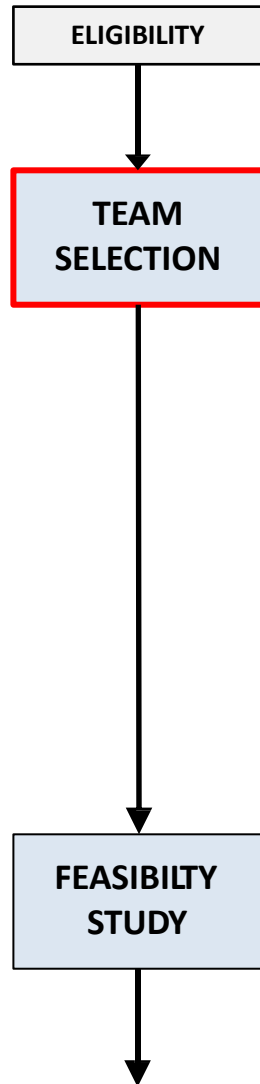
MSBA Process

Modules Overview

**COUNTRYSIDE
SCHOOL BUILDING
COMMITTEE**



MSBA Process



ACCEPTANCE INTO ELIGIBILITY MODULE – Commenced 6/1/2021 – Concluded 2/26/2022

- Certify Program Compliance – Submitted 6/2021
- Form School Building Committee (SBC) - Submitted 6/2021
- Educational Program Questionnaire & Online Enrollment Projection - Submitted 6/2021
- Provide Maintenance / Capital Improvements Information - Submitted 6/2021
- Local Vote Authorization Feasibility Study Funding – Submitted 6/2021
- Enrollment Certification –MSBA recommendation – 11/17/2021
- **MSBA Board Invites Newton into Feasibility Phase – 12/15/2021**

SELECT OWNER’S PROJECT MANAGER (OPM)

- **City / SBC advertises, Interviews, Ranks & Selects OPM**
- City Negotiates OPM Services Contract
- MSBA OPM Panel Approves Selected OPM

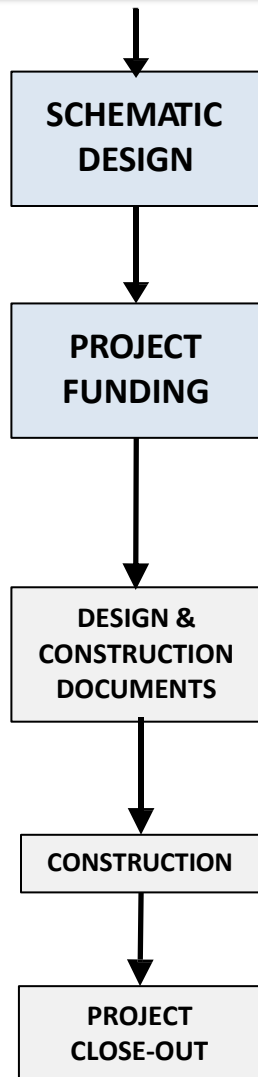
SELECT DESIGNER

- City advertises Request for Services (RFS) for Designer
- City assigns three (3) members to MSBA Designer Selection Panel
- Designer Selection Panel Ranks Designers
- City Negotiates Design Services Contract.

CONDUCT FEASIBILITY STUDY

- Designer & OPM Develop Feasibility Study Alternative Concepts
- City approves Preferred Alternative
- MSBA approves Feasibility Study & Preferred Alternative

MSBA Process (cont)



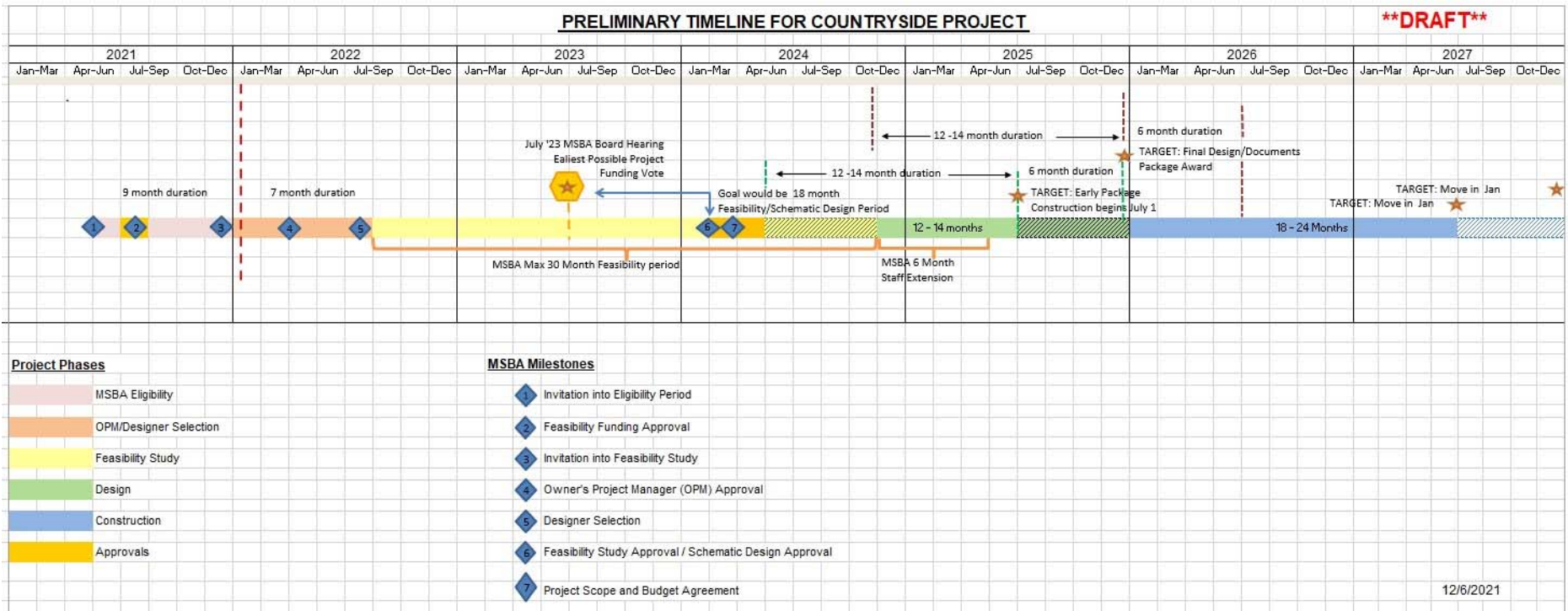
DEVELOP SCHEMATIC DESIGN & SITE PLAN APPROVAL

- Develop Final Design Program and Robust Schematic
- Establish Scope, Budget and Final Schedule
- MSBA approves Schematic Design
- City Site Plan & Schematic Design Approvals

PROJECT FUNDING

- **MSBA Board Vote - No sooner than July 2023**
 - MSBA determines Financial Assistance
 - City & MSBA establish Scope & Budget Agreement
 - City approves Project Funding
 - City / MSBA Execute Project Funding Agreement
-
- City’s Design Team advances design and construction documents
 - MSBA monitors project progress
-
- City with OPM and MSBA monitor construction progress
-
- MSBA performs final audit, determines final total grant amount

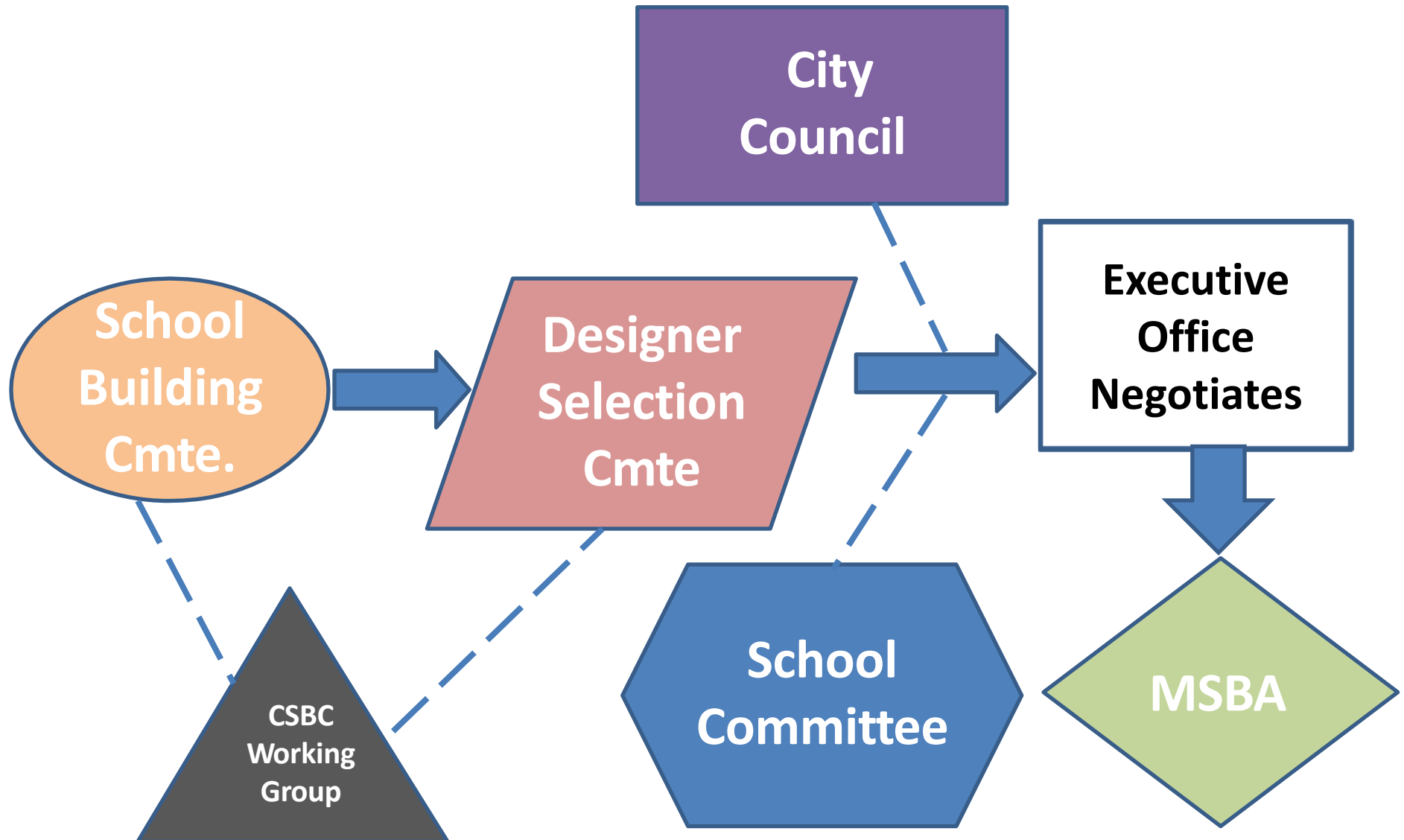
Typical MSBA Funded Project Timeline



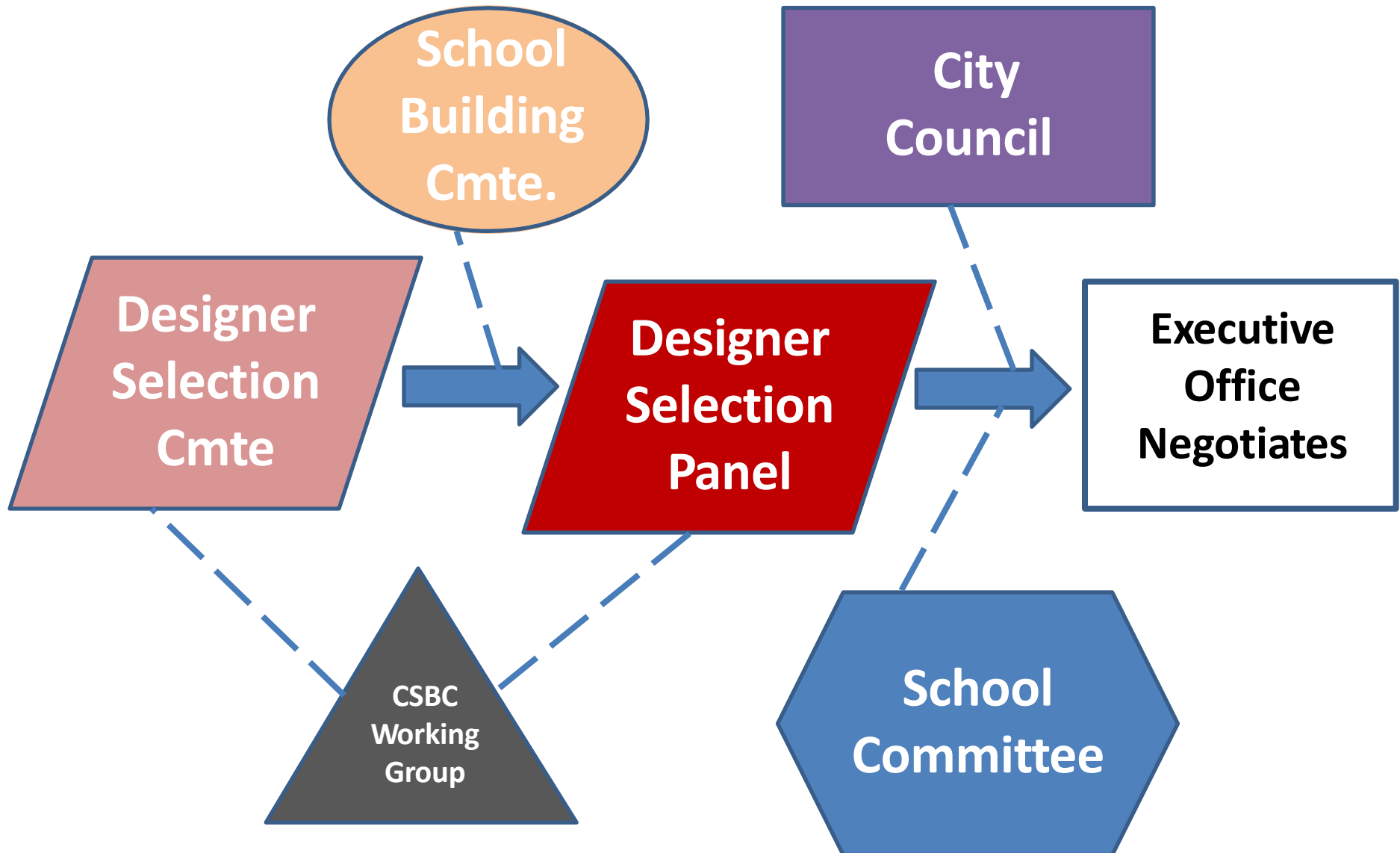
School Building Committee Role & City Process

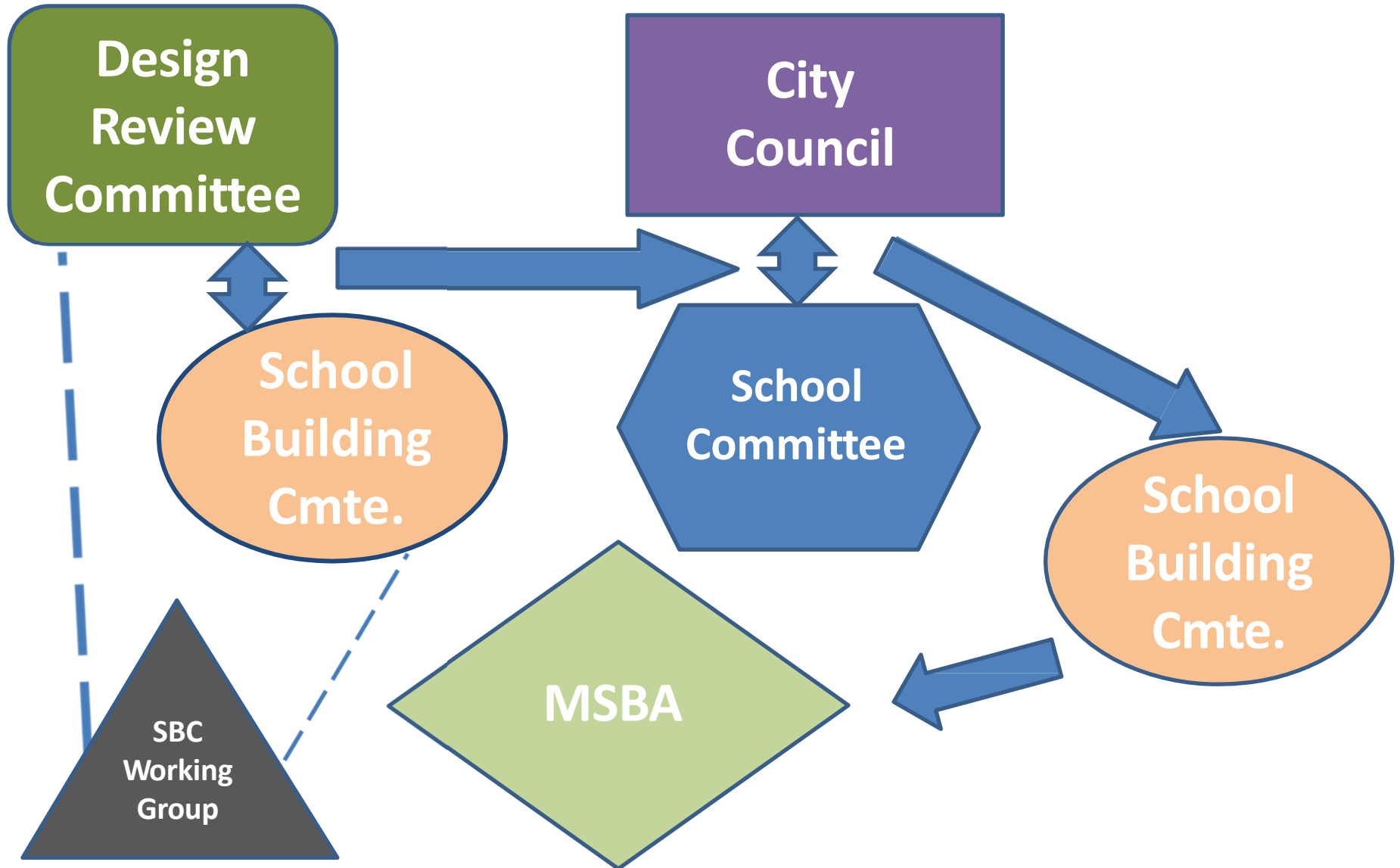


Selection of Owner's Project Manager – City Process



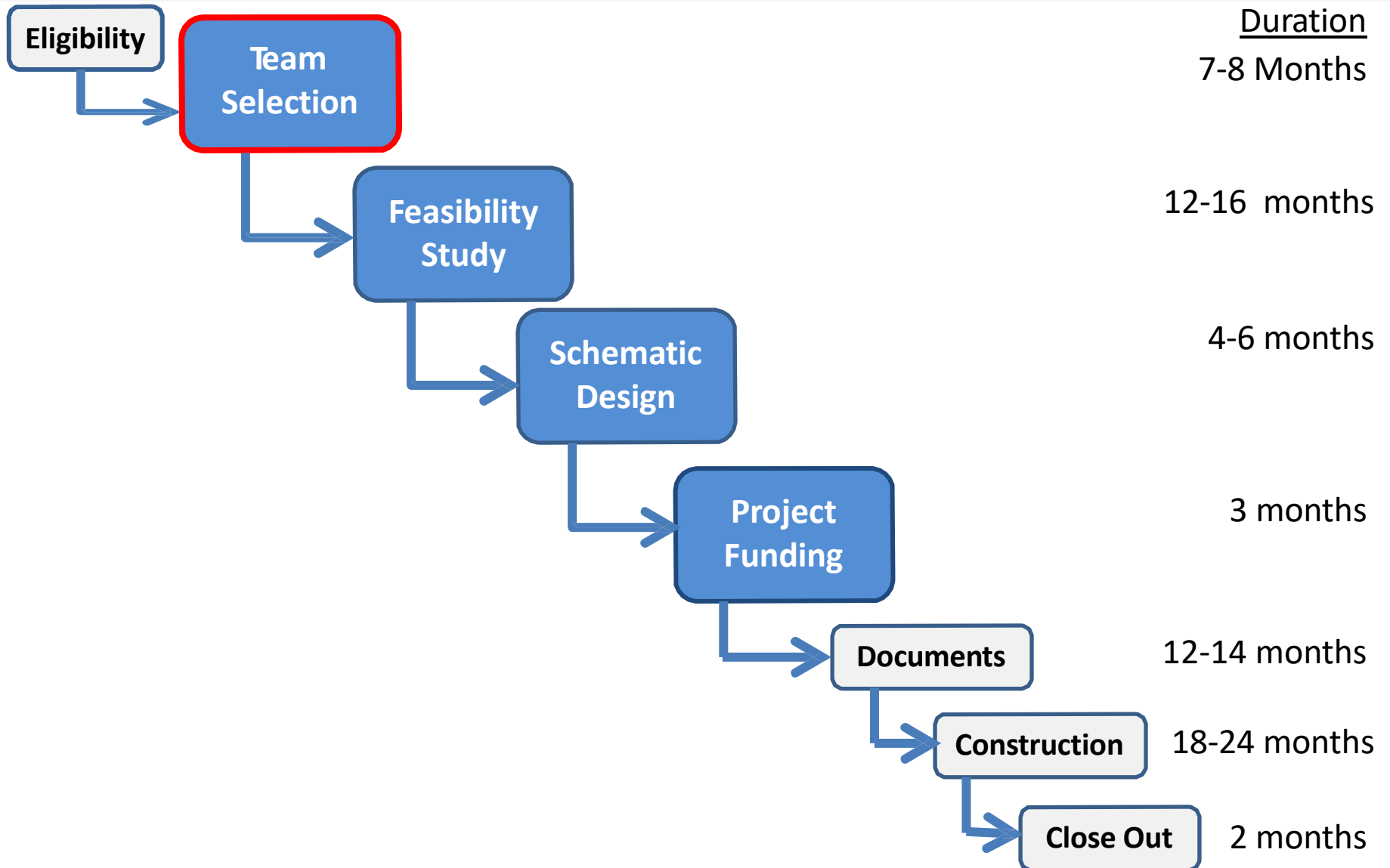
Selection of Designer MSBA Process





MSBA Process

Modules Overview





Agenda

January 18, 2022

COUNTRYSIDE
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PART 2

Committee Organization:

Determine Requirements for a Quorum
Determine Number of Votes Required for
Recommendations to MSBA

Committee Authorizations:

Authorize Designer Selection Committee (DSC)
To Select Owner's Project Manager (OPM)
Authorize Request for Services (RFS)
Authorize Advertisement of OPM RFS



SBC Committee Organization

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Members Required for A Quorum:

Motion:

Moved that a majority of the voting members of the Countryside School Building Committee constitute a quorum.

Vote required for Approval of Matters:

Motion:

Moved that matters coming before the Countryside School Building Committee that require a vote be approved by a majority of those voting members present.



Designer Selection Committee

COUNTRYSIDE
SCHOOL BUILDING
COMMITTEE

Designer Selection Committee

Required under Section 5-35 of Revised City Ordinances

Committee Members:

Howard Goldberg, P.E. - Chair

Mr. Goldberg has over 40 years of experience in the management, design and construction of a wide variety of public and private projects in diverse fields. Howard has managed multi-disciplinary teams of designers on complex projects with critical completion schedules and has been involved in value engineering workshops, technical advisory groups and performed constructability reviews.

Amy MacKrell AIA, LEED AP BD+C

Ms. MacKrell of Miller Dyer Spears creates thriving campus environments, serving as Design Principal on many of the firm's student life, academic, workplace, and health care projects. Her balanced design approach and attention to detail draws on more than three decades of experience. She is particularly skilled at identifying design opportunities that elevate environmental quality, advance institutional goals, and fully realize the potential of each project. Ms. MacKrell is a 30-year resident of Newton.



Designer Selection Committee

COUNTRYSIDE
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Committee Members:

Kenneth White

Mr. White is a Project Executive with Walsh Brothers with extensive experience in the construction management industry. Ken's unique ability to relate to a client while enhancing their space and minimizing disruptions to their routine is what makes him an exceptional asset to any project team. Ken brings over 30 years of seasoned construction experience to this assignment.

Tamar Warburg AIA, LEED AP BD+C

Ms. Warburg, Director of Sustainability and Resilience at Sasaki works with teams to develop sustainability and resilience goals appropriate for each project and access critical resources to reach those goals. She enjoys collaborating to integrate sustainability considerations throughout the design process, from preliminary programming through construction management practices. Tamar has 25 years of experience designing educational and community buildings.



Designer Selection Committee

COUNTRYSIDE
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Committee Members:

Daniel Funk

As City Solicitor for 32 years Mr. Funk developed and manage the Newton Law Department. As a mentor/manager, he assembled and fostered the development of a skillful professional team that possessed the broad, diverse, and specialized expertise necessary to effectively respond to issues affecting the City. Among his range of experience substantive areas of included: land use matters, zoning, subdivision control, environmental law, contract and public bid issues, conflicts of interest; public records law; and open meeting laws.

John Synnott

Mr. Synnott has been a registered architect for over 40 years and has worked at The Architects Collaborative, Cannon, and Tsoi/Kobus & Associates. He has held positions of Vice President, Principal and Associate Principal. He has spent his career solving difficult planning, design and budget issues on large health care projects at some of the most prestigious academic medical centers in the country. Jack is currently retired and has been a Newton resident for over 41 years.



Owner's Project Manager Procurement

COUNTRYSIDE
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Delegation Regarding Procurement of OPM Services:

Motion:

Moved that the Designer Selection Committee established by Section 5-35 of the Revised Ordinances of the City of Newton be authorized to oversee the selection of the OPM in accordance with the requirements of City ordinances, state laws and regulations, and Massachusetts School Building Authority's requirements for the Countryside Elementary School Project.

Composition of Selection Committee for Procurement of OPM Services:

Motion:

Moved that the composition of the Designer Selection Committee for procurement of OPM services for the Countryside Elementary School Project shall be in accordance with the requirements of Section 5-36 of the Revised Ordinances of the City of Newton.



Owner's Project Manager Request For Services

COUNTRYSIDE
SCHOOL BUILDING
COMMITTEE

Project Description:

At the December 15, 2021, Board of Directors meeting, the MSBA voted to issue an invitation to the Owner to conduct a feasibility study for this Statement of Interest (SOI) to identify and study possible solutions and, through a collaborative process with the MSBA, reach a mutually-agreed upon solution.

As indicated in the MSBA's enrollment letter for the City of Newton's Countryside Elementary School, and agreed upon by the City in signing the Study Enrollment Certification, the design alternatives which may be evaluated as part of the feasibility for the Proposed Project shall be in accordance with the following:

Enrollment for Grades K-5, in the Countryside Elementary School	Enrollment for Grades K-5, in an expansion of the Countryside Elementary School
340 students	465 students

In addition, it is anticipated that the feasibility study will review the problems identified in the SOI at the Countryside elementary School.



Owner's Project Manager Request For Services

COUNTRYSIDE
SCHOOL BUILDING
COMMITTEE

Project Objectives and Services:

- **Identifying other community concerns** that may impact study options.
- **Investigate the most appropriate swing space.**
- **Ensuring that the educational program is fully understood and incorporated into the process.**
- **Developing a design that is of high quality, efficient, cost effective,** and that conforms to the educational program and the Northeast Collaborative for High Performance Schools criteria, NE-CHPS. Or US Green building Council's LEED for Schools Rating System at a minimum and complying with all applicable regulatory requirements including the Massachusetts Stretch Code which has been adopted by the City of Newton, and City of Newton Public Buildings Department Building Design and Construction Sustainability Guideline.
- **Collaborating in the development of Iterative Whole Building Energy Models.** The project will require additional modeling beyond that which may be required in fulfillment of other project objectives. Prior to the conclusion of the Feasibility Phase the project will seek to establish the lowest possible Energy Use Intensity (EUI) based on Life Cycle Costs and available funding.
- **Development and evaluation of creative energy efficiency solutions** and innovative alternative sustainable design solutions, including but not limited to active/passive solar, geothermal, etc., and identifying alternate funding sources, first costs and paybacks.



Owner's Project Manager Request For Services

COUNTRYSIDE
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Project Objectives and Services:

- **Developing accurate and complete cost estimates**, including life cycle cost analysis of operating the school as it relates to future operational budgets.
- **Determining appropriateness of CM-at-Risk delivery Method for the Project.**

Minimum Requirements:

- **The Project Director** shall be a person who is registered by the Commonwealth of Massachusetts as an architect or professional engineer and who has at least five years' experience in the construction and supervision of construction and design of public buildings;
or,
- if not registered as an architect or professional engineer, the Project Director must be a person who has at least seven years of experience in the construction and supervision of construction and design of public buildings.

Evaluation Criteria:

A. Relevant Experience

1. **Past performance of the Respondent**, if any, with regard to public, private, DOE funded and MSBA-funded school projects across the Commonwealth, as evidenced by:



Owner's Project Manager Request For Services

COUNTRYSIDE
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Evaluation Criteria:

- a. Documented performance on previous projects as set forth in Attachment C, including the number of projects managed, project dollar value, number and percentage completed on time, number and dollar value of change orders, average number of projects per project manager per year, number of accidents and safety violations, dollar value of any safety fines, and number and outcome of any legal actions;
- b. Satisfactory working relationship with designers, contractors, Owner, the MSBA and local officials.

B. Knowledge of Codes, Procurement and Sustainability

1. **Provide examples of and demonstrate the Respondents** past performance and thorough knowledge of the Massachusetts State Building Code.
2. **Provide examples of and demonstrate the Respondents** past performance and thorough knowledge of Commonwealth construction procurement laws.
3. **Thorough knowledge and experience with CM-at-Risk Procurement methodology.**
4. **Familiarity with Northeast Collaborative for High Performance Schools criteria (NE-CHPS) or USGBC LEED for Schools Rating System (LEED-S).**
5. **Thorough knowledge and demonstrated experience** with life cycle cost analysis cost.
6. **Knowledge of the purpose and** practices of the services of Building Commissioning Consultants.



Owner's Project Manager Request For Services

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Evaluation Criteria:

C Project Understanding and Approach

- 1. Management approach:** Describe the Respondent's approach to providing the level and nature of services required as evidenced by proposed project staffing for a potential (hypothetical) proposed project for new construction of approximately 60,000-75,000 square feet or renovation of approximately 36,000 square feet of existing and new addition such that the total building will meet the space requirements of the MSBA study enrollments of 340 and 465 students; proposed project management systems; effective information management; and examples of problem solving approaches to resolving issues that impact time and cost.

D. Project Team / Commitments / Availability

- 1. Key personnel:** Provide an organizational chart that shows the interrelationship of key personnel to be provided by the Respondent for this project and that identifies the individuals and associated firms (if any) who will fill the roles of Project Director, Project Representative and any other key roles identified by the Respondent, including but not limited to roles in design review, estimating, cost and schedule control. Specifically, describe the time commitment, experience and references for these key personnel including relevant experience in the supervision of construction of several projects that have been either successfully completed or in process that are similar in type, size, dollar value and complexity to the project being considered.

Owner's Project Manager Request For Services

Evaluation Criteria:

E. Firm Qualifications / Capacity

- 1. Capacity and skills:** Identify existing employees by number and area of expertise (e.g. field supervision, cost estimating, schedule analysis, value engineering, constructability review, quality control and safety). Identify any services to be provided by Sub-consultants.
- 2. Provide references as set forth in Attachment C,** and from Owner's, Designers and Contractors who have all collaborated together with the Respondent on projects of similar size and complexity.
- 3. Identify the Respondent's current and projected workload** for projects estimated to cost in excess of \$1.5 million.
- 4. Financial Stability:** Provide two years of financial statements including current balance sheet, income statement, and a Certificate of Insurance that certifies the OPM can meet the insurance requirements set forth in the Contract for Project Management Services, Attachment B.
- 5. Quality of work and level of performance.** The Owner will seek evidence of practicality, creativity, attention to detail and follow through, as well as professional competence.
- 6. Ability to schedule, undertake and complete responsibilities in a timely manner.**



Owner's Project Manager Request For Services

COUNTRYSIDE
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Evaluation Criteria: Scoring and Ranking

Based upon the responses to the above Evaluation Criteria, the Owner will rank the Respondents in each of the above categories, and will weight them as follows:

A. Relevant Experience:	20%
B. Knowledge of Codes, Procurement and Sustainability:	15%
C. Project Understanding and Approach:	30%
D. Project Team Commitments / Availability:	20%
E. <u>Firm Qualifications / Capacity:</u>	15%
TOTAL	100%



Legal Notice Request For Services

COUNTRYSIDE
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OWNER'S PROJECT MANAGER SERVICES

The **City of Newton, ("Owner")**, acting through the **Countryside School Building Committee and Designer Selection Committee**, is seeking the services of a qualified "Owner's Project Manager" as defined in Massachusetts General Laws Chapter 149, § 44A½(c) and as further defined by provisions stated in the RFS to provide Project Management Services for the design, construction, demolition, addition to and/or renovation of the Countryside Elementary School (the "Proposed Project"), located at 191 Dedham Street, Newton Highlands, Massachusetts 02461.

The City of Newton is requesting the services of an Owner's Project Manager to represent the Owner during the feasibility study and schematic design phases of the contract, which may be amended to include continued Project Management Services through design development, construction documents, bid and award, construction, and final closeout of the Proposed Project. The estimated total project costs of an approved Proposed Project may range from \$43 million to \$53 million depending upon the solution agreed upon by the Owner and the MSBA and ultimately approved by a vote of the MSBA Board of Directors.

A voluntary informational meeting and site inspection will be conducted by the City of Newton on Tuesday, February 1, 2022, at 3:30 PM at the Countryside Elementary School site located at 191 Dedham Street, Newton Highlands, Massachusetts, 02461.

The complete RFS may be obtained on or after January 27, 2022, from the Owner's website <https://www.newtonma.gov/government/purchasing/current-bids> or by contacting the Purchasing Department: purchasing@newtonma.gov 617-796-1220 from 10:00AM to 4:30 PM Monday-Friday.

Proposals will be received in hard copy only at the Purchasing Department located at Newton City Hall, 1000 Commonwealth Avenue, Newton, Massachusetts 02459 until 10:00 AM on February 10, 2022.

All questions regarding this RFS should be directed to Mr. Nicholas Read, Chief Procurement Officer, by email to: purchasing@newtonma.gov. Questions will be accepted until February 4, 2022, at 12:00 PM.

OPM RFS / Advertisement Authorization

Authorize RFQ and Advertise for OPM Services:

Motion:

Moved that the City of Newton acting through its Public Buildings Commissioner and Designer Selection Committee issue a Request for Services for an OPM for the Countryside Elementary School Project and place an advertisement for such RFS at the earlier date possible.

Next Steps

Schedule:

Invitation to Feasibility December 15, 2021
Forming the Team

OPM Selection	January –March 2022
Designer Selection	April – July 2022
Feasibility Study Kick-Off	August 2022

Anticipated Cs SBC / DRC Meetings:

March 22, 2022	6:00 PM
April 26, 2022	6:00 PM
May 24, 2022	6:00 PM
June 21, 2022	6:00 PM
July 21, 2022	6:00 PM
August 23, 2022	6:00 PM
September 20, 2022	6:00 PM



Next Steps

COUNTRYSIDE
SCHOOL BUILDING
COMMITTEE

Information and Updates:

Project E-Mail countryside@newtonma.gov

Contact

Josh Morse or Alex Valcarce
Newton Public Buildings
617 796 1600

Meeting Concluded:

Thank You for your Participation



COUNTRYSIDE ELEMENTARY SCHOOL PROJECT

COUNTRYSIDE
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