

**REQUEST FOR SERVICES (RFS)  
OWNER'S PROJECT MANAGER (OPM) FOR STERLING MIDDLE SCHOOL  
CITY OF QUINCY  
QUINCY, MASSACHUSETTS**



**NOTICE**

**2015**

The **City of Quincy**, (öOwnerö) is seeking the services of a qualified öOwnerø Project Managerö as defined in Massachusetts General Laws Chapter 7 Designer services and as further defined by the provisions of this RFS, to provide Project Management Services for the design, construction, addition to and /or renovation of the Sterling Middle School (öSchoolö) in Quincy, Massachusetts (öProjectö).

Proposals will be received at the office of the Purchasing Department; City Hall; 1305 Hancock Street; Quincy, MA 02169, until **January 15, 2015 @ 11:00 a.m.**

Detailed specifications are available on-line at the City of Quincyø website, [www.quincyma.gov](http://www.quincyma.gov) and also available at the office of the Purchasing Agent, Quincy City Hall, 1305 Hancock Street, Quincy, Massachusetts, 02169, between the hours of 8:30<sup>AM</sup> and 4:30<sup>PM</sup>

The City of Quincy shall determine the selected proposer(s). The City of Quincy reserves the right to withdraw the Request for Services Proposals; to reject any and all proposals; and to accept any proposal deemed to be in the best interest of the City of Quincy.

All questions regarding this bid should be directed to Kathryn R. Hobin, Purchasing Agent through fax: 617-376-1074 and email: [khobin@quincyma.gov](mailto:khobin@quincyma.gov) and cc: to [kimtrillcott@quincyma.gov](mailto:kimtrillcott@quincyma.gov) Questions will be accepted until January 9, 2015 at 4:00 p.m.

Thomas P. Koch, MAYOR

Kathryn R. Hobin, PURCHASING AGENT

LEGAL: DECEMBER 31, 2014  
LEGAL: JANUARY 1, 2015  
LEGAL: DECEMBER 31, 2015

CENTRAL REGISTER  
P.O. # S011515  
P.O. # G011515

DEPT. CHARGED: PUBLIC BUILDING  
DEPT. CHARGED: PUBLIC BUILDING



**CITY OF QUINCY**  
**Purchasing Department**  
**1305 Hancock Street, Quincy, MA 02169**

Phone: 376-1060

Fax: 376-1074

## **TAX COMPLIANCE CERTIFICATE**

**MASS. GENERAL LAWS, CH. 62C, S: 49A(b)**

I hereby certify that pursuant to MGL Chapter 62c, section 49a, I have complied with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding of child support. This is being signed under the pains and penalties of perjury.

(1) Individual Contractor

\_\_\_\_\_  
(Contractor's Name and Signature)

Social Security Number

(2) Corporation, Association  
or Partnership

\_\_\_\_\_  
(Contractor's Name)

Federal Tax ID Number, or  
Social Security Number

By:

\_\_\_\_\_  
(Authorized Signature)

## **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. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union committee, club, or other organization, entity, or group of individuals.

\_\_\_\_\_  
(Name of person signing bid or proposal)  
(Please print)

\_\_\_\_\_  
(Signature required)

\_\_\_\_\_  
(Name of business)



CITY OF QUINCY  
Purchasing Department  
1305 Hancock Street, Quincy, MA 02169

Phone: (617) 376-1060

Fax: (617) 376-1074

### SIGNATURE AUTHORIZATION

At a duly authorized meeting of the Board of Directors of the

\_\_\_\_\_  
(NAME OF CORPORATION)

held on \_\_\_\_\_, at which all the Directors were present or waived notice, it was  
(DATE)

VOTED, that:

\_\_\_\_\_  
(NAME)

\_\_\_\_\_  
(OFFICER)

of this company, be and he/she 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 or obligation in this Company's name on its behalf by such \_\_\_\_\_ under seal of the Company, shall be valid  
(OFFICER)

and binding upon this Company. It was further voted that the City of Quincy may rely on such authorization of future Contracts until notified to the contrary.

A true copy,

ATTEST: \_\_\_\_\_  
(CLERK'S SIGNATURE)

PLACE OF BUSINESS: \_\_\_\_\_

DATE OF THIS CONTRACT: \_\_\_\_\_

I hereby certify that I am the Clerk of the:

\_\_\_\_\_ that \_\_\_\_\_ is the  
(COMPANY)

(NAME)

duly elected \_\_\_\_\_ of said Company, and that the above VOTE has not been  
(TITLE)

amended or rescinded and remains in full force and effect as of the date of this Contract.

\_\_\_\_\_ CORPORATE SEAL

## INDEMNITY AGREEMENT

In consideration of the award of Contract No. \_\_\_\_\_  
by the City of Quincy, hereinafter referred to as INDEMNITEE, to the CONTRACTOR/BIDDER:

\_\_\_\_\_  
hereinafter referred to as INDEMNITOR, and for other good and valuable consideration, said INDEMNITOR agrees to hold INDEMNITEE, City of Quincy, and its various department and employees harmless from any and all liability, loss or damage that INDEMNITEE may suffer as the result of claims, demands, costs, including attorneys fees, or judgement or other actions against it by reason of any and all work done by or on behalf of the INDEMNITOR in connection with the above-referenced contract.

INDEMNITOR,

\_\_\_\_\_  
By Duly Authorized Agent

Date: \_\_\_\_\_

**REFERENCE LIST**

All vendors are to fill out the following reference form, and submit it with the bid package, with similar work over the last 3-5 years.

Reference #1 Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Reference #2 Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Reference #3 Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Reference #4 Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

# REQUEST FOR OWNER'S PROJECT MANAGEMENT SERVICES (RFS)

## 1. Introduction

The **City of Quincy**, (“Owner”) is seeking the services of a qualified “Owner’s Project Manager” as defined in Massachusetts General Laws Chapter 149, Section 44A½ and as further defined by the provisions of this RFS, to provide Project Management Services for the design, construction, addition to and /or renovation of the Sterling Middle School (“School”) in Quincy, Massachusetts (“Project”).

The Owner is requesting the services of an Owner’s Project Manager to represent the Owner during the feasibility study and schematic design phases of the project initially. Subject to the approval of the Project by the Massachusetts School Building Authority (the “MSBA”) and further subject to continued funding authorized by the City, the contract between the Owner and the Owner’s Project Manager may be amended to include continued Project Management Services through design development, construction documents, bid and award, construction and final closeout of the potential Project. A potential approved Project may include a renovation of the existing School, a renovation and addition of the existing School and/or new construction. The estimated total project costs of an approved potential Project may range from \$35M to \$45M depending upon the solution that is agreed upon by the Owner and the MSBA and that is ultimately approved by a vote of the MSBA.

## 2. Background

Sterling Middle School is a 73,880 square foot facility, built in 1926. It now serves a Grade 6-8 population, and contains a middle school population of approximately 340 students. A large portion of Sterling's mechanical electrical and plumbing components were installed during the construction of the facility in 1926. The building has not benefited from any substantial upgrades or improvements to the electrical and plumbing infrastructure or to the interior/exterior structures. These components are a significant detriment to the utilization of the building for educational use. The District has identified deficiencies in major building systems including boilers, plumbing and electrical and therefore seeks to address the deficiencies raised in the District’s submitted Statement of Interest. It seeks the services of an owner’s project manager with appropriate experience to assist in a potential renovation of the existing School, a renovation and addition to the existing School or new construction of a middle school facility, which meets the academic requirements of the Department of Education and the needs of the middle school families and community in Quincy.

## 3. Project Description, Objectives and Scope of Services

On or about October 27, 2009, the Owner submitted a Statement of Interest (Attachment A) to the MSBA for Sterling Middle School – this initial SOI has been updated annually, most recently on January 9, 2013. The MSBA is an independent public authority that administers and funds a program for grants to eligible cities, towns, and regional school districts for school construction and renovation projects. The MSBA’s grant program is discretionary, and no city, town, or regional school district has any entitlement to any funds from the MSBA. At a Board of Directors meeting on November 19, 2014, the MSBA voted to issue an invitation to the Owner to conduct a feasibility study for this Statement of Interest to identify and study possible solutions and, through a collaborative process with the MSBA, reach a mutually-agreed upon solution. The MSBA has not approved a Project and the results of this feasibility study may or may not result in an approved Project.

A large portion of Sterling's mechanical electrical and plumbing components were installed during the construction of the facility in 1926. The SOI statements strongly state that Sterling has not benefited from any substantial upgrades or improvements to the electrical and plumbing infrastructure or to the interior/exterior structures. These components are a significant detriment to the utilization of the building for educational use. Recent work includes 2007 exterior improvements such as repointing and lintel replacement. The only other exterior work of note occurred in 1993, involving roof and window upgrades. Most of the plumbing, piping and plumbing fixtures are in excess of 50 years old. In 2005, one of the original 1926 boilers was replaced. All steam piping is original and in need of replacement. Electrical infrastructure is original, undersized and has undergone numerous repairs over the years.

Sterling is not ADA accessible. The building cannot be fully utilized by students/staff who are disabled. Entrances and exits, bathrooms, stairs, drinking fountains, doorways, general art and music classrooms, as well as the auditorium, gymnasium or media center/library have no ADA utility. Furthermore there is no elevator or lift. In order to accomplish ADA requirements, major renovations to Sterling's infrastructure are needed.

As a result of a collaborative analysis with the MSBA of enrollment projections and space capacity needs for the Proposed Project at the Sterling Middle School, the City of Quincy hereby acknowledges and agrees that the design of the Proposed Project at the Sterling Middle School shall be based on an enrollment of no more than 430 students in grades 5-8.

It is anticipated that the feasibility study will review the problems identified in the Statement of Interest at the Sterling Middle School, including site location and the renovation, renovation/addition and/or potential new school building, Project Objectives under consideration by the Owner include:

- *Identification of community concerns that may impact study options;*
- *Identification of specific milestone requirements and/or constraints of the District – e.g. City votes, swing space, occupancy issues;*
- *Life cycle costs of operating the School as it relates to future operational budgets;*
- *Massachusetts MA-CHPS criteria or US Green Building Council's LEED for Schools Rating System*
- *CM-at-Risk Delivery Method.*

The required scope of services is set forth in Article 8 of the standard contract for Owner's Project Management Services for a Design/Bid/Build project that is attached hereto as Attachment B and incorporated by reference herein. If the Owner determines to use a CM-at-Risk delivery method, this contract shall need to be amended and/or substituted. The work is divided into the Project Phases as listed in Attachment A of this contract. The durations of the Phases shown below are estimates only, based on the Owner's experience. Actual durations may vary depending upon the Project agreed upon by the Owner and the MSBA. The total duration of the Contract is estimated as follows:

- |   |                     |
|---|---------------------|
| 1. Feasibility Study/Schematic Design Phase;                    | <i>10-24</i> months |
| 2. Design Development/Construction Documents/Bidding Phase; and | <i>10-12</i> months |
| 3. Construction Phase.  | <i>24-36</i> months |

#### **4. Minimum Requirements and Evaluation Criteria:**

##### Minimum Requirements:

In order to be eligible for selection, each Respondent must certify in its cover letter that it meets the following minimum requirements. Any Response that fails to include such certification in its response, demonstrating that these criteria have been met, will be rejected without further consideration.

Each Respondent must designate an individual who will serve as the Project Director. The Project Director shall be certified in the Massachusetts Certified Public Purchasing Officer Program as administered by the Inspector General of the Commonwealth of Massachusetts and must also meet the following 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 5 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 7 years experience in the construction and supervision of construction and design of public buildings.

##### Evaluation Criteria

In addition to the minimum requirements set forth above, all Respondents must demonstrate that they have significant experience, knowledge and abilities with respect to public construction projects, particularly involving the construction and renovation of K-12 schools in Massachusetts. The Owner will evaluate Responses based on criteria that shall include, but not be limited to, the following criteria and weights:

- 1) (10%) 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 :
  - 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.
- 2) (8%) Thorough knowledge of the Massachusetts State Building Code, regulations related to the Americans with Disabilities Act, and all other pertinent codes and regulations related to successful completion of the project.
- 3) (8%) Thorough knowledge of Commonwealth construction procurement laws, regulations, policies and procedures, as amended by the 2004 Construction Reform laws. In addition, thorough knowledge and experience with CM-At-Risk Procurement methodology.
- 4) (8%) 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 105,000 square feet or renovation of 127,000 square feet; proposed project management systems; effective information management; and examples of problem solving approaches to resolving issues that impact time and cost.
- 5) (10%) Key personnel: Provide an organizational chart that shows interrelationship of key personnel to be provided by the Respondent for this project and that identifies the individuals and associated firms (if any) who will fill the roles of Project Director, Project Representative and any

other key roles identified by the Respondent, including but not limited to roles in design review, estimating, cost and schedule control. Specifically, describe the time commitment, experience and references for these key personnel including relevant experience in the supervision of construction of several projects that have been either successfully completed or in process that are similar in type, size, dollar value and complexity to the project being considered.

- 6) (10%) Capacity and skills: Identify existing employees by number and 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 Subconsultants.
- 7) (8%) Identify the Respondent's current and projected workload for projects estimated to cost in excess of \$1.5 million.
- 8) (8%) Familiarity with Massachusetts-CHPS (MA-CHPS) High Performance Green Schools Guidelines and/or US Green Building Council's LEED for Schools Rating System. Demonstrated experience working on high performance green buildings (if any), green building rating system used (e.g., MA-CHPS or LEED), life cycle cost analysis and recommendations to Owners about building materials, finishes etc., ability to assist in grant applications for funding and track Owner documentation for MA-CHPS and/or LEED-S prerequisites.
- 9) (12%) Thorough knowledge and demonstrated experience with life cycle cost analysis, cost estimating and value engineering with actual examples of recommendations and associated benefits to Owners.
- 10) (8%) Knowledge of the purpose and practices of the services of Building Commissioning Consultants.
- 11) (10%) Financial Stability: Provide current balance sheet and income statement as evidence of the Respondent's financial stability and capacity to support the proposed contract.

In order to establish a short list of Respondents to be interviewed, the Owner will base its initial ranking of Respondents on the above Evaluation Criteria. The Owner will establish its final ranking of the short-listed Respondents after conducting interviews and reference checks.

The Owner reserves the right to consider any other relevant criteria that it may deem appropriate, within its sole discretion, and such other relevant criteria as the MSBA may request. The Owner may or may not, within its sole discretion, seek additional information from Respondents.

This Request for Services, any addenda issued by the Owner, and the selected Respondent's response, will become part of the executed contract. The key personnel that the Respondent identifies in its response must be contractually committed for the Project. No substitution or replacement of key personnel or change in the Subconsultants identified in the response shall take place without the prior written approval of the Owner and the MSBA.

The selected Respondent(s) will be required to execute a Contract for Project Management Services with the Owner in the form that is attached hereto as Attachment B and incorporated by reference herein. Prior to execution of the Contract for Project Management Services with the Owner, the selected Respondent will be required to submit to the Owner a certificate of insurance that meets the requirements set forth in the Contract for Project Management Services.

Prior to execution of the Contract for Project Management Services, the fee for services shall be negotiated between the Owner and the selected Respondent to the satisfaction of the Owner, within its sole discretion. The initial fee structure will be negotiated through the Feasibility Study/Schematic Design Phase. The selected Respondent, however, will be required to provide pricing information for all Phases specified in the Contract at the time of fee negotiation.

## 5. Selection Process and Selection Schedule

### Process

The Owner will work in concert with the MSBA, applying its guidelines for OPM selection, as outlined below. Ranking of candidates during the selection process will include score sheets, substantially similar to those attached hereto as Attachment B. The process will involve the creation of a short list of candidates, selected by the Sterling Middle School Building Committee; followed by an interview process of the short-listed candidates by the entire Building Committee. Contemporaneous with this process, one or more members of the Building Committee will check references supplied by the short-listed candidates, and report back to the Committee with a written summary of the results of each reference check.

The guidelines for selection are as follows:

- 1) The Sterling Middle School Building Committee will review responses, with each member of the committee reviewing minimum requirements as well as completing his/her own score sheet for each candidate using the assigned evaluation criteria and percentage listed above in section 4. The Committee will rank all responses that meet the minimum requirements and to record the ranking on a scoring sheet. Each committee member's score sheet will then be turned over to a compiler, who will compile the scores for each candidate. Upon completion of the short list process, a minimum of three candidates will be selected for interviews by the Committee
- 2) Sterling Middle School Building Committee will rank the Responses based on the weighted evaluation criteria identified in the RFS and will short-list a minimum of three Responses.
- 3) The committee will then conduct interviews. Each candidate must present its key personnel at the interview process, including the individual(s) who will work on this project as their primary job. Each candidate will then be ranked by the interview team based on specific criterion that will be presented to each candidate prior to the interviews. The candidates will then be ranked, and the ranking will be submitted to the Committee for its final vote and approval.
- 4) The fee for service will be negotiated based upon qualifications and the ranking based upon the weighted evaluation criteria.
- 5) The Owner will commence fee negotiations with the first-ranked selection.
- 6) If the Owner is unable to negotiate a contract with the first-ranked selection, the Owner will then commence negotiations with its second-ranked selection and so on, until a contract is successfully negotiated and approved by the Owner.
- 7) First-ranked selection will be submitted to the MSBA for its approval.
- 8) The first-ranked selection may be asked to participate in a presentation to the MSBA and/or submit additional documentation, as required by MSBA, as part of the MSBA approval process.
- 9) The Owner may include its provisions to re-advertise if less than three responses are received or to re-advertise if fee negotiations fail.

The following is a tentative schedule of the selection process, subject to change at the Owner's and MSBA's discretion.

|                   |   |
|-------------------|---|
| <u>12/23/2014</u> | Advertise in Central Register                           |
| <u>01/07/2015</u> | Informational meeting and site visit – (Non -Mandatory) |
| <u>01/09/2015</u> | Last day for questions from Respondents                 |
| <u>01/15/2015</u> | Responses due (by 11am on the due date)                 |

01/29/2015 Respondents short-listed  
02/04/2015 Interview short-listed Respondents  
02/04/2015 Negotiate with selected Respondent  
02/09/2015 Final selection submitted to the MSBA for review and approval  
03/02/2015 MSBA Owner's Project Review Panel Meeting  
03/23/2015 Execute contract

Requests for Services may be obtained from

Name: Kathryn Hobin, Purchasing Office  
Address: City of Quincy, 1305 Hancock Street, Quincy MA 02169  
Phone Number: (617) 376-1061

On or after December 31, 2014.

Any questions concerning this Request for Services must be submitted in writing to

Name: James S. Timmins, City Solicitor  
Address: 1305 Hancock Street, Quincy MA 02169  
Phone Number: (617) 376-1511  
Email: [jtimmins@quincyma.gov](mailto:jtimmins@quincyma.gov)  
Fax # (617) 376-1519

by the close of business on January 9, 2015.

Sealed Responses to the Requests for Services for Owner's Project Manager Services must be clearly labeled "Owner's Project Management Services for Sterling Middle School and delivered to

Name: Purchasing Department, ATTN: Kathryn Hobin  
Address: 1305 Hancock Street, Quincy MA 02169  
Phone Number: (617) 376-1061

**no later than 3:00 PM on JANUARY 15, 2015.** The Owner assumes no responsibility or liability for late delivery or receipt of Responses. All responses received after the stated submittal date and time will be judged to be unacceptable and will be returned unopened to the sender.

#### **6. Requirements for content of response:**

Submit 12 hard copies of the response to this Request for Services and one electronic version in PDF format on CD. All responses shall be:

- In ink or typewritten;
- Presented in an organized and clear manner;
- Must include the required forms in Attachment C;
- Must include all required certifications;
- Must include the following information:
  1. Cover letter shall be a maximum of two pages in length and include:

- a. An acknowledgement of any addendum issued to the RFS.
  - b. An acknowledgement that the Respondent has read the Request for Services. Respondent shall note any exceptions to the RFS in its cover letter.
  - c. An acknowledgement that the Respondent has read the Standard Contract. Respondent shall note any exceptions to the Standard Contract in its cover letter.
  - d. A specific statement regarding compliance with the minimum requirements identified in Item 4 of this Request for Services to include identification of registration, number of years of experience and where obtained (as supported by the resume section of Attachment C), as well as the date of the MCCPO certification. (A copy of the MCCPO certification should be attached to the cover letter).
  - e. A description of the Respondent's organization and its history.
  - f. The signature of an individual authorized to negotiate and execute the Contract for Project Management Services, in the form that is attached to the RFS, on behalf of the Respondent.
  - g. The name, title, address, e-mail and telephone number of the contact person who can respond to requests for additional information.
2. Selection Criteria: The response shall address the Respondent's ability to meet the "Selection Criteria" Section including submittal of additional information as needed. The total length of the Response (including Attachment C only but excluding Attachments A, B and D) may not exceed twenty (20) single-sided numbered pages with a minimum acceptable font size of "12 pt" for all text. Respondents may supplement this proposal with graphic materials and photographs that best demonstrate its project management capabilities of the team proposed for this project. **Limit this additional information to a maximum of 3 - 8½"x 11" pages, double-sided.**

Certifications: *The city of Quincy requires that each applicant submit with its response the following certifications:*

Tax Compliance Certification

Certification Relating to Debarment and Suspension

Certification regarding Authorized Signators

*The Owner should consult with its legal counsel to determine what, if any, other certifications may be appropriate and/or required.*

## 7. Payment Schedule and Fee Explanation:

The Owner will negotiate the fee for services dependent upon an evaluation of the level of effort required, job complexity, specialized knowledge required, estimated construction cost, comparison with past project fees, and other considerations. As construction cost is but one of several factors, a final construction figure in excess of the initial construction estimate will not, in and of itself, constitute a justification for an increased Owner's Project Manager fee.

## 8. Other Provisions

**A. Public Record**

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

**B. Waiver/Cure of Minor Informalities, Errors and Omissions**

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

**C. Communications with the Owner**

The Owner's Procurement Officer for this Request for Services is:

Kathryn Hobin  
Office of the Purchasing Agent  
Quincy City Hall  
1305 Hancock Street  
Quincy MA 02169  
(617) 376-1061  
FAX 376-1060  
[khobin@quincyma.gov](mailto:khobin@quincyma.gov)

Respondents that intend to submit a response are prohibited from contacting any of the Owner's staff other than the Procurement Officer. An exception to this rule applies to Respondents that currently do business with the Owner, but any contact made with persons other than the Procurement Officer must be limited to that business, and must not relate to this RFS. In addition, such respondents shall not discuss this RFS with any of the Owner's consultants, legal counsel or other advisors.

***FAILURE TO OBSERVE THIS RULE MAY BE GROUNDS FOR DISQUALIFICATION.***

**D. Costs**

Neither the Owner nor the MSBA will be liable for any costs incurred by any Respondent in preparing a response to this RFS or for any other costs incurred prior to entering into a Contract with an Owner's Project Manager approved by the MSBA.

**E. Withdrawn/Irrevocability of Responses**

A Respondent may withdraw and resubmit their response prior to the deadline. No withdrawals or re-submissions will be allowed after the deadline.

**F. Rejection of Responses, Modification of RFS**

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

**G. Subcontracting and Joint Ventures**

Respondent's intention to subcontract or partner or joint venture with other firm(s), individual or entity must be clearly described in the response.

**H. Validity of Response**

Submitted responses must be valid in all respects for a minimum period of ninety (90) days after the submission deadline.

**FURTHER INFORMATION**

*The Owner should include any additional information that is required or that may assist Respondents in responding to the RFS.*

**ATTACHMENTS:**

Attachment A: Statement of Interest

Attachment B: Contract for Owner's Project Management Services

Attachment C: OPM Application Form - May 2008

Attachment D: Required Certifications (*To be developed by the Owner*)

**ATTACHMENT A**  
**STATEMENT OF INTEREST**

## Massachusetts School Building Authority

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School District    Quincy

District Contact    Richard De Cristofaro TEL: (617) 984-8700

Name of School    Reay E Sterling Middle

Submission Date    10/27/2009

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### Note

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

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

**Potential Project Scope:**        Renovation/ Addition

**Is this SOI the District Priority SOI?**        YES

**The MSBA ID for the District Priority SOI:**        2010 Reay E Sterling Middle

#### **District Goal for School: Please explain the educational goals of any potential project at this school**

The district goals for the renovation of Sterling Middle School are to provide a safe and nurturing learning environment for children and young adults to achieve their maximum potential. Also, we need to develop students who persevere in their studies, take responsibility for their choices and are honest in their character. Additionally, the renovations of Sterling will allow the staff to focus more consistently on Curriculum and Instruction, Assessment and appropriate Program Evaluations along with having the ability for on-site professional development opportunities. The renovations of Sterling Middle School's core educational classrooms and program areas will significantly improve the positive climate/culture goal for Sterling; bringing the staff, students and families from South West Quincy closer together as an educational community. The measure of this renovation success will be measured by our students who will exemplify a lifelong love for learning.

#### **District's Proposed Schedule: What is the District's proposed schedule to achieve the goal(s) stated above?**

In November of 1997, the Mayor's School Building Task Force highlighted Raey E. Sterling Middle School. The report stated the building is well constructed but "its poor layout and educational inadequacies" need to be addressed through renovation. The Committee and City Council adopted the Mayor's School Building Task Force recommendations in December of 1997. According to the plans, Sterling Middle School will be renovated following the construction of a new Quincy High School and a new Central Middle School. The School Committee reaffirmed this vote in October, 2001. The School Committee authorized

the Superintendent to complete and submit a statement of interest form to the Massachusetts School Building Authority for Sterling in 2006. The refreshing process for the SOI for a Sterling renovation continues the City's building plan of 1997. As we complete the new Quincy High School (2009) and begin construction for a new Central Middle School, Sterling will follow soon after.

**Is this part of a larger facilities plan?** NO

**If "YES", please provide the following:**

**Facilities Plan Date:**

**Planning Firm:**

**Please provide an overview of the plan including as much detail as necessary to describe the plan, its goals and how the school facility that is the subject of this SOI fits into that plan:**

**Please provide the current student to teacher ratios at the school facility that is the subject of this SOI: 20 students per teacher.**

**Please provide the originally planned student to teacher ratios at the school facility that is the subject of this SOI: 20 students per teacher.**

**Is there overcrowding at the school facility?** NO

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

**Has the district had any recent teacher layoffs or reductions** YES

**If "YES", how many teaching positions were affected?** 19

**At which schools in the district?** All schools were equally affected.

**Please describe the types of teacher positions that were eliminated(i.e art, math, science, physical education, etc.):**

In 2009-2010 there are 19 less teaching positions (9 Academic Classroom Teachers (including 4 Middle School Foreign Language staff) and 10 Academic Program teaching staff: Literacy, Health, Media, Phys. Ed., Art, Music and Occ. Ed.

**Has the district had any recent staff layoffs or reductions** YES

**If "YES", how many staff positions were affected?** 17

**At which schools in the district?** All schools were equally affected.

**Please describe the types of staff positions that were eliminated(i.e guidance, administrative, maintenance, etc.):**

Within the 2009-2010 Quincy Public Schools budget, there are 17.0 less Non-Academic Support positions. They included the following staff areas: Maintenance, Custodial, and Secretarial.

**Please provide a description of the program modifications as a consequence of these teacher and/or staff reductions,including the impact on district class sizes and curriculum.**

The focus of reductions to our teaching workforce has always been to keep the academic class size as low. The School Committee has strict class size guidelines, this school year no classes exceed these guidelines. Our Elementary class size is 17, Middle School is 19 and High School is 22. The academic program teacher reduction of 9 led to modifications in service delivery of Foreign Language (Spanish only at the middle school level), Physical Education/Health (utilizing staff to maintain quality service in both areas), shifting literacy teachers so they are at more than one of our 11 elementary sites, reducing Media/Library staff at the middle school level and shifting coverage and modifying time on task in the staffing areas of Art and Music. The core curriculum has been maintained in regard to our state and local curriculum requirements and expectations. The Quincy Public Schools text and learning materials for classrooms was maintained at the 2008 level.

**Please provide a detailed description of your recent budget approval process including a description of any budget reductionsand the impact of those reductions on te District's school facilities, class sizes and educational program.**

The overall budget process of the Quincy Public Schools/Quincy School Committee is one that is based upon specific and consistent budget priorities. These priorities center upon our students and build out from that point. Student priority is followed by the next important budget areas of Academic Classroom Teachers, Academic Programs (Teaching Staff), Academic Support Staff (Directors, Department Heads, Principals, Clerical, Paraprofessionals, Superintendent and Assistant

Superintendent, and Non-Academic Support Staff (Transportation, Clerical, Custodial, Maintenance, Security and Substitutes staff). The academic expenses and non-academic expenses are discussed after all other areas of the budget have been deliberated upon. In School Committee budget subcommittee sessions, this year May 19, May 7, June 3 and June 9, along with regular School Committee, Public Hearing and final City Council approval on June 11, the 2010 fiscal year budget was thoroughly discussed. The deficit we faced in building the 2009-2010 school year budget was close to \$7 million. Through deliberation, the School Committee used ARRA stabilization funds, Circuit Breaker, IDEA funds available for maintenance of effort, additional fees and salary deferrals to arrive at a minimum of disruption to quality educational programs and class size. Our school system facilities will have little or no maintenance consequence in relation to our budget reductions.

## General Description

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

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

**SITE DESCRIPTION:** Please provide a detailed description of the current site and any known existing conditions that would impact a potential project at the site (maximum of 5000 characters):.

Lot Size 7.59 acres Spot Elevations (building) Front 55.2', Left 50', Right 54.59', Rear 52.7' Spot Elevations (lot) Front 55', Left 50', Right 52.5', Rear 25.6'. The lot slopes to the left side approximately 2 feet and dramatically towards the rear about 28 feet to the back lower left corner. The rear of the lot lies in a 100 year flood zone. The structure is not in the flood zone.

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

Unreinforced masonry construction with substantial repointing requirements.

**Age of EXTERIOR WALLS (In Years):** 80

**Year of Last Repair or Replacement:** 2007

**Description of Last Repair or Replacement:**

200 sf of cutting and pointing in the worst area of the brick face.  
42 linear feet of lintel replacement.

**Age of ROOF(In Years):** 80

**Year of Last Repair or Replacement:** 1993

**Type Of ROOF**

**Description of Last Repair or Replacement:**

8000sf of tar and gravel was removed and replaced with rubber

**Age of WINDOWS(In Years):** 15

**Year of Last Repair or Replacement:** 1993

**Type Of WINDOWS**

**Description of Last Repair or Replacement:**

Removal of original wood windows and replacement of alum. replacement windows.

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

Most of the plumbing, piping and plumbing fixtures are in excess of 50 years old. One boiler was replaced n 2005 and the original boiler is original 1926 and is in poor condition. Some steam traps have been replaced. All steam piping is original and in need of replacement.

The electric is original with numerous repairs over the years. Electrical iinfrastructure is undersized.

**Age of BOILERS(In Years):** 82

**Year of Last Repair or Replacement:** 2005

**Description of Last Repair or Replacement:**

One of the original boilers was taken off line and a new boiler was installed in 2005.

**Age of HVAC SYSTEM (In Years):** 82

**Year of Last Repair or Replacement:** 2007

**Description of Last Repair or Replacement:**

There has been no major upgrade to the HVAC system.

**Age of ELECTRICAL SERVICES AND DISTRIBUTION SYSTEM(In Years):** 82

**Year of Last Repair or Replacement:** 1988

**Description of Last Repair or Replacement:**

Electrical repairs are on-going on a regular basis. Classroom lighting replaced in 1988.

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

Building interior - most is in original condition. Floor and ceilings and pipe wrap contain asbestos. Some lighting has been replaced.

**PROGRAMS and OPERATIONS: Please provide a detailed description of the current programs offered and indicate whether there are program components that cannot be offered due to facility constraints, operational constraints, etc.:**

Aside from the improvements needed to the physical building, the crucial Programs and Operations necessary for 21st century middle schools cannot be appropriately implemented.

In order to educate our Sterling students in the manner in which they deserve, all areas listed below need significant upgrades/renovation.

Areas of Significant Need:

BATHROOMS have not undergone renovation for at least fifty (50) years and all cannot be utilized.

The NURSE'S OFFICE is cramped and lacks any area for student rest, recovery or privacy.

The STUDENT SUPPORT AREA at Sterling is woefully inadequate. No appropriate areas are available for student support staff to meet with parents or groups of students in need of individual or small group-guided discussions.

The GYMNASIUM is undersized, lacks appropriate seating and has no appropriate adjacent office areas for the physical education staff.

The LOCKER ROOMS and SHOWER AREAS are in major need of renovation. These areas should be healthful, hygienic and comfortable for student use.

There are no team or TEACHER PLANNING AREAS that offer collegial, collaborative opportunities and technology availability that staff may appropriately research and plan high quality lessons or to meet as teams.

Sterling's CAFETERIA is undersized. The kitchen area remains inadequate to serve students and to offer them a variety of nutritional choices.

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

Within the most important area of teaching and learning, the inadequacies of a 1926-1927 constructed school are notably consequential. Sterling teachers' and students' educational needs for the 21st century are:

GENERAL CLASSROOMS that are equipped for a quality technology driven curriculum which should include white boards, smart boards, computers, projection screens, and adequate ceiling and flooring materials.

SCIENCE LABS integral for appropriate and state-mandated instruction.

Currently there is one COMPUTER AREA - at least four additional are needed for grade level content area as well as special student curriculum needs. The Sterling building would require substantial infrastructure renovations for this need to be met.

The LIBRARY, two general classrooms, reading areas and study rooms need a technology upgrade so students can appropriately utilize the internet and other resources for classroom research projects and be provided computer instruction in the form of Powerpoint, Excel, Word, and keyboarding instruction and other forms of informal technology.

The ART ROOM at Sterling is not physically able to offer the variety of opportunities of the state-mandated curriculum (technology, graphic design, or pottery work).

In a quality middle school FINE ARTS thrive. Sterling Middle School struggles mightily with no appropriate space for music (vocal or instrumental), an auditorium that has constant leaks from the much-patched roof, seating that may be the original wooden folding seats, and a stage with no appropriate lighting or sound equipment necessary for quality drama or musical productions.

SPECIAL POPULATION CLASSROOM NEEDS FOR SPECIAL EDUCATION AND ENGLISH AS A SECOND LANGUAGE have no technology or physical integrative access for inclusion; therefore, limiting the richness of these state-mandated services.

It is certainly time for the students and staff of Sterling Middle School to see the "light at the end of the tunnel" in regard to a renovation that would offer the high quality education necessary in the 21st century and meet the requirements they all deserve.

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

A large portion of Sterling's mechanical electrical and plumbing components were installed during the construction of the facility in 1926. The SOI statements strongly state that Sterling has not benefited from any substantial upgrades or improvements to the electrical and plumbing infrastructure or to the interior/exterior structures. These components are a significant detriment to the utilization of the building for educational use.

STERLING IS NOT ADA ACCESSIBLE! The building cannot be fully utilized by students/staff who are disabled. Entrances and exits, bathrooms, stairs, drinking fountains, doorways, general art and music classrooms, as well as the

auditorium, gymnasium or media center/library have no ADA utility. Furthermore there is no elevator or lift. In order to accomplish ADA requirements, major renovations to Sterling's infrastructure are needed.

UTILIZATION OF SECURITY AND SAFETY SYSTEMS need to be updated With an increased urgency for schools to create and sustain consistent and updated safety measures for all students and staff this is crucial for Sterling Middle School. Sterling's needs feature a complete updating of its internal and external communications including intercom replacement to ensure messages to and from all areas in the building replacement of a clock and bell system that is currently inoperable and antiquated, as well as modernization of a fire and police communication.

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

We do an annual cleaning of the burners and boilers. Annual seal of the asbestos-containing floor material. Regular in-house and external service for mechanical and electrical systems.

**Priority 1**

*Please provide a detailed description of the perceived health and safety problems below. Attach copies of orders or citations from state and/or local building and/or health officials.*

**Priority Number One: Replacement or renovation of a building which is structurally unsound or otherwise in a condition seriously jeopardizing the health and safety of school children, where no alternative exists.**

**Opening Statement**

Sterling Middle school was built in 1926-1927 and has approximately, 98,500 square feet. The 2003 Draft Environmental Impact Report (EOEA No. 12982) Volume III, stated from The Report on Middle School Evaluation Program – July 1997, “substantial improvements required for the building and school site due to its age.” In November 1997, the recommendation from the Mayor’s School Buildings Needs Task Force was “the school, constructed in 1926-1927, is at a crossroads. Due to its age and lack of any major renovation, many of its systems need substantial upgrading or replacement.” Since that recommendation by the Mayor’s Task Force there have been no substantial upgrades or improvements to the electrical and plumbing infrastructure, or to the interior/exterior structures.

A large portion of the mechanical, electrical and plumbing infrastructure currently in use today, was installed during the construction of the facility in 1926. These systems cannot support current technology needs or meet current state/local building codes and ADA requirements.

▪ **Structural Deficiencies/Health and Safety Problems**

The existing tar and gravel roof and rubber membrane have many substantial leaks. The tar and gravel section has out lived its life and needs to be completely removed and replaced.

The exterior structure has been compromised by many years of weather abuse. The bricks and mortar are deteriorating daily. The entire exterior section requires re-pointing and water proofing. The exterior of the chimney has been weakened from years of weather abuse and has the potential for bricks and mortar to break lose and fall to the ground. Also, the porous chimney has the potential to allow harmful flue gases to leak within the school facility. Because the exterior structure is unstable and in need of major renovations, the interior walls, floors and ceilings have sustained substantial damage. With the amount of water that penetrates the facility, there is serious concern with the development of mold through out the facility. This issue requires constant monitoring. The exterior foundation has experienced some cracking and is in need of repair.

The facility itself is not ADA accessible at all. An elevator and or a Mechanical Lift are required to bring the building up to code. Major modifications of the building structure will be required to accommodate the installation of an elevator.

Air quality and air exchangers that do not comply with the current health and safety codes have the potential to jeopardize the health and safety of students and staff. The existing system that controls the flow of make-up air to classrooms and large gathering areas is undersized and outdated. Existing exhaust equipment is undersized and outdated.

The majority of mechanical equipment, boilers and piping are covered with asbestos. Loose asbestos fibers are a serious health concern for students and staff.

**Priority 1**

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

■ **Steps Taken to Mitigate Problems**

-

1. In-house staff monitors the condition of leaks on the roof during and after storms. If a leak is located we attempt to repair it with in-house staff. If that fails, a contractor is contacted to make repairs and alterations.
2. Some of the exterior areas that have been compromised from years of weather abuse have been re-pointed by in-house staff. This work in no way mitigates the major work that is required to prevent further damage to the interior structure and the potential growth of mold. The entire outer shell needs complete re-pointing and water proofing. The inside of the chimney has been re-lined with flue piping to accommodate the breaching from the new to existing boilers. If mold is detected it is remediated per standard operating procedures. Repairs to ceilings, walls and flooring are made as needed by in-house staff. Many of the walls and ceilings are damaged beyond repair and are in need of complete reconstruction.
3. The physical structure and design of the school does not allow us the ability to make required ADA accommodations without major renovation within the building.
4. The inadequate ventilation and exhaust systems are undersized and require complete replacement. In-house staff is trained in the use of air quality monitoring equipment. Three (3) air quality readings are taken during the school year.
5. Mechanical equipment, boilers and piping covered with asbestos is inspected quarterly. Any damaged asbestos covering is encapsulated per state and local standards. One of our in-house staff is trained and certified in the care and removal of asbestos.

**Priority 1**

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

The most significant impact of a renovation to Sterling Middle School would be adherence to the Americans Disability Act. The ability for all students and staff to access any areas in the school, being so much more a part of their educational and social environment is invaluable. Additionally, the mere age (1926-1927) of the building unfortunately lends itself to a quality of air exchange that is not the most healthy of situations. Only the renovations of Sterling will adequately satisfy the critical needs for the highest quality of air in all core education and program areas.

The constant leaking from the aged tar and gravel roof, to the desperate need for significant re-pointing and waterproofing, impact the educational program in specific ways. There is limited use of the auditorium, state and storage areas, locker rooms science labs and the media center/library due to either re-pointing or consistent roof leaking (to walls and ceilings). Additionally, the boys and girls bathrooms, as well as the teachers' lunch area on the third floor has limited use due to similar building inadequacies. As well, technology use within many general classrooms on the third floor is prohibitive.

**Please also provide the following:**

**Name of Firm that performed the Study/Report:**

City of Quincy

**Date of Study/Report:** 11/21/1997

**Synopsis of Study/Report:**

According to the Mayors School Buildings Needs Task Force, report Sterling Middle School was in desperate need of major renovation in regard to the exterior as well as the interior components.

**Is the perceived Health and Safety problem related to asbestos?:** NO

If "YES", please describe the location in the facility, if it is currently friable, and the mitigation efforts that the district has undertaken to date.:

**Is the perceived Health and Safety problem related to an electrical condition?:** NO

If "YES", please describe the electrical condition, any imminent threat, and the mitigation efforts that the district has undertaken to date.:

**Is the perceived Health and Safety problem related to a structural condition?:** NO

If "YES", please describe the structural condition, any imminent threat, and the mitigation efforts that the district has undertaken to date.:

**Is the perceived Health and Safety problem related to the building envelope?:** NO

If "YES", please describe the building envelope condition, any imminent threat, and the mitigation efforts that the district has undertaken to date.:

**Is the perceived Health and Safety problem related to the roof?:** NO

If "YES", please describe the roof condition, any imminent threat, and the mitigation efforts that the district has undertaken to date.:

**Is the perceived Health and Safety problem related to accessibility?:** NO

If "YES", please describe the areas that lack accessibility and the mitigation efforts that the district has undertaken to date. In addition, please submit to the MSBA copies of any federally-required ADA Self-Evaluation Plan and Transition Plan.:

**Priority 5**

*Please provide a detailed description of the energy conservation measures that are needed and include an estimation of resultant energy savings as compared to the historic consumption.*

**Priority Number Five:** Replacement, renovation or modernization of the heating system in any schoolhouse to increase energy conservation and decrease energy related costs in the schoolhouse:

**Opening Statement:**

In November 1997 the Mayor's School Buildings Needs Task Force statement regarding the heating and ventilation systems, "these systems are original to the school. They are tired, with complete failure a possibility at any time. Avoiding a crisis of this magnitude ought to be the first priority." During the 2005 heating season their statement proved to be correct. During that heating season we had complete failure of the two boilers. In this time of crisis we had to lease a self-contained trailerized boiler to enable the school department the ability to continue classes for the remainder of the heating season. Currently we are still using one of these boilers to heat the facility.

In 2006 we de-commissioned one of the existing boilers and installed a gas fired boiler to replace it. Also, in 2006 we removed the oil burner on one of the original boilers and replaced it with a gas burner. The energy management, control wiring, power wiring, feed pumps and re-circulating pumps are outdated and under performing and need complete replacement. Our goal to increase energy conservation and decrease energy related cost can not be obtained with the existing antiquated mechanical equipment. The breaching from the two boilers is collapsing, undersized and pours. The pours breaching allows harmful gasses to enter the facility. Steam traps and radiators are leaking and run constantly and have a serious impact on our ability to control heating cost and provide adequate heating controls for student and staff.

**§ Heating System Deficiencies**

1. Existing supply and return steam lines are leaking and corroded. Majority of steam lines are covered with asbestos.
2. Classroom unit vents do not operate correctly and do not provide adequate ventilation.
3. Energy management system, pneumatic and other control valves run freely during the heating season. Classroom thermostats are outdated and do not provide any energy conservation.
4. Boiler number 1 in need of complete structural repairs.
5. Existing fan and heating units located within the auditorium mechanical areas have out lived their usefulness. The system does not provide required air changes and heating.
6. Electrical infrastructure supplying the mechanical room is undersized and is not capable of supporting any major renovations to the area.
7. Make-up air equipment located in the mechanical room does not properly vent or add required amount of air and circulation for heating equipment to operate efficiently and conserve energy.

**Priority 5**

*Please describe the measures the School District has already taken to reduce energy consumption.*

■ **Steps taken to Mitigate Problems**

1. Any leaks that are located are repaired by in-house staff.
2. Filters located inside classroom unit vents are replaced annually.
3. Energy management system is antiquated. There are no cost effective means to mitigate this system.
4. Each boiler's internal tubes are cleaned and flushed annually.
5. Auditorium fan and heating unit's filters are replaced annually. The complete system is antiquated and there is no cost effective means to mitigate this system.
6. As needed, fuses that are burnt out are replaced.
7. During peak performance usage of the mechanical equipment and boilers we open up exterior doors to allow additional make up air.

**Priority 5**

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

The inability to control the heat in many general classrooms and program areas is obviously problematic to energy conservation. The teaching/learning environment is significantly impacted by the lack of sufficient or adequate heating controls in the classrooms or program areas. Many classroom univents are ineffective to both the air quality and room temperature. Fluctuations in heat and cold often necessitate the moving of students and staff to different classrooms where they can accomplish the teaching/learning process. The auditorium is utilized sparingly during the heating season due to the inability of the current heating system to consistently, adequately and appropriately heat this critical area for students and staff. The locker rooms are not usable during the heating season because within the current ability of the heating system controls, it is either too hot or too cold.

The Sterling Middle School's classroom windows do not assist in any way in energy efficiency - the cold/breezes that filter through them deter any effect by an antiquated system to keep our students/staff consistently warm in the heating season.

**Please also provide the following:**

**Age of Exterior Walls (Years):** 80

**Were any major repairs or renovations of the exterior walls undertaken in the past?:** YES

**If "YES", please provide the year of the last major repair/renovation of the exterior walls:** 2007

**Age of Roof (Years):** 80

**Were any major repairs or renovations of the roof undertaken in the past?:** YES

**If "YES", please provide the year of the last major repair/renovation of the roof:** 1993

**Age of Windows (Years):** 15

**Were any major repairs or renovations of the windows undertaken in the past?:** YES

**If "YES", please provide the year of the last major repair/renovation of the windows:** 1993

**Age of Boilers (Years):** 82

**Were any major repairs or renovations of the boilers undertaken in the past?:** YES

**If "YES", please provide the year of the last major repair/renovation of the boilers:** 2005

**Age of HVAC (Years):** 82

**Were any major repairs or renovations of the HVAC undertaken in the past?:** YES

**If "YES", please provide the year of the last major repair/renovation of the HVAC:** 2007

**Age of Electrical System (Years):** 82

**Were any major repairs or renovations the electrical system undertaken in the past?:** YES

**If "YES", please provide the year of the last major repair/renovation of the electrical system:** 1988

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

**If "YES", please provide the name of the individual and his/her professional affiliation:**

City of Quincy Inspectional Services

**Please also provide the date of the inspection::** 8/15/2008

**Please describe how addressing the system will extend the useful life of the facility that is the subject of this SOI (maximum of 5000 characters):**

The proposed renovation of Streling Middle School is intended to make use of the existing structure with up-graded mechanical and electrical systems. Renovations will be designed to meet current building code requirements to create a comfortable environment for learning. Attention to correct classroom size, improved lighting, comfortable and energy efficient heat and improved access to the technological/electronic means and methods of teaching will be incorporated. These aspects

are intended to bring the building up to an acceptable standard. The current state of the building is not conducive to the demands and techniques of educationla practice today. It would be difficult for the ciy to justify operating the school in its current condition. There have been very few modifications to the floor plans since the structure was built. Since the building structur is essential useable all modifications and renovations will be targeted to the benefit of Sterling students for many years to come.

## Vote

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Vote of Municipal Governing Body YES: 1 NO: 1 Date: 10/16/2006

Vote of School Committee YES: 7 NO: 0 Date: 9/25/2006

Vote of Regional School Committee YES: NO: Date:

**Form of Vote**

The following form of vote should be used by both the City Council/Board of Aldermen, Board of Selectmen/equivalent governing body AND the School Committee in voting to approve this Statement of Interest.

If a regional school district, the regional school district should use the following form of vote.

Resolved: Having convened in an open meeting on \_\_\_\_\_, the \_\_\_\_\_ *[City Council/Board of Aldermen, Board of Selectmen/Equivalent Governing Body, School Committee]* of \_\_\_\_\_ *[City/Town/School District]*,

in accordance with its charter, by-laws, and ordinances, has voted to authorize the Superintendent to submit to the Massachusetts School Building Authority the Statement of Interest dated \_\_\_\_\_ for the \_\_\_\_\_ *[Name of School]* located at

\_\_\_\_\_ *[Address]* which describes and explains the following deficiencies and the priority category(s) for which

\_\_\_\_\_ *[Name of City/Town/District]* may be invited to apply to the Massachusetts School Building Authority in the future

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ *[Insert a description of the priority(s) checked off on the Statement of Interest and a brief description of the deficiency described therein for each priority];* and hereby further specifically

acknowledges that by submitting this Statement of Interest, the Massachusetts School Building Authority in no way guarantees the acceptance or the approval of an application, the awarding of a grant or any other funding commitment from the Massachusetts School Building Authority, or commits the

\_\_\_\_\_ *[Name of City/Town/District]* to filing an application for funding with the Massachusetts School Building Authority.

**CERTIFICATIONS**

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

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

**Chief Executive Officer**

**School Committee Chair**

**Superintendent of Schools**

\_\_\_\_\_  
(print name)

\_\_\_\_\_  
(print name)

\_\_\_\_\_  
(print name)

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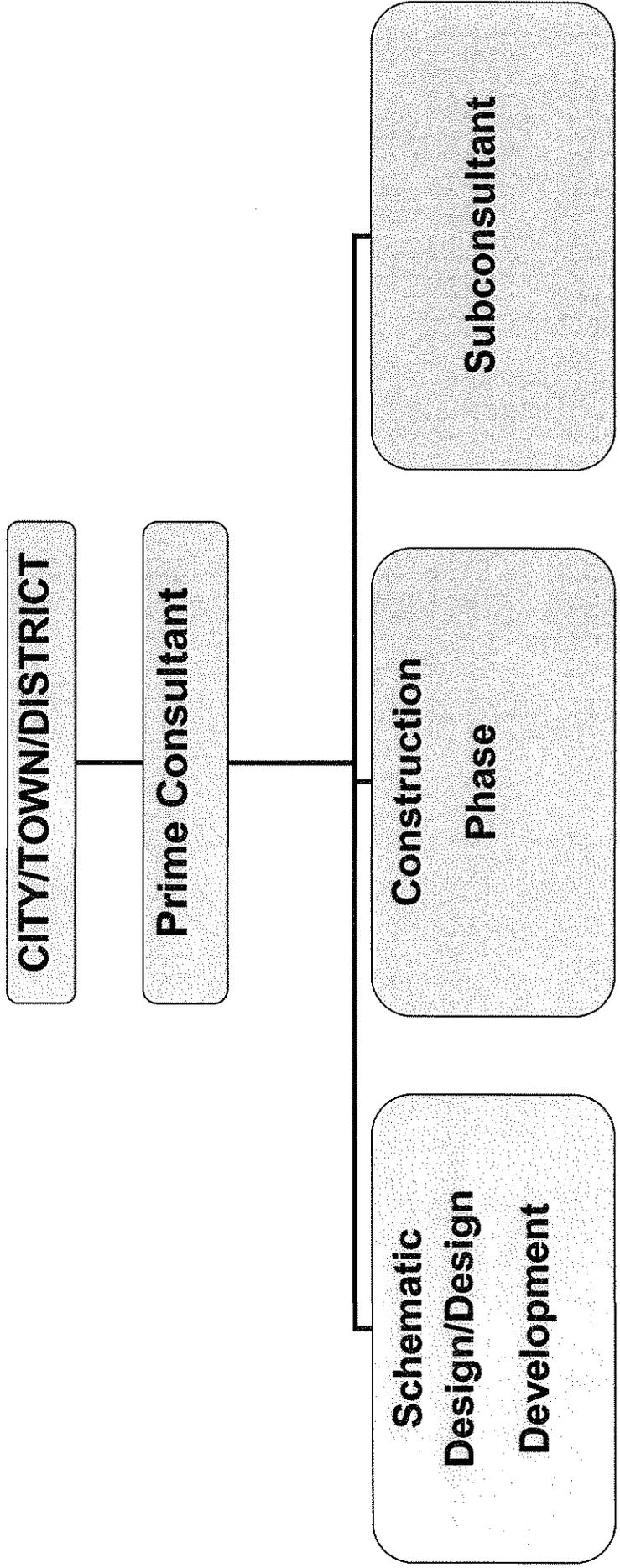
\_\_\_\_\_  
Date

**ATTACHMENT B**  
**MSBA STANDARD CONTRACT**  
**(Design/Bid/Build or CM-at-Risk)**

**Owner's Project Manager Application Form - May 2008**

|   |   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
|---|---|------------------|-------|------------|-------|-------------------|-------|--------------|-------|------------------|-------|-------------------------|-------|-----------------|-------|-------------------|-------|----------------------|-------|----------------------|-------|-------------------|-------|-------|-------|
| <p>1. Project Name/Location for Which Firm is Filing:</p>   |   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| <p>1a. MSBA Project Number:</p>   |   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| <p>2a. Respondent, Firm (Or Joint-Venture) - Name And Address Of Primary Office To Perform The Work:</p>  | <p>2b. Name And Address Of Other Participating Offices Of The Prime Applicant, If Different From Item 3a Above:</p> |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| <p>2c. Date Present And Predecessor Firms Were Established:</p>   | <p>2d. Name And Address Of Parent Company, if Any:</p>  |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| <p>2e. Federal ID #:</p>  | <p>2f. Name of Proposed Project Director:</p>   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| <p>3. Personnel From Prime Firm Included In Question #2 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):</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Admin. Personnel</td> <td style="width: 50%;">Other</td> </tr> <tr> <td>Architects</td> <td>_____</td> </tr> <tr> <td>Acoustical Engrs.</td> <td>_____</td> </tr> <tr> <td>Civil Engrs.</td> <td>_____</td> </tr> <tr> <td>Code Specialists</td> <td>_____</td> </tr> <tr> <td>Construction Inspectors</td> <td>_____</td> </tr> <tr> <td>Cost Estimators</td> <td>_____</td> </tr> <tr> <td>Electrical Engrs.</td> <td>_____</td> </tr> <tr> <td>Environmental Engrs.</td> <td>_____</td> </tr> <tr> <td>Licensed Site Profs.</td> <td>_____</td> </tr> <tr> <td>Mechanical Engrs.</td> <td>_____</td> </tr> <tr> <td style="text-align: right;">Total</td> <td>_____</td> </tr> </table> |   | Admin. Personnel | Other | Architects | _____ | Acoustical Engrs. | _____ | Civil Engrs. | _____ | Code Specialists | _____ | Construction Inspectors | _____ | Cost Estimators | _____ | Electrical Engrs. | _____ | Environmental Engrs. | _____ | Licensed Site Profs. | _____ | Mechanical Engrs. | _____ | Total | _____ |
| Admin. Personnel  | Other   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| Architects  | _____   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| Acoustical Engrs.   | _____   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| Civil Engrs.  | _____   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| Code Specialists  | _____   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| Construction Inspectors   | _____   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| Cost Estimators   | _____   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| Electrical Engrs.   | _____   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| Environmental Engrs.  | _____   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| Licensed Site Profs.  | _____   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| Mechanical Engrs.   | _____   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| Total   | _____   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |
| <p>4. Has this Joint-Venture previously worked together? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>   |   |                  |       |            |       |                   |       |              |       |                  |       |                         |       |                 |       |                   |       |                      |       |                      |       |                   |       |       |       |

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:



6. Brief Resume for Key Personnel **ONLY** as indicated in the Request for Services. Resumes Should Be Consistent With The Persons Listed On The Organizational Chart In Question # 5. Additional Sheets Should Be Provided Only As Required For The Number Of Key Personnel And They Must Be In The Format Provided. By Including A Firm As A Subconsultant, The Prime Applicant Certifies That The Listed Firm Has Agreed To Work On This Project, Should The Team Be Selected.

|   |  |
|---|--|
| a. Name And Title Within Firm:  |  |
| b. Project Assignment:  |  |
| c. Name And Address Of Office In Which Individual Identified In 6a Resides:   |  |
| d. Years Experience: With This Firm: _____ With Other Firms: _____  |  |
| e. Education: Degree(s) /Year/Specialization  |  |
| f. Date of MCCPO Certification:   |  |
| g. Applicable Registrations and Certifications:   |  |
| h. Current Work Assignments And Availability For This Project   |  |
| i. Other Experience And Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed, if Not Current Firm): |  |

| 7a 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. |   |                         |   |                        |   |                  |  |                                     |  |  |
|--|---|-------------------------|---|------------------------|---|------------------|--|-------------------------------------|--|--|
| a. Project Name And Location<br>Project Director   | b. Brief Description Of Project And Services (Include Reference To Areas Of Similar Experience) | c. Project Dollar Value | d. Completion Date (Actual Or Estimate) | e. On Time (Yes Or No) | f. Original Construction Contract Value | g. Change Orders | h. Number of Accidents and Safety Violations | i. Dollar Value of any Safety fines | j. Number And Outcome Of Legal Actions |  |
| (1)  |   |                         |   |                        |   |                  |  |                                     |  |  |
| (2)  |   |                         |   |                        |   |                  |  |                                     |  |  |
| (3)  |   |                         |   |                        |   |                  |  |                                     |  |  |
| (4)  |   |                         |   |                        |   |                  |  |                                     |  |  |
| (5)  |   |                         |   |                        |   |                  |  |                                     |  |  |

7b. Past Performance: Provide the following information for those completed Projects listed above in 7a for which the Prime Applicant has performed, or has entered into a contract to perform (cont) Owner's Project Management Services for all Public Agencies within the Commonwealth within the past 10 years.

| a. Project Name And Location<br>Project Director | b. Original Project Budget | c. Final Project Budget | d. If different, provide reason(s) for variance | e. Original Project Completion | e. Actual Project Completion On Time (Yes or No) | f. If different, provide reason(s) for variance. |
|--|----------------------------|-------------------------|---|--------------------------------|--|--|
| (1)  |                            |                         |   |                                |  |  |
| (2)  |                            |                         |   |                                |  |  |
| (3)  |                            |                         |   |                                |  |  |
| (4)  |                            |                         |   |                                |  |  |
| (5)  |                            |                         |   |                                |  |  |

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

| Project Name And Location<br>Project Director | b. Brief Description Of Project And Services (Include Reference To Areas Of Similar Experience) | c. Original Project Budget | d. Current Project Budget | d. Project Completion Date | e. Current forecast completion date<br>On Time<br>(Yes Or No) | f. Original Construction Contract Value | g. Number and dollar value of Change Orders | h. Number and dollar value of claims |
|---|---|----------------------------|---------------------------|----------------------------|---|---|---|--------------------------------------|
| 1.  |   |                            |                           |                            |   |   |   |                                      |
| 2.  |   |                            |                           |                            |   |   |   |                                      |
| 3.  |   |                            |                           |                            |   |   |   |                                      |
| 4.  |   |                            |                           |                            |   |   |   |                                      |
| 5.  |   |                            |                           |                            |   |   |   |                                      |
| 6.  |   |                            |                           |                            |   |   |   |                                      |
| 7.  |   |                            |                           |                            |   |   |   |                                      |
| 8.  |   |                            |                           |                            |   |   |   |                                      |

| 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. |   |   |   |   |   |   |
|--|---|---|---|---|---|---|
| a.   | Project Name And Location<br>Project Director | Client's Name, Address and Phone Number. Include Name of Contact Person | Project Name And Location<br>Project Director | Client's Name, Address and Phone Number. Include Name of Contact Person | Project Name And Location<br>Project Director | Client's Name, Address and Phone Number. Include Name of Contact Person |
| 1)   |   |   | 5)  |   | 9)  |   |
| 2)   |   |   | 6)  |   | 10)   |   |
| 3)   |   |   | 7)  |   | 11)   |   |
| 4)   |   |   | 8)  |   | 12)   |   |

9. Use This Space To Provide Any Additional Information Or Description Of Resources Supporting The Qualifications Of Your Firm And That Of Your Subconsultants. If Needed, Up To Three, Double-Sided 8 1/2" X 11" Supplementary Sheets Will Be Accepted. **APPLICANTS ARE REQUIRED TO RESPOND SPECIFICALLY IN THIS SECTION TO THE AREAS OF EXPERIENCE REQUESTED.**

10. I hereby certify that the undersigned is an Authorized Signatory of Firm and is a Principal or Officer of Firm. 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

Date

# **ATTACHMENT C**

# Attachment D

## Required Certifications

### City of Quincy Required Certifications (3)

- Tax Compliance Certification
- Certification Relating to Debarment and Suspension
- Certification regarding Authorized Signators