



OPM UPDATE REPORT

PROJECT: Smith Elementary School, Danvers

DATE: November 16, 2018

Designer	Tappe Architects	Project Phase	Design Development
Facility Type	Elementary School (Grades K-5)	Current MSBA Phase	Modules #5 & #6
Construction Type	New Construction	MSBA Board Vote	December 12, 2018
Building Size	82,728 GSF (approx.)	MSBA Funding (% of eligible costs)	Currently 55.455% of eligible costs <i>(includes 4.875 incentive points)</i>
Enrollment Projection	465 students	Construction Method	CM @ Risk (C149A)

Recent Project Milestones:

- CMR SOQs Received: 10/3/18
- Submitted Schematic Design & DESE Package to MSBA: 10/17/18
- CMR RFP Issued: 11/9/18
- Received MSBA SD Comments: 11/14/18 (15 days to respond)

Recent & Upcoming Meetings:

- SBC Meeting: 10/12/18
- CMR Prequalification/Selection Subcommittee Meeting: 10/23/18 (see below)
- Community Forum @ Smith School: 11/1/18
- MSBA Meeting: 11/5/18
- SBC Meeting: 11/16/18
- Design Meetings TBD
- CMR Interviews: 11/21/18
- MSBA Board of Directors Meeting: 12/12/18
- Community Forum @ Holten Richmond School: 12/13/18

MSBA Module 5 – Funding the Project:

MSBA Module 5 is all about securing MSBA funding. The following bullets summarize the process:

- The total project budget submitted in the Schematic Design Package is reviewed and updated as part of MSBA SD Review
 - **MSBA SD Review Comments Received: 11/14/18**
- MSBA Board of Directors Approves Project for Funding
 - **MSBA Board of Directors Meeting: 12/12/18**
- The updated total project budget is used to form a Project Scope & Budget Agreement with the MSBA
- District secures local funding authorization (within 120 days of MSBA Project Funding Approval on 12/12/18)
 - **Special Town Meeting: 2/4/19**
- Project Scope & Budget Agreement becomes Project Funding Agreement
- ProPay System Budget Update takes place to memorialize Project Funding Agreement

Please refer to the following website for additional information: <http://www.massschoolbuildings.org/building/funding>

MSBA Module 6 – Detailed Design:

Within MSBA Module 6, the project design is developed via Construction Documents and Specifications and the MSBA participates in multiple design reviews. Detailed Design involves three separate submissions to the MSBA:

- Design Development (DD)
- 60% Construction Documents
- 90% Construction Documents

The following elements compose the Design Development submittal to the MSBA:

- Commissioning Agent (Cx) is assigned, and Cx comments on DD package incorporated into submittal
- Updated project schedule
- Updated project budget
- Value engineering summary
- Design requirements including but not limited to:
 - Design work plan, basis of design narratives for all disciplines, building code analysis
 - Interior color theory statement
 - Confirmation of project registration with CHPS
 - Structural narratives/calculations
 - Energy calculations; life cycle cost analyses for energy/water consuming devices; HVAC Systems Heat gain and loss calcs; electrical load calculations
 - Safety and visual access requirement confirmation
 - Quality control documents
- Updated MSBA Space Summary and narratives
- Project approvals update
- Construction Cost Estimates
- Drawings (Developed to Design Development progress level as outlined by MSBA Module 6 Guidelines)
- Project Manual (Developed to Design Development progress level as outlined by MSBA Module 6 Guidelines)

Budget Summary	
Architect Feasibility Study (FS)/Schematic Design (SD)	508,175
Architect FS/SD Amendments 1, 2, and 3	47,310
Total Design FS/SD Contract	\$555,485
Current Design DD Contract (up to Town Vote)	\$561,895
OPM Feasibility Study (FS)/Schematic Design (SD)	259,410
OPM FS/SD Amendment 1	-30,000
OPM FS/SD Amendment 2	1,200
Total OPM FS/SD Contract	\$230,610
Current OPM DD Contract (from Amendment #1)	\$49,460
Total Encumbered to Date	\$1,397,450
Invoices/Cost To Date	\$752,600
MSBA ProPay Reimbursement Payments to Date	\$231,894
MSBA ProPay Reimbursements Payments Pending	\$185,460

CMR Procurement:

CMR Procurement/Selection is multi-step process consisting of the following:

- Submit CMR Application to OIG & Receive Approval
 - **Application submitted 8/10/18**
 - **Notice to Proceed received 9/5/18**
- Establish Prequalification & Selection Committees (can be the same members)
 - 1 OPM and 1 Design representative, minimum of 2 representatives from the Town
 - **Committee: Jen Breaker, Paul Queeeney, David Lane, Keith Taverna, Charlie Hay**
- Request for Qualifications (RFQ)
 - OPM issues RFQ
 - **Issued 9/12/18**
 - RFQ responses reviewed (called Statement of Qualifications, or SOQs)
 - **Received by 8 firms on 10/3/18**
 - SOQ scoring guidelines issued by PMA, provide detailed scoring system for evaluation of similar project experience, management personnel, terminations, legal proceedings, safety record, MBE/WBE compliance record, sustainable construction experience, references, and capacity to complete project. PMA checks for mandatory requirements.
 - Prequalification Committee must prequalify at least 3 firms
 - **Met 10/23/18 and prequalified 4 firms.**
- Request for Proposals (RFP)
 - OPM issues RFP to prequalified CMR firms
 - **Issued 11/9/18**
 - CMR site visit
 - **Took place on 11/1/18**
 - Issue addenda (formal response to questions asked)
 - Receive CMR Proposals (Pricing & Non-pricing) from prequalified firms, verify statutory requirements are met
 - **CMR Proposals due 11/21/18**
- Select Appropriate CMR Firm
 - Evaluate CMR Price & Non-Price Proposals based on predetermined scoring criteria
 - Selection Committee reviews and establishes ranking
 - Interview firms
 - **Interviews scheduled for 11/29/18, 8:30AM-12:30PM @ Danvers Town Hall**
 - Establish final ranking after interview and price reviews
 - Notice of intent to award to selected CMR
 - Negotiate fee
 - Execute after final legal counsel review of contract for preconstruction services