

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

## **1. Introduction**

The ***Wrentham Public School District*** ("Owner") is seeking the services of a qualified OPM "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 ***Charles E. Roderick Elementary School*** ("School") in ***Wrentham, Massachusetts*** ("Project").

The Owner is requesting the services of an OPM 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 Town, 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 ***\$64,421,000 to \$94,902,500*** 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 Board of Directors.

## **2. Background**

***The Charles E. Roderick Elementary School (Roderick School) teaches 372 students in grades 4, 5, and 6 in Wrentham, Massachusetts. It is the only public elementary school for students in grades 4, 5, and 6 in the town. Roderick School is on a 60-acre campus with two other school buildings, Delaney School (preschool through grade 3) and Vogel School (special subjects, special education classrooms, and administrative offices). The campus has a septic treatment plant that the schools and two other town buildings utilize. The school abuts two large fields that are owned by the school district but used by the town.***

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

On or about ***April 29, 2022***, the Owner submitted a Statement of Interest (Attachment A) to the MSBA for ***Charles E. Roderick Elementary School*** in ***Wrentham, MA***. The MSBA is an independent public authority that administers and funds a program for grants to eligible cities, towns, and regional school districts for school construction and renovation projects. The MSBA's grant program is discretionary, and no city, town, or regional school district has any entitlement to any funds from the MSBA. At the April 24, 2024 Board of Directors meeting, 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.

It is anticipated that the feasibility study will review the problems identified in the Statement of Interest at the ***Charles E. Roderick Elementary School***.

***Charles E. Roderick Elementary School (Roderick School) was constructed in 1968. The building was 29,208 sq. ft. and consisted of fourteen classrooms, a kitchen, two adult bathrooms, two student bathrooms, two student changing rooms, and two storage rooms around the perimeter of a***

***combined cafeteria/gym. The original building also had a main office suite with smaller offices for the principal and nurse. In 1988, the town built a 26,754 sq. ft. addition to the building. The 1988 addition consists of eleven classrooms, one library, eight small offices, two adult restrooms and two student bathrooms.***

***The Roderick School envelope consists of brick and mortar, concrete slab, 53 single pane windows installed in 1968, 75 two-pane windows installed in 1988, 11 skylights, and an EPDM roof. The entire Roderick School roof was replaced in 2006 with ribbed-steel roof substrate, ½ -inch thick gypsum board, two-ply vapor retarder, three inch thick insulation, and EPDM roof and flashing. Each of the original classrooms has an exterior door that is original from 1968. The original single pane windows and doors are not energy efficient and many are failing.***

***The Roderick School mechanical system is original to the 1968 building. The 1968 original building has the following electrical components: main distribution panel 120/208/240/277/480 V, 800 Amp; two GE panels in the kitchen 120/208/240/277/480 V, 200-250 Amp; and three GE sub-panels in the cafeteria and sped room. The 1988 addition has the following electrical components: one SQ D panel 120/208/240/277/480 V, 400 Amp; two sub-panels; one sub-panel in the band room.***

***The Roderick School HVAC system is pneumatic and original to the 1968 building. The HVAC system consists of one air handler unit that supplies heat and fresh air to induction unit vents in 14 classrooms. All other offices have radiant heat. Two air handler units supply heat and fresh air to the cafeteria. The 1988 addition HVAC consists of two air handler units that supply heat and fresh air to the band room. Fourteen face & bypass unit vents supply heat and fresh air to 12 classrooms and the library. All other offices have radiant heat.***

***The Roderick School building interior consists of painted cinder block walls, drop ceilings, VCT tile flooring, and energy efficient LED lighting installed in 2017.***

***The Roderick School teaches all elementary school students in Wrentham in grades 4, 5, and 6. The current enrollment is 372 students. The school provides general education and special education programming. All students participate in the school's special subjects, which are library, art, physical education, health, and technology. Students may participate in a fee-based band program. Students in grades 4 and 6 participate in the DARE program taught by the Wrentham Police Department.***

As a result of a collaborative analysis with the Massachusetts School Building Authority (the "MSBA") of enrollment projections and space capacity needs for the Charles E. Roderick Elementary School (the "Proposed Project"), the Town of Wrentham hereby acknowledges and agrees that the design of alternatives, which may be evaluated as a part of the feasibility study for the Charles E. Roderick Elementary School, shall be based in accordance with the following:

| Enrollment for<br>Grades 4-6 | Enrollment for<br>Grades 3-6 |
|------------------------------|------------------------------|
| 450 students                 | 595 students                 |

***The Roderick School has 14 classrooms that are 900 sq. ft. that were built in 1968. These classrooms are around the perimeter of the cafeteria/gym. They are too small to accommodate the tables and other furniture and equipment necessary for contemporary education. Additionally, the rooms are very loud due to the noise in the cafeteria/gym. The school has 12 classrooms that are***

950 sq. ft. which were built in 1988. The school has 12 multipurpose rooms that are approximately 200 sq. ft., one art room that is 1,000 sq. ft., one library that is 1600 sq.ft., one technology lab that is 920 sq. ft., one band room that is 3500 sq. ft., and one cafeteria/gym room that is 5,000 sq. ft.

Project Objectives under consideration by the Owner include:

- *Identification of community concerns that may impact study options, including potential impact to Sweatt Field;*
- *Identification of specific milestone requirements and/or constraints of the District – e.g. Town votes, swing space, occupancy issues;*
- *Life cycle costs of operating the School as it relates to future operational budgets;*
- *Northeast Collaborative for High Performance Schools (NE-CHPS) criteria or US Green Building Council’s LEED for Schools (LEED-S) Rating System;*
- *Identification of model school plans.*

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:

|  |                      |
|--|----------------------|
| Feasibility Study/Schematic Design Phase;                    | <b>20-24 months*</b> |
| Design Development/Construction Documents/Bidding Phase; and | <b>10-12 months*</b> |
| Construction Phase.  | <b>24-36 months*</b> |

(\*These ranges for scheduling timeframes are provided as guidelines only and are based upon schedules established by other Owners.)

**4. Minimum Requirements and Evaluation Criteria**

Minimum Requirements

In order to be eligible for selection, each Respondent must certify 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, may 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 (the “MCPPO”) 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 five years’ experience in the construction and supervision of construction and design of public buildings;
- or,
- if not registered as an architect or professional engineer, the Project Director must be a person who has at least seven years’ 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:

- 1) **25 Points (split below)** - Past performance of the Respondent, if any, with regard to public, private, Department Of Education funded and MSBA-funded school projects across the Commonwealth, as evidenced by:
  - a) **15 Points** 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) **10 Points** Satisfactory working relationship with designers, contractors, Owner, the MSBA and local officials.
- 2) **5 Points** - 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) **10 Points** - Thorough knowledge of Commonwealth construction procurement laws, regulations, policies and procedures, as amended by the 2004 Construction Reform laws.
- 4) **15 Points** - Management approach: Describe the Respondent's approach to providing the level and nature of services required as evidenced by proposed project staffing for a potential (hypothetical) proposed project for new construction of approximately **100,000** square feet or renovation of approximately **56,000** 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 Points** - Key personnel: Provide an organizational chart that shows the interrelationship of key personnel to be provided by the Respondent for this project and that identifies the individuals and associated firms (if any) who will fill the roles of Project Director, Project Representative and any other key roles identified by the Respondent, including but not limited to roles in design review, estimating, cost and schedule control. Specifically, describe the time commitment, experience and references for these key personnel including relevant experience in the supervision of construction of several projects that have been either successfully completed or in process that are similar in type, size, dollar value and complexity to the project being considered.
- 6) **10 Points** - Capacity and skills: Identify existing employees by number and area of expertise (e.g. field supervision, cost estimating, schedule analysis, value engineering, constructability review, quality control and safety). Identify any services to be provided by sub-consultants.
- 7) **5 Points** - Identify the Respondent's current and projected workload for projects estimated to cost in excess of \$1.5 million.
- 8) **5 Points** - Familiarity with Northeast Collaborative for High Performance Schools criteria 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., NE-CHPS or LEED-S), 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 NE-CHPS or LEED-S prerequisites.

- 9) **5 Points** - 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) **5 Points** - Knowledge of the purpose and practices of the services of Building Commissioning Consultants.
- 11) **5 Points** - 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.

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 RFS, 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 sub-consultants 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**

- 1) The Roderick School Building Committee Evaluation Subcommittee shall review the minimum requirements of the firms. Each proposal will first be reviewed for completeness and any incomplete proposals will be rejected. Remaining proposals will be evaluated individually by each member of the Evaluation Subcommittee and scores will be averaged to develop a ranking. The Evaluation Subcommittee will meet to discuss its scoring and agree on a short-list of a minimum of the top three firms by total average points based on the selection criteria listed herein.***
- 2) The top three firms will be invited to interview. All questions asked during the interviews will be the same of each firm unless arrived at organically as a result of the interview and/or if related to the firm specifically or their current/past projects.***
- 3) Interviews will include questions regarding strengths and weaknesses in the proposals and firms will be ranked by each member on a five point scale: 5 (Exceptional), 4 (Strong), 3 (Average), 2 (Below Average), and 1 (Weak). The interview scores will be averaged and will***

*make up 30% of the total score. The remaining 70% of the total score will come from the initial application scores (60%) and references (10%). References will be scored using the rubric described below in point 4.*

- 4) References of the top firm will be reviewed for accuracy. The Owner will use a scoring mechanism to rate the accuracy of the reference checks: 4 (Very Accurate), 3 (Accurate), 2 (Somewhat Accurate), and 1 (Not Accurate). Should any inconsistencies in the reference checks be identified, the Committee reserves the right to move to negotiations with the next highest ranked firm.*
- 5) The highest ranked firm will provide its fee proposal with justification for costs.*
- 6) The Owner will commence fee negotiations with the first-ranked selection.*
- 7) 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.*
- 8) The selected firm will be submitted to the MSBA for its approval.*
- 9) The selected firm 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.*
- 10) 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.*

The following is a tentative schedule of the selection process, subject to change at the Owner's and MSBA's discretion. All following dates are in 2024.

|                                |  |
|--------------------------------|--|
| <i>June 5</i>                  | RFS appears in the Central Register of the Commonwealth of Massachusetts and <i>The Sun Chronicle</i> newspaper. |
| <i>June 10: 10:00 a.m. EDT</i> | Informational meeting and site observation.  |
| <i>June 12: 5:00 p.m. EDT</i>  | Last day for questions from Respondents.   |
| <i>June 19: 5:00 p.m. EDT</i>  | Responses due  |
| <i>June 20</i>                 | Respondents short-listed   |
| <i>June 26-28</i>              | Interview short-listed Respondents   |
| <i>July 1-July 8</i>           | Negotiate with selected Respondent   |
| <i>July 10</i>                 | Final selection submitted to the MSBA for review and approval  |
| <i>August 5</i>                | Anticipated MSBA OPM Review Panel Meeting  |
| <i>August 12</i>               | Anticipated execution of contract  |

The RFS may be obtained from:

Allan Cameron, Superintendent  
Wrentham Public Schools  
120 Taunton Street  
Wrentham, MA, 02093  
508-384-5430 ext. 3 (phone)  
508-384-5444 (fax)

***On or after June 5, 2024***

Any questions concerning this RFS must be submitted in writing to:

Allan Cameron, Superintendent  
Wrentham Public Schools  
120 Taunton Street  
Wrentham, MA, 02093  
508-384-5430 ext. 3 (phone)  
508-384-5444 (fax)  
[camerona@wrenthamschools.org](mailto:camerona@wrenthamschools.org)

***By 5:00 p.m. EDT on June 12, 2024***

Sealed responses to the RFS for OPM services must be clearly labeled “Owner’s Project Management Services for ***Charles E. Roderick School*** and delivered to:

Allan Cameron, Superintendent  
Wrentham Public Schools  
120 Taunton Street  
Wrentham, MA, 02093  
508-384-5430 ext. 3 (phone)  
508-384-5444 (fax)  
[camerona@wrenthamschools.org](mailto:camerona@wrenthamschools.org)

***No later than 5:00 PM EDT, June 19, 2024***

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 ***five (5)*** hard copies of the response to this RFS and one electronic version in PDF format via email. 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 Attachments and 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 RFS. Respondents shall note any exceptions to the RFS in its cover letter.

- c. An acknowledgement that the Respondent has read the Contract for Project Management Services. Respondent shall note any exceptions to the Contract for Project Management Services in its cover letter.
  - d. A specific statement regarding compliance with the minimum requirements identified in Item 4 of this RFS 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 MCPPO certification. (A copy of the MCPPO certification must 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 submission of additional information as needed. The total length of the Response (including Attachment C only but excluding Attachments A, B, D, and E) 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 three 8½" x 11" pages, double-sided.**

## **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 OPM 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 RFS is:

Shannon Shepherd, Business Manager  
Wrentham Public Schools  
120 Taunton Street  
Wrentham, MA, 02093  
508-384-5430 ext. 3 (phone)  
508-384-5444 (fax)  
[shepherds@wrenthamschools.org](mailto:shepherds@wrenthamschools.org)

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 OPM 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**

## **ATTACHMENTS:**

**Attachment A: Statement of Interest**

**Attachment B: Contract for Owner's Project Management Services**

**Attachment C: OPM Application Form – March 2017**

**Attachment D: Enrollment Letter and Enrollment Certification**

**Attachment E: Required Certifications**

## ATTACHMENT A

### Statement of Interest

## Massachusetts School Building Authority

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### Next Steps to Finalize Submission of your FY 2022 Statement of Interest

Thank you for submitting an FY 2022 Statement of Interest (SOI) to the MSBA electronically. **Please note, the District's submission is not yet complete if the District selected statutory priority 1 or priority 3.** If either of these priorities were selected, the District is required to mail the required supporting documentation to the MSBA, which is described below.

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

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

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

If you have any questions about the SOI process please contact the MSBA at 617-720-4466 or [SOI@massschoolbuildings.org](mailto:SOI@massschoolbuildings.org).

## Massachusetts School Building Authority

School District Wrentham

District Contact Allan Cameron TEL: (508) 384-5430

Name of School Charles E Roderick

Submission Date 4/29/2022

### SOI CERTIFICATION

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

- ☒ The district hereby acknowledges and agrees that this SOI is NOT an application for funding and that submission of this SOI in no way commits the MSBA to accept an application, approve an application, provide a grant or any other type of funding, or places any other obligation on the MSBA.
- ☒ The district hereby acknowledges that no district shall have any entitlement to funds from the MSBA, pursuant to M.G.L. c. 70B or the provisions of 963 CMR 2.00.
- ☒ The district hereby acknowledges that the provisions of 963 CMR 2.00 shall apply to the district and all projects for which the district is seeking and/or receiving funds for any portion of a municipally-owned or regionally-owned school facility from the MSBA pursuant to M.G.L. c. 70B.
- ☒ The district hereby acknowledges that this SOI is for one existing municipally-owned or regionally-owned public school facility in the district that is currently used or will be used to educate public PreK-12 students and that the facility for which the SOI is being submitted does not serve a solely early childhood or Pre-K student population.
- ☒ Prior to the submission of the SOI, the district will schedule and hold a meeting at which the School Committee will vote, using the specific language contained in the "Vote" tab, to authorize the submission of this SOI. This is required for cities, towns, and regional school districts.
- ☒ Prior to the submission of the SOI, the district will schedule and hold a meeting at which the City Council/Board of Aldermen or Board of Selectmen/equivalent governing body will vote, using the specific language contained in the "Vote" tab, to authorize the submission of this SOI. This is not required for regional school districts.
- ☒ The district hereby acknowledges that current vote documentation is required for all SOI submissions. The district will use the MSBA's vote template and the required votes will specifically reference the school name and the priorities for which the SOI is being submitted.
- ☒ The district hereby acknowledges that it must upload all required vote documentation on the "Vote" tab, in the format required by the MSBA. All votes must be certified or signed and on city, town or district letterhead.
- ☒ The district hereby acknowledges that this SOI submission will not be complete until the MSBA has received all required supporting documentation for statutory priority 1 and statutory priority 3. If statutory priority 1 is selected, your SOI will not be considered complete unless and until you provide the required engineering (or other) report, a professional opinion regarding the problem, and photographs of the problematic area or system. If statutory priority 3 is selected, your SOI will not be considered complete unless and until you provide a summary of the accreditation report focused on the deficiency as stated in this SOI. The documentation noted above must be post-marked and submitted to the MSBA by the Core Program SOI filing period closure date.

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

**Chief Executive Officer \***

Kevin Sweet

**School Committee Chair**


Veronica Gonzalez

**Superintendent of Schools**

Allan Cameron

Town Administrator





(signature)

(signature)

(signature)

Date

Date

Date

4/28/2022 10:10:11 PM

4/27/2022 4:35:20 PM

4/26/2022 3:17:18 PM

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

## Massachusetts School Building Authority

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School District Wrentham

District Contact Allan Cameron TEL: (508) 384-5430

Name of School Charles E Roderick

Submission Date 4/29/2022

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### Note

Thank you for reviewing the Wrentham Public Schools SOI for Roderick School. Please contact me with any questions.

Sincerely,

Allan Cameron, Superintendent of Wrentham Public Schools

camerona@wrenthamschools.org

508-384-5430 ext 3

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

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

### SOI Vote Requirement

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

will not be reviewed by the MSBA unless the required accompanying vote documentation is submitted to the satisfaction of the MSBA. All SOI vote documentation must be uploaded on the Vote Tab.

**SOI Program:** Core

**Potential Project Scope:** Potential New School

**Is this a Potential Consolidation?** No

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

**School name of the District Priority SOI:** 2022 Charles E Roderick

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

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

**Facilities Plan Date:**

**Planning Firm:**

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

**Please provide the current student to teacher ratios at the school facility that is the subject of this SOI:** 12 students per teacher

**Please provide the originally planned student to teacher ratios at the school facility that is the subject of this SOI:** 12 students per teacher

**Does the District have a Master Educational Plan that includes facility goals for this building and all school buildings in District?** No

**Does the District have related report(s)/document(s) that detail its facilities, student configurations at each facility, and District operational budget information, both current and proposed?** Yes

**If "YES", please provide title, author, and date of report in area below.**

Roderick School Overview; Allan Cameron, Chad Lovett, and Glenn Gillespie; February 28, 2022 FY22 WPS Operating Budget; Allan Cameron and Shannon Shepherd; July 1, 2022 FY23 Proposed WPS Operating Budget; Allan Cameron and Shannon Shepherd; March 15, 2022

**Please include a hard copy of these report(s)/document(s).**

**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?** 2

**At which schools in the district?** Roderick School and Delaney School

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

One FTE General Music Teacher position was eliminated at Roderick School and 1.0 FTE Library Teacher position was eliminated from Delaney School.

**Has the district had any recent staff layoffs or reductions?** No

**If "YES", how many staff positions were affected?** 0

**At which schools in the district?**

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

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

The staff reductions had a significant impact on student programming at both schools. The 1.0 FTE staff reduction at Roderick School resulted in the elimination of the general music program at Roderick School. Students in grades 4, 5,



and 6 do not have general music. The 1.0 FTE staff reduction at Delaney School resulted in the elimination of the library program at Delaney School. Students visit the library with their classroom teachers but do not have a library class.

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

The School Committee will review the SOI for the Roderick School at their meeting on March 15, 2022. If approved, the Select Board will review the SOI at their meeting on April 19, 2022. If approved, I will submit the SOI to MSBA on April 20. If accepted by MSBA, the town will work with MSBA to prepare for a vote by Town Meeting on June 5, 2023.

## 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).

The original Roderick school was constructed in 1968. The building was 29,208 sq. ft. and consisted of fourteen classrooms, a kitchen, two adult bathrooms, two student bathrooms, two student changing rooms, and two storage rooms around the perimeter of a combined cafeteria/gym. The original building also had a main office suite with smaller offices for the principal and nurse. In 1988, the town built a 26,754 sq. ft. addition to the building. The 1988 addition consists of eleven classrooms, one library, eight small offices, two adult restrooms and two student bathrooms. Roderick School sits on a 60-acre campus with Delaney School and a septic treatment plant.

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

55962

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

The Roderick school is on a 60-acre campus with two other school buildings, the Delaney School and the Vogel School. It has a septic treatment plant on campus that the schools and two other town buildings utilize. The school abuts two large fields that are owned by the school district but used by the town.

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

120 Taunton Street, Wrentham MA, 02093. The rear of the school is on Randall Road, Wrentham, MA.

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

The Roderick school envelope consists of brick and mortar, concrete slab, 53 single pane windows installed in 1968, 75 two-pane windows installed in 1988, 11 skylights, and an EPDM roof. Each of the original classrooms has an exterior door that is original from 1968. The original single pane windows and doors are not energy efficient and many are failing.

**Has there been a Major Repair or Replacement of the EXTERIOR WALLS?** NO

**Year of Last Major Repair or Replacement:(YYYY)** 1968

**Description of Last Major Repair or Replacement:**

None

**Roof Section** A

**Is the District seeking replacement of the Roof Section?** NO

**Area of Section (square feet)** 55962

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)**

The entire Roderick School roof was replaced in 2006 with ribbed-steel roof substrate, ½ -inch thick gypsum board, two-ply vapor retarder, three inch thick insulation, and EPDM roof and flashing.

**Age of Section (number of years since the Roof was installed or replaced)** 17

**Description of repairs, if applicable, in the last three years. Include year of repair:**

Not applicable

**Window Section A**

**Is the District seeking replacement of the Windows Section?** YES

**Windows in Section (count)** 128

**Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))**

53 single pane and 75 double pane windows

**Age of Section (number of years since the Windows were installed or replaced)** 55

**Description of repairs, if applicable, in the last three years. Include year of repair:**

None

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

The Roderick mechanical system is original to the 1968 building. The 1968 original building has the following electrical components: main distribution panel 120/208/240/277/480 V, 800 Amp; two GE panels in the kitchen 120/208/240/277/480 V, 200-250 Amp; and three GE sub-panels in the cafeteria and sped room. The 1988 addition has the following electrical components: one SQ D panel 120/208/240/277/480 V, 400 Amp; two sub-panels; one sub-panel in the band room.

**Boiler Section 1**

**Is the District seeking replacement of the Boiler?** NO

**Is there more than one boiler room in the School?** YES

**What percentage of the School is heated by the Boiler?** 100

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

Natural Gas

**Age of Boiler (number of years since the Boiler was installed or replaced)** 23

**Description of repairs, if applicable, in the last three years. Include year of repair:**

Routine maintenance.

**Has there been a Major Repair or Replacement of the HVAC SYSTEM?** NO

**Year of Last Major Repair or Replacement:(YYYY)** 1968

**Description of Last Major Repair or Replacement:**

The HVAC system is pneumatic and original to the 1968 building. The HVAC system consists of one air handler unit that supplies heat and fresh air to induction unit vents in 14 classrooms. All other offices have radiant heat. Two air handler units supply heat and fresh air to the cafeteria. The 1988 addition HVAC consists of two air handler units that supply heat and fresh air to the band room. Fourteen face & bypass unit vents supply heat and fresh to 12 classrooms and the library. All other offices have radiant heat.

**Has there been a Major Repair or Replacement of the ELECTRICAL SERVICES AND DISTRIBUTION SYSTEM?** NO

**Year of Last Major Repair or Replacement:(YYYY)** 1968

**Description of Last Major Repair or Replacement:**

Routine maintenance.

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

The Roderick schools building's interior consists of painted cinder block walls, drop ceilings, VCT tile flooring, and energy efficient LED lighting installed in 2017.

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

The Roderick school teaches all elementary school students in Wrentham in grades 4, 5, and 6. The school provides general education and special education programming. All students participate in the school's special subjects, which are library, art, physical education, health, and technology. Students may participate in a fee-based band program. Students in grades 4 and 6 participate in the DARE program taught by the Wrentham Police Department.

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

The Roderick School has 14 classrooms that are 900 sq. ft. that were built in 1968. These classrooms are around the perimeter of the cafeteria/gym. They are too small to accommodate the tables and other furniture and equipment necessary for contemporary education. Additionally, the rooms are very loud due to the noise in the cafeteria/gym. The school has 12 classrooms that are 950 sq. ft. which were built in 1988. The school has 12 multipurpose rooms that are approximately 200 sq. ft., one art room that is 1,000 sq. ft., one library that is 1600 sq. ft., one technology lab that is 920 sq. ft., one band room that is 3500 sq. ft., and one cafeteria/gym room that is 5,000 sq. ft.

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

Roderick School classrooms capacity is 490 students. The cafeteria/gym can accommodate 700 people with no tables and 340 with tables. The library can accommodate 75 people.

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

The district uses Dude Solutions as a preventive maintenance program. A daily checklist is completed and recorded of all three buildings' mechanical, HVAC, electrical, septic, and fire suppression systems. Preventative maintenance is scheduled in the Dude Solutions preventive maintenance program. All preventive maintenance is performed on all mechanical, electrical, emergency lighting, plumbing, building exterior, interior, and HVAC systems by in-house maintenance personnel and licensed and qualified contractors. The school has worked with the town to fund a number of capital projects including a roof replacement in 2006, asbestos removal in 2008 and 2015, new security entrance to the school in 2016, and new technology lab in 2018.

**Priority 5**

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

The Roderick School's windows were installed in 1968 and 1988. The windows installed in 1968 are single pane, have no energy-efficient rating, and are not up to today's safety standards. The window frames are made of steel. The window frames and seals are in poor condition and continue to deteriorate. The 1988 addition windows have two-panes and are in fair condition. Some of the window seals have broken, causing the windows to fog in between the glass panes.

The 1968 section of Roderick Schools has original doors. Each classroom in that section has an exterior door. All of the 1968 doors are wooden and in poor condition. The frames are steel with large gaps between the doors and the frames. The doors are not energy efficient. The 1988 doors have steel frames that are in decent condition.

The Roderick School HVAC system is pneumatic and original to the 1968 building. The HVAC system consists of one air handler unit that supplies heat and fresh air to induction unit vents in fourteen classrooms. All other offices have radiant heat. Two air handler units provide heat and fresh air to the cafeteria/gym; however, one of the air handlers is inoperable. The 1988 addition HVAC consists of two air handlers that supply heat and fresh air to the band room. The rest of the 1988 addition has fourteen face and bypass univents that provide heat and fresh air to classrooms and the library. All other offices have radiant heat. The univents have no hot water control valves, which makes them very inefficient. The pneumatic system has exceeded its life expectancy and requires frequent repairs. It is challenging to find technicians with the knowledge and skills to work on the outdated system.

The Roderick Aerco Benchmark 2.0 gas-fired condensing boilers were installed in 2005 and work as designed. The past five years have been costly to maintain due breakdowns. The Roderick School has 15 exhaust fans dating from 1968, 1988, 2019, 2020, 2021. The exhaust fans work as designed.

The Roderick School electrical service is distributed from Taunton Street and traverses through about 700 feet of woods. The Roderick School loses power during stormy weather on occasion due to the number of trees the wires traverse. From the last pole, the service goes underground into a transformer. The transformer was installed in 2003. From the transformer, the service goes into the school's main electrical panel, a 1968 GE 800 amp panel, and feeds a number of subpanels dating from 1968 to 1988. Many circuits have been added over the years to accommodate modern learning devices. Most of the branch wiring is original to the building, 1968 or 1988. The electrical system is in working order but not up to today's electrical standards and is at its capacity.

The Roderick Roof was installed in 2006 and is in good condition.

**Priority 5**

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

---

Wrentham Public Schools has a scheduled preventative maintenance program that helps maintain the buildings and protect the town's assets. The district uses Dude Solutions to track routine maintenance and emergency repairs in the schools.

The district and the town collaborate on capital projects. Past capital projects include new internally locking classroom door handles, security cameras, a secure entrance to the school, and an ADA compliant restroom. In addition, the district raised money to pay to make the playground larger, safer, and more inclusive.

The Roderick School's doors, windows, and frames have been painted, repaired, and replaced as needed over the last ten years.

The Roderick HVAC system and boilers are monitored daily for proper operation and are serviced, inspected, repaired, and replaced as needed by qualified technicians.

The Roderick electrical service and devices are monitored daily for proper operation and are serviced, inspected, repaired, and replaced as needed by qualified technicians.

The Roderick roof is inspected and repaired on a regular schedule.

**Priority 5**

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

---

There are several problems associated with the inefficient doors, windows, and systems in Roderick School. The windows in the 1968 portion of the building do not meet contemporary safety or efficiency requirements. That means that all of the 5th grade and 6th grade classrooms in the district are exposed to higher risk from intruders and significant temperature swings. Both conditions detract from student learning.

The windows pose a safety risk for students and staff members since they are made from a single pane of traditional glass. The windows could be easily broken by an intruder. The glass from a broken window could cause injury.

The exterior doors in the 1968 portion of the building also fail to meet contemporary standards for safety and efficiency. Each classroom has one door that opens outside of the building. The doors are made of wood and are in poor condition. An intruder could easily access a classroom through one of these doors. The gap between the door frame and the door is wide. This gap allows heat to escape and cold air inside the classroom.

The electrical system is original to the 1968 and 1988 structures. The system has been updated over the years to allow for increased electrical draw necessitated by contemporary learning. However, the system is not up to standard and is at its capacity. The need for computers and other online resources will only increase, which will exceed the capabilities of the current electrical system. This will prevent the district from delivering the required educational programming.

The HVAC system is pneumatic and original to the 1968 building. The system has exceeded its life expectancy and requires frequent repair. This means that the system is inefficient and ineffective. We struggle to find technicians capable of serving the system due to its age and designs. This detracts from the learning environment since it limits the air exchange in the rooms when it is not working. As we learned during the pandemic, frequent air exchanges is one of the most important aspects of a healthy learning environment.

**Priority 5**

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

The Roderick School will be significantly improved if it has new doors, windows, electrical system, and HVAC system. The school will be safer for students and staff members with new doors and windows. An intruder would struggle to access the building, and a broken window would be less likely to injure someone if made of safety glass. The new doors and windows, along with the new HVAC system, would make the learning environment more comfortable for students and staff members, which would improve learning outcomes. They would also make the school more energy efficient, a goal for the district and the town. Finally, a new electrical system would support the devices necessary for learning in the 21st century. All of these changes would make the school experience safer and more productive for students and staff members, lessen the environmental impact of the school, and reduce heating and cooling costs.

**Please also provide the following:**

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

NO

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

**The date of the inspection:**

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



**CERTIFICATIONS**

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

**Chief Executive Officer \***

Kevin Sweet

**School Committee Chair**

Veronica Gonzalez

**Superintendent of Schools**

Allan Cameron

Town Administrator



(signature)

(signature)

(signature)

Date

Date

Date

4/28/2022 10:10:11 PM

4/27/2022 4:35:20 PM

4/26/2022 3:17:18 PM

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

## ATTACHMENT B

### MSBA Standard Contract (Design/Bid/Build or CM-at-Risk)

## **CONTRACT FOR PROJECT MANAGEMENT SERVICES**

This Contract is made this \_\_\_\_\_ day of \_\_\_\_\_ in the year \_\_\_\_\_ between  
(day) (month) (year)

the \_\_\_\_\_,  
(Owner) (street)  
\_\_\_\_\_, **Massachusetts**,  
(City) (State) (Zip Code)

hereinafter called "the Owner" and \_\_\_\_\_  
(Owner's Project Manager)

\_\_\_\_\_,  
(street) (city) (State) (Zip Code)

hereinafter called the "Owner's Project Manager" to provide the Project Management services required to complete  
the Basic and Extra Services described herein at \_\_\_\_\_  
(name/description of Project)

The Owner's Project Manager is authorized to perform the services required by this Contract through the Feasibility Study Phase and, pending receipt of a written Approval to proceed from the Owner, through the Schematic Design Phase. At the Owner's option, the Owner's Project Manager may be authorized to perform services for subsequent design phases and/or the Construction Phases and Completion Phase, at which time a mutually agreed upon amendment to this Contract will be executed between the Owner and the Owner's Project Manager. If the Owner elects to construct the project pursuant to G.L. c. 149, the amendment to this Contract shall include the Authority's Base OPM Contract Amendment for DBB for Basic Services required for the design-bid-build construction delivery method. If the Owner elects to construct the project pursuant to G.L. c. 149A, the amendment to this Contract shall include the insertion of the Authority's Base OPM Contract Amendment for CM at Risk, for Basic Services required for the CM at Risk construction delivery method.

For the performance of the services required under this Contract for the Feasibility Study Phase and the Schematic Design Phase, the Owner's Project Manager shall be compensated by the Owner for Basic Services in accordance with the Payment Schedule included as Attachment A.

IN WITNESS WHEREOF, the Owner and the Owner's Project Manager have caused this Contract to be executed by their respective authorized officers.

OWNER

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

\_\_\_\_\_  
(print title)

By \_\_\_\_\_  
(signature and seal)

Date \_\_\_\_\_

OWNER'S PROJECT MANAGER

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

\_\_\_\_\_  
(print title)

By \_\_\_\_\_  
(signature )

Date \_\_\_\_\_

(Attach Certificate of Vote of Authorization)

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## **ARTICLE 1: DEFINITIONS**

**APPROVAL** – a written communication from the Owner approving either the work of the current Phase, as identified on Attachment A, or authorizing the Owner's Project Manager to proceed to the next Phase or approving the scope and compensation for either Extra Services or Reimbursable Expenses.

**ARCHITECT/ENGINEER** – herein also referred to as the **DESIGNER** -- the person or firm with whom the Owner has contracted to perform the professional designer services for this Project.

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

**BASIC SERVICES** – the minimum scope of services to be provided by the Owner's Project Manager under this Contract, unless the Contract is otherwise terminated pursuant to Article 12.

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

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

**CONTRACT** – this Contract, inclusive of all Attachments, between the Owner and the Owner's Project Manager; all written amendments to this Contract; and all Approvals issued pursuant to this Contract.

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

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

**CONSTRUCTION MANAGER AT RISK, CONSTRUCTION MANAGEMENT at RISK FIRM or CM at RISK** – a sole proprietorship, partnership, corporation, or other legal entity with which the Owner has contracted pursuant to G.L. c. 149A, § 6(e), to provide Construction Management at Risk Services;

**EXTRA SERVICES** – services requested by the Owner to be performed by the Owner’s Project Manager but which are additional (or “extra”) to the services performed as Basic Services.

**FEASIBILITY STUDY AGREEMENT** – the agreement between the Owner and the Authority that sets forth the terms and conditions pursuant to which the Authority will collaborate with the Owner in conducting a feasibility study, which agreement shall include the budget, scope and schedule for the feasibility study.

**FEE FOR BASIC SERVICES** – the fee to be paid to the Owner’s Project Manager for satisfactorily performing, in the Owner’s sole discretion, the Basic Services required under this Contract, exclusive of the compensation to which the Owner’s Project Manager is entitled pursuant to Articles 9 and 10.

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

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

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

**GUIDELINES AND STANDARDS** – Documents published by the Authority including regulations and procedures that supplement the tasks of Owner’s Project Managers contracting with Owners for projects receiving any funding from the Authority.

**NON-TRADE CONTRACTOR** – for purposes of a project utilizing the CM at Risk construction delivery method only, a subcontractor, as described in M.G.L. c. 149A, § 8(j), who is not a Trade Contractor, as defined herein, and who has a direct contractual relationship with a CM at Risk whether or not the work exceeds the threshold sum as identified in M.G.L. c. 149, § 44F(1).

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

**OWNER** – the entity identified as such on page one of this Contract, or its authorized representative, that is the owner of the property that is the site of the Project and is responsible for administering this Contract.

**OWNER’S PROJECT MANAGER** – the individual, corporation, partnership, sole proprietorship, joint stock company, joint venture or other legal entity identified as such on page one of this Contract performing the professional Project Management Services under this Contract.

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

**PRINCIPALS** – the owners and/or officers of the Owner’s Project Manager who are actively involved in the management of the Project.

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

**PROJECT BUDGET** – a complete and full enumeration of all costs of the Project, as defined in the Owner-Authority Project Scope and Budget Agreement or Project Funding Agreement.

**PROJECT DIRECTOR** – the employee of the Owner’s Project Manager who has been designated in writing by the Owner’s Project Manager as its authorized representative, as approved by the Owner, and subject to the approval of the Authority, pursuant to the requirements of M.G.L. c.149 §44A½ or G.L. c. 149A, § 2, as the case may be, for an “owner’s project manager” and 963 CMR 2.00 et seq., and shall be the person who shall oversee and be responsible for all Project Management Services provided under this Contract. The Project Director shall be certified in the Massachusetts Certified Public Purchasing Official Program as administered by the Inspector General of the Commonwealth of Massachusetts.

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

**PROJECT REPRESENTATIVE** – the employee or a Subconsultant of the Owner’s Project Manager, who shall be dedicated exclusively to the Project, on-site full-time during the Construction Phase in accordance with the requirements of Article 8.6.2.

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

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

**REIMBURSABLE SERVICES OR REIMBURSABLE EXPENSES** – the cost of services requested by the Owner to be performed by the Owner’s Project Manager or the cost of expenses paid by the Owner’s Project Manager that are reimbursable pursuant to the provisions of Article 10.

**SUBCONTRACTOR** – for purposes of a project utilizing the design-bid-build construction delivery method pursuant to G.L. c. 149, a person or entity having a direct contractual relationship with the Contractor, who has the contract to perform the construction of the Project, except as otherwise specifically provided herein or as required by Law.

**SUBCONSULTANT** – any individual, company, firm, or business having a direct contractual relationship with the Owner’s Project Manager, who provides services on the Project.

**TRADE CONTRACTOR** – for purposes of a project utilizing the CM at Risk construction delivery method only, subcontractors having a direct contractual relationship with a CM at Risk pursuant to G.L. c. 149A, § 8 (a)-(i), to perform one or more so-called sub-bid classes of work listed in M.G.L. c.149 §44F and all other sub-bid classes of work selected by the public agency for the Project, provided the sub-bid work meets or exceeds the threshold sum identified in M.G.L. 149 §44F(1).

## **ARTICLE 2: RELATIONSHIP OF THE PARTIES**

- 2.1 The Owner's Project Manager shall act as an independent contractor of the Owner in providing the services required under this Contract.
- 2.2 The Owner's Project Manager warrants and represents to the Owner that it has fully, completely and truthfully represented the qualifications and skills of the Owner's Project Manager, its Subconsultants, agents, servants and employees in the proposal submitted by the Owner's Project Manager, the Contract documents and in all communications with the Owner relative to this Contract and the services to be performed hereunder by the Owner's Project Manager, its Subconsultants, agents, servants and employees.
- 2.3 The Owner's Project Manager shall perform its services under this Contract with no less than that degree of skill and care ordinarily exercised by similarly situated members of the Owner's Project Manager's profession on projects of similar size, scope and complexity as is involved on the Project. The Owner's Project Manager's services shall be rendered in accordance with this Contract.
- 2.4 The Parties hereto agree that the Designer is solely responsible for the design requirements and design criteria for the Project (except to the extent specifically delegated to others) and for performing in accordance with the contract between the Owner and Designer.
- 2.5 The Parties hereto agree that the Contractor or CM at Risk, as the case may be, shall be solely responsible for construction means, methods, techniques, sequences and procedures, the Contractor's or CM at Risk's schedules, and for safety precautions and programs in connection with the Project and for performing in accordance with the Owner-Contractor Agreement or the Owner-CM at Risk Agreement. The Owner's Project Manager shall be responsible for the Owner's Project Manager's negligent acts or omissions but shall not have control over or charge over acts or omissions of the Contractors, CM at Risk, Subcontractors, Trade Contractors or Non-Trade Contractors or the agents or employees of the Contractor, CM at Risk, Subcontractors, Trade Contractors or Non-Trade Contractors the Designer, the Authority, the Owner or the Commissioning Consultant.
- 2.6 Nothing in this Contract shall be construed as an assumption by the Owner's Project Manager of the responsibilities or duties of the Contractor or the CM at Risk or the Designer. The Owner's Project Manager's services shall be rendered compatibly and in coordination with the services provided by the Designer. It is not intended that the services of the Owner's Project Manager and Designer be competitive or duplicative, but rather complementary. The Owner's Project Manager shall be entitled to rely upon the Designer and Contractor or CM at Risk for the proper performance of their obligations pursuant to their respective contracts with the Owner.

### **ARTICLE 3: RESPONSIBILITIES OF THE OWNER**

- 3.1 The Owner shall be responsible to oversee and monitor the performance of the Owner's Project Manager to ensure that it performs its obligations in a satisfactory manner. The Owner shall provide the necessary general direction and broad management coordination required to execute the Project.
- 3.2. The Owner shall designate an individual or individuals who shall have the authority to act on behalf of the Owner under this Contract and who shall be responsible for day-to-day communication between the Owner and the Owner's Project Manager.



- 3.3 Upon satisfactory completion of services performed, the Owner shall make payments to the Owner's Project Manager as provided in Articles 7, 8, 9 and 10.
- 3.4 The Owner shall be responsible for requiring the Contractor or CM at Risk and/or the Designer to comply with their respective contract obligations and to cooperate with the Owner's Project Manager.
- 3.5 The Owner shall provide timely information with respect to its requirements relative to the Project Schedule and the Project Budget, and shall further give timely notice to the Owner's Project Manager of any changes or modifications to the same.
- 3.6 To the extent such data is available, the Owner shall furnish to the Owner's Project Manager existing surveys of the Project site, building plans, borings, test pits, structural, mechanical, chemical or other test data, tests for air and water pollution and for hazardous materials, photographs and utility information. The Owner's Project Manager shall be entitled to reasonably rely upon the sufficiency and accuracy of the information furnished under this Article 3.6, provided that the Owner's Project Manager shall notify the Owner in writing of any deficiencies in such data that the Owner's Project Manager becomes aware of.

#### **ARTICLE 4: RESPONSIBILITIES OF THE OWNER'S PROJECT MANAGER**

- 4.1 The Owner's Project Manager shall provide project management services to monitor procurement procedures, design, construction and other related activities and to facilitate, coordinate and manage the Project with respect to timely performance in accordance with the Project Schedule and monitor the quality of services and workmanship and shall recommend courses of action to the Owner when respective contractual requirements are not being fulfilled. Services shall continue through substantial use and occupancy by the Owner, and Project closeout. As part of Basic Services, the Owner's Project Manager shall provide information as requested during final auditing as conducted by the Authority.
- 4.2 The Owner's Project Manager shall perform the services required under this Contract in conformance with applicable federal, state, and local laws, ordinances and regulations.
- 4.3 The Owner's Project Manager shall report to the Owner any act or inaction in connection with the Project which the Owner's Project Manager believes creates a substantial health or safety risk. Notwithstanding the immediately preceding sentence, the Owner's Project Manager shall not assume responsibility for safety precautions and programs in connection with the Project, which shall remain the sole responsibility of the Contractor or CM at Risk, as the case may be.
- 4.4 The Owner's Project Manager shall comply with terms and conditions of all project agreements executed between the Owner and the Authority and any and all administrative directives issued by the Authority now in effect or hereafter promulgated during the term of this Contract, without any additional compensation. The Owner shall reasonably compensate the Owner's Project Manager for complying with any such term or condition or directive, that was not provided to or was not readily available to the Owner's Project Manager prior to such Services being performed and that materially impacts the Owner's Project Manager's scope, or other aspect of its Services, Fee, schedule, or any obligations and responsibilities under this Contract.

- 4.5 The Owner's Project Manager acknowledges the importance that the Owner attributes to the abilities and qualifications of the key members of the Owner's Project Manager's team, including Subconsultants, and the continuity of key members participation in the services to be provided under this Contract. This Contract has been entered into on the representation of the Owner's Project Manager that the individuals, consultants, assignments and responsibilities will be maintained throughout the duration of this engagement. No substitution or replacement of individuals or change in the Subconsultants, listed in Attachment B, shall take place without the prior written approval of the Owner and the Authority, except when necessitated by causes beyond the Owner's Project Manager's control. If the Owner's Project Manager proposes to replace one of the key members of the Owner's Project Manager's team, the Owner's Project Manager shall propose a person or consultant with qualifications at least equal to the person or firm the Owner's Project Manager proposes to replace. The Owner and the Authority shall have the right to approve any substitution or replacement or change in status for the persons or Subconsultants listed in Attachment B and such approval shall not be unreasonably withheld. At the request of the Owner, the Owner's Project Manager shall consult with the Owner to resolve any situation in which the Owner determines that a member of the Owner's Project Manager's team is failing to perform services in an acceptable manner to the Owner. The Owner shall have the right to direct the removal of any such person or consultant. No act or omission of the Owner or the Authority made or permitted under this Section shall relieve the Owner's Project Manager of its responsibility for the performance of the services specified in this Contract.
- 4.6 The Owner's Project Manager shall employ at all times professional and support personnel with requisite expertise and adequate numbers to assure the complete, timely and high quality performance of the obligations of the Owner's Project Manager.
- 4.7 The Owner's Project Manager shall be and shall remain liable to the Owner for all damages incurred by the Owner as a result of the failure of the Owner's Project Manager to perform in conformance with the terms and conditions of this Contract.

#### **ARTICLE 5: SUBCONSULTANTS**

- 5.1 The Owner's Project Manager may employ Subconsultants, subject to the prior written approval of the Owner and subject to Paragraph 10.3 in order to perform Basic, Extra and Reimbursable services under this Contract. The employment of Subconsultants shall not in any way relieve the Owner's Project Manager from its responsibilities under this Contract. Nor shall the Owner's approval of a Subconsultant in any way relieve the Owner's Project Manager from its responsibilities under this Contract.
- 5.2 Upon request, the Owner's Project Manager shall provide the Owner copies of its agreements with Subconsultants, including amendments thereto, and shall consult with the Owner with respect to the inclusion therein of appropriate terms and conditions to assure timely, efficient and competent performance of the Subconsultants.
- 5.3 No substitution of Subconsultants and no use of additional Subconsultants shall be made without prior written approval of the Owner, which approval shall not be unreasonably withheld.
- 5.4 The OPM shall be responsible for all compensation to be paid to a subconsultant. No Subconsultant shall have recourse against the Owner or the Authority for payment of monies

alleged to be owed to the Subconsultant by the Owner's Project Manager, and the Owner's Project Manager shall include in all contracts with its Subconsultants language so providing.

- 5.5 All contracts between the Owner's Project Manager and its Subconsultants shall include a provision in which the Owner's rights to initiate corrective action shall be stipulated

#### **ARTICLE 6: TERM AND TIMELY PERFORMANCE**

- 6.1 The Owner's Project Manager acknowledges that expeditious completion of the Owner's Project Manager's services and the Project is of the utmost importance to the Owner. The term of this Agreement shall commence on the date stipulated in an Approval to proceed from the Owner. The Owner's Project Manager shall complete the services required under this Contract in a prompt and continuous manner. The Owner's Project Manager shall perform its services in a timely manner and shall not delay the work of the Designer, Contractor or CM at Risk. The Owner's Project Manager shall monitor the performance of the Designer and the Contractor or CM at Risk in accordance with schedules of performance that are established under their contracts with the Owner. The Owner's Project Manager shall immediately advise the Owner, as well as the Designer or the Contractor or CM at Risk, in writing, any time the Owner's Project Manager determines that either the Designer or the Contractor's or CM at Risk's performance is jeopardizing the Project Schedule or the Project Budget.
- 6.2 Time is of the essence in the performance of the Owner's Project Manager's obligations under this Agreement and under any amendment. The Owner's Project Manager agrees that no other work in its organization will be permitted to interfere with its timely performance of the work required under this Agreement or any amendment.
- 6.3 The Owner's Project Manager's services are to be provided in accordance with the time schedule set forth in the Feasibility Study Agreement and the Project Scope and Budget Agreement. If the schedule changes causing the need for revisions to the Owner's Project Manager's services, the Owner's Project Manager shall notify the Owner of the revisions to its services. The Owner shall have the right to extend the term of this Contract by amendment. All the rights and obligations of the parties for such extended periods shall be as set forth in this Contract or in the amendment.

#### **ARTICLE 7: COMPENSATION**

- 7.1 For the satisfactory performance of all services required pursuant to this Contract, excluding those services specified under Articles 9 and 10, the Owner's Project Manager shall be compensated by the Owner in an amount up to the Not-to-Exceed Fee for Basic Services, identified on Attachment A. The Owner's Project Manager shall submit invoices on a monthly basis in accordance with the Payment Schedule included as Attachment A. The Owner shall make payments to the Owner's Project Manager within 30 days of the Owner's approval of the invoice, which approval shall not be unreasonably withheld or delayed.
- 7.2 The Fee for Basic Services shall include, but not necessarily be limited to, all labor, overhead, profit, insurance, legal services, transportation, communication expenses, reasonable printing and copying necessary for completion of the Project. The fee for Basic Services also shall include (a) the costs of rebidding and resolicitation of proposals, bids, or

qualifications if due to the fault of the Owner's Project Manager, and (b) assisting the Owner as provided by section 8.1.4.2 in litigation or resolution of claims or other administrative proceedings associated with a bid protest arising out of the Designer contract or the construction contract and for assistance beyond the requirements of 8.1.4.2 if such litigation or claims are due to the fault of the Owner's Project Manager.

- 7.3 When the Owner's Project Manager receives payment from the Owner, the Owner's Project Manager shall promptly make payment to each Subconsultant whose work was included in the work for which such payment was received. The Owner shall have the contractual right to investigate any breach of performance of a Subconsultant and to initiate corrective measures it determines are necessary and in the best interest of the Owner. All contracts between the Owner's Project Manager and its Subconsultants shall include a provision in which the Owner's rights to initiate corrective action shall be stipulated.
- 7.4 The Owner's Project Manager shall be paid the remainder of the Fee for Basic Services, less previous payments, upon acceptance by the Owner of the Certificate of Final Completion and submission of evaluations.

## **ARTICLE 8: BASIC SERVICES**

The Owner's Project Manager shall perform the following Basic Services:

### **8.1 Project Management (For All Phases)**

- 8.1.1 The Owner's Project Manager shall prepare a communication and document control procedure during the Feasibility Study/Schematic Design Phase and continue to update it as specified for the duration of the Project. This procedure shall detail the responsibilities and lines of communication among all Project participants (Owner, Authority, Owner's Project Manager, Designer, Contractor or CM at Risk, Subcontractors, Trade Contractors, Non-Trade Contractors and other consultants, vendors or suppliers) and establish the procedure for correspondence, document control, designer and contractor or CM at Risk submittal logs, change order reporting logs and other tracking logs, as needed. The Owner's Project Manager shall include the Designer in its distribution of the Project Budget, Schedule, Monthly Progress Report and other reports as appropriate and as outlined in the Communications Plan.
- 8.1.1.2 The Owner's Project Manager shall assist the Owner in the preparation of all information, material, documentation, and reports that may be required or requested by the Authority, including without limitation, documentation related to incentive reimbursement percentage points that may be awarded to the Owner by the Authority, requests for reimbursement, and audit materials.
- 8.1.1.3 The Owner's Project Manager shall prepare agendas for and attend school building committee meetings, attend meetings with other representatives of the Owner, municipal administration and the school department, and attend neighborhood meetings relating to the Project, and participate as a member of the Owner's Prequalification Committee. The Owner's Project Manager shall take minutes of all of the above-referenced meetings and promptly distribute minutes of these meetings to the Owner.

- 8.1.1.4 The Owner's Project Manager shall review all applications for payments, requisitions and invoices relating to the Project as submitted by the Designer, equipment vendors and all other contractors and suppliers and make recommendations to the Owner relative to amounts due.

8.1.2 Project Control

During the Feasibility Study/Schematic Design Phase of this Contract, the Owner's Project Manager shall monitor and report to the Owner and the Authority any changes to the Feasibility Study Budget, Scope and Schedule established in the Owner-Authority Feasibility Study Agreement.

8.1.2.1 Project Budget

The Owner's Project Manager shall prepare a detailed baseline Project Budget in a form acceptable to the Owner and the Authority, which will be reviewed and agreed upon by the Owner and the Authority as part of the Project Scope and Budget Agreement and further subject to approval by the MSBA. The Owner's Project Manager shall monitor and compare all Designer estimates, contractor bids, Guaranteed Maximum Price (if applicable), and other cost information to this Project Budget and identify and report all variances to the Owner and the Authority. The Owner's Project Manager shall maintain and update the baseline Project Budget throughout the term of this Contract. The Owner's Project Manager shall report any variances to the baseline Project Budget as part of the Monthly Progress Report.

The Owner's Project Manager shall prepare revisions to the baseline Project Budget, as needed, and submit them to the Owner for approval.

8.1.2.2 Cost Estimating

The Owner's Project Manager shall prepare detailed independent cost estimates at each Design phase (feasibility/schematic) when required by the Owner. If the Owner requires the Owner's Project Manager to prepare an independent cost estimate, the Owner's Project Manager shall compare its cost estimate to that prepared by the Designer to identify and notify the Owner of any variances.

In the event that the cost as estimated by the Designer exceeds the construction cost in the Project Budget at any of the Design phases, the Owner's Project Manager shall consult with the Designer and recommend to the Owner appropriate revisions to the scope of work.

The Owner's Project Manager shall provide cost estimating services, as may be required, to develop cash flows.

During the schematic design Phase, the Owner's Project Manager shall prepare a construction cost estimate in Uniformat II Level 2 format with aggregated unit rates and quantities supporting each item.

#### 8.1.2.3 Project Schedule

The Owner's Project Manager shall prepare a Project Schedule in a form acceptable to the Owner and the Authority, which will be reviewed and agreed upon by the Authority as part of the Project Scope and Budget Agreement and further subject to approval by the Authority.

The Owner's Project Manager shall prepare revisions to the Project Schedule, as needed, and submit them to the Owner for approval.

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#### 8.1.3 Monthly Progress Report

The Owner's Project Manager shall submit to the Owner and the Authority no later than the twelfth day of each calendar month a written Monthly Progress Report summarizing activity during the preceding calendar month. The Monthly Progress Report shall be submitted in a format acceptable to the Authority and shall describe work performed by all project participants (OPM, Designer, Contractor or CM at Risk) during the reporting period and work planned for the next reporting period. The report shall also address matters of schedule adherence (Project Schedule as well as individual completion percentages for design and construction), costs to date (updated Project Budget and actual expenses incurred), change orders and potential change orders, cash flow projections, Contractor's or CM at Risk's safety performance, Designer's QA/QC, Contractor's or CM at Risk's environmental compliance, community issues, Designer and Contractor or CM at Risk's MBE/WBE activities, the Designer and Contractor or CM at Risk's M.G.L. c. 149 Workforce Participation activities, any issues that could result in additional time and/or additional costs and any anticipated problems/concerns together with recommended solutions.

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#### 8.1.5 MBE/WBE and Workforce Participation Compliance Monitoring (All Phases)

- (a) The Owner's Project Manager shall monitor and report on the Designer's and Contractor's or CM at Risk's compliance with MBE/WBE requirements as set forth in M.G.L. c. 7C, §6 and M.G.L. c. 7, §61.
- (b) The Owner's Project Manager shall monitor and report on the Designer's and Contractor's or CM at Risk's compliance with the Commonwealth's Workforce Participation requirements set forth in M.G.L. c. 149, § 44A(2)(g).

#### 8.1.6 Site Investigations and Environmental Testing

Prior to Designer Selection, the Owner's Project Manager shall assist the Owner in determining the need for and the implementation of site evaluation and testing including, but not necessarily limited to, site surveys, wetlands evaluation, environmental evaluations, hazardous materials evaluation, subsurface testing (percolation tests, test pits, borings, etc.), destructive testing and other investigative work in the case of renovation projects. The determination that any additional

services or testing need to be performed shall rest with the Owner or Designer.

**8.1.7 Project Records and Reports (All Phases)**

The Owner's Project Manager shall maintain a complete Project file including, but not necessarily limited to, a copy of the executed agreements of the Owner-Owner's Project Manager, Owner-Architect/Engineer and the Owner-Contractor or Owner- CM at Risk, including copies of performance and payment bonds, a master list of permits, certificates of insurance, licenses and approvals for the Project, correspondence, daily reports, payment records, shop drawings, submittals, project schedules, requests for information, change orders/amendments, change directives and meeting minutes. The Owner's Project Manager shall assist the Owner in responding to any public records request received by the Owner.

**8.2 Feasibility Study/Schematic Design Phase**

**8.2.1 Designer Selection**

The Owner's Project Manager shall coordinate the designer selection process for the Owner in accordance with the Authority's Designer Selection Guidelines. Services shall include:

- 8.2.1.1 The Owner's Project Manager shall assist the Owner in preparing the schedule for designer selection, advertisement, request for services, selection criteria and other materials required for the application package in accordance with Authority guidelines and submit to the Authority for review and approval prior to advertising.
- 8.2.1.2 The Owner's Project Manager shall record the names and addresses of all designers who request an application package, shall notify all interested designers of any changes to the request for services or application package and shall respond to project specific questions. The Owner's Project Manager shall complete reference checks on all applicants and provide the Owner with a report on the references.
- 8.2.1.3 The Owner's Project Manager shall review each submitted application to be sure it is complete and shall submit the application packages as well as the completed references to the Authority at least two weeks before the targeted Designer Selection Panel meeting.
- 8.2.1.4 The Owner's Project Manager shall present the project particulars and the results of the reference checks to the Authority's Designer Selection Panel.
- 8.2.1.5 The Owner's Project Manager shall assist the Owner in the negotiation of the design contract with the first-ranked firm.

**8.2.2 Feasibility Study/Schematic Design**

The Owner's Project Manager shall monitor the activities and responsibilities of the Designer during this phase and assist the Owner in the review of the proposed scope, schedule and budget, developed by the Designer, including the review of the Designer's preliminary drawings. The Owner's Project Manager shall:

- a. Prepare independent construction cost estimates pursuant to Section

8.1.2.2 of this Contract for comparison with the Designer's cost estimates. (Two estimates during Task 8.2.2)

b. Work with the Owner and Designer to prepare the Project Schedule.

- 8.2.2.1 The Owner's Project Manager shall review the schematic design to recommend Value Engineering Changes (VEC) to the Owner. A Value Engineering Change shall include an analysis of the constructability, cost, quality and schedule impact. The Designer will be responsible for a thorough review and recommendation on the technical merit of any VEC.
- 8.2.2.2 The Owner's Project Manager shall lead design coordination meetings every two weeks, between the Designer and the Owner and, as required, the Authority, to provide for review and discussion of design/engineering related issues. The Owner's Project Manager shall provide technical assistance to the Owner. The Owner's Project Manager shall take and distribute minutes of these meetings to the Owner.
- 8.2.2.3 The Owner's Project Manager shall assist in the implementation of additional site evaluation and testing as required by the Designer, including, but not necessarily limited to, site surveys, wetlands evaluation, environmental evaluations, hazardous materials evaluation, subsurface testing (percolation tests, test pits, borings, etc.), destructive testing and other investigative work in the case of renovation projects.
- 8.2.2.4 The Owner's Project Manager shall monitor the status of the Designer contract including monitoring the schedule of the Designer, provide review and comment of Designer's work product and make recommendations to the Owner when, in the opinion of the Owner's Project Manager, requirements of the Designer's contract with the Owner are not being fulfilled.
- 8.2.2.5 The Owner's Project Manager shall meet with the Owner, Designer and other project participants as necessary.
- 8.2.2.6 The Owner's Project Manager shall assist the Owner with the completion of grant applications for funding for the study of green design strategies and assist by identifying green strategies, as appropriate, for study during this phase. The Owner's Project Manager shall assist the Owner and Designer, as needed, in the preparation of the certification required for Green Schools in accordance with the current edition of the MA-CHPS or LEED for Schools guidelines.
- 8.2.2.7 The Owner's Project Manager shall assist the Owner in determining the appropriate construction delivery methodology for the Proposed Project. In providing such assistance, the Owner's Project Manager, in conjunction with the Designer, shall advise the Owner on the relative advantages and disadvantages associated with each of the construction delivery methods provided in M.G.L. Chapters 149 and 149A. The services provided by the Owner's Project Manager in assisting and advising the Owner in its determination of the appropriate construction delivery methodology shall be included in Basic Services.

If the Owner elects to proceed with the CM at Risk construction delivery method when directed by the Owner, the Owner's Project Manager shall, in a



timely manner, assist and advise the Owner in properly preparing and submitting to the Office of the Inspector General, the application to proceed with the CM at Risk construction delivery method and in obtaining a notice to proceed, in accordance with the provisions of M.G.L. c. 149A, § 4, and the applicable regulations and procedures promulgated by the Inspector General. The Owner's Project Manager shall assist the Owner in correcting and resubmitting the application to proceed, as necessary, and in responding to any requests for additional information from the office of the Inspector General.. The services provided by the Owner's Project Manager in assisting and advising the Owner with the preparation and submission of the application to proceed with the CM at Risk construction delivery method shall be included in Basic Services.

If the Inspector General issues a notice to proceed with the CM at Risk delivery method, and if the Owner, at its option, authorizes the Owner's Project Manager to perform services for subsequent design phases and/or the Construction Phases and Completion Phase, the Parties will enter into a mutually agreed upon amendment to this Contract using the amended Contract language for CM at Risk delivery method prescribed by the Authority. In the event that the Inspector General does not issue a notice to proceed with the CM at Risk delivery method, the Owner, at its option, may elect to construct the project in accordance with the provisions of M.G.L. c. 149.

**INTENTIONALLY LEFT BLANK FOR INSERTION OF ARTICLES 8.3 THROUGH 8.8 FOR EITHER DBB OR CM AT RISK CONSTRUCTION DELIVERY METHOD AT THE ELECTION OF THE OWNER AND BY AMENDMENT TO THE CONTRACT**

**ARTICLE 9: EXTRA SERVICES**

**9.1 General**

- 9.1.1 Extra Services are those services requested by the Owner to be performed by the Owner's Project Manager but which are additional (or "extra") to the services performed as Basic Services. Such services are not included in the Fee for Basic Services and shall be invoiced and paid for separately. Extra services shall not be deemed authorized until a written Approval is received from the Owner.
- 9.1.2 The proposed cost, scope and schedule of all Extra Services shall be presented to and approved by the Owner in writing prior to the performance of any Extra Services.
- 9.1.3 Cost proposals for Extra Services shall be computed in accordance with the Hourly Rate Schedule established in Attachment A.

- 9.2 Unless specifically prohibited elsewhere and with the prior written Approval of the Owner, the Owner's Project Manager shall perform any of the following services as Extra Services:

- 9.2.1 Preparing special studies, reports, or applications at the written direction of the Owner, other than those specifically required herein as part of Basic Services;
  - 9.2.2 Assisting in the appeals process of permitting boards or commissions;
  - 9.2.3 Rebidding, resolicitation, or re-advertising for bids, proposals, or qualifications unless made necessary by the fault of the Owner's Project Manager, in which events such rebidding shall be deemed part of Basic Services;
  - 9.2.4 Furnishing services in connection with a bid protest filed in court or with the Office of the Attorney General, provided such activities did not arise due to the fault of the Owner's Project Manager;
  - 9.2.5 Furnishing services in excess of Basic Services made necessary by the termination of the General Contractor or CM at Risk;
  - 9.2.6 Providing consultation with respect to replacement of work damaged by fire or other casualty during construction;
  - 9.2.7 Assisting the Owner in litigation, claims resolution or non-binding mediation arising out of the Designer contract or the construction contract, provided such litigation or claims did not arise due to the fault of the Owner's Project Manager; and
  - 9.2.8 Providing other services requested by the Owner that are not included as Basic Services pursuant to this Contract.
- 9.3 Invoices for Extra Services shall be accompanied by a complete breakdown listing the name, payroll title, date, number of hours by day, hourly rate and extended amount, per specified task of Extra Services performed. Hourly rates shall be in accordance with the Hourly Rate Schedule in Attachment A.

#### **ARTICLE 10: REIMBURSABLE EXPENSES**

- 10.1 For coordination and responsibility for the work described in the following paragraphs 10.1.1 and 10.1.2, the Owner's Project Manager shall be reimbursed its actual costs and those of its Subconsultants, supported by invoices or receipts, plus 10%. The following are reimbursable expenses:
- 10.1.1 Certain out of pocket expenses paid by the Owner's Project Manager such as filing fees, and permit fees that are normally paid by the Owner; travel to fabrication or manufacturing locations to identify completed, identified, and stored materials or equipment specifically for the Project; field office furnishings.
  - 10.1.2 Any other specially authorized reimbursement deemed essential by the Owner, in the Owner's sole discretion, in writing.
- 10.2 Non-Reimbursable Items: The Owner shall not reimburse the Owner's Project Manager or its Subconsultants for travel expenses, sustenance, telephone, facsimiles, electronic mails, postage and delivery expenses, unless specifically required elsewhere in this Contract.

- 10.3 The Owner's Project Manager shall not be entitled to compensation under this Article for the services of Subconsultants hired to perform Basic Services under this Contract. If a Subconsultant hired to perform Basic Services performs Extra Services approved by the Owner, compensation for such Extra Services shall be made under Article 9.

#### **ARTICLE 11: RELEASE AND DISCHARGE**

- 11.1 The acceptance by the Owner's Project Manager of the last payment under the provisions of Article 7 or Article 12 in the event of termination of the Contract, shall in each instance, operate as and be a release to the Owner and the Authority and their employees and agents, from all claims of the Owner's Project Manager and its Subconsultants for payment for services performed and/or furnished, except for those written claims submitted by the Owner's Project Manager to the Owner and Authority with, or prior to, the last invoice.

#### **ARTICLE 12: ASSIGNMENT, SUSPENSION, TERMINATION**

##### **12.1 Assignment:**

- 12.1.1 The Owner's Project Manager shall not assign or transfer any part of its services or obligations under this Contract (other than as specified in Article 5), without the prior written approval of the Owner and the Authority. Likewise, any successor to the Owner's Project Manager must first be approved by the Owner and the Authority before performing any services under this Contract. Such written consent shall not in any way relieve the Owner's Project Manager or its assignee from its responsibilities under this Contract.

##### **12.2 Suspension**

- 12.2.1 The Owner may, at any time, upon seven (7) days written notice to the Owner's Project Manager, suspend this Contract. If the Owner provides such written notice, the Owner's Project Manager shall be compensated for work satisfactorily performed in accordance with the Contract terms prior to the effective date of such suspension for which invoices have been properly submitted.

##### **12.3 Termination**

- 12.3.1 By written notice to the Owner's Project Manager, the Owner may, with prior written approval of the Authority, terminate this Contract at any time with or without cause. If such termination shall occur through no fault of the Owner's Project Manager, all compensation and reimbursement due to the Owner's Project Manager in accordance with the Contract terms, for work satisfactorily performed up to the date of termination, including proportionate payment for portions of the work started but incomplete at the time of termination, shall be paid to the Owner's Project Manager, provided no payment shall be made for work not yet performed or for anticipated profit on unperformed work. If such termination is for cause then

no further payment shall be due to the Owner's Project Manager beyond the date of termination.

12.3.2 By written notice to the Owner and the Authority, the Owner's Project Manager may terminate this Contract:

- (a) if the Owner, within thirty (30) days following written notice from the Owner's Project Manager of any material default by the Owner under the Contract, shall have failed to cure such default; or
- (b) if, after the Owner's Project Manager has performed all services required during any phase prior to construction, at least six (6) months have elapsed without receipt by the Owner's Project Manager of Approval to proceed with the next Phase of the Project, provided the delay was not the fault of the Owner's Project Manager. This provision shall not apply to an Owner's Project Manager who has received a notice of suspension pursuant to Article 12.2.
- (c) Upon a proper termination by the Owner's Project Manager, the Owner's Project Manager shall be compensated as provided in 12.3.1 above regarding termination without cause.

#### **ARTICLE 13: NOTICES**

13.1 Any notice required to be given by the Owner or Authority to the Owner's Project Manager, or by the Owner's Project Manager to the Owner or Authority, shall be deemed to have been so given, whether or not received, if mailed by certified or registered mail to the Owner's Project Manager or the Owner at the addresses indicated on page one or to the Authority at 40 Broad Street, Boston, Massachusetts 02109. Notices to the Authority shall be sent to the attention of the Director of Capital Planning.

#### **ARTICLE 14: INDEMNIFICATION OF OWNER AND AUTHORITY**

- 14.1 With respect to professional services rendered by Owner's Project Manager, to the fullest extent permitted by law, Owner's Project Manager shall defend, indemnify and hold harmless the Owner, and its officers and employees from and against all claims, damages, liabilities, injuries, costs, fees, expenses, or losses, including, without limitation, reasonable attorney's fees and costs of investigation and litigation, whatsoever which may be incurred by the Owner to the extent caused by the negligence of or the breach of any of the provisions of this Contract by the Owner's Project Manager, a person employed by the Owner's Project Manager, or any of its Subconsultants.
- 14.2 With respect to non-professional services rendered by Owner's Project Manager, to the fullest extent permitted by law, Owner's Project Manager shall defend, indemnify and hold harmless the Owner and the Authority, and their officers and employees from and against all claims, damages, liabilities, injuries, costs, fees, expenses, or losses, including, without limitation, reasonable attorney's fees and costs of investigation and litigation, whatsoever which may be incurred by the

Owner and/or the Authority arising out of or resulting from the performance of its services provided that such claims, damages, liabilities, injuries, costs, fees, expenses, or losses are attributable to bodily injury or death or injury to or destruction of tangible property and to the extent caused by an act or omission of the Owner's Project Manager, a person employed by the Owner's Project Manager, or any of its Subconsultants.

- 14.3 The indemnification obligation in this Article shall be in addition to, and not a limitation of, any other rights and remedies available to the Owner under this Contract or at law.

#### **ARTICLE 15: INSURANCE**

- 15.1 The Owner's Project Manager shall obtain and maintain at its sole expense all insurance required by law and as may be required by the Authority and by the Owner under the terms of this Contract. The insurance required hereunder shall be provided at the sole expense of the Owner's Project Manager or its Subconsultant, as the case may be, and shall be in full force and effect for the full term of this Contract between the Owner and the Owner's Project Manager or for such longer period as otherwise required under this Contract.
- 15.2 All policies shall be issued by companies lawfully authorized to write that type of insurance under the laws of the Commonwealth of Massachusetts with a financial strength rating of "A" or better as assigned by A.M. Best Company, or an equivalent rating assigned by a similar rating agency acceptable to the Owner and the Authority.
- 15.3 The Owner's Project Manager and its Subconsultants, shall submit to the Owner original certificates of insurance evidencing the coverage required hereunder, together with evidence that all premiums for such insurance have been fully paid simultaneously with the execution of this Contract. Certificates shall show each type of insurance, insurance company, policy number, amount of insurance, deductibles/self-insured retentions, and policy effective and expiration dates. The Owner's Project Manager shall submit updated certificates to the Owner and the Authority prior to the expiration of any of the policies referenced in the certificates so that the Owner and the Authority shall at all times possess certificates indicating current coverage. Original certificates shall be provided to the Authority by the Owner's Project Manager upon request by the Authority. Failure by the Owner's Project Manager to obtain and maintain the insurance required by this Section, to obtain all policy renewals, or to provide the respective insurance certificates as required shall constitute a material breach of the Contract and shall be just cause for termination of the services of the Owner's Project Manager under this Contract.
- 15.4 Termination, cancellation, or material modification of any insurance required by this Contract, whether by the insurer or the insured, shall not be valid unless written notice thereof is given to the Owner and the Authority at least thirty days prior to the effective date thereof, which shall be expressed in said notice.
- 15.5 The Owner's Project Manager shall require by contractual obligation, and shall ensure by the exercise of due diligence, that any Subconsultant hired in connection with the services to be provided under this Contract shall obtain and maintain all insurance required by law and as may be required by the Owner under the terms of this Contract.

- 15.6 The Owner's Project Manager or its Subconsultant, as the case may be, is responsible for the payment of any and all deductibles under all of the insurance required by this Contract. Neither the Owner nor the Authority shall be responsible for the payment of deductibles, self-insured retentions or any portion thereof.

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

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

- 15.7.1 Workers' Compensation Insurance in accordance with General Laws Chapter 152. The policy shall be endorsed to waive the insurer's rights of subrogation against the Owner and the Authority.
- 15.7.2 Commercial General Liability Insurance (including Premises/Operations; Products/ Completed Operations; Contractual; Independent Contractors; Broad Form Property Damage; and Personal Injury) with a minimum limit of \$1,000,000 per occurrence, \$2,000,000 aggregate. The Owner's Project Manager shall maintain such insurance in full force and effect for a minimum period of one year after final payment and shall continue to provide evidence of such coverage to the Owner and the Authority. The Owner and the Authority shall be added as an additional insured on this policy. The policy shall be endorsed to waive the insurer's rights of subrogation against the Owner and the Authority.
- 15.7.3 Comprehensive Automobile Liability Insurance (including owned, non-owned and hired vehicles) at limits of not less than:
- a. \$1,000,000 Each Person for Bodily Injury;
  - b. \$1,000,000 Each Accident for Bodily Injury; and
  - c. \$1,000,000 Each Accident for Property Damage.
- 15.7.4 Valuable Papers insurance in an amount sufficient to assure the restoration of any plans, drawings, computations, field notes, or other similar data relating to the work covered by this Contract or by the Agreement between the Owner and the Designer in the event of loss or destruction while in the custody of the Owner's Project Manager until the final fee payment is made or all data is turned over to the Owner, and this coverage shall include coverage for relevant electronic media, including, but not limited to, documents stored in computer-aided design drafting (CADD) systems.

15.8 Professional Liability

The Owner's Project Manager shall maintain professional liability insurance covering errors and omissions and negligent acts of the Owner's Project Manager and of any person or entity for whose performance the Owner's Project Manager is legally liable at all times while services are being performed under this Contract. Certificates of professional liability insurance evidencing such coverage shall be provided to the Owner on or before the effective date of this Contract and for a period of at least six years after

the earlier of: (1) the date of official acceptance of the completed Project by the Owner; (2) the date of the opening of the Project to public use; (3) the date of the acceptance by the general contractor of a final pay estimate prepared by the Owner pursuant to M.G.L. chapter 30; or (4) the date of substantial completion of the Construction Contract and the taking of possession of the Project for occupancy by the Owner. The certificates shall indicate a retroactive date that is no later than the effective date of this Contract and a limit of not less than \$1,000,000.

In the event that the Owner terminates this Contract at or before the completion of the Feasibility Study/Schematic Design Phase "without cause" as provided in Article 12.3.1; or the Contract term ends pursuant to its own provisions at the completion of the Feasibility Study/Schematic Design Phase and the Contract is not amended to authorize the Owner's Project Manager to perform services for subsequent design phases, Construction Phases and/or Completion Phase; or the Owner otherwise elects not to proceed with the Project beyond the Feasibility Study/Schematic Design Phase, either because the Owner lacks sufficient funding for the Project or because the Authority's Board of Directors does not approve the Project to proceed beyond the Feasibility Study/Schematic Design Phase, the Owner may, subject to the written approval of the Authority, amend this Article 15.8.

#### **15.9 Liability of the Owner's Project Manager**

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

#### **15.10 Waiver of Subrogation**

To the extent damages are covered by property insurance, the Owner and the Owner's Project Manager waive all rights against each other and against the General Contractor or CM at Risk, Subcontractors, Trade Contractors, Non-Trade Contractors, consultants, agents, and employees of the other for damages caused by fire or other causes of loss, except such rights as they may have to the proceeds of such insurance as set forth in the Owner-Contractor Agreement or the Owner-CM at Risk Agreement. The Owner shall require of the General Contractor or CM at Risk, Subcontractors, Trade Contractors, Non-Trade Contractors Owner's Project Manager, consultants, Subconsultants, and agents and employees, by appropriate agreements, written where legally required for validity, similar waivers each in favor of other parties enumerated herein. The policies shall provide such waivers of subrogation by endorsement or otherwise. A waiver of subrogation shall be effective as to a person or entity even though that person or entity would otherwise have a duty of indemnification, contractual or otherwise, did not pay the insurance premium directly or indirectly, and whether or not the person or entity had an insurable interest in the property damaged.

### **ARTICLE 16: OWNERSHIP OF DOCUMENTS**

16.1 Unless provided otherwise by law, ownership and possession of all information, data, reports, studies, designs, drawings, specifications, materials, documents, models, and any other documentation, product or tangible materials authored or prepared, in whole or in

part, or purchased, obtained, created by the Owner's Project Manager pursuant to this Contract (collectively, the "Materials"), other than the Owner's Project Manager's administrative communications, records, and files relating to this Contract, shall be the sole property of, and shall vest in, the Owner as "works made for hire" or otherwise. The Owner will own the exclusive rights, worldwide and royalty-free, to and in all Materials prepared and produced by the Owner's Project Manager pursuant to this Contract, including, but not limited to, United States and International patents, copyrights, trade secrets, know-how and any other intellectual property rights, and the Owner shall have the exclusive, unlimited and unrestricted right, worldwide and royalty-free, to publish, reproduce, distribute, transmit and publicly display all Materials prepared by the Owner's Project Manager. At the completion or termination of the Owner's Project Manager's services, all original Materials shall be promptly turned over to the Owner.

#### **ARTICLE 17: REGULATORY AND STATUTORY REQUIREMENTS**

- 17.1 Truth-in-Negotiations Certificate: If the Owner's Project Manager's fee is negotiated, by signing this Contract, the Owner's Project Manager hereby certifies to the following:
- 17.1.1 Wage rates and other costs used to support the Owner's Project Manager's compensation are accurate, complete, and current at the time of contracting; and
  - 17.1.2 The Contract price and any additions to the Contract may be adjusted within one year of completion of the Contract to exclude any significant amounts if the Owner determines that the fee was increased by such amounts due to inaccurate, incomplete or non-current wage rates or other costs.
- 17.2 The person signing this Contract certifies, as a principal or director of the Owner's Project Manager, that the Owner's Project Manager has not given, offered or agreed to give any person, corporation, or other entity any gift, contribution or offer of employment as an inducement for, or in connection with, the award of this Contract; no consultant to or Subconsultant for the Owner's Project Manager has given, offered or agreed to give any gift, contribution or offer of employment to the Owner's Project Manager, or to any other person, corporation, or entity as an inducement for, or in connection with, the award to the Owner's Project Manager or Subconsultant of a contract by the Owner's Project Manager; and no person, corporation or other entity, other than a bona fide full-time employee of the Owner's Project Manager, has been retained or hired by the Owner's Project Manager to solicit for or in any way assist the Owner's Project Manager in obtaining this Contract upon an agreement or understanding that such person, corporation or other entity be paid a fee or other consideration contingent upon the award of this Contract .
- 17.3 Revenue Enforcement and Protection Program (REAP): Pursuant to Massachusetts General Laws, Chapter 62C, Section 49A, the undersigned certifies under the penalties of perjury that to the best of his/her knowledge and belief that the Owner's Project Manager and the principals thereof are in compliance with all laws of the commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.
- 17.4 Interest of Owner's Project Manager: The Owner's Project Manager hereby certifies that it is in compliance with the provisions of General Laws Chapter 268A whenever



applicable. The Owner's Project Manager covenants that 1) he/she presently has no financial interest and shall not acquire any such interest direct or indirect, which would conflict in any manner or degree with the services required to be performed under this Contract or which would violate M.G.L. Chapter 268A, as amended from time-to-time; 2) in the performance of this Contract, no person having any such interest shall be employed by the Owner's Project Manager; and 3) no partner or employee of the firm is related by blood or marriage to any officer, official, or employee of the Owner, unless approved by the State Ethics Commission.

- 17.5 Equal Opportunity: The Owner's Project Manager shall not discriminate in employment against any person on the basis of race, color, religion, national origin, sex, sexual orientation, age, ancestry, disability, marital status, veteran status, membership in the armed forces, presence of children, or political beliefs. The Owner's Project Manager shall comply with all provisions of Title VI of the Civil Rights Act of 1964 and M.G.L. c.151B.
- 17.6 Certification of Non-Collusion: The Owner's Project Manager certifies under penalties of perjury that its proposal has been made in and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.
- 17.7 Governing Law: This Contract shall be governed by the laws of the Commonwealth of Massachusetts.
- 17.8 Dispute Resolution: If a dispute arises between the parties related to this Contract, the parties agree to use the following procedures to resolve the dispute: (a) Negotiation. A meeting shall be held between representatives of the parties with decision-making authority regarding the dispute to attempt in good faith to negotiate a resolution of the dispute; such meeting shall be held within fourteen calendar days of a party's written request for such a meeting; (b) Mediation. If the parties fail to negotiate a resolution of the dispute, they shall submit the dispute to mediation as a condition precedent to litigation and shall bear equally the costs of the mediation. The parties shall jointly appoint a mutually acceptable mediator; they shall seek assistance from an independent third party in such appointment if they have been unable to agree upon such appointment within 30 days of the meeting just noted in (a) above; (c) Litigation. If the parties fail to resolve the dispute through mediation, or are unable to convene mediation within 90 days of first attempting to do so, then either party may file suit in accordance with Article 17.9; and (d) This paragraph of dispute resolution provisions shall survive termination of this Contract.
- 17.9 Venue: Any suit by either party arising under this Contract shall be brought only in the a court of competent jurisdiction in the county where the Project is located. The parties hereto waive any argument that this venue is improper or that the forum is inconvenient.

**ATTACHMENT A**

**PAYMENT SCHEDULE**

In consideration of Owner's Project Manager's delivery of Basic Services, the Owner shall pay the Owner's Project Manager on an hourly basis, up to a total fee that shall not exceed **\$[insert total fee amount]**. The **\$[insert total fee amount]** fee is a cap for Basic Services related to this Contract, and the actual amount paid by the Owner for Basic Services required during the duration of this Contract may be an amount less than **\$[insert total fee amount]**. The Owner's Project Manager shall invoice the Owner based on hours worked pursuant to this Contract, according to the hourly rates below and the schedule set forth below. During the course of this Contract, the rates in effect shall not be increased above those delineated in the following table:

**Hourly Rate Schedule**

| <b><u>Title</u></b> | <b><u>Rate/Hr.</u></b> |
|---------------------|------------------------|
|---------------------|------------------------|

The Owner's Project Manager shall perform the Services in accordance with the following Schedule:

| <b><u>Project Phase/Item of Work</u></b> | <b><u>Not-to-Exceed Fee</u></b> | <b><u>Completion Date</u></b> |
|--|---------------------------------|-------------------------------|
|--|---------------------------------|-------------------------------|

Feasibility Study/Schematic Design Phase

Design Development/Construction  
Document/Bidding Phase

Construction Phase/Final Completion

Extra Services  
(Identify by Category)

Reimbursable Services (Identify by  
Category)

**Independent Cost Estimates**

|                                  |                  |     |
|----------------------------------|------------------|-----|
| Task 8.2.2 – Up to two estimates | \$X/per estimate | N/A |
|----------------------------------|------------------|-----|

|                           |                  |     |
|---------------------------|------------------|-----|
| Task 8.4.2 – One Estimate | \$X/per estimate | N/A |
|---------------------------|------------------|-----|

**Owner's Project Manager Application Form – March 2017**

1. Project Name/Location for Which Firm is Filing:

1a. MSBA Project Number:

|     |   |     |  |
|-----|---|-----|--|
| 2a. | Respondent, Firm (Or Joint-Venture) - Name And Address Of Primary Office To Perform The Work: | 2b. | Name And Address Of Other Participating Offices Of The Prime Applicant, If Different From Those Above: |
| 2c. | Date Present And Predecessor Firms Were Established:  | 2d. | Name And Address Of Parent Company, If Any:  |
| 2e. | Federal ID #:   | 2f. | Name of Proposed Project Director:   |

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):

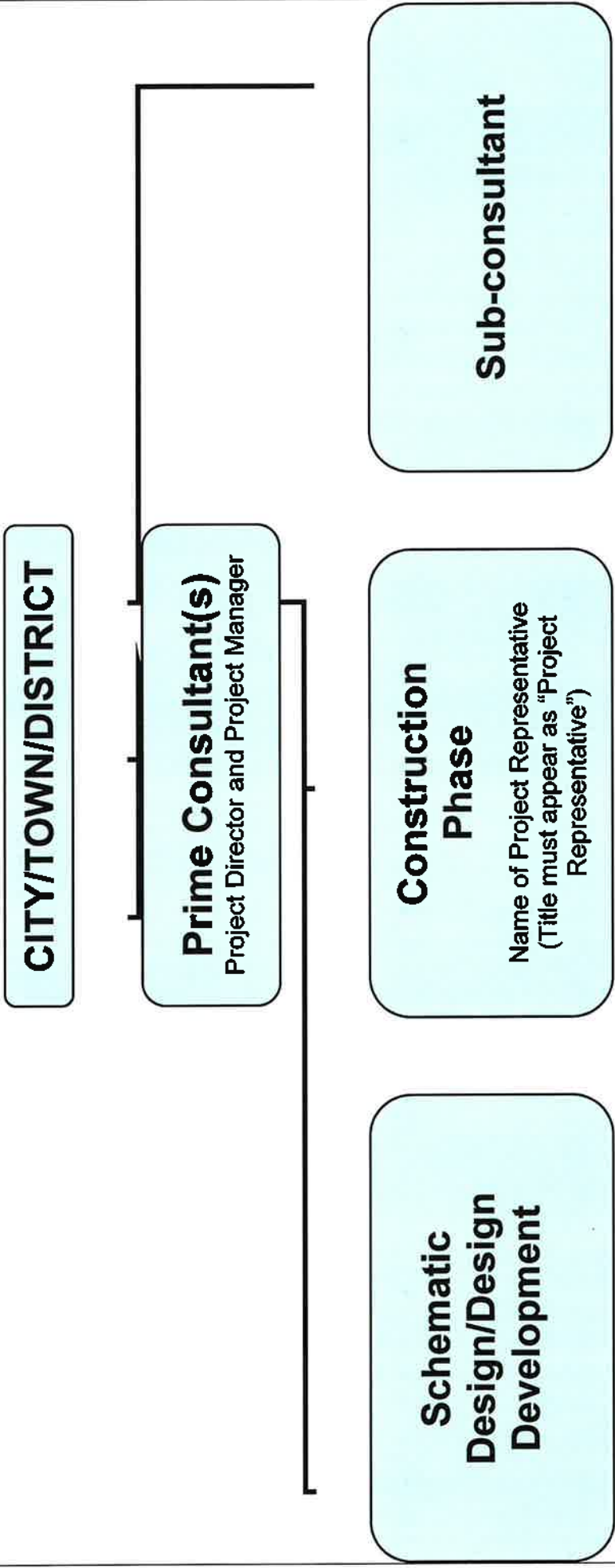
|                         |       |                      |       |       |       |
|-------------------------|-------|----------------------|-------|-------|-------|
| Admin. Personnel        | _____ | Cost Estimators      | _____ | Other | _____ |
| Architects              | _____ | Electrical Engrs.    | _____ |       | _____ |
| Acoustical Engrs.       | _____ | Environmental Engrs. | _____ |       | _____ |
| Civil Engrs.            | _____ | Licensed Site Profs. | _____ |       | _____ |
| Code Specialists        | _____ | Mechanical Engrs.    | _____ |       | _____ |
| Construction Inspectors | _____ |                      | _____ |       | _____ |
|                         |       |                      |       |       | Total |

4. Has this Joint-Venture previously worked together?

→ Yes

→ No

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



|   |   |
|---|---|
| <p>6. Brief Resume for Key Personnel <b>ONLY</b> 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.</p> |   |
| 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 MCPPO Certification:  |
| g.  | Applicable Registrations and Certifications :   |
| h.  | Current Work Assignments And Availability For This Project (availability should be identified as a percentage: eg: "As of 5/30, 50% available"):  |
| i.  | Other Experience And Qualifications Relevant To The Proposed Project: (Identify OPM Firm By Which Employed, If Not Current Firm. Please distinguish between OPM work and any design work performed by the firm.): |

| 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 Sub-consultants. 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 Sub-consultants. If Needed, Up To Three, Double-Sided 8 1/2" X 11" Supplementary Sheets Will Be Accepted. <b><u>APPLICANTS ARE REQUIRED TO RESPOND SPECIFICALLY IN THIS SECTION TO THE AREAS OF EXPERIENCE REQUESTED.</u></b> |                        |      |
| 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<br>{Signature}  | Printed Name And Title | Date |

## ATTACHMENT D

### Enrollment Letter and Enrollment Certification

# Massachusetts School Building Authority

Deborah B. Goldberg  
*Chair, State Treasurer*

James A. MacDonald  
*Chief Executive Officer*

Mary L. Pichetti  
*Executive Director / Deputy CEO*

February 14, 2024

Mr. Kevin Sweet, Town Administrator  
Wrentham Town Hall  
79 South Street  
Wrentham, MA 02093

Re: Town of Wrentham, Charles E. Roderick Elementary School

Dear Mr. Sweet:

I would like to thank representatives of the Town of Wrentham (the "District") for meeting with Massachusetts School Building Authority (the "MSBA") staff on November 28, 2023, and December 12, 2023, to review enrollment projections and methodologies for the Charles E. Roderick Elementary School project (the "Proposed Project"). As discussed, the next critical step is for the MSBA and the District to agree on a study enrollment for the Proposed Project.

The MSBA works with local communities to create affordable, sustainable, and energy efficient schools across Massachusetts. A critical early component in achieving these objectives begins with an appropriate design enrollment that positions the District to efficiently meet space capacity needs throughout potential future enrollment variations.

The MSBA uses a data driven enrollment projection methodology based on the widely accepted modified grade-to-grade cohort survival methodology (the "enrollment methodology"). The MSBA's enrollment methodology generates a baseline enrollment projection as discussed during the November 28, 2023 enrollment meeting, and as further described on the MSBA's website found under the 'Building With Us', 'MSBA Enrollment Methodology' section. For specifics on how the MSBA's methodology impacts the Proposed Project, please refer to the District's Enrollment Projection package, provided to the District on November 21, 2023.

Based on information supplied by the District, data from sources such as the Department of Elementary and Secondary Education ("DESE") and Department of Public Health, and discussion with the District, the MSBA has been able to create an enrollment projection for the Proposed Project, as follows.

The Charles E. Roderick Elementary School presently serves the District's entire grade 4-6 enrollment. The MSBA understands that the District would like its feasibility study to also examine options that explore the addition of grade 3 to the Charles E. Roderick Elementary School. Based on the information provided by the District in its Statement of Interest and prior to its invitation to Eligibility Period, the District's desire to include grade 3 as a component of the

proposed building project was not known. The District was informed that the Feasibility Study can include options that consider exploring grade 3 as a component of the Proposed Project and, should the grade 3-6 configuration be the preferred solution, the MSBA will limit its participation to grades 4-6 enrollment.

The MSBA will not evaluate any additional grade levels for the potential eligibility of space beyond grades 3-6 or the inclusion of Pre-K in the Proposed Project. Accordingly, this analysis will be focused on the projections for grade 3-6 enrollment.

The table below illustrates the District's K-6 enrollment during the most recent ten-year period, including enrollment for the most recent school year (2023-2024) as reported by DESE.

| <b>School Year</b> | <b>K-3</b> | <b>4-6</b> | <b>Total</b> |
|--------------------|------------|------------|--------------|
| 2014-2015          | 520        | 457        | 977          |
| 2015-2016          | 507        | 446        | 953          |
| 2016-2017          | 504        | 439        | 943          |
| 2017-2018          | 497        | 466        | 963          |
| 2018-2019          | 476        | 442        | 918          |
| 2019-2020          | 465        | 400        | 865          |
| 2020-2021          | 441        | 373        | 814          |
| 2021-2022          | 460        | 380        | 840          |
| 2022-2023          | 490        | 369        | 859          |
| 2023-2024          | 524        | 370        | 894          |

A version of the above table with more detail regarding the District's historic enrollment may also be found in the District's Enrollment Projection package.

The total grade 4-6 enrollment in the Wrentham Public Schools as reported by the District for the 2023-2024 school year was 370 students, which reflects a decrease of 96 students (-26.0%) from the grade 4-6 enrollment reported for the 2017-2018 school year, which was the maximum grade 4-6 enrollment reported in the preceding ten years. Additionally, the current year's grade 4-6 enrollment reflects a decrease of approximately 44 students (-12.0%) from the average grade 4-6 enrollment reported during the preceding ten-year period.

The total grade 3-6 enrollment in the Wrentham Public Schools as reported by the District for the 2023-2024 school year was 496 students, which reflects a decrease of 109 students (-22.0%) from the grade 3-6 enrollment reported for the 2014-2015 school year, which was the maximum grade 3-6 enrollment reported in the preceding ten years. Additionally, the current year's grade 3-6 enrollment reflects a decrease of approximately 47 students (-9.5%) from the average grade 3-6 enrollment reported during the preceding ten-year period. The MSBA understands that the District is proposing a study enrollment to accommodate approximately 600 students in grades 3-6 at the Charles E. Roderick Elementary School.

With respect to future enrollments, the MSBA's base enrollment projection indicates the District's grade 4-6 enrollment will continue to experience an increasing trend through the 2027-2028 school year, then remain stable through the 2033-2034 school year. In accordance with the MSBA's Enrollment Methodology, the baseline enrollment is calculated using the ten-year average of projected enrollments. As such, the average base enrollment projection for the Charles E. Roderick Elementary School through the 2033-2034 school year is as follows.

- The average grade 4-6 base enrollment projection is 410 students.
- The average grade 3-6 base enrollment projection is 545 students.

As a result of a sensitivity analysis performed by the MSBA on this base enrollment projection and further discussion with the District, the following adjustment has been made to the base enrollment projection:

- **Out-of-District Enrollment**
  - In order to adjust for fluctuations to the out-of-district enrollment patterns of the District's residents over time, the MSBA has made an additional adjustment to the base enrollment projection.
  - In order to make this adjustment, the MSBA adjusted the grade-to-grade survival ratios for grades 3-6 by a total of 3.3% throughout a four-year period in the projection.
  - This adjustment added the following to the base grade 3-6 enrollment as compared to the projection without this adjustment:
    - For grades 4-6, the adjustment added approximately ten students.
    - For grades 3-6, the adjustment added approximately ten students.
- **Development**
  - Based on the discussions between the District and the MSBA, and the anticipated development information provided by the District, the MSBA enrollment model has been adjusted to use the five-year 75th percentile cohort survival rate for 2025 rather than the five-year average cohort survival rate, which is utilized throughout the base enrollment forecast.
  - This adjustment added the following totals to the projected averages for the District's proposed grade configurations as compared to the base enrollment projection:
    - For grades 4-6, the adjustment added approximately 30 students.
    - For grades 3-6, the adjustment added approximately 40 students.

As a result of the analysis on the base enrollment forecast, the historical enrollment trends of the District, and the adjustments described above, the MSBA recommends for planning and study purposes only, study enrollments for the Proposed Project as follows:

- **Grade 4-6 enrollment: 450**



- Grade 3-6 enrollment: 595

Please note that these recommendations for multiple study enrollments do not represent an affirmation by the MSBA for approval and/or funding of any of these options and are intended only to provide a framework to inform the feasibility study, to be conducted as a means of determining the most cost effective and educationally sound solution to be agreed upon by the District and the MSBA. The MSBA's study enrollment recommendations assume full utilization of all remaining school facilities.

If the grade 3-6 enrollment configuration is determined to be the Preferred Solution, the District will be required to establish in the Preferred Schematic Report the proposed future use or disposition of any existing spaces vacated or otherwise reprogrammed by this Proposed Project and that the Preferred Solution has been approved by the School Committee and necessary District officials. Further, the MSBA will require a written plan from the District describing the process for determining local support for potential grade reconfiguration. Upon approval of the District's Preferred Solution, the MSBA will forward a design enrollment certification that is specific to the grade configuration associated with the approved Preferred Solution.

The MSBA believes that this study enrollment recommendation will position the District to efficiently meet space capacity needs throughout future enrollment variations. Please sign and return the attached certification within ten calendar days to confirm agreement on this study enrollment. If the District feels that this study enrollment does not meet the needs of the District, please respond to this letter via e-mail to Carley Belfield and propose three meeting/conference call times for which the District can be available to discuss enrollment.

If you have any questions regarding this matter, please do not hesitate to contact me or [Carley.Belfield@MassSchoolBuildings](mailto:Carley.Belfield@MassSchoolBuildings) at 617-720-4466.

Sincerely,



Michael McGurl  
Director of Capital Planning

Cc: Legislative Delegation  
Joseph F. Botaish, II, Chair, Wrentham Board of Selectmen  
Philip Jordan, Chair, Wrentham School Committee  
Dr. Allan Cameron, Superintendent, Wrentham Public Schools  
File: 10.2 Letters (Region 5)

**MASSACHUSETTS SCHOOL BUILDING AUTHORITY  
TOWN OF WRENTHAM  
CHARLES E. RODERICK ELEMENTARY SCHOOL  
STUDY ENROLLMENT CERTIFICATION**


As a result of a collaborative analysis with the Massachusetts School Building Authority (the "MSBA") of enrollment projections and space capacity needs for the Charles E. Roderick Elementary School (the "Proposed Project"), the Town of Wrentham hereby acknowledges and agrees that the design of alternatives, which may be evaluated as a part of the feasibility study for the Charles E. Roderick Elementary School, shall be based in accordance with the following:

| Enrollment for<br>Grades 4-6 | Enrollment for<br>Grades 3-6 |
|------------------------------|------------------------------|
| 450 students                 | 595 students                 |

The Town of Wrentham further acknowledges and agrees that pursuant to 963 CMR 2.00 *et seq.*, the MSBA shall determine the square feet per student space allowance and total square footage according to the enrollments noted above. The Town of Wrentham acknowledges and agrees that it has no right or entitlement to any particular design enrollment, square feet per student space allowance, or total square footage and that it has no right or entitlement to a design enrollment any greater than any of the enrollments noted above, and further acknowledges and agrees that it shall not bring any claim or action, legal or equitable, against the MSBA, or any of its officers or employees, for the purpose of obtaining an increase in the design enrollment for the Proposed Project that it has acknowledged and agreed to herein. The Town of Wrentham further acknowledges and agrees that, among other things, the design enrollment, square feet per student space allowance, and total square footage of the Proposed Project shall be subject to the approval of the MSBA's Board and that the final approval of a Proposed Project shall be within the sole discretion of the MSBA's Board.

The undersigned, for themselves and the Town of Wrentham, hereby certify that they have read and understand the contents of this study enrollment certification and that each of the above statements is true, complete and accurate. The undersigned hereby certify that they have been duly authorized by the appropriate governmental body to execute this Certification on behalf of the Town of Wrentham and to bind the Town of Wrentham to its terms.

  
\_\_\_\_\_  
Chief Executive Officer

  
\_\_\_\_\_  
Duly Authorized Representative of School Committee

2-14-24  
\_\_\_\_\_  
Date

2-14-24  
\_\_\_\_\_  
Date

  
\_\_\_\_\_  
Superintendent of Schools

Feb. 14, 2024  
\_\_\_\_\_  
Date



## **ATTACHMENT E**

### **Required Certifications**

The Owner's Project Manager (OPM) must submit proof of the certifications required by the Massachusetts School Building Authority (MSBA) to work on an MSBA-funded school project, including MCPPO Designation and OPM/Designer Certification.