

ATTACHMENT A - Part 1

Narrative of the Selection Process

Formation of the Selection Committee:

A Selection Committee was formed by the Town of Norwood Middle School Building Committee to prepare a Request for Services (“RFS”) for an OPM. The RFS is attached as Exhibit A.

The Selection Committee included the following members:

Name	Title	Description of related experience
Alan Slater	Chairman, School Building Committee	Member of Finance Commission for more than 16 years, member of School Building Committee for Norwood High School Construction, and Registered Professional Engineer
Tony Mazzucco	General Manager, Town of Norwood	Chief Executive Officer of Norwood, MCPPO Certified
Thomas Maloney	Board of Selectmen and Chairman of Capital Outlay Committee	More than 6 years on the Finance Commission, 4 years as a Selectman, and Chairman of the Capital Outlay Committee for 8 years
Paul Riccardi	Director of School Buildings and Grounds	More than 9 years of experience as the Director of School Buildings and Grounds for the Norwood School Department as well as Dean for Administration and Operations at Harvard School of Public Health for 20 years
Margo Fraczek	Principal, Dr. Philip O. Coakley Middle School	More than 23 years in the education field, including 5 years as a middle school principal

Procurement administrator: Catherine A. Carney, Contract Administrator, MCPPO Training Certification dated December 2018. The procurement administrator was a non-voting member of the Selection Committee.

Issuing the Request for Services:

On March 25, 2020, the Selection Committee presented the RFS to the Middle School Building Committee, and voted to authorize the formation of the Selection Committee. The Middle School Building Committee approved the RFS and authorized the Selection Committee to advertise the RFS for an OPM. The certified vote approving the RFS, and authorizing the Selection Committee to issue the RFS is attached as Exhibit B.

On May 6, 2020, the Town of Norwood advertised an RFS for an OPM for a school construction project in the Central Register and the Norwood Record as required by law. Copies of the Advertisement are attached as Exhibit C. A virtual informational meeting and a virtual site inspection was held via

GoToMeeting on May 11, 2020 and 38 interested parties attended. Questions were not received from the interested parties and resulted in no addenda to the RFS.

Review of Responses Received:

57 potential respondents requested the RFS including:

Firm Name
1. Ai3 Architects
2. Anser Advisory
3. Arcadis
4. Atlantic Construction & Management
5. B. Goba
6. B+AC Structural Engineers
7. C.V.D. Paving Corp.
8. CBRE Heery
9. CBT
10. CHA Consulting
11. Colliers Project Leaders
12. Compass Project Management
13. Consigli Construction
14. ConstructConnect
15. Construction Journal
16. Construction Monitoring Services
17. Dimeo Construction
18. DiNiscoDesign
19. Dore + Whittier
20. Finegold Alexander Architects
21. Flansburgh Architects
22. Fuss
23. GZA GeoEnvironmental
24. Hill International
25. Howeler + Yoon Architecture
26. Integrated Marketing Systems
27. JCJ Architecture
28. JLL
29. John Turner Consulting
30. Johnathan Levi Architects
31. Leftfield
32. LeMessurier Consultants
33. Leonardi Aray Architects
34. MDS/Miller Dyer Spears
35. Mount Vernon Group
36. Onvia, Inc.
37. P.J. Keating Company

38. Perkins Eastman
39. PMA Consultants
40. Pomroy Associates
41. Raymond Design Associates
42. RGB Architects
43. Rider Levett Bucknall
44. Shawmut Design and Construction
45. Skanska USA Building
46. STV/DPM
47. Tappe Architects
48. Taylor
49. Terva Corporation
50. Thornton Tomasetti
51. Tighe
52. Tshay Enterprise
53. Valley Communications
54. Vanderweil Engineers
55. Vidhwan, Inc.
56. Warner Larson Landscape Architects
57. William Rawn Associates

Twelve respondents submitted responses by the due date of May 22, 2020 as follows:

Firm Name
1. Arcadis
2. Atlantic Construction & Management
3. CBRE/Heery
4. CHA Consulting Inc.
5. Colliers Project Leaders
6. Compass Project Management
7. Construction Monitoring Services
8. Dore + Whittier
9. Hill International Inc.
10. PMA Consultants
11. STV/DPM
12. Terva Corporation

The Selection Committee members each received copies of the responses that were received. The Selection Committee determined which responses comply with the minimum requirements set forth in M.G.L. c.149 §44A½ for an “owner’s project manager” and 963 CMR 2.00 *et seq.*

The Selection Committee then ranked the group of respondents that met the minimum requirements. They ranked this group based on the selection criteria listed in the RFS as described below.

- 1) 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) 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; **(TOTAL 10 POINTS)**
 - b) Satisfactory working relationship with designers, contractors, Owner, the MSBA and local officials. **(TOTAL 5 POINTS)**
- 2) 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. **(TOTAL 10 POINTS)**
- 3) Thorough knowledge of Commonwealth construction procurement laws, regulations, policies and procedures as well as knowledge of Construction Management at Risk (CMR), as amended by the 2004 Construction Reform laws. **(TOTAL 5 POINTS)**
- 4) 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 185,040 square feet or renovation of 128,000 square feet; proposed project management systems; effective information management; and examples of problem solving approaches to resolving issues that impact time and cost. **(TOTAL 5 POINTS)**
- 5) 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. **(TOTAL 10 POINTS)**
- 6) 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. **(TOTAL 10 POINTS)**
- 7) Identify the Respondent's current and projected workload for projects estimated to cost in excess of \$1.5 million. **(TOTAL 5 POINTS)**
- 8) 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. **(TOTAL 15 POINTS)**

- 9) 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. **(TOTAL 10 POINTS)**
- 10) Knowledge of the purpose and practices of the services of Building Commissioning Consultants. **(TOTAL 10 POINTS)**
- 11) Financial Stability: Provide current balance sheet and income statement as evidence of the Respondent's financial stability and capacity to support the proposed contract. **(TOTAL 5 POINTS)**

The Selection Committee ranked the respondents as follows:

Firm Name	Cumulative Average Score (highest to lowest)
1. Compass	94.8
2. CBRE/Heery	93.0
3. PMA	91.2
4. Colliers	90.6
5. Dore + Whittier	90.4
6. Hill	89.4
7. Arcadis	88.8
8. Atlantic	84.6 (Tied)
9. STV/DPM	84.6 (Tied)
10. CHA	84.4
11. Terva	83.4
12. CMS	83.0

The Selection Committee short-listed the following respondents:

Firm Name	Cumulative Average Score (highest to lowest)
1. Compass	94.8
2. CBRE/Heery	93.0
3. PMA	91.2

The Selection Committee did conduct interviews of the short-listed respondents.

Interviews:

Three respondents were interviewed and the following questions were asked:

Questions for all candidates

1. Can you discuss the advantages of the CM at Risk methodology over the Design/Bid/Build approach and vice versa and can you tell us if you have a preference for the Coakley project?

2. If you are selected as the OPM for this project can you tell us your view on how long you will be engaged with the Town on the project? Essentially, when would your involvement and responsibility end?
3. One of the project objectives is sustainability, particularly NE-CHPS criteria and LEED. Please include examples of opportunities and strategies that you would pursue for Norwood.
4. Have you worked on school projects that include grade reconfiguration? Please discuss the communications strategies that you would employ to galvanize public opinion for a project that could involve grade reconfiguration.

CBRE/Heery question

- Clearly, you regard the Beverly Middle School as a great recent success. Can you tell us how that project compares in purpose and scope to the Norwood project?

COMPASS question

- In your introductory letter, you urge the Town to consider other sites for this project. Can you explain your reasoning for making this suggestion and do you have any specific sites in mind?

PMA Consultants question

- You include the Quinn Middle School in the Town of Hudson as an example of problem solving. Can you tell us how you worked with this site that required so much blasting?

The Selection Committee used the following scoring system in assessing the interviewees, which was in accordance with the process outlined in the Owner's OPM RFS.

There were 5 questions for each interviewee with each question worth 20 points for a possible total of 100 points.

The Selection Committee did factor in the respondent's original scores with the interview scores, which was in accordance with the process outlined in the Owner's OPM RFS.

A combination of the respondent's original scores and the interview scores is the final score for each respondent. The ranking of the original scores and the interview scores each counted for 50% of the final score.

Below are narratives of each interview that the Selection Committee conducted.

CBRE/Heery: For CM at Risk, the firm noted that they had worked on several CM at Risk projects, including the Beverly Middle School, and that the construction delivery method would be a consideration if the potential new building is close to the existing structure. On engagement with the client, they noted that they are always available to the clients and will be there after the project is

completed. Relative to sustainability, the firm's intent is to make buildings more efficient and to help the client make better decisions. Their goal is to provide good information including capital, operations and maintenance costs to the client so they make the best decision. For the Beverly Middle School question, the firm said that there were many similarities to Norwood such as diversity and grade reconfiguration, particularly the grade 5-6 versus 7-8 questions.

The responses were fine but tended to be more general in nature while the Selection Committee was looking for more specific explanations. We had hoped for examples of solutions and processes in other communities that could be applied in Norwood. In particular, we weren't given much specificity on the first three questions. This lack of specificity certainly impacted their scoring and subsequent ranking. CBRE Heery's average score for its proposal was 93; its interview average score was 90.8. The total combined average score was 91.9.

Compass Management: For CM at Risk, they noted that 30-40% of their projects were using this construction delivery method, and that they evaluate every project on its merits. They gave examples in Norwood where depending on the type of project, CM at Risk may or may not be advantageous. For engagement with the client, they stated that their intent is to build client relationships and their involvement is never ending. The firm gave several examples how they provided assistance to the client years after the project was completed without additional compensation. On the sustainability question, they said that they would investigate zero energy projects and gave examples of technology that they would consider. They also noted that whatever they recommend should also have educational and/or health benefits and gave examples there. For the grade reconfiguration question, they talked about developing life cycle costs and the importance of sharing information in public sessions in an accurate and timely manner. This is an emotional and sensitive issue, and close coordination with the School Department is important to help build consensus on the educational aspects of the plan. On the last question concerning sites, they said they would cast a wide net to demonstrate a thorough and transparent process and gave several examples of areas that should be further investigated.

The interview revealed a thorough knowledge of the material and provided many specific examples of approaches and methodology that they could apply to Norwood. In particular, the responses on engagement with the client and sustainability were excellent and demonstrated knowledge of the issues and attention to detail. Their interview responses were viewed very favorably in the final ranking. Compass Project Management's average score for its proposal was 94.8; its interview average score was 96.6. The total combined average score was 95.7.

PMA Consultants: For CM at Risk, the construction delivery method decision will depend on site selection. CM at Risk is generally better for an add/reno project, but must be evaluated on a case-by-case basis. Once the scope of the project has been determined then the decision will be made. On engagement with the client, their involvement doesn't end with closeout. They gave examples of keeping in contact with clients dating back to 2010 and they pride themselves on repeat clientele. For sustainability, they believe that every community is different and their responsibility is to inform the community as to current and state of the art technologies, materials, and cost estimates for those items and let them make the decision. It is important that the community knows the costs and is capable of maintaining the building systems. For the grade reconfiguration question, they gave several examples of communication strategies that they have employed. It is important to get all people involved early and

have their voices heard. Stakeholders include parents, teachers, and local officials. For the Quinn Middle School question, they noted that the need for the blasting was identified early. This allowed the site blasting to be implemented while the design phase continued. In that way the schedule could be expedited.

The interview demonstrated a detailed knowledge of both construction management and the MSBA process. The responses gave a clear indication of their overall philosophy and well as examples of how they addressed issues, many of which would be relevant to the Norwood project. Their interview responses were viewed very favorably in the final ranking. PMA Consultant’s average score for its proposal was 91.2; its interview average score was 93.8. The total combined average score was 92.5.

After the interviews, the Selection Committee ranked the three short-listed respondents as follows:

Firm Name	Cumulative Average Score (highest to lowest)
1. Compass Management	95.7
2. PMA Consultants	92.5
3. CBRE/Heery	91.9

Reference Checks:

The Selection Committee conducted 3 reference checks for each short-listed candidate in accordance with the process outlined in the Owner’s OPM RFS, and as summarized in the OPM Reference Checks Matrix (attached as Exhibit E). We attempted to contact at least three for each firm, but either we received no answer or messages were not returned. Due to the COVID-19 pandemic, access to references was very difficult; voice messages were left, but only four contact were actually made. We were able to perform two checks for Compass and one each for CBRE/Heery and PMA.

Final Ranking of all Interviewees:

The Selection Committee ranked Compass Management first based on:

- Strong management team, which was exemplified through their knowledge of materials, details of experience, accessibility during projects, and willingness to return to assist the Town of Norwood with problems that appeared after the completion of the Norwood High School project;
- Excellent interview including pertinent examples, particularly on sustainability;
- Proven track record with previous Norwood projects including Norwood High School, Public Works building, and Light Department building and excellent reference from another client;
- Superior communication skills; and,
- Recent experience with several similar middle school projects.

Compass was the highest rated firm for their response to the RFS and the interview.

The Selection Committee ranked PMA Consultants second based on:

- Strong management team, which included significant experience for its project team members;
- Superior interview where their depth of knowledge and hands on approach to problems was apparent;

- Worked well on a previous Norwood Callahan Elementary School Boiler which was an Accelerated Repair school project, which was bid and opened on March 26, 2015 and partially funded through the MSBA. Excellent reference from another client;
- Impressive discussion of communication strategies where public input was critical; and,
- Recent experience with several similar middle school projects.

While the Selection Committee was very impressed by PMA's qualifications and presentation, they scored second in their response to the RFS and the interview.

The Selection Committee ranked CBRE/Heery third based on:

- Strong management team, which included considerable experience with similar projects and well-spoken and articulate team members;
- Interview responses lacked specific examples;
- Excellent reference, although it was noted that while the eventual end product was fine that sometimes they missed deadlines;
- Referenced strong communication skills;
- Recent experience with a similar middle school project.

CBRE/Heery is recognized as a top OPM firm, but the lack of details and/or specifics during the interview resulted in the lowest score.

Conclusion Statement:

Compass Project Management and the Town of Norwood have completed negotiations and Compass Project Management has signed the MSBA standard Contract for Project Management Services for a Design/Bid/Build or Construction Manager at Risk project, without modifications to its terms and conditions. The contract as signed only by Compass Management is attached as Exhibit G.

Pursuant to section 3.2 of the Contract between the OPM and the Town of Norwood, the Eligible Applicant for the Town of Norwood has designated Alan Slater, Chairman of the School Building Committee as the individual who shall have the authority to act on behalf of the Owner under this Contract and who shall be responsible for the day-to-day communication between the Owner and the OPM.

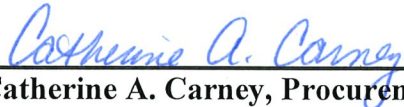
Based on the information as stated above, the undersigned hereby certify that: (1) all required local approvals in connection with the RFS have been obtained, (2) the Owner utilized a qualifications-based selection process, (3) the Owner followed the procurement process that was set forth in the RFS that was issued by the Owner, including the process for scoring and reference checks, (4) the final ranking of respondents accurately reflects the scores received by the respondents, and (5) the scoring sheets used in the selection process are true, complete and accurate. The Owner recommends the selection of Compass Management as the most qualified respondent to provide OPM Services for the proposed Coakley Middle School project. The Owner requests that the MSBA approve its selection as required by 963 CMR 2.11(2).



7/2/2020

Tony Mazucco, Chief Executive Officer

Dated



7/2/2020

Catherine A. Carney, Procurement Administrator (MCPPO Certified)

Dated

Exhibits

- A. RFS including any addenda and questions and answers.
- B. School Building Committee (or other authorized body) authorization of membership of the Selection Committee, approval of the RFS, and authorization for the Selection Committee to advertise the RFS.
- C. Copy of advertisement in the Central Register and additional publications, including name and date of publication.
- D. Copy of the selected respondent's proposal, including organizational chart.
- E. OPM Reference Checks Matrix.
- F. OPM Procurement Certification.
- G. Original copy of the MSBA standard Contract for Project Management Services signed only by the selected respondent. The Owner should not sign this contract until the MSBA OPM Review Panel has approved the Owner's selection.