

**Keystone Educational
Collaborative
2 Shaker Road, D215
Shirley, MA 01464**

**REQUEST FOR QUALIFICATIONS
OWNER'S PROJECT MANAGER SERVICES
JOSLIN STREET**

The Keystone Educational Collaborative will receive sealed applications to provide Owners Project Manager (OPM) Services for procurement and oversight of architectural work, engineering and construction of a building renovation project estimated to cost up to \$3 million. The OPM will work with the Executive Director and report to the Executive Board as required. The estimated time frame for the project to occur is from July 2023 to approximately July 2024. The fee for the OPM services is not to exceed \$90,000 or 3% of project cost .

Copies of the Request for Qualifications (RFQ) are available on the Collaborative's website at: www.keystonecollaborative.org and from the Office of the Executive Director, 2 Shaker Road, D215, Shirley, MA 01464.

The Collaborative reserves the right to reject any and all proposals, to waive informalities and to recommend award of the contract to the Executive Board of Directors, in the best interest of the Collaborative. All questions regarding this RFQ should be directed to John Demanche, Executive Director, at: jdemanche@kecg.org.

Sealed proposals marked "OPM SERVICES-JOSLIN STREET" must be received by May 24, 2023, at 1:00 p.m. and addressed as follows:

John Demanche
Executive Director
Keystone Educational Collaborative
2 Shaker Road, D215
Shirley, MA 01464

It is the sole responsibility of the Respondent to ensure their Proposal is received in the Executive Director's Office no later than May 24, 2023, at 1:00p.m. Proposals will be opened and recorded in the Collaborative's office on May 24, 2023, at approximately 1:05p.m.

LEGAL NOTICE

REQUEST FOR QUALIFICATIONS OWNER'S PROJECT MANAGER SERVICES JOSLIN STREET

The Collaborative seeks submissions to a Requests for Qualifications (RFQ) for Owner's Project Manager Services for procurement and oversight of architectural, engineering and construction services. The construction cost is anticipated to be near \$3,000,000, with a two to three month design and bidding period, and approximately twelve month construction period. The Project's estimated time frame is from July 2023 through July 2024. The fee for the OPM services is not to exceed \$90,000 or 3% of project cost.

The RFQ packages may be obtained from the Collaborative's website: www.keystonecollaborative.org or from the Keystone Collaborative, Office of the Executive Director, 2 Shaker Road, D215, Shirley, MA 01464 beginning on May 3, 2023 at 1:00 p.m. The proposals are due no later than May 24, 2023, at 1:00 p.m. Interviews with prospective candidates may be scheduled during the period of June 5 - June 9, 2023. The Collaborative reserves the right to reject any or all proposals, to waive informalities or to advertise for new proposals as deemed in the best interest of the Collaborative.

**REQUEST FOR QUALIFICATIONS
OWNER’S PROJECT MANAGER SERVICES
JOSLIN STREET**

I. Project Overview

The Collaborative will receive sealed applications for Owners Project Manager (OPM) Services for procurement and oversight of architectural work, engineering, and construction services, to convert 20,000 square feet of a 35,000 square foot multi-use facility into classroom and program space for students with special needs. The construction cost is anticipated to be up to \$3,000,000. The estimated time frame for the project to occur is from July 2023 to approximately July 2024. The fee for the OPM services is not to exceed \$90,000 or 3% of project cost.

II. Background

The Collaborative provides educational and therapy services to students from north central Massachusetts. As the programs have grown, we have experienced a need for space that can be developed to provide an optimal learning environment for many of our students.

The Collaborative is in the process of purchasing a multi-use building in Leominster that provides a central location for our students and has sufficient space to accommodate 10-12 classrooms averaging 350-400 square feet per classroom. Space for related uses will also be available and subject to renovation, as will making the multi level site handicap accessible.

Working with Collaborative staff and contractors, the Collaborative seeks to develop a setting that will support various student and staff functions. Because the Collaborative must respond to time sensitive placement issues for students, this renovation is considered a first step and of a scope that will get the space usable and open as soon as possible.

III. Scope of Services

- A. Working with the Executive Director, provide procurement and oversight of architectural, engineering and construction services of the renovation of a building in Leominster to be converted to school use.
- B. Prepare a Project schedule which shall serve as the control standard for monitoring performance on the Overall Project and shall maintain and monitor such Project schedule. Incorporate schedules prepared by the designer and the contractor into the Project schedule as they become available; with input from the designer and the contractor, provide narratives describing the status of the Project schedule, deviations from the baseline schedule, and other material schedule information.
- C. Develop and monitor the Project budget; coordinate the preparation of Owner’s independent estimates, if any, and insure that cost estimates prepared by the

designer and the contractor are fully reconciled with each other and with estimates prepared by the Owner; prepare estimates of all Project soft costs and track all costs throughout the duration of the Project; with input from the designer and the contractor, provide narratives to the Collaborative describing the status of the Project budget, deviations from the baseline budget, and other material budget information, including expenditure of the construction contingency; and track the projected draw schedule of the contractor against the actual monthly requisitions. The OPM shall immediately report to the Executive Director in writing any variances in the Project budget, including a detailed explanation as to the source of such variances and proposed reconciliation of the same.

- D. Consult with Collaborative's personnel on all aspects of previous project development including, but not limited to, established and agreed-upon space program, budget, schedule, schematic design of building and site, engineering studies of wetland, traffic and related items.
- E. Advise the Collaborative on the Architect's conformance with established project parameters including program requirements, budget and schedule.
- F. Coordinate with all city departments as necessary to facilitate the completion of the project, including but not limited to attending official and work group meetings. Specifically, manage communication of design and engineering responses to project requirements to ensure project requirements are fully understood by all parties.
- G. Participate with the Executive Director at design and coordination meetings among architect and engineering team and participate in weekly construction meetings.
- H. Monitor permitting activities.
- I. Assist with pre-qualification of bidders and filed sub-bidders.
- J. Assist the Collaborative with the solicitation of bid(s) for contract work, as well as all required filed sub-bids in accordance and compliance with all public bidding requirements and General Laws of the Commonwealth of Massachusetts.
- K. Act as the Collaborative's Representative during the construction of this project
- L. Monitor budget compliance and coordinate on-site issues with Architect and Contractor.
- M. Perform oversight of project close out including punch list, instructions to owner's personnel on operation and maintenance.

- N. Assist with evaluations of contractors and sub-contractors upon completion of the project(s).
- O. Oversee the work of the Designer and complete Designer Evaluation upon completion of the project.

IV. Minimum Requirements

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

The OPM shall meet the following minimum criteria:

1. Be a registered architect or professional engineer with at least five (5) years of experience in the construction and supervision of construction and design of public buildings or, if not registered, have at least 7 years' experience in the construction and supervision of construction of buildings of similar size and scope of complexity. Certified OPM credentials preferred. Documentation of such experience must be included in the response.
2. The OPM must be independent of both the architect and construction firm.
3. The OPM will identify a field representative who will have this project as their primary responsibility and will be available at all times to the city and contracted groups.
4. Submittal of required forms including: Corporate Authority (A), Non-collusion (B), Tax Compliance (C), and DCAMM Standard Designer Form (D). These forms are part of this RFQ as Appendices A-D, respectively.
5. Proof of Professional Liability Insurance, \$1 million per occurrence; \$3 million aggregate.

V. Evaluation Criteria

Responses that meet the minimum criteria above must demonstrate how they will meet the following criteria:

- A. **Prior Relevant Experience**
 1. Documented experience by the firm and key personnel on public building projects in the last ten (10) years.

2. Documented experiences by the firm and key personnel on successful completion of public facility projects and construction projects in Massachusetts.

3. Documented experience by the firm and key personnel on similar type and size projects in the last five (5) years of which at least two (2) shall be public projects.

4. Documented and demonstrated knowledge by the firm and key personnel of MA State Building Code and all pertinent codes and regulations related to successful and timely completion of projects similar in scope.

5. Demonstrated knowledge by the firm and key personnel of MA Procurement and Public Construction Laws (MCPPO certification preferred).

B. Identity and Qualifications of Consultant Who Will Work with the Owner on the Project.

1. Identify the firm's primary contacts that will work with the Owner on this project.

2. Documentation that any/all personnel have the required registrations and licenses.

3. Documentation of experience by any/all personnel on public safety projects of similar size and cost.

C. Demonstrated Capacity and Resources to undertake a Project of this Scope.

1. Documentation that the firm has sufficient staff and capacity to undertake this project on the identified schedule in conjunction with any other current projects on which they are working. Including but not limited to meetings at the convenience of the Collaborative, availability and regular communication and timely follow-through.

2. Documented and verifiable evidence of meeting timelines and estimated budgets for public facility construction projects.

D. Financial Stability

1. Documentation that the firm has the financial resources and stability to undertake a project of this scope and size in conjunction with any other current projects.

E. Interviews

1. The Collaborative may, within its sole discretion, seek additional information from Respondents including scheduling interviews.

VI. Comparative Evaluation Criteria

A. The following ratings will be used to measure the relative merits of each submission which has met the Evaluation Criteria described above. Those submissions which do not meet a majority of the Evaluation Criteria will be deemed unacceptable and will not be considered for this project. These rankings will be applied to each of the Evaluation Criteria in section V for the purpose of evaluating each submission.

B. Definition of the rankings is as follows:

1. **Highly Advantageous (HA):** That submission which demonstrably meets or exceeds all requirements of the RFQ criteria.
2. **Advantageous (A):** That submission which meets or exceeds a majority of the requirements of the RFQ. Vagueness or lack of information may not allow full understanding of the Submitters description of services or staff qualifications.
3. **Not Advantageous (NA):** That submission which clearly does not meet a majority of the requirements of the RFQ criteria.
4. **Unacceptable (U):** That submission which clearly does not meet any of the requirements of the RFQ criteria.

VII. Fee

A. The Fee is Not to Exceed \$90,000.00 or 3% of cost.

B. The proposed Fee shall be submitted in a separate, sealed envelope marked "FEE-OPM SERVICES-JOSLIN STREET" with the RFQ. Only one copy of the Fee is required.

C. The Executive Board, via the Chair or their designee, and the Executive Director, shall negotiate a Fee with the first-ranked Respondent. If they are unable to negotiate a contract with the first-ranked Respondent, they will then commence negotiations with its second ranked selection and so on, until a contract is successfully negotiated and approved by the Collaborative.

D. The Collaborative reserves the right to re-advertise if a fee cannot be negotiated with one of the finalists.

E. The negotiated fee will include all expenses, direct and indirect, related to this project.

F. A final construction cost in excess of the initial construction estimate will not, in and of itself, constitute a justification for an increased OPM Fee.

VIII. Additional Information

A. The Executive Director will be responsible for oversight of this project. The Executive Director reserves the right to include staff it deems necessary to assist with this project.

B. The Collaborative is an Affirmative Action/Equal Employment employer, which encourages the utilization of minority and women-owned enterprises.

C. The Board of Directors, upon recommendation from the Executive Director, reserves the right to reject any proposal which, in its judgment, fails to meet the requirements of the RFQ; or which is incomplete, conditional, or obscure; or which contains additions or irregularities; or in which errors occur; or if determined to be in the best interest of the Town to do so.

D. The Collaborative may cancel this RFQ, in whole or in part, at any time whenever such act is deemed in its best interest and reserves the right to waive minor discrepancies or permit an applicant to clarify such discrepancies and so conduct discussion with all qualified applicants in any manner necessary to serve the best interests of the Collaborative.

E. Finalists may be required to meet with the Executive Board of Directors, and Executive Director for an interview. Interviews are anticipated to occur during the week of June 5-June 9, 2023.

Questions regarding this RFQ must be submitted to: John Demanche, Executive Director, Keystone Educational Collaborative, 2 Shaker Road, D215, Shirley, MA 01464
Or via email to: jdemanche@kecg.org

1. Questions must be received no later than Monday May 15, 2023, at 12:00 p.m.

2. The Owner shall endeavor to but shall not be required to answer all questions received.

F. This Request for Qualifications (RFQ), any Addenda issued by the Collaborative, and the selected Respondent's response, will become part of the executed contract.

G. 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.

IX. Proposal Submittal

A. Sealed proposals marked "OPM SERVICES-JOSLIN STREET" must be received May 24, 2023, at 1:00 p.m. and addressed as follows:

John Demanche
Executive Director
Keystone Educational Collaborative
2 Shaker Road, D215
Shirley, MA 01464

It is the sole responsibility of the Respondent to ensure their Proposal is received in the Collaborative's Office no later than May 24, 2023, at 1:00 p.m. Proposals will be opened and recorded in the Executive Director's office at approximately 1:05 p.m on May 24, 2023.

B. Each Response must include one signed original and two (2) copies of the RFQ, and one (1) electronic (PDF) copy labeled thumb drive. The Fee Proposal **MUST NOT** be included in the RFQ response hardcopies or thumb drive.

C. Only one Fee Proposal, as described in Section VII, shall be submitted.

D. A Respondent may withdraw or modify their proposal prior to the deadline. All proposals submitted must remain valid for 90 days following RFQ deadline.

E. The Owner is not responsible for, and will not pay for, any costs incurred in preparing a Response to the RFQ, interviewing for the project, negotiating a contract for the project, or any other costs incurred prior to entering a contract with the OPM.

APPENDIX A: CORPORATE AUTHORITY

Keystone Educational Collaborative

CERTIFICATE OF CORPORATE AUTHORITY

OPM SERVICES- JOSLIN STREET

The principle, officer, or person to sign below pledges under penalties of perjury, that he or she has been designated by the Owner(s) of the Board of Directors of the below named firm as an authorized representative.

Date: _____

Signature of individual submitting bid or proposal: _____

Printed Name of Person signing the bid or proposal: _____

Title of Person signing bid or proposal: _____

Name of Business: _____

Business Address: _____

Business Phone: _____

APPENDIX B: NON-COLLUSION

CERTIFICATE OF NON-COLLUSION

Pursuant to M.G.L. Chapter 40, s.4B ½, the undersigned certifies under penalties of perjury that this proposal is in all respects bona fide, fair, and made without collusion or fraud with any other person. As used in this certification, the word “person” shall mean any natural person, joint venture, partnership, corporation, or other business or legal entity.

COMPANY NAME

SIGNATURE OF AUTHORIZED REPRESENTATIVE

PRINTED NAME OF AUTHORIZED REPRESENTATIVE AND TITLE

DATE

APPENDIX C: TAX COMPLIANCE

CERTIFICATE OF COMPLIANCE WITH STATE TAX LAWS

Pursuant to M.G.L. C.62C, s.49A (b) and M.G.L. C.ISIA, s.19A, I hereby certify under the penalty of perjury that _____ has complied with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

SIGNATURE OF INDIVIDUAL OR CORPORATE OFFICE*

SOCIAL SECURITY NUMBER/FEDERAL IDENTIFICATION NUMBER**

CORPORATE NAME (IF APPLICABLE)

NAME AND TITLE OF CORPORATE OFFICE (IF APPLICABLE)

*Approval of a contract or other agreement will not be granted unless this certification clause is signed by the proposer. For all corporations, a certified copy of the authorizing vote of the Board of Directors must be provided.

** Your social security number will be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligation. Providers who fail to correct their non-filing or delinquency will not have a contract or other agreement issued, renewed, or extended. This request is made under the authority of Massachusetts General Laws, Chapter 62C, s. 49A.

APPENDIX D: DSB STANDARD DESIGNER FORM

(Attached)

