



LINCOLN PUBLIC SCHOOLS

BUCKNER M. CREEL
ADMINISTRATOR FOR BUSINESS AND FINANCE

July 23, 2014

To: School Committee
Becky McFall, Superintendent .
From: Buckner Creel

Subject: Award of Designer Contract – Lincoln School Study

Background In March 2014, the Town Meeting appropriated funds and authorized the School Committee to acquire the services of a design consultant to study the Lincoln School and assist the School Committee in presenting options to address the facilities issues in the Lincoln School. The School Committee appointed a subcommittee, the School Building Advisory Committee (SBAC), to conduct a study of the Lincoln School and authorized it to select a consultant to provide assistance. Massachusetts procurement laws require the selection of a designer through a qualifications-based process.

Process In accordance with the procedures outlined in M.G.L. 7C §§44-57, qualifications from firms interested in providing designer services for the Lincoln School Study were solicited from potential design agents using the following process:

- Legal notices were published in the Lincoln Journal on June 5, 2014.
- Construction announcements in the *Central Register* were published announcing the availability of Request for Qualifications (RFQ) documents on June 5, 2014.
- The RFQ document contained the terms of the RFQ, the required certifications, the SBAC report, and the language of the proposed contract. The RFQ, including the proposed contract, was reviewed by the School Committee Counsel.
- Fifty-two (52) potential responders picked up an RFQ packet or requested the electronic version.
- Seventeen (17) potential responders attended the non-mandatory briefing session and site visit held June 11, 2014 at 10:00 AM in the Brooks Building.
- One addendum was added to the bid packet after the briefing and site visit: Addendum #1 dated June 16, 2014 answered questions from the conference and those received subsequently, but before the cut-off date.
- Eight qualification & interest statements (responses) were received by June 19, 2014 at 2: pm. One of the eight firms responding had not attended the briefing session.

Response results The respondents were (alphabetically):

- Design Partnership of Cambridge
- designLAB Architects
- Dore & Whittier Architects
- HMFH Architects
- Knight, Bagge and Anderson
- Mount Vernon Group Architects
- Perkins+Will
- Schwartz/Silver Architects

All eight responses were received prior to the official response receipt time; the submitted materials appeared to meet the requirements of the RFQ instructions, and I initially found that all eight are responsive.

Evaluation The responses were evaluated by a panel with six members drawn from the SBAC:

- Owen Beenhouwer
- Gary Taylor
- Vincent Cannistraro
- Peter Sugar
- Douglas Adams, Co-Chair SBAC
- Buckner Creel, Administrator for Business and Finance (recorder)

The RFQ contained the following criteria, which were used by the panel for response evaluation:

- a. The number of similar projects completed within the last five years
- b. Proposed team members' level of demonstrated expertise in the following areas:
 - 1) School design combining renovation and new design, repair, construction and/or funding under MSBA processes
 - 2) Mechanical, Electrical, Plumbing and Fire Protection Engineering
 - 3) Structural Engineering
 - 4) Site/Civil Engineering, Landscape Architecture and Campus Planning
 - 5) Food Service Equipment
 - 6) Construction Cost Estimating
 - 7) Project Management
- c. Proposed teams demonstrating the ability to meet the requirements of the Massachusetts Supplier Diversity Program
- d. The degree of Massachusetts public sector experience
- e. Prior similar experience best illustrating current qualifications for the specific project.
- f. Current workload and ability to undertake the contract based on the number and scope of projects for which the firm is currently under contract.
- g. The identity and qualifications of the consultants (if any) who will work on the project.
- h. The financial stability of the firm.
- i. The qualifications of the personnel to be assigned to the project.
- j. Geographical proximity of the firm to the project site or willingness of the firm to make site visits and attend local meetings as required by the client.

Panel members reviewed and ranked the responses separately, then met to vote.

Initial review After discussion, the panel unanimously decided to advance HMFH Architects, Dore & Whittier Architects, Design Partnership of Cambridge and Schwartz/Silver Architects to the next step. By Addendum 2 dated June 26, 2014, the four finalist firms were invited to a second briefing session on June 27th, and requested to submit a proposal by July 11, 2014 at 2:00 PM. The proposal was to contain the following information:

- a. A detailed project approach describing the step-by-step process the proposer intends to follow in conducting the study.
- b. A detailed project timeline assuming the Designer commences work on July 24, 2014 and issues its draft final report on November 7, 2014.
- c. A confirmation of the proposed team.

All four finalists submitted proposals by the appointed time.

Reference checks Subsequent to the initial review, I conducted reference checks on all four firms. At least four references for each firm were contacted, and a series of questions developed by the SBAC were asked. All four firms received excellent references for their work, although one firm had not engaged in work which was comparable to the study tasks.

All four responses contained sufficient information detailing experience and qualifications leading us to believe that they are all capable of performing the required designer services. Nothing in the reference checks leads me to believe that any of the four would not successfully perform the desired scope of the Lincoln School Study. Therefore, I find all four finalists to be responsible.

Interviews and final ranking The firms were notified of the interview times by Addendum 3 on July 2, 2014, and the four firms were interviewed on July 15 and 16, 2014 by the entire SBAC. Following the last interview on July 16th, the SBAC heard the results of the reference checks, reviewed the proposals and other submitted materials, and discussed the relative merits of the firms.

The panel unanimously agreed that Schwartz/Silver presented the least qualifications for the proposed study, and so they were eliminated from further discussion. The remaining three firms were all considered strong, and the SBAC had difficulty determining a clear front-runner. After additional discussion, a number of SBAC members proposed ranking the firm of Dore & Whittier Architects first. The SBAC approved this ranking by a vote of seven in favor, one opposed, with three abstentions. The SBAC voted unanimously to rank both HMFH and Design Partnership second.

The SBAC authorized me to request a fee proposal from Dore & Whittier Architects.

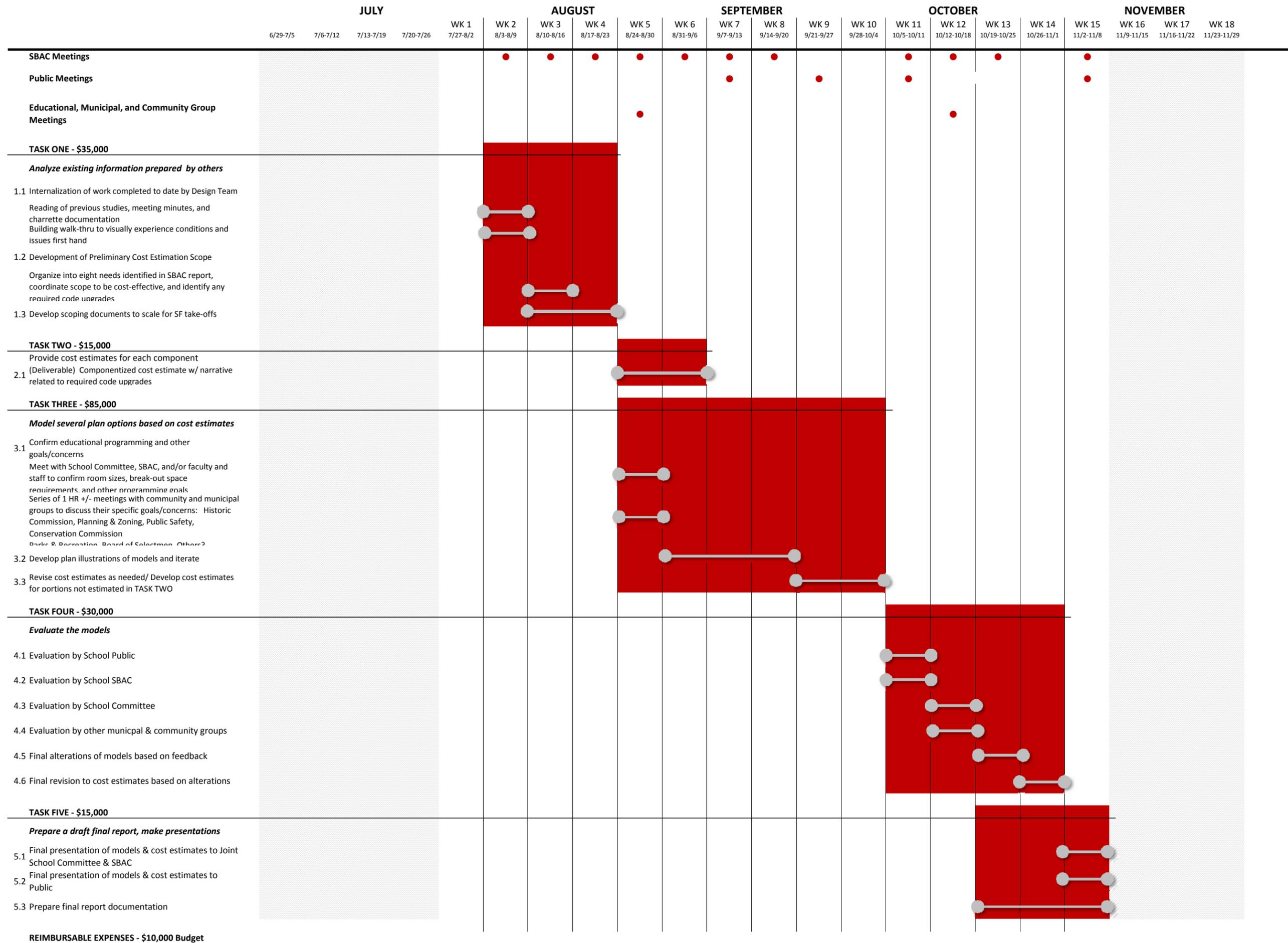
Fee proposal negotiation Upon request, Dore & Whittier Architects submitted a fee proposal and updated schedule dated July 18, 2014. While the proposed fees appear reasonable, the schedule and project approach raised several questions among the SBAC. The SBAC discussed the fee proposal and schedule at its meeting on July 22, and approved the fee subject to the clarification of the number of public meetings to be held, and a change in the wording of Task 5. The SBAC voted unanimously to recommend to the School Committee that Dore & Whittier Architects be awarded the

contract for the Lincoln School Study, contingent upon agreement over the contract document language.

Discussions were held with the Dore & Whittier Architects team on July 23, 2014, which resulted in their agreeing to incorporate all of the SBAC requests. Their revised fee proposal totalling \$180,000, with an allowance of \$10,000 for reimbursable expenses, is attached. This amount is less than the estimates given by several firms before the RFQ was written, and seems very reasonable.

Recommendation Dore & Whittier Architects is a responsive, responsible proposer who has offered a reasonable price. Accordingly, I recommend that we accept their proposal and enter into a contract with them for designer services for Lincoln School Study.

Suggested motion MOVE, That the School Committee VOTE to accept the Dore & Whittier Architects fee proposal and authorize the Committee Chairperson to award the contract to provide designer services for the Lincoln School Study, subject to agreement upon the language of the contract document.



REIMBURSABLE EXPENSES - \$10,000 Budget