



# LINCOLN PUBLIC SCHOOLS

BUCKNER M. CREEL  
ADMINISTRATOR FOR BUSINESS AND FINANCE

August 24, 2010

To: School Committee  
Michael Brandmeyer, Superintendent  
From: Buck Creel

Subject: Selection of Owner's Project Manager – MSBA Lincoln School Project

**Background.** Massachusetts procurement laws require the selection of an Owner's Project Manager (OPM) to oversee building projects with an estimated construction cost of \$1.5 million or more. The MSBA procedures spell out in some detail the qualifications-based process we must follow for OPM selection, and the documentation required to support the selection. Finally, the MSBA will review and has final approval of the OPM selected by the School Committee. The bulk of this memorandum follows the MSBA-directed format.

**Process.** An OPM Subcommittee was formed by the Lincoln School Building Committee to prepare the Request for Services (Exhibit A-omitted) for an Owner's Project Manager. The OPM Subcommittee included the following members:

Name	Title	Description of related experience
Owen Beenhouwer	Community member	Architect; practice included school projects
Buckner Creel	Admin. for Bus. & Fin.	MCPPO; engineer; program and project manager for public buildings; facilities manager
Andrew Glass	Community member	Attorney
Stephen McKenna	School Principal	Principal, Lincoln School K-4
Laura Regrut	Community member	Architect; practice included comparable projects
Sheila Webber	Community member	Professor of Management; has conducted qualifications-based selections

Procurement administrator: Buckner M. Creel, Administrator for Business and Finance, designated MCPPO on January 1, 2008.

On July 8, 2010, the OPM Subcommittee presented the Request for Services to the Lincoln School Committee which authorized the Lincoln School Building Committee to advertise the Request for Services for an Owner's Project Manager. (Exhibit B -- omitted)

On July 21, 2010, the Lincoln District advertised a Request for Services for an Owner's Project Manager for a school construction project in the Central Register as well as in the *Lincoln Journal*, the local newspaper, (Exhibit C – omitted). A voluntary informational meeting and site visit was held on July 27, 2010 and eight potential respondents attended. Questions were received from respondents which resulted in two addenda to

the Request for Services (Exhibit D – omitted). The addenda addressed very minor administrative matters and did not extend the date for submission.

22 respondents requested the Request for Services; a list follows.

	<b>Firm Name</b>
1	Atlantic Construction & Management
2	Cardinal Construction
3	Delta Heights
4	Heery International
5	Joslin Lesser
6	KBA Architects
7	KVAssociates, Inc
8	Maguire Group
9	OMR Architects, Inc
10	Pinck & Company
11	PMA Construction Services
12	Pomroy Associates
13	Potomac Capital Advisers
14	RF Walsh Collab. Partners
15	RISE Group
16	Ryegate, Inc.
17	Skanska USA Building
18	STV Construction, Inc.
19	STV, Inc.
20	Syska Hennessy Group, Inc
21	Ted Gentry Associates
22	URS Corporation

Eleven respondents submitted responses by the original due date of August 6, 2010; a list follows.

	<b>Firm Name</b>
1	Atlantic Construction & Management
2	Cardinal Construction
3	Delta Heights
4	Joslin Lesser
5	KBA Architects
6	Maguire Group
7	PMA Construction Services
8	RF Walsh Collaborative Partners
9	RISE Group
10	Ryegate, Inc.
11	Skanska USA Building

The OPM Subcommittee members each received copies of all the responses received. The OPM Subcommittee verified that all responses complied 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.*

**Initial ranking.** The OPM Subcommittee ranked the respondents based on the five selection criteria listed in the Request for Services. These criteria and the associated point values are shown below:

1. (20) Relevant Experience. Past performance of the Respondent, if any, with regard to public, private, DOE-funded and MSBA-funded school projects across the Commonwealth, as evidenced by :
  - a. Documented performance on previous projects as set forth in Attachment C to the RFS, 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. Satisfactory working relationship with designers, contractors, Owner, the MSBA and local officials.
  
2. (20) Knowledge of Codes, Procurement, Green Development
  - a. 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.
  - b. Thorough knowledge of Commonwealth of Massachusetts public construction and procurement laws, regulations, policies and procedures.
  - c. Knowledge and experience with CM-At-Risk Procurement methodology.
  - d. Familiarity with Massachusetts-CHPS (MA-CHPS) High Performance Green Schools Guidelines. Demonstrated experience working on high performance green buildings (if any), green building rating system used (e.g., MA-CHPS or LEED), 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 MA-CHPS prerequisites.
  - e. 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.
  - f. Knowledge of the purpose and practices of the services of Building Commissioning Consultants.
  
3. (15) Project Approach
  - a. 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 120,000 square feet or renovation and additions to 137,452 square feet; proposed project management systems; effective information management; and examples of problem solving approaches to resolving issues that impact time and cost.
  - b. Provide at least one example of the project staffing provided for a successful project similar in type, size, dollar value and complexity to the project being considered.

4. (25) Project Team
  - a. 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.
  - b. 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.
  
5. (20) Firm Qualifications and Capacity
  - a. 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 Subconsultants.
  - b. Identify the Respondent's current and projected workload for projects estimated to cost in excess of \$1.5 million.
  - c. Financial Stability: Provide current balance sheet and income statement as evidence of the Respondent's financial stability and capacity to support the proposed contract.
  - d. Quality of work and level of performance. The Owner will seek evidence of practicality, creativity, attention to detail and follow through, as well as professional competence.
  - e. Ability to schedule, undertake and complete responsibilities in a timely manner.

A ranked list of the respondents with the scoring by the OPM Subcommittee is shown below, and the committee members' scoring sheets are included as Exhibit E.

	<b>Firm Name</b>	<b>Average Score</b>
1	RF Walsh Collab. Partners	92.3
2	Skanska USA Building	89.5
3	PMA Construction Services	89.2
4	RISE Group	85.7
5	Joslin Lesser	85.3
6	KBA Architects	84.2
7	Maguire Group	75.7
8	Cardinal Construction	63.3
9	Ryegate, Inc.	50.5
10	Atlantic Construction & Mgt.	46.0
11	Delta Heights	35.3

**Finalist interviews.** The committee short listed the following respondents:

	<b>Firm Name</b>	<b>Average Score</b>
1	RF Walsh Collab. Partners	92.3
2	Skanska USA Building	89.5
3	PMA Construction Services	89.2
4	RISE Group	85.7

The following members of the Lincoln School Building Committee conducted interviews with all four finalist firms:

	<b>SBC Member Name</b>
1	David Bau
2	Owen Benhouwer
3	Michael Brandmeyer
4	Buckner Creel
5	Andrew Glass
6	Michael Haines
7	Al Schmertzler, SBC Chair
8	John Snell
9	Sheila Webber

The Committee asked each firm the following eight questions:

1. The Lincoln Public Schools last major school building project was the 1994 addition connecting the Smith and Brooks buildings. At that time, districts were not required to hire Owner’s Project Managers. Please describe your firm’s vision of the OPM role and how your firm will assist Lincoln as we work through this complex process of feasibility study and hopefully construction.
2. We anticipate that the Feasibility Study will result in a renovation project with the possibility of some new construction, and that it will be undertaken in phases while school remains in session. Can you share your experience with managing projects in elementary schools that are occupied during the construction period? What are the challenges and strategies that you can use to address this situation?
3. The Town of Lincoln is one of 35 communities in MA that is designated a “Green Community.” In addition, Lincoln has agreed to meet the Architecture 2030 energy guidelines for major renovation and new construction projects for town facilities. Please describe how your team will help support very high energy performance guidelines and hold the design team accountable for sound green technology investments that are durable, meet reasonable life cycle cost criteria, and can be maintained by existing school facility management resources.
4. The typical timeline for an MSBA feasibility study is 12 months. We have negotiated a 15-month study period as part of the Feasibility Study Agreement so that we can present a proposal at a Special Town Meeting in October 2011. Given that we have

this extended time we hope to develop extensive support before Town Meeting in October 2011. Describe what your firm could do to assist in this effort.

5. Please tell us about your approach to savings and cost estimating and how you would give us the accurate and timely estimates needed in the Feasibility Study process.
6. We know that all projects are completed without challenges, particularly meeting key milestones. Please tell us about one of your projects that experienced a significant challenge, what was the issue, were you able to bring it back in line and how did you accomplish that? What would you do differently to avoid a similar challenge in the future?
7. We are considering Construction Manager at Risk. Would you describe the benefits, risks and your experience with this approach?
8. What are your methods for project communication and monitoring and how do you use technology to support them?
9. Please describe your firm's relative strengths, and identify areas of weakness.

Each member of the Lincoln School Building Committee took notes during the interviews and prepared their own summary comments. Following the last interview, the School Building Committee conducted a debrief session during which the Committee members shared their summary assessments.

Some comments and observations from the finalist interviews follow.

RFWalsh collaborative Partners. The Project Executive, Joe Naughton, began by stating that RFWalsh intended to replace the originally proposed Project Manager, with another member of the team. The OPM Subcommittee had short-listed RFWalsh largely on the strengths and experience of the proposed project manager, and the Committee reacted negatively to the change in designated project managers so early in the process. The Committee felt that substitute project manager brought fewer skills to the team; for example, he has not worked directly on a project using the CM at Risk approach, and did not display the thoughtful interactions with the Committee that others displayed.

Skanska USA Building. The Committee formed very favorable impressions of the proposed team: Dale Caldwell as Project Executive; Dan Tavares as Project Director, the designated day-to-day contact with the Committee; Paul Kneedler, Project Representative. All three are LEED AP certified, which the Committee felt showed a special emphasis on an area important to the Town of Lincoln. All team members interacted effectively with each other and with the Committee, and made it very clear that the primary role of the OPM is to serve as a trusted advisor and extension of the owner's staff. Dan Tavares displayed an impressive grasp of all phases of the project process, and gave thoughtful and detailed answers to the questions posed. The Committee was impressed with his depth of experience as a project architect, clerk-of-the-works and school building committee member in his home town. The Committee also was impressed with the variety of approaches Paul Kneedler has used in communicating project goals with the Town, and the articulate way he expressed them.

PMA Construction Services. The Committee formed very favorable impressions of the proposed team: Chris Carroll as Project Executive and Chris Simmler as Project Manager, the designated day-to-day contact with the Committee. The team explained that the OPM is a trusted advisor for the owner, and is accountable in assisting the Committee accomplish its project goals. The Committee was impressed with the wide variety of methods PMA has used in the critical task of public outreach, and felt the thoughtful approach of reconciling multiple estimates and examining the differences would result in a better project cost estimate. We were also impressed with the variety of methods for project communication and monitoring PMA presented, the number of MSBA projects underway and the firm's "engineering" approach to project management. The Committee expressed some concerns about the intensity of the proposed project manager's approach to his duties, and his ability to adapt that approach to the unique challenges of Lincoln. The Committee expressed concern that the proposed project manager would be too directive in his interactions and assume more authority than the Committee would be willing to delegate. The Committee also perceived a focus on reductions to project scope and quality instead of value engineering.

RISE Group. The Committee was very impressed with the abilities displayed by Bill Anderson, Program Director, and Cary Tisch, Technical Services/Design Review. It was clear that the RISE Group could bring a considerable amount of talent to bear in support of our project, and would devote a lot of attention to the proposed effort. Their experience as a firm lies in higher education buildings, mostly private, and public schools in large urban settings, mostly in Chicago. The project manager proposed has experience in public housing and higher education, but none in elementary school construction. The Committee felt that other firms offered project managers with experience in Massachusetts public school building projects.

**Reference checks.** The Lincoln School Building Committee conducted 25 reference checks in total. Following the interview debrief on August 17 and preliminary reference checks, the final reference checks focused on the two firms considered strongest, PMA Construction and Skanska, and more specifically, the manner of performance of the individuals proposed for the day-to-day contact, the project manager. The twelve reference checks for these two firms are summarized below:

PMA Construction. Almost all references for PMA in general, and all references for Chris Carroll and Chris Simmler, were positive. Both had good relations with the MSBA, clearly worked well together as a team, and were considered particularly strong in construction and knowledge of CM at Risk. Several references indicated that at times PMA Construction experienced some initial difficulty in several engagements, but eventually were successful with their projects. Strengths seemed to be the attention to detail in construction, forging strong relations with key stakeholders and vendors, and strong process management skills. Relative weaknesses cited were administrative support, particularly supporting the ProPay system.

Skanska. All references for Skanska in general, and all references for Dale Caldwell, Dan Tavares and Paul Kneedler in particular, were positive. All had good relations with the MSBA and were considered strong in all phases of the project process. As Dan Tavares had recently joined Skanska, the Committee obtained references which covered his

project work at KBA. These references, too, were all positive. All team members have good experience with and knowledge of CM at Risk. Most of the reference checks focused on Dan Tavares, whose performance on past school projects was described in superlatives. Several references described in detail how his low-key approach, attention to detail and creative problem-solving “rescued” projects which otherwise might have foundered. No reference could identify a negative aspect of his (or Skanska’s) performance.

The Committee obtained independent references on all finalists. The independent references were discussed and considered in the finalist ranking.

**Final Selection.** The School Building Committee met again on August 23, 2010 and discussed the interviews and reference information further. After the interviews, reference checking and discussion, the Lincoln School Building Committee ranked the four finalist firms as follows:

	<b>Firm Name</b>	<b>Rank</b>
	Skanska USA Building	1
	PMA Construction	2
	RFWalsh collaborative	4
	RISE Group	4

After extensive discussion, the Lincoln School Building Committee ranked Skanska first based on the following four factors:

1. The depth of resources available “in-house” through the Skanska organization
2. The design review abilities, quality control and value engineering initiatives the proposed project manager brings
3. The Skanska approach to project monitoring and communication
4. The experience and approach of the proposed project manager would be a good match for the culture of Lincoln.

A motion to approve Skanska to serve as the OPM for the Lincoln School project, and if negotiations with Skanska fail, to approve PMA Construction to serve as OPM was made, and the School Building Committee voted unanimously to recommend Skanska as number one and PMA Construction as number two firm to the School Committee.