

**Request
for
Qualifications
for
Designer Services for a Study of
The Lincoln School**

**by the
Lincoln School Committee**

Lincoln Public Schools
6 Ballfield Road
Lincoln, MA 01773
(781) 259-2623

The Town of Lincoln, through the Lincoln School Committee (“Owner”) is seeking the services of a qualified “Designer” within the meaning of M.G.L. Chapter 7C, Sections 44-57, to provide professional design services to study possible approaches to the renovation and/or addition of the Lincoln School (“School”) in Lincoln, Massachusetts (“Project”). Selection of a Designer will be made by the Designer Selection Panel of the School Building Advisory Committee, subject to approval by the Lincoln School Committee.

Proposals are to be delivered in person or by certified/express mail to the Business Office located in the Hartwell Building, 6 Ballfield Road, Lincoln, MA 01773. All proposals must be received by 2:00 pm (Eastern Time) on Thursday, June 19, 2014, to be considered. Proposals submitted by fax or by electronic mail will not be considered.

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Lincoln School Committee
Town of Lincoln

REQUEST FOR QUALIFICATIONS (RFQ)

Invitation

The Town of Lincoln, through the Lincoln School Committee (“Owner”) is seeking the services of a qualified “Designer” within the meaning of M.G.L. [Chapter 7C, Sections 44-57](#), to provide professional design services to study possible approaches to the renovation and/or addition to the Lincoln School (“School”) in Lincoln, Massachusetts (“Project”). Selection of a Designer will be made by the Designer Selection Panel of the School Building Advisory Committee, subject to approval by the Lincoln School Committee.

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The Owner is seeking design services to conduct a Study which will include the development and evaluation of potential alternative solutions, development of cost estimates and presentations to the public. A potential Project may include renovation and new construction of the School.

The Fee for Basic Services will be negotiated, but will not exceed \$200,000.

For additional information on Designer qualifications see Section G in this RFQ.

A. Background

The School is a 137,452 square feet single-story campus-style facility housing approximately 625 students in Grades K-8. The site is 54.4 acres. It is composed of four buildings, several playgrounds, athletic fields and parking areas. The site is in an environmentally sensitive area, which includes a tributary to a public water supply. It is also within the Zone 2 of a Town well.

The School was first occupied in 1948. Additions and upgrades were made in 1953, 1955, 1963, 1970 and 1994. Of the School’s four buildings, three (the Smith, Link and Brooks Buildings) appear to be one continuous structure. The Reed Field House is adjacent to Brooks Building but detached. (For your convenience, a plan of the layout of the buildings is annexed hereto as Attachment 1.) The School is organized under two principals, with the K-4 program centered on the Smith Building, and the 5-8 program housed in the Brooks Building. The Link Building contains library, classrooms and common-use areas, and connects the two programs. The interior of the buildings contain a variety of surfaces, which range from simple concrete masonry unit walls to gypsum wall board and tile.

Though the facility has been well maintained, many portions of its systems are near or beyond their expected life and need replacement or significant upgrades, including exterior wooden curtain walls, HVAC, plumbing and electrical. The site may present some permitting issues due to its proximity to protected areas, including wetlands, conservation and historical. The site suffers from a high groundwater table; the septic system is currently operating under a variance from the Mass DEP, and portions of the school, including the Smith boiler room and the Brooks utility tunnels flood frequently. The roofs need immediate attention. There are no structural impediments to renovation, but the facility should be examined and assessed against current lateral-load safety standards.

Handicapped accessibility and ADA compliance are mainly absent and will require extensive modifications. Although asbestos abatements have occurred over the years, some asbestos-containing materials remain on the site and abatement should be considered. The major portions of the buildings have exposed wooden structural elements and are not up to current fire safety codes because they lack sprinkler systems. Numerous other building code issues exist.

In addition to the problems posed by the physical condition of the buildings, the Master Plan study and other reviews identified significant programmatic deficiencies at the School. Some of the physical plant issues affecting the educational program are inadequate lighting, poor ventilation and cooling, and some acoustic issues. Others are the size and arrangement of certain spaces, or are simply a lack of the correct type of space. Among the spaces not meeting the minimum MSBA standards current at the time of the study are: selected classrooms in each of the buildings; Special Education classrooms and tutorial rooms; cafeteria and kitchen areas; teacher planning spaces; administrative areas; art and music; health suite; and support/storage areas.

The Ballfield Road campus is very important to the citizens of Lincoln. The Town has only a single school facility, so it is the hub of many community activities. As the single largest collection of Town facilities, the campus occupies a unique place in Town planning, and the look and feel of the campus is special to Town citizens.

B. Previous studies of the School’s facilities and the MSBA process

A Physical Needs Facility Study and assessment conducted by LPBA Architects, Inc. in 2000 and partially updated in the summer of 2004 concluded that the facility requires both substantive renovation and additions to address certain program deficiencies. The School Committee decided to solicit a further assessment and program review, and retained Symmes Maini & McKee Associates (SMMA) in July 2006 to conduct a K-8 Master Plan Study. The primary tasks given to SMMA were to:

1. evaluate the existing conditions of the Lincoln School located on the Ballfield Road Campus; and
2. develop an overall master plan for renovations and/or upgrades to address the space needs, enrollments, and building infrastructure needs of the Town.

The SMMA evaluation focused on the existing conditions of the Ballfield Road Campus schools, on how well they fulfill program needs, what space is needed based on projected enrollments, and what capital improvements are needed for each of the buildings. The result of the Master Plan Study was a series of identified deficiencies, both facility condition and programmatic needs; recommendations for possible approaches to improvement; and cost estimates for four alternative solution schemes involving various combinations of new construction and rehabilitation of existing buildings.

The Master Plan Study results formed the basis of a draft Statement of Interest (SOI) for possible submission to the MSBA. The School Committee presented the Study results and SOI framework to a meeting of the major Town Boards in early October, 2008. The Multi-Board Meeting approved the submission of an SOI for the School, which was accepted by MSBA in November 2008.

The Town of Lincoln was invited into the MSBA project pipeline in September 2009. In collaboration with the MSBA, the School Building Committee undertook a feasibility study

which reviewed alternatives as defined in the regulations, including no build, renovation and new school options. The Owner’s Project Manager, Skanska USA, with the Designer, The Office of Michael Rosenfeld, conducted a Feasibility Study and Schematic Design under the MSBA project process. The Preferred Option project approved by the MSBA in September 2012 was a mixture of 35% new construction and 65% renovation, with a total project cost of \$49.9M. As input to the public discussion of the Preferred Option project, the Lincoln Finance and Capital Planning Committees hired the Maguire Group to recommend approaches to and estimate costs for “repair only” options.

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At a Special Town Meeting in November 2012 the Town failed to approve the project. Subsequent public outreach clarified some aspects of a potential solution to the School facility needs, but raised question concerning the costs and specific features of various approaches. The School Committee appointed a School Building Advisory Committee (SBAC) in May 2013 to propose potential “Pathways” towards addressing the needs of the School. The SBAC report, issued in November 2013, identified two L-shaped “pathways.”¹ The first assumed MSBA funding. It recommended that specific needs of the School be addressed. These needs are discussed on pages 12-22 of the SBAC November 21, 2013 report. The second pathway assumed no MSBA funding. Since SBAC had no funding, it did not have to capacity to hire a cost estimator or other consultants to assist it in determining which portions of the comprehensive plan should not be pursued at this time. The SBAC, therefore, was unable to bring forward specific recommendations for what should be done in the absence of MSBA funding.²

On December 8, 2013, the MSBA informed the Lincoln Public Schools that it would not be invited into its funding pipeline for a renovation project during its upcoming application cycle. This resulted in a town process to determine the next steps for the School project. As a result of this process, the Lincoln School Committee reappointed the SBAC in April 2014 and charged it, working with the school administration, to develop school renovation options. The School Committee seeks assistance in accomplishing its charge through this RFQ.

C. Project Goals and General Scope

The project goal is to give the Town a limited number of school renovation choices that:

- Provide learning environments designed for today’s and tomorrow’s educational programs, with appropriate lighting, work space, noise controls and ventilation.
- Provide sufficient teacher workspace, meeting space, varied learning spaces and a cafeteria/kitchen to support school operations.
- Ensure that the Lincoln School meets the Massachusetts Architectural Access Board requirements and ADA regulations.
- Strive to comply with the Massachusetts High Performance Green Schools Guidelines (MA-CHPS Guidelines) or LEED-Silver standards, and meets the requirements of the Lincoln Town Facilities Energy Performance Standard (Architecture 2030 Initiative). Information on the Architecture 2030 Initiative may be found at:

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http://www.architecture2030.org/downloads/2030FactSheet_published.pdf

¹ The School is currently in an L-Shape. (See Attachment 1)

² See SBAC Report at pp. 23-24 for its discussion of the no MSBA funding scenario.

General scope of this study includes:

- Review the documentation of existing conditions at the School, and the design concepts developed by others in earlier studies.
- Provide cost estimates for each of the potential components of a project, as identified by the Owner and developed by the Designer.
- Based on the component estimates, develop design options that are high in educational value and quality, efficient, cost-effective and meet the needs of the educational program to varying degrees.
- Identify Building Code requirements that must be met for each of the proposed design options and the costs associated with meeting the requirements of each such code.
- Identify community concerns that may impact study options, including conservation and environmental considerations and other community uses.
- Identify specific milestone requirements and/or constraints of the District – e.g. Town votes, swing space and occupancy issues.
- Work with the SBAC to solicit input from the community and communicate outcomes of the study at key milestones.
- Develop conceptual project cost estimates,

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D. Preliminary Scope of Services (subject to refinement in finalist proposals)

Task One – Analyze existing information prepared by others, including:

1. 2004 -- LPBA Existing Conditions Report
2. 2007 -- SMMA Report of Existing Conditions and Program Deficiencies
3. 2008 -- Statement of Interest
4. 2009 -- STV Report Of Senior Study For MSBA (Contained Within 2010 MSBA Work Product Reviews document)
5. 2010 -- MSBA Needs Study
6. 2011 -- OMR -- PDP Report of Existing Conditions and Program Deficiencies
7. 2012 -- OMR Schematic Design Report with detailed estimates
8. 2012 -- Maguire Group report
9. 2013 -- School Building Advisory Committee report
10. Other relevant reports and updates, as may be identified

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Task Two – Provide cost estimates for each component of the plan recommended in the SBAC Report at pp. 12-22. As the SBAC Report (Attachment 5) was based on the SOI, which was based on the Master Plan Study, and the SBAC considered the priority needs of items identified in the SOI, the SBAC Report provides a compilation of what SBAC considered to be the major facility needs of the School and provides a good starting point. The Designer is to provide cost estimates for each of the components of the plan set forth on pp. 12-22 of the SBAC Report and any additional items on which the SBAC wants cost estimates, which the SBAC will identify through discussions during this Task. Estimates should be developed in sufficient detail to allow the School Committee to consider the cost breakdown for various disciplines across components, and to examine the estimates for the various tasks which make up an individual component. At the end of this Task, the Designer will be expected to present and explain these cost estimates to SBAC and the Town in a public forum.

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Task Three – Model several plan options based on cost estimates developed in Task Two of this Scope of Services. Develop a detailed cost estimate for each plan option

(including hard cost, soft cost and contingency) and an analysis including phasing, timing options, and disruption costs. At least one of the models must be MSBA fundable.

Task Four – Evaluate the models, considering the educational priorities of the schools and the Town. Develop a schedule for implementing each model option, and describe the financial implications for the Town, with and without MSBA approval (as appropriate). At the end of this Task, the Designer may be expected to present and explain these cost estimates to SBAC and the Town in a public forum

Task Five – Prepare a draft final report, make presentations at meetings of the SBAC, the School Committee, Town boards and other Town forums to explain the results of the study and answer questions, and incorporate the comments received into a final report.

E. Selection Process

1. The Designer will be selected through a two-step process:
 - a. Step 1. At least three finalists will be selected through a review of statements of qualifications by a Selection Committee, using the evaluation criteria described below.
 - b. Step 2. The finalists will be asked to submit a proposal after a receiving a more detailed briefing. The SBAC will review the proposals, interview the finalist firms and rank the finalists before selecting the Designer.
 - c. The finalist ranked first will be asked to provide a fee proposal, which will form the basis for negotiations.
2. The Administrator for Business and Finance, and/or his designee, will review all responses to determine which responses meet or contain the material outlined in the Statement of Qualifications outlined below. Responses which contain all necessary information and qualifications shall be forwarded to a designated Selection Committee for further review using the Evaluation Criteria.

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F. Step 1 Selection Process

1. The Selection Committee will consider the following criteria in evaluating qualifications:
 - 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.

2. The Selection Committee will develop a list of at least three finalist firms to be interviewed.

G. Step 2 Selection Process

- 1. The SBAC will conduct a briefing on June 27, 2014 for the finalist firms, during which some specific details of the proposed scope of work will be discussed and interviews will be scheduled.
- 2. Prior to the interviews, each finalist firm will be asked to submit a proposal containing 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.
- 3. The members of the SBAC will review the proposals submitted, interview the finalist firms and rank them, and make a recommendation for contract award to the School Committee based on the proposal evaluation (the completeness of the detailed project approach narrative describing the step-by-step process and a detailed project timeline) and the interview outcomes.
- 4. One contract will be awarded to the proposer determined to be the best qualified to provide the services described herein.

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H. Submission requirements for Statements of Qualifications

- 1. Statement of Qualifications. Responses should contain the following:
 - a. A fully completed Commonwealth of Massachusetts Standard Designer Application Form for Municipalities and Public Agencies not within DSB Jurisdiction (Updated February 2013) indicating the proposer is a qualified Designer within the meaning of M.G.L. Chapter 7C, Sections 44-57.
 - b. A list of all firms anticipated to participate in the Study as part of proposer's team.
 - c. A list of all individuals, with resumes, at all firms anticipated to participate in the Study as part of proponent's team
 - d. Clearly identify team structure with names of individuals in each position
 - e. Include, as appropriate, professional registration of individuals (include registration number) and LEED Professional Credentials (include level of LEED Accreditation)
 - f. Include post-high school academic degrees of all team members (including conferring academic institution)

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- g. A list of all projects of a similar nature, both public and private, performed by proposed team since 2010.
 - h. Clearly identify any project that might have been performed by a team member while employed at a firm other than the proponent or one of its team members
 - i. Clearly identify projects that are complete and projects that are ongoing
 - j. Provide a current telephone number, e-mail address and project position for at least one owner representative for each project listed
 - k. A description of the familiarity with and experience of individual team members with the MSBA process for renovation programs
 - l. All required forms attached to this RFQ completed with original signature of a principal of the proponent firm on each form
 - m. Inclusion of supplemental marketing materials of proponent’s firm (or its team members) and boiler-plate filler is discouraged
2. One (1) original, five (5) hard copies and one (1) digital copy in PDF format on a compact disk must be received on or before 2:00 PM on Thursday, June 19, 2014 at the Business Office, Lincoln Public Schools, 6 Ballfield Road, Lincoln MA 01773.
 3. Proposals shall be clearly identified by marking the package or envelope with the following: Designer Services for Lincoln School Study.
 4. Buckner Creel, Administrator for Business and Finance, will serve as the Chief Procurement Officer and the contact point during the RFQ and through the Study process. All questions regarding this RFQ should be addressed to Buckner Creel, Administrator for Business & Finance, Lincoln Public Schools, 6 Ballfield Road, Lincoln, MA 01773, phone 781-259-2623 or bcreel@lincnet.org, and submitted by 4:00 PM on June 16, 2014.

I. Briefing Session

A non-mandatory briefing session will be held for interested parties at the Hartwell Building on the Lincoln Campus, 6 Ballfield Road, Lincoln, MA 01773, on Wednesday, June 11, 2014 at 10:00 AM.

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J. Withdrawal

Applicants may withdraw an application as long as the written request to withdraw is received by the Owner prior to the time and date of the proposal opening.

K. Public Record

All responses and information submitted in response to this RFQ 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.

L. 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 designer, and to conduct discussions with any qualified Respondents and to take any other measures with respect to this RFQ in any manner necessary to serve the best interest of the Owner and its beneficiaries.

M. Rejection of Responses, Modification of RFQ

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 RFQ 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 RFQ in part or in its entirety, or to change the RFQ guidelines. A Respondent may not alter the RFQ or its components.

N. Fee and Contractual Terms

The fixed fee for services under this contract shall be negotiated, not to exceed \$200,000 including reimbursable expenses. Reimbursable expenses and scope of services shall be in accordance with the terms and conditions of the attached contract. The Owner will establish the final contract language with the chosen designer, which shall be substantially in the form as attached.

O. Additional Information

1. Costs. The Owner will not be liable for any costs incurred by any Respondent in preparing a response to this RFQ or for any other costs incurred prior to entering into a contract with a Designer approved by the School Committee.
2. Compliance with Procurement Laws. All respondents submitting qualifications agree to abide by all relevant provisions of Massachusetts General Laws as they apply to procurement of design services for public buildings by municipalities.

ATTACHMENTS

- Attachment 1: Plan of Lincoln Ballfield Road Campus
- Attachment 2: Designer Application Form - DSB_App_2005
- Attachment 3: Certifications
- Attachment 4: Contract for Designer Services
- Attachment 5: School Building Advisory Committee report dated November 21, 2012

End of Request for Qualifications for Designer Services