



Do Not Write in this Space

Town of Uxbridge

☒ Meeting

☐ Cancellation

Board or Commission School Building Comm.
Meeting Date 18-Aug-10
Place UHS Library
Authorized Signature _____

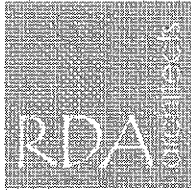
Time 6:00 p.m.

-
- 1 Call to Order
 - 2 Pledge of Allegiance
 - 3 Public Comment
 - 4 Report of Design Coordination Working Group
 - 5 Discuss prioritization of Alternates (reach consensus)
 - * Irrigation for playing fields / drill well for irrigation
 - * Softball field package with backstops
 - * Practice fields
 - * Additional Parking
 - * Football/Track bleachers package with lights and concessions
 - * Artificial turf field
 - * Field Hockey
 - * Baseball field package with bleachers and lights/soccer field
 - * Tennis court package including lights
 - 6 Discussion on ad-hoc SBC members/talent bank form required (vote)
 - 7 Review Communication and Document Control Protocol (vote)
 - 8 Review commitments and invoices (vote)
 - * RDA Amendment #4
 - * JLA Invoice #10
 - 9 Approve Minutes of August 5 (vote)
 - 10 Review Schedule Milestones and Upcoming Meetings:
 - * August 23 at 7 PM, Board of Selectmen review JLA and RDA Contract Amendments, Town Hall
 - * September 1 at 3 PM, CM Informational meeting, Spartan Room at High School
 - * September 8 at 2 PM, Design Coordination Meeting, Spartan Room at High School
 - * September 15 at 6 PM, SBC Meeting High School Library
 - 11 Old/New Business
 - 12 Next Meeting September 15, 6 PM, UHS Library/Agenda/Presentation
 - 13 Adjournment

Meeting Postings:

- * Except in an emergency, a public body must post notice of a meeting at least 48 hours in advance, excluding Saturday's, Sunday's and legal holidays, except in emergencies.
- * "Emergency" is a sudden, generally unexpected occurrence or set of circumstances demanding immediate action.
- * In an emergency, a public body shall post notice as soon as reasonably possible prior to a meeting.
- * Notice must include date, time and place of meeting.
- * Must include listing of topics the chair reasonably anticipates will be discussed at the meeting.
- * Topics must give enough specificity so that the public will understand what will be discussed.
- * Public bodies are encouraged to update the notice when aware of new topic within the 48 hour period before the meeting.
- * Chairs should not post notices so far in advance that there is a high likelihood that new topics will arise, unless the chair updates the notice with any such new topics 48 hours in advance of the meeting.

- * Chairs should not post notices so far in advance that there is a high likelihood that new topics will arise, unless the chair updates the notice with any such new topics 48 hours in advance of the meeting.



Raymond Design Associates, Inc.
222 North Street, Hingham, Massachusetts 02043
Telephone 781-749-5530

Uxbridge High School Building Design Meeting
August 4, 2010
Meeting Minutes
Meeting 1 – Contract Documents / Design

Attendees:

George Zini (GZ)	Uxbridge School Superintendent (USS)
Tara Bennett (TB)	Uxbridge High School (UHS)
Dan Deveau (DD)	Uxbridge School Building Committee (USBC)
Jeff Luxenberg (JL)	Joslin Lesser Associates (JLA)
David Krawitz (DK)	Joslin Lesser Associates (JLA)
Gene Raymond (GR)	Raymond Design Associates (RDA)
Steve Lamothe (SL)	Raymond Design Associates (RDA)
Jefferey Yost (JY)	Raymond Design Associates (RDA)
Leslie Fanger (LF)	BSC Group (BSC)

Meeting Minutes

Site / Civil

- 1.01 LF distributed current site plan layout for review and comment. LF to review permitting process with Town and coordinate drawing deliverables for early package issuance. JL discussed site permitting schedule and requested future milestones to be published with in meeting minutes. GZ to follow up with Town on permitting process / bi-laws for site plan approval process.
- 1.02 Site Plan Layout was reviewed, discussion of program requirements and field layout to be finalized and confirmed by USBC / UHS.

Permitting / Schedule

- 1.03 JL requested that a current schedule of Permits and Application for Permits be developed and be part of the regular meeting minutes. Current and future applications.
- Natural Heritage – Turtle Habitat
 - Massachusetts Environmental Policy Act (MEPA) - Wetlands
 - Army Corp. of Engineers – Wetland and Riverfront
 - Local ConCom
 - Massachusetts Highway – Road Access
 - Building Inspections Review – Prior to Permit Application by CM.
- 1.04 JY distributed draft document of drawing production schedule for comment. Design and School Building Committee meetings to be coordinated with schedule once meeting schedules are confirmed at tomorrow's (8/5/10) School Building Committee.

Directories

- 1.05 JL requested team directory information be updated and issued back to JLA. RDA issued progress design directory at meeting, will follow up with electronic file by email.

Design

- 1.06 GR reviewed and summarized the design, program concepts and status of the contract drawings. GZ / TB wanted to take the time before the next meeting to confirm the program layout as it stands now and would have any comments ready for the next meeting. The following plan items discussed:
- Toilet Locations, faculty and students.
 - Special Education, integration throughout the building layout
 - Kitchen Layout – Further discussion to occur on use (Scramble) of
 - o GZ visited other schools and felt confident current design of kitchen / cafeteria layout. TB stated that the current kitchen / cafeteria design allowed flexibility and as an alternate instruction space.
 - GR stated that the sound and video program requirements for the school be further reviewed, i.e., auditorium, gymnasium, cafeteria and general address system.
 - GR confirmed that the current MSBA schematic design was accepted by the design committee and no major changes were forth coming. This was confirmed by GZ, TB and DD.
 - Verify Computer Lab layouts and program.

- TB and GZ to confirm faculty lunch room and work room program layout.
 - GR and SL to meet with Science dept. head and librarian on Monday (8/8/10) to confirm layout and program. TB and DK to also attend.
- 1.07 JL requested that a list be developed for any changes that occur in the design, and that the drawings are marked (clouded) where changes occur.
- 1.08 GR / JL discussed and confirmed items that were changed in the budget for the MSBA submission.
- Pitch / sloped roofs are included in the design.
 - Site irrigation was removed in C & D site areas from base bid budget.
 - HVAC Recovery System was included in the base bid.
 - CM fee budget number was reduced, based on current market / history conditions.
- 1.09 It was discuss that the library casework would not be part of the FEE budget, but part of the millwork package budget.
- 1.10 Need to confirm direction on structural steel design for future expansion at second floor above Tech room area.
- 1.11 Early packages were discussed for deliverables for early winter (Nov-Dec), to include the following:
- site package – cut and fills, clearing and grubbing
 - steel package, buyout

Meeting Schedule / Communication Protocol

- 1.12 Schedule for Design meetings and School Building Committee meetings were discussed. The proposed schedule would be that the Design meetings would be the second and forth Wednesday of the month and the third Wednesday of the month for the School Building Committee Meeting. This will be proposed at the School Building Meeting tomorrow night (8/5/10).
- 1.13 JL requested that a schedule of future design and user group meetings with specific users / program items be developed and maintained, and to be published in the regular meeting minutes. JL discussed this document as a 30 day look-ahead schedule to allow proper attendance by committee members and user groups.
- 1.14 JL requested that communications shall be copied and / or funneled through the Owner's Project Manager Joslin Lesser.

MSBA Comments

- 1.15 DK review MSBA comments. GR to review SMBA correspondence and to respond to outstanding SMBA concerns.

CM at Risk

- 1.16 JL discussed the CM at Risk procedures; it was discussed to recommend to the School Building Committee to Vote on an approval for a CM at Risk Contract for the Uxbridge High School Project.
- 1.17 JL discussed a schedule scenario that could bring the Construction Manager (CM) on board by the beginning of October. JL discussed that two committees needed to be set up for the CM at Risk interview process. This was recommended by JL to be discussed at the School Building Committee tomorrow night (8/04/10).
- CM Prequalification Committee
 - CM Selection Committee

Please review meeting minutes for accuracy and content. Please issue any comments or changes in writing prior to the next Design meeting. These meeting minutes are presented by RDA, and are in the best understanding of the discussions and actions that occurred on the date of meeting.

CC: Dan Deveau, Co-Chair (USBC)
John Higgins, Co-Chair (USBC)
Don Sawyer, Vice-Chair (USBC)
Mike Legendre (USBC)
Robert Departie Jr. (USBC)
Jeff Stewart, Secretary (USBC)
Eugene O'Rourke (USBC)
Kevin Kuros (USBC)
Jane Keegan (USBC)
Bruce Desilets (USBC)
Ed Maharay (USBC)
Mike Szlosek, Town Manager
George Zini, Superintendent
Tara Bennett, UHS Principle

To: Gene Raymond	Date: August 11, 2010	33 Waldo Street
From: Leslie Fanger	Proj. No.	Worcester MA 01608
Re: Uxbridge HS-Meeting with Athletic Director		
Date of Meeting: August 10, 2010	Time: 8:30	Tel: 508-792-4500
Place of Meeting: Uxbridge HS		800-288-8123
Purpose: Review and Prioritize Athletic Facilities		Fax: 508-792-4509
List of Attendees: Tara Bennett (TB), Dan Deveau (DD), Mike Legendre (ML), Mark Donahue (MD), Leslie Fanger (LF)		www.bscgroup.com

***ACTION ITEMS IN PARENTHESIS

General Comments;

- All fields that are seeded need to be irrigated and if not, don't seed until irrigation can be installed.
- 4" Sewer line seems undersized (LF-review with Dom)
- Investigate the installation of a new on-site Well for irrigation -strategically placed to serve all turf and landscaped areas (LF/Dom-review with Ben Sherman) (This would add up front costs but is intended to offset future municipal water charges to the school dept.)
- Include building pads and utilities in Base Bid for one storage/concession/restroom building and the Press Box
- Investigate possibility of BVTech students building the storage/concession/restroom building, 4 dugout shelters, and press box (Member of SBC to determine if feasible by discussing with responsible teacher/principal)
- Architect to prepare plans for storage/concession/restroom building and the Press Box (RDA to coordinate with MD and ML on building program and code requirements)
- Relocate parking lot lights to perimeter of p-lot. Use flood lights for greater coverage and reduced costs. (LD to review with lighting consultant)
- Bleachers shall have first row elevated above track & field. (LD to review for accessibility to press box and lower level adjacent to track)
- Design of fields shall include subsurface marking pins for layout of fields. Metal detector used to locate pins.
- Synthetic Turf Field inside track would provide extended play value. Sports lighting
- Preference is to complete each facility to the extent practical and as budget allows. For instance, first complete the Track & field complex, then complete the Baseball Field and if the entire project cannot be completed within the established budget and elements need to be funded at a later date, then asking the town for funding for smaller projects such as finishing the softball infield has a greater chance of success.
- Baseball field-distance from backstop to homeplate to be reduced to 40'.
- Security camera's should be installed for surveillance (RDA to review if feasible to provide electric service for future installation)

Subsequent site visit with Dan Deveau to Vernon Hill Park to review athletic fields under construction

- 3 bench dugouts sufficient
- Grass turf area to define base running lanes
- Infield mix in coaches boxes
- All chain link is to be black vinyl coated and with band-it-buckles
- Install concrete pads in dugouts and bleacher pads – if funding permits – otherwise stonedust

Reviewed athletic facilities included in the Base Bid

- Irrigation has been removed from Base Bid

ACCURACY NOTICE

We have sought to record accurately the minutes of this meeting. If any of the above items do not agree with your understanding, please contact us within seven (7) days from the date of this document.

- Synthetic track-(reorient to have straight track section on same side as home bleachers)
- Grass playing field inside track w/layout marking pins
- Field events areas (verify w/Gene –estimate from SD phase)
- Grading, loam and seed practice, softball field and adjacent areas
- Grading, loam and seed north gravel pit for use as soccer field
- Accessible walkway to north gravel pit field area
- Accessible ramp and stairs to track and field area (verify w/Gene –estimate from SD phase)

Prioritized Add Alternates:

1. Complete Track & Field area (in order of priority)
 - a. Irrigation
 - b. Perimeter fence and gates
 - c. 500 seat bleachers (eliminate “away” bleachers)
 - d. Press Box pad and utility connections
 - e. Storage/Concession/Restrooms pad and utility connections
 - f. Construct Press Box and Storage Buildings
2. Complete Baseball Field:
 - a. Earthwork and drainage for infield
 - b. Infield, backstop and players benches
 - c. Fine grade loam, seed
 - d. Layout marking pins
 - e. Irrigation
 - f. Electric service
 - g. Dugouts

*Eliminate bleachers, outfield fence, water bubbler, scoreboard, sports lighting
3. Softball infield
 - a. Skinned infield, backstop, fencing
 - b. Layout marking pins
 - c. Dugouts
 - d. Irrigation
 - e. Electric service

*Eliminate bleachers, outfield fence, water bubbler, scoreboard, sports lighting
4. Tennis Courts
 - a. Earthwork and drainage
 - b. Court surfacing, net supports and nets
 - c. 10' fence and gates
 - d. Players benches
 - e. Electric service
5. Field hockey
 - a. Clearing and grubbing, earthwork and drainage
 - b. Fine grade, loam and seed
 - c. Layout marking pins
 - d. Irrigation
 - e. Electric Service
 - f. Players benches
6. Synthetic Turf field inside track



MEETING MINUTES

7. Football field sports lighting
 - a. footings, electric service and connections
 - b. Install sports lighting
8. Tennis courts sports lighting
 - a. Footings, electric service and connections
 - b. Install sports lighting

UXBRIDGE HIGH SCHOOL

UXBRIDGE, MA

COMMUNICATION AND DOCUMENT CONTROL PROTOCOL

MSBA GRANT FUNDED SCHOOL CONSTRUCTION PROJECTS

August 16, 2010

JOSLIN, LESSER + ASSOCIATES, INC.



Project Management

UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA

COMMUNICATION AND DOCUMENT CONTROL PROTOCOL

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UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA

COMMUNICATION AND DOCUMENT CONTROL PROTOCOL

OVERVIEW

As the Owner's Project Manager, Joslin Lesser provides coordination among all parties to ensure that everyone is working together. Whereas clear communication is critical for collaboration and team work, standards need to be developed and adhered to.

By establishing protocol and standards, the team will be enabled to work effectively to create a new Uxbridge High School where all goals are met where the project is delivered on time and on budget with minimum disruption.

As required per Section 8.1.1 in the / ~~CA Contract~~ ~~CA A~~ ~~CA S~~ ~~CA S~~, the intent of this Document Protocol manual is to establish responsibility and procedures for all documentation which will be issued throughout the project during the Design Development phase, Bidding, Construction and Close-Out phases. Documentation which will be issued includes schedules, reports, meeting minutes, and logs distribution list for each type of meeting.

SCHEDULES

There are a few different types of schedules which will be prepared and maintained throughout the project including the Master Project Schedule, the Schedule of Values, the overall construction schedule and the Two-Week Look Ahead. Depending upon the specific type of schedule, there will be a responsible party to prepare and maintain the schedule throughout the project, as required. There will also be a distinct distribution established for each of these schedules.

REPORTS

There are many different reports which will be issued throughout the job including Monthly Progress Reports, Field Reports and Punch Lists. Monthly Reports will be issued throughout the design and construction process and will include a list of meetings held and milestones reached for that month and a similar list for the upcoming month. This report will also include an updated budget report, cash flow report and schedule. Weekly Field Reports will be issued during construction.

MEETING MINUTES

There are many different types of meetings that will occur ranging from Building Committee meetings to pre-construction meetings to construction job meetings. For all of these meetings, meeting minutes will be prepared and distributed. For each meeting type, standards will be established (if not already established) in regards to the required attendance, the party responsible for recording the minutes, the format of the minutes, and the distribution of the minutes.

UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA

COMMUNICATION AND DOCUMENT CONTROL PROTOCOL

OVERVIEW (continued)

LOGS

To effectively track all documentation issued throughout the project, there are many different types of logs which will be prepared, maintained and distributed. There will be logs for Construction Drawings, Addenda, Requests for Information (RFIs), Architect's Supplemental Information (ASIs), Construction Change Directives (CCDs), Submittals, Proposed Change Orders (PCOs), Change Orders (COs) and a Finish Schedule.

For all of the logs noted, there will be an established protocol in terms of the responsible party, how often the logs are issued and to whom the logs are distributed.

Attached herein is a Project Directory established thus far including the Uxbridge School Building Committee, Joslin, Lesser + Associates (Owner's Project Manager), RDA Architects (Designer). The Construction Manager will be added once selected. This directory will be updated throughout the project when additional participants are added to the project.

Also enclosed is a Project Roles and Responsibilities matrix which outlines the various tasks throughout different stages of the project. For each task listed, the degree of involvement for the responsible parties is identified by either being a lead (L), a support (S), or offering review and/or input (R).

Extracted from the Project Roles and Responsibility matrix described above, are the items which pertain to the various types of documents which will be issued throughout the project, including schedules, reports, meeting minutes and logs. A detailed narrative follows the Responsibility matrix.

UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA**COMMUNICATION AND DOCUMENT CONTROL PROTOCOL****PROJECT DIRECTORY****School Building Committee (SBC)/ Owner**

Daniel Deveau	SBC Co-Chair	508 341-8024	padd@charter.net
John Higgins	SBC Co-Chair	508 254-4718	jhiggins@tsgma.com
Don Sawyer	Vice Chair, Business Manager	508 278-0101	dsawyer@uxbridge.k12.ma.us
Michael Szlosek	Town Manager	508 278-8600	town.manager@uxbridge-ma.gov
George Zini	Superintendent of Schools	508 278-6249	gzini@uxbridge.k12.ma.us
Tara Bennett	High School Principal	508 278-8634	tbennett@uxbridge.k12.ma.us
Jeff Stewart	Secretary	508 278-5678	jstew3@charter.net
Robert Departie Jr.	HVAC Construction Expert	508 278-6249	departie13@charter.net
Bruce Desilets	Board of Selectmen	508 278-7139	brucedesilets@netscape.net
Jane Keegan	School Committee	508 278-6064	stealth@charter.net
Kevin Kuros	Board of Selectmen	508 278-6804	kevin.kuros@uxbridge.ma.gov
Mike Legendre	Schools Plant Manager	508 278-8634	mlegendre@uxbridge.k12.ma.us
Ed Maharay	Finance Committee	508 278-5004	emaharay@charter.net
Eugene O'Rourke	Former School & Finance Committee	508 278-7777	osnaps@verizon.net

Joslin Lesser + Associates, Inc.

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Jeffery A. Luxenberg, OCM, AICP

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Gene Raymond, RA, LEED AP, CSL

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graymond@rda-design.com

Steve Lamothe, RA

617 347-4615

slamothe@rda-design.com

Jeff Yost

617 877-7725

jyost@rda-design.com**Construction Manager (TED)**

UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA
COMMUNICATION AND DOCUMENT CONTROL PROTOCOL
PROJECT ROLES/RESPONSIBILITIES MATRIX
L = Lead

Provides information during process and final issuance of document or recommendation

S = Support

Provides information during process or otherwise supports Lead role

R = Review/Input

Provides interim opinion and final review

ACTIVITY	RDA	JA	Cx	CM	OWNER	MSBA
PHASE 1: PROBLEM IDENTIFICATION						
a Statement of Interest					L	R
b Facilities Master Plan					L	R
c Design and Education Program					L	R
d Budget Statement for Educational Objectives					L	R
e Form School Building Committee					L	R
f Initial Compliance Certification					L	R
PHASE 2: PROBLEM VERIFICATION						
a Facility and Maintenance Assessment					S	L
b Enrollment Projections					S	L
PHASE 3: OPM SELECTION/ FEASIBILITY STUDY/ SCHEMATIC DESIGN						
a Pre-Study Review Meeting					S	L
b Procure OPM					L	S
c Procure Designer/ Feasibility		S			L	R
d Designer Selection Panel		S			S	L
e Review Design & Education Program	S	S			L	R
f Feasibility Study	L	S			R	R
PHASE 4: EXECUTE PROJECT FUNDING AGREEMENT						
a Project Scope & Budget Conference	S	S			R	L
b Project Scope & Budget Agreement		S			R	L
PHASE 5: OPM CONTRACT ADMINISTRATION						
a Project Controls - Total Project Cost	S	L			S	R
b Meetings with Owner, MSBA & Community	S	L		S	R	S
c Progress Reports (monthly)		L			R	R
d Document Control	S	L			R	R

UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA
COMMUNICATION AND DOCUMENT CONTROL PROTOCOL
PROJECT ROLES/RESPONSIBILITIES MATRIX
L = Lead

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Provides interim opinion and final review

ACTIVITY	RDA	JA	Cx	CM	OWNER	MSBA
e Review All Project Invoices		L			S	R
f Review Designer's Contract Compliance		L			S	R
g Submit Pro-Pay Application		S			L	S
PHASE 6: IMPLEMENTATION						
Final Design						
a Procure Designer for Final Design		L			S	S
b Designer Selection Panel (if change)		S			S	L
c Negotiate Final Design Contract	S	L			S	S
d Assign Commissioning Agent	R	R			R	L
e Design Development	L	S	S	S	S	
f Procure Construction Manager	S	L			R	
g Design Coordination Meetings	S	L		S	S	R
h Value Engineering (Schematic, 30% and 60%)	S	L	S	S	S	S
i 60% Construction Documents	L	S	S	S		
j Procure CM at risk	S	L			S	S
k Negotiate CM contract		L			S	R
l 90% Construction Documents	L	S	S	S	S	S
m Bid Documents	L	S	S	S	S	S
Bidding Services						
a Prequalification of Contractors	S	L		S	S	R
b Pre-Bid Meetings/ Site Visit	S	L		L	S	S
c Issuance of Addenda	L	S		L	R	
d Response to Technical Inquiries	L	S		R		
e Bid Tabulations	S	S		L		
f Bid Evaluations	S	S		L	R	
g Award Recommendations	S	S		L	S	R
h Pre-Award Conference	S	S		L	R	

UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA**COMMUNICATION AND DOCUMENT CONTROL PROTOCOL****PROJECT ROLES/RESPONSIBILITIES MATRIX**

L = Lead

Provides information during process and final issuance of document or recommendation

S = Support

Provides information during process or otherwise supports Lead role

R = Review/Input

Provides interim opinion and final review

ACTIVITY	RDA	JA	Cx	CM	OWNER	MSBA
Construction						
Meetings						
a Pre-Construction Conference	S	L	R	S	R	
b Progress Meetings	S	L		S	R	
Project Controls						
a Scheduling/Work Plan/SOV/Coordination	S	S		L	R	R
b Construction Meetings (weekly)	S	S		L	S	
c Cost Estimates/Budgeting/Cash flows	S	L		S	R	R
d Site Observation - Daily Log		L				R
e Weekly Progress Reports (Field Reports)	L	S		R	R	
Record Drawings						
a As-Built Drawing Preparation	R			L	R	
b Review As-Built Drawings	R	R		L	R	
c Record Drawing Approval	L	S			R	
Construction Contract Administration						
a MBE/WBEMonitoring Compliance		L		S	R	
b Review Contractor Payment Requisitions	L	S		S	R	
c Contractor Evaluations - 50%	S	L		S	S	
d Change Order Development	S	S		L	R	
e Change Order Review and Approval	S	L		S	R	
f Claims Processing	S	L				
Resident Inspection						
a Survey	S	S		L		
b Construction Observation	S	L				
c LSP Services/Support		S		L		
d Independent Quality Assurance	S	L				
e Environmental Compliance	S			L		

UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA**COMMUNICATION AND DOCUMENT CONTROL PROTOCOL****PROJECT ROLES RESPONSIBILITIES MATRIX**

L = Lead

Provides information during process and final issuance of document or recommendation

S = Support

Provides information during process or otherwise supports Lead role

R = Review/Input

Provides interim opinion and final review

ACTIVITY	RDA	JA	Cx	CM	OWNER	MSBA
<i>Document Interpretation/ Submittals</i>						
a Specification for Submittals	L	S	R	S	R	
<i>Testing & Commissioning</i>						
a Develop Testing Specifications	L	S	S	R	R	
b Functional Test Performance	R		S	L	R	
c In-Shop Test Witnessing	L	S	S	S		
d Operation & Maintenance Manual Review	S		L	S	S	
e Commissioning	S	S	L	S	S	S
<i>Contracts Closeout</i>						
a Punch list	L	S	S	L	S	
b Certificate of Occupancy	S	S		L	S	
c Contractor Evaluations - Final	S	L		S	S	
d Warranty Consultation	S	L		S	S	
e Designer Evaluation		L			S	
f OPM Evaluation					L	S
g Record Set for Owner	R	R		L		

UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA**COMMUNICATION AND DOCUMENT CONTROL PROTOCOL****DOCUMENT CONTROL: DETAIL**

L = Lead
S = Support
R = Review/Input

ACTIVITY	RDA	JLA	Cx	CM	OWNER	MSBA
CONTRACT ADMINISTRATION						
a Project Controls - Total Project Cost	S	L		S	R	R

JLA manages the project budget. JLA tracks all project costs including hard and soft costs, including all project commitments, expenditures to-date, as well as provide projections of additional costs that may be needed. JLA reviews all invoices for the project.

b Meetings with Owner, MSBA & Community	S	L		S	R	S
--	---	---	--	---	---	---

JLA and RDA will meet on a monthly basis with the School Building Committee. JLA will prepare and distribute electronically the agenda and previous meeting minutes for the monthly meeting 3 days in advance of each meeting. The Agenda will include authorization of the minutes from the month prior as the first order of business, which will require a motion and a vote by the Committee. In accordance with the new Open Meeting Law, all additional items requiring discussion and/or a vote by the Committee will be included on the agenda which will be posted 48 hours prior to the meeting.

JLA, RDA and the CM will meet every other week in a Design Coordination meeting. School Building Committee members are invited to attend these meeting. Working Groups comprised of SBC members, users, administration or community members will be established for selected design topics in order to make efficient design decisions. JLA will prepare the agenda for each meeting with input from RDA and the CM. RDA will prepare meeting minutes within one week of the meeting date. The meeting minutes will be distributed to all members of the School Building Committee as an attachment to the agenda for the next regularly scheduled School Building Committee meeting.

JLA will attend all meetings with the MSBA. RDA will attend meetings with the MSBA if informed by JLA or the MSBA that their review/input is required.

When required, JLA and/or RDA will attend meetings with the Community, user groups and regulatory authorities.

JLA will maintain a binder(s), chronologically ordered, that documents all Building Committee meetings. JLA will also make documents available on a web based system for convenience.

UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA**COMMUNICATION AND DOCUMENT CONTROL PROTOCOL****DOCUMENT CONTROL: DETAIL**

- L = Lead
 S = Support
 R = Review/Input

ACTIVITY	RDA	JA	Q	CM	OWNER	MSBA
c Progress Reports (monthly)		L			R	R

JA will issue monthly progress reports to the MSBA and the Owner throughout the Design Development, Construction Documents, Bidding, Construction and Close-Out phases of the project.

Throughout the Schematic Design and Design Development phases, these reports will include Tasks Completed, Project Budget Update, 1-Month Look Ahead and a Project Schedule. This Monthly Progress Report will be issued electronically and will be distributed to the MSBA and the Owner.

Once construction commences, the report will be reformatted to include an Executive Summary, Project Schedule, Project Budget, Meeting Minutes and Supplemental Information including project photographs. Copies of the monthly report will be issued to the MSBA and the Building Committee and a copy will be filed in the City Clerk's office.

d Document Control	S	L			R	
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Throughout the project, JA will maintain a systematic filing system for all project documents issued to date.

All construction document logs including ASs, CODs, RFIs, Submittals, POOs and COs shall be monitored and maintained by the Construction Manager. All logs will be distributed by the Construction Manager for Review at weekly job meetings. The particular software in which the data will be tracked will be reviewed and determined at the pre-construction conference.

JA will maintain an independent POO/CO/Risk Log to track these changes in relation to the Total Project Budget.

e Review all Project Invoices	S	L			R	
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As part of managing the overall project budget, JA will review all project invoices on behalf of the Owner. Once paid, the Owner will submit invoices to the MSBA Pro-Pay system. JA will review and sign hard copies of the Pro-pay monthly submissions. JA will verify that the Pro-Pay submittals are consistent with the project budget reports that JA maintains.

UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA**COMMUNICATION AND DOCUMENT CONTROL PROTOCOL****DOCUMENT CONTROL: DETAIL**

L = Lead
 S = Support
 R = Review/ Input

ACTIVITY	RDA	JLA	Cx	CM	OWNER	MSEA
IMPLEMENTATION						
Bidding Services						
c Issuance of Addenda	L	S				

JLA will prepare, maintain and update an Addenda Log to track all addenda issued.

Construction						
Project Controls						
a Scheduling/ Work Plan/ SOV/ Coordination	S	S		L	R	R

JLA will maintain a detailed baseline master Project Schedule throughout the duration of the project. This document will serve as the Project control against which all Project progress will be measured and will be updated throughout the duration of the Project. Any major revisions made to the Project Schedule shall be submitted to the Owner for approval.

JLA, RDA and the Owner shall review the schedule and work plan which is prepared monthly by the Construction Manager. JLA will review this schedule in terms of monitoring the timeliness of the of submittal requirements. If there is any slippage in the schedule JLA will require the Construction Manager to submit a schedule recovery plan.

JLA shall review the Schedule of Values prepared by the Construction Manager at the beginning of construction to be compared against the final estimate.

The Construction Manager shall coordinate all aspects of construction to ensure that all building systems have been coordinated and are in sync with the project schedule.

UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA**COMMUNICATION AND DOCUMENT CONTROL PROTOCOL****DOCUMENT CONTROL: DETAIL**

L = Lead

S = Support

R = Review/ Input

ACTIVITY	RDA	JLA	Cx	CMI	OWNER	MSBA
b Construction Meetings (weekly)	S	S		L	S	

Prior to each job meeting, JLA and RDA will meet on site to review current issues.

The Construction Manager will meet on site, weekly, with RDA, JLA and (1) or (2) members of the School Building Committee, as designated by the SBC. When required, design consultants and the Construction Manager's sub-consultants will be asked to attend the meeting. The Construction Manager will prepare and maintain a Two-Week Look Ahead throughout the construction process. The meetings will be structured to commence with review of the Two-Week Look Ahead, followed by review of RFI and Submittal Logs. The status of previous issues will then be addressed, followed by new business and change orders.

JLA will prepare the construction job meeting minutes and distribute copies of meeting minutes electronically at least 24 hours prior to the next job meeting. The minutes will record items by date, action and status.

c Cost Estimates/ Budgeting/ Cash flows	S	L		S	R	R
--	---	---	--	---	---	---

As noted in 'Project Controls - Total Project Cost' above, JLA will manage the project budget throughout the entire project. Cost estimates will be prepared during Design Development as well as 60% Construction Documents. A review estimate will be prepared at 90% Construction Documents. JLA will reconcile its cost estimate to the estimate prepared by RDA and notify the Owner of any variances. JLA will oversee this process and work with RDA. During construction, JLA will work with the Construction Manager to ensure that the project stays within budget.

UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA**COMMUNICATION AND DOCUMENT CONTROL PROTOCOL****DOCUMENT CONTROL: DETAIL**

L = Lead
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 R = Review/Input

ACTIVITY	RDA	JA	Cx	CM	OWNER	MSBA
d Site Observation - Daily Log		L				R

A JA project representative shall keep a daily log containing site conditions and construction activity as outlined in the Contract for Project Management Services, Article 8.6.5.1.

e Weekly Progress Reports (Field Reports)	L	S		R	R	
--	---	---	--	---	---	--

RDA shall prepare weekly progress reports which will be submitted to JA and the Owner. This report will summarize the progress achieved and a concise description of issues.

Record Drawings						
a As-Built Drawing Preparation	S			L	S	

The Construction Manager shall submit to RDA As-Built Drawings prior to issuance of the Certificate of Substantial Completion.

Construction Contract Administration						
b Contractor Payment Requisitions	S	L		S	S	

The Construction Manager will submit to RDA and JA a pencil requisition by the third business day of each month for work completed in the preceding month. RDA and JA will review and the Construction Manager will modify the requisition based on changes requested. A final requisition will then be submitted to RDA and JA for certification on a schedule established during the pre-construction meeting. Within 15 days of the Architect's Certification the requisition will be paid by the Town.

d Change Order Processing	S	S		L	R	
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The Construction Manager shall prepare a Proposed Change Order/Change Order Log as well as "works-in-progress" cost schedules for review at the weekly job meeting.

UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA**COMMUNICATION AND DOCUMENT CONTROL PROTOCOL****DOCUMENT CONTROL: DETAIL**

L = Lead
 S = Support
 R = Review/Input

ACTIVITY	RDA	JLA	Cx	CM	OWNER	MSBA
e Change Order review and Approval	S	L		S	R	

RDA will coordinate the COR review with JLA. RDA will review and determine whether a PCO is within the scope of the Contract Documents or is indeed a change. PCOs that are legitimate changes will be reviewed on a regular basis and collected into change orders that are signed by the Construction Manager, RDA, JLA and the Owner. No payments for PCOs will be made until a signed change order is prepared and executed. In addition to the PCO/CO log which is prepared and maintained by the Construction Manager, JLA will maintain a separate log to track these documents in relation to the Total Project Budget.

<i>Documentation Interpretation/ Submittals</i>							
a Specification for Submittals		L	S	R	S	R	

The specifics of submittal processing will be determined in the Project Specification and reviewed at the pre-construction conference. Items to be reviewed are the logistics of submittal distribution, submittal format (hard copy or electronic) and number of days required for review. The Construction Manager will provide a log of submittals at each job meeting with the items that require immediate attention identified.

RDA shall prepare, maintain and update logs for all submittals including, but not limited to, Addenda, ASs, COD and Submittals.

<i>Contracts Close-Out</i>							
a Punch list		L	S	S	L	S	

Once Substantial Completion is achieved, the Construction Manager will prepare a punch list of all outstanding items to be completed. This list will be comprehensive including items from all trades within the contract scope including architecture, MEP & FP, Communications & Technology, Food Service, etc. RDA will review this list and coordinate a punch list process with the design team. RDA and JLA will establish a process to track completed items and items which remain open. RDA shall reserve the right to deem whether or not to proceed in a particular space given the scope of work pending completion.

UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA**COMMUNICATION AND DOCUMENT CONTROL PROTOCOL****DOCUMENT CONTROL: DETAIL**

L = Lead
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ACTIVITY		RDA	JLA	Cx	CM	OWNER	MSBA
c	Contractor Evaluations	S	S		S	L	

RDA and JLA shall assist the Owner with providing written Contractor Evaluations required of the Owner at approximately 50% and at the final completion of the Construction Phase.

g	Record Set for Owner	R	R		L	R	
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Two (2) suitably bound copies of all original design and quantity calculations, including those pertinent to change orders and shop drawings if applicable, shall be given to the Owner at the conclusion of the Owner-Contractor agreement.

One (1) disk, or multiple disks, shall be prepared by the CM and given to the Owner consisting of a complete set of Record Drawings and all project document logs including Addenda, ASIs, OODs, PCOs, CO, submittals and a finish schedule.

UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA

COMMUNICATION AND DOCUMENT CONTROL PROTOCOL

ABBREVIATIONS

ASI	Architect's Supplemental Instructions
CCD	Construction Change Directive
CO	Change Order
Cx	Commissioning (or Commissioning Agent)
GBC	Gibane Building Company
JLA	Joslin, Lesser + Associates (OPM)
L	Lead
LSP	Licensed Site Professional
MSBA	Massachusetts School Building Authority
RDA	Raymond Design Associates, Inc. (Architect)
OPM	Owner's Project Manager
PCO	Proposed Change Order
R	Review/Input
RFI	Request for Information
S	Support
SBC	School Building Committee
SOV	Schedule of Values

JOSLIN, LESSER + ASSOCIATES, INC.

MEMORANDUM

To: Don Sawyer, Uxbridge Public Schools
From: David Krawitz - Joslin, Lesser + Associates, Inc.
Date: August 13, 2010
Re: Invoice Summary: Uxbridge High School
Cc: Uxbridge School Building Committee; Jeffery A. Luxenberg (JLA)

Enclosed for processing is the following invoice to be considered at the 08.18.2010 SBC meeting:

INVOICES (Payments)					
ProPay Code	Vendor	Invoice #	Budget Category	Description of Services	Invoice \$
0102-0400	JLA	10	Owner's Project Manager - DD	OPM Services: July 2010	\$6,000
				TOTAL:	\$6,000

The Invoice listed above is consistent with the Total Project Budget and to the best of our knowledge is eligible for reimbursement from the Massachusetts School Building Authority. Joslin, Lesser + Associates recommends that the Uxbridge School Building Committee approve this invoice.

Note: The July 2010 Monthly Report, which includes the Total Project Budget, was electronically distributed to the MSBA, the Town of Uxbridge and the School Building Committee under separate cover. If you should have any questions, please feel free to contact the Owner's Project Manager, Joslin, Lesser + Associates.

Joslin, Lesser + Associates, Inc.

44 Pleasant Street
Watertown, MA 02472

Invoice

DATE	INVOICE #
8/10/2010	10

BILL TO

Don Sawyer, Business Manager
Uxbridge Public Schools
21 South Main Street
Uxbridge, MA 01569

PROJECT**Uxbridge High School**

DESCRIPTION	AMOUNT
Design Development Phase Lump Sum Payment for July, 2010 - ProPay Code 0102-0400	6,000.00
Total	
	\$6,000.00



JOSLIN, LESSER + ASSOCIATES, INC.


MEMORANDUM

To: Don Sawyer, Uxbridge Public Schools
 From: Jeffery A. Luxenberg - Joslin, Lesser + Associates, Inc.
 Date: August 03, 2010 (revised August 16, 2010)
 Re: Invoices: Uxbridge High School
 Cc: Uxbridge School Building Committee

Enclosed for processing are the following commitments and invoices to be considered at the August 5th, 2010 SBC Meeting. Now that the MSBA and local approvals have been received, both the OPM and Designer Contracts need to be amended to reflect the full project scope. OPM Amendment #2 includes fees for all remaining project phases and is consistent with the project budget. Attached please find the OPM fee proposal from Joslin Lesser including Revised Attachments A & B, and a copy of the OPM Contract as amended.

Design Services Amendment 3 includes design fees for all remaining project phases for Basic Services, and is consistent with the project budget. Attached please find the designer services fee proposal from RDA. Joslin Lesser has reviewed RDA's fee proposal and recommends approval.

COMMITMENTS (Fee Proposals)			
ProPay Code	Budget Category	Description of Services	Contract \$
OPM Amendment #2			
0102-0400	OPM: Design Development	Design Development	\$53,000
0102-0500	OPM: Construction Contract Documents	Contract Documents	\$212,000
0102-0600	OPM: Bidding	Bidding	\$26,420
0102-0700	OPM: Construction Contract Administration	Contract Administration	\$837,000
0102-0800	OPM: Closeout	Closeout	\$69,750
		Total Amendment #2	\$1,198,170
Design Services Amendment #3			
0201-0400	A/E Designer: Design Development	Design Development	\$640,000
0201-0500	A/E Designer: Construction Contract Documents	Contract Documents	\$1,115,000
0201-0600	A/E Designer: Bidding	Bidding	\$80,000
0201-0700	A/E Designer: Construction Contract Administration	Contract Administration	\$895,000
0201-0800	A/E Designer: Closeout	Closeout	\$94,200
		Total Amendment #3	\$2,824,200


 Project Management

Monthly Invoice Summary
Page 2

Below is a summary of current invoices for processing. They include a JLA invoice for independent cost estimating services that was submitted in June and the final invoice for RDA for Feasibility/Schematic Design which was also submitted in June and a new invoice from RDA for the start of Design Development. Attached please find a copy of the JLA invoice, RDA's previous invoice (see attached June 30, 1010 Memorandum), and a new invoice for RDA.

INVOICES (Payments)					
ProPay Code	Vendor	Invoice #	Budget Category	Description of Services	Invoice \$
0102-0200	JLA	Consult-1	OPM Feasibility Study	OPM independent cost estimate	\$11,000
0201-0200	RDA	782	Architecture and Engineering – FS/SD	Designer Services: 05.22.10 - 06.15.10 (marks 100% of SD)	\$66,435
0102-0400	RDA	August 3, 2010	Architecture and Engineering-DD	20% Design Development	\$128,000

The Invoices listed above are consistent with the Total Project Budget and to the best of our knowledge are eligible for reimbursement from the Massachusetts School Building Authority. Joslin Lesser + Associates recommends that the Uxbridge High School Building Committee approve these invoices.

ATTACHMENT F

CONTRACT FOR DESIGNER SERVICES

AMENDMENT NO. 3

WHEREAS, the Town of Uxbridge ("Owner") and Raymond Design Associates, Inc., (the "Designer") (collectively, the "Parties") entered into a Contract for Designer Services for the Uxbridge High School Project on August 10, 2009 (the "Contract"); and

WHEREAS, Amendment No.1 was executed on October 28, 2009, and Amendment No. 2 was executed on April 29,2010; the Parties wish to amend the Contract with Amendment No 3 effective August 9, 2010.

NOW, THEREFORE, in consideration of the promises and the mutual covenants contained in this Amendment, and other good and valuable consideration, the receipt and legal sufficiency of which are hereby acknowledged, the Parties, intending to be legally bound, hereby agree as follows:

1. The Owner hereby authorizes the Designer to perform services for the Design Development Phase, the Construction Documents Phase, the Bidding Phase, the Construction Phase, and the Final Completion Phase of the project, pursuant to the terms and conditions set forth in the Contract, as amended.
Proposed Additional Fee: **\$ 2,824,200**
2. For the performance of services required under the Contract, as amended, the Designer shall be compensated by the Owner in accordance with the following Fee for Basic Services:

Fee for Basic Services	Original Contract	Previous Amendments	Amount of This Amendment	After This Amendment
Feasibility Study Phase	\$120,000	\$34,650		\$154,650
Schematic Design Phase	\$180,000	\$26,510		\$206,510
Design Development Phase	-	-	\$640,000	\$640,000
Construction Doc Phase	-	-	\$1,115,000	\$1,115,000
Bidding Phase	-	-	\$80,000	\$80,000
Construction Phase	-	-	\$895,000	\$895,000
Completion Phase	-	-	\$94,200	\$94,200
Total Fee	\$300,000	\$ 61,160	\$2,824,200	\$3,185,360

3. The Construction Budget shall be as follows:

Original Budget:	\$0
Amended Budget	\$34,469,807

4. The Project Schedule shall be as follows:

Original Schedule:	
Amended Schedule	Design Development Complete 10/06/10 Construction Documents Complete 12/29/10 Substantial Completion 07/03/12

5. This Amendment contains all of the terms and conditions agreed upon by the Parties as amendments to the original Contract. No other understandings or representations, oral or otherwise, regarding amendments to the original Contract shall be deemed to exist or bind the Parties, and all other terms and conditions of the Contract remain in full force and effect.

IN WITNESS WHEREOF, the Owner, with the prior approval of the Authority, and the Designer have caused this Amendment to be executed by their respective authorized officers.

OWNER

(print name)

(print title)
By _____
(signature)
Date _____

DESIGNER

(print name)

(print title)
By _____
(signature)
Date _____

SCHOOL BUILDING COMMITTEE

MEETING MINUTES

AUGUST 5, 2010

- 1.) Chairman Higgins called the meeting to order at 6:05 PM at the UHS Library.

<u>Members</u>	<u>Position</u>	<u>Present</u>	<u>Absent</u>
Robert Departie Jr			X
Dan Deveau	Co-Chairman	X	
Mike Legendre		X	
John Higgins	Co-Chairman	X	
Eugene O'Rourke		X	
Jeff Stewart	Secretary		X
Don Sawyer	Vice Chairman	X	
Kevin Kuros		X	
Jane Keegan		X	
Bruce Desilets		X	
Ed Maharay		X	
<u>Non-Voting</u>			
Mike Szlosek	Town Manager	X	
George Zini	Superintendent	X	
Tara Bennett	UHS Principal		X
Jeff Luxenberg	Joslin Lesser	X	
David Krawitz	Joslin Lesser	X	
Gene Raymond	RDA		X
David Youst	RDA	X	

- 2.) Pledge of Allegiance

- 3.) Public Comment - None

- 4.) New rules pertaining to open meeting law: Discussion – No Action Taken

- 7.) Discuss design issues (sloped roof): *[Taken Out of Order with Committee Consensus]*

Jeff Luxenberg, Joslin Lesser, provided the Committee with a summary of design issues reviewed by the MSBA including site vs. construction reimbursement options, reimbursable building expenses, the increase in MSBA reimbursement dollars to the Town with the transfer of the Sloped Roof and HVAC Energy package off the “add/alternate” list into main construction project. Revised project designs were distributed to the Committee (copy attached to these minutes).

8.) Final budget (form 3011) approved by MSBA: *[Taken Out of Order with Committee Consensus]*

Jeff Luxenberg, Joslin Lesser, provided the Committee with a summary of the MSBA's final Project Scope & Budget with MSBA Form 3011 (dated 7/28/10) approved at the MSBA Executive Board Meeting on 7/28/10. The MSBA approved \$22,632,327 maximum facilities grant contingent upon the additional 1% reimbursement incentive for the Construction Manager at Risk delivery method (copy attached to these minutes).

5.) Review CM at Risk Option and vote on recommendation to BOS

Jeff Luxenberg, Joslin Lesser, reviewed the summary comparison of construction delivery methods previously presented, the Construction Manager at Risk delivery method "pros & cons", and required application process and submission to the Office of the Inspector General with discussion by the Committee.

MSDV by SBC Member Kuros seconded by SBC Member Maharay, to approve the Construction Manager at Risk delivery method for the school construction project and recommend that the Board of Selectmen approve the Construction Manager at Risk delivery method for the school construction project. The **VOTE** was UNANIMOUS.

6.) Appointment of two or more members of SBC to serve on CM at Risk pre-qualification committee and CM at Risk selection committee

Discussion by the Committee on the required Construction Manager at Risk application process to the Office of the Inspector General including the CM at Risk selection process.

MSDV by SBC Member Kuros, seconded by SBC Member Legendre, to appoint Members Desilets, Maharay, O'Rourke, Deveau, and Sawyer to CM at Risk Prequalification and Selection Committee with the Town Manager and School Superintendent as ad hoc members. The **VOTE** was UNANIMOUS.

9.) Discuss and vote recommendation to BOS for OPM fee, amendment #2 to OPM contract

Discussion by the Committee on fees of the Owner's Project Manager services as determined by the MSBA and continuation of current OPM for the project.

MSDV by SBC Member Keegan, seconded by SBC Member Kuros, to extend the contract of the Owner's Project Manager, Joslin Lesser, through the conclusion of the high school construction project, approve Amendment #2 to OPM contract (copy attached to these minutes), and recommend that the Board of Selectmen accept Amendment #2. The **VOTE** was UNANIMOUS.

10.) Discuss and vote recommendation to BOS for architect fee, amendment #3 to RDA Contract

Discussion by the Committee on fees of the Architect services as determined by the MSBA and continuation of current Architect for the project.

MSDV by SBC Member Keegan, seconded by SBC Member O'Rourke, to extend the contract of the Architect, Raymond Design & Associates (RDA), through the conclusion of the high school construction project, approve Amendment #3 to the Architect's contract (copy attached to these minutes), and recommend that the Board of Selectmen accept Amendment #3. The **VOTE** was UNANIMOUS.

11.) Vote to send revised JLA organizational chart to MSBA

Committee discussion on updates to be forwarded to the MSBA file info. **MSDV** by SBC Member Sawyer, seconded by SBC Member Maharay, the Committee, through Co-Chairs, submit updated Joslin Lesser & Associates organization chart to the MSBA (copy attached to these minutes). The **VOTE** was UNANIMOUS.

12.) Approval of outstanding invoices

MSDV by SBC Member Sawyer, seconded by SBC Member Maharay, that Committee approve Joslin, Lesser & Associates final Feasibility Study Invoice #9-Revised totaling \$12,500. The **VOTE** was UNANIMOUS.

MSDV by SBC Member Sawyer, seconded by SBC Member Maharay, that Committee approve Joslin, Lesser & Associates Invoice #Consult-1 totaling \$11,000. The **VOTE** was UNANIMOUS.

MSDV by SBC Member Sawyer, seconded by SBC Member Maharay, that Committee approve Raymond Design & Associates final Feasibility/Schematic Design services Invoice #782 for an amount that does not allow aggregate of all project payments to RDA to exceed the amount totaling \$361,160 for FS/SD services and additional items per contract. The **VOTE** was UNANIMOUS.

MSDV by SBC Member Sawyer, seconded by SBC Member Maharay, that Committee approve Raymond Design & Associates Invoice dated 8/3/10 totaling \$128,000 per Amendment #3 contingent upon the acceptance of Amendment #3 by the Board of Selectmen. The **VOTE** was UNANIMOUS.

13.) Old / New Business: By consensus, the next meeting scheduled for August 18, 2010 and monthly meetings will be scheduled for the 3rd Wednesday of each month.

14.) Meeting Minutes:

MSDV by SBC Member Keegan, seconded by SBC Member Legendre, to approve the 5/27/10 Meeting Minutes as written. The **VOTE** was 8-0-1.

MSDV by SBC Member Maharay, seconded by SBC Member O'Rourke, to approve the 6/15/10 Meeting Minutes with amendment that SBC Member Maharay was in attendance and not absent. The **VOTE** was UNANIMOUS.

- 15.) With no additional business, **MSDV** by SBC Member Kuros, seconded by SBC Co-Chair Deveau, **"to adjourn meeting"** at 8:18 PM. The **VOTE** was UNANIMOUS.

Note: Meeting was recorded for local cable access.

MSDV: Moved, Seconded, Discussed & Voted

*Respectfully Submitted,
Donald R. Sawyer, Vice Chairman*

SCHOOL BUILDING COMMITTEE:

John Higgins – Co-Chairman

Dan Deveau – Co-Chairman

Eugene O'Rourke

Jeff Stewart - Secretary

Don Sawyer – Vice Chairman

Robert Departie Jr.

Mike Legendre

Jane Keegan

Kevin Kuros

Ed Maharay

Bruce Desilets

MAJOR SCHEDULE MILESTONES REPORT

AUGUST 2010

CLIENT: TOWN OF UXBRIDGE
UXBRIDGE SCHOOL BUILDING COMMITTEE

PROJECT: UXBRIDGE HIGH SCHOOL

1 MONTH LOOK AHEAD

- 08.23.10 Board of Selectmen Meeting (Approve Amendments JLA #2 & RDA #12, 3 & 4)
- Weekly User Group Meetings (TBD)
- 09.08.10 Design Coordination Working Group Meeting, 2 PM @ High School Spartan Room

CM at RISK

- 08.05.10 SBC approves CM at Risk, names Qualification and Proposal review committee
- 08.09.10 BOS approves CM at Risk
- 08.13.10 BOS and Town Counsel Certify Minutes and OIG Application
- 08.13.10 Submit electronic OIG application
- 08.16.10 Submit hardcopy OIG application with original signatures
- 08.17.10 Submit Central Register Notice and Compass ad for CM at Risk RFQ
- 08.24.10 Central Register Notice and Compass ad published
- 08.25.10 Issue CM at Risk RFQ
- 09.01.10 Informational Meeting for CM's @ High School, Spartan Room, 3 PM
- 09.08.10 Qualifications due from CM to JLA
- 09.09.10 Copies of qualifications sent to Town Hall for Pre-Qual Committee members
- 09.15.10 Pre-Qual Committee meets to determine which CM's are qualified for the project
- 09.16.10 Additional Pre-Qual meeting time if required
- 09.17.10 Issue CM RFP to qualified CM's
- 09.27.10 Request BOS to include approval of CM Contract on 10.12.10 meeting agenda
- 10.01.10 CM proposals due
- 10.04.10 Proposals sent to Town Hall for Selection Committee members
- 10.05.10 Selection Committee interviews all CM's that submitted proposals
- 10.06.10 Additional time slots for CM interviews as required
- 10.06.10 Special SBC Meeting to review/interview recommended CM
- 10.07.10 CM begins project review and DD cost estimate
- 10.12.10 BOS approves CM at Risk contract (Tuesday meeting after Monday holiday)
- 10.19.10 CM contract executed

MAJOR PROJECT SCHEDULE MILESTONES: Revised from July Monthly Report

- 10.07.10 Design Development drawings complete for estimate
- 10.28.10 Construction Documents 60% complete for estimate
- 12.09.10 Construction Documents 90% complete for estimate
- 12.22.10 Construction Documents 100% complete for Redi Check
- 01.07.11 Redi Check complete
- 01.26.11 Bid Documents issued
- 02.10.11 Trade Contractor bids due
- 02.24.11 GMP and contract execution
- 07.11.12 Construction substantial completion
- 08.14.12 Furniture and equipment installation complete
- 08.21.12 Faculty relocates to new High School
- 08.28.12 Closeout and commissioning complete: School Opens



MEMORANDUM

To: Gene Raymond
From: Leslie Fanger
Re: Uxbridge High School - BSC Project Milestones **DRAFT**

Date: August 13, 2010
Proj. No. 61067.03

33 Waldo Street
Worcester MA 01608

Tel: 508-792-4500
800-288-8123
Fax: 508-792-4509
www.bscgroup.com

The following project milestones are an estimate based on established timelines dictated by the designated regulatory agencies. BSC cannot guarantee that these timelines can be met due the uncertainty of the agencies requirements for review. We will perform early coordination and cooperation with agencies to expedite the permitting process to the extent possible.

OFF-SITE ROAD IMPROVEMENTS – MASSDOT

- Notice to Proceed – August 24
- 25% Design submittal-October 30
- MADOT 25% review complete – November 30
- 75/100% Design submittal- January 30, 2011
- MADOT 75/100% Review complete– February 30, 2011
- PS&E submittal – March 1, 2011
- MADOT PS&E review complete – April 1, 2011-
- Access Permits Issued – April 30, 2011

MEPA-ENVIRONMENTAL NOTIFICATION FORM

- Notice to Proceed – August 24
- Submit ENF – September 30
- Published in Env Monitor – October 6
- 20 day Comment Period Ends – October 26
- Complete ENF Process – November 5, 2010 (assumes no EIR required)

ENVIRONMENTAL-U.S. Army Corps of Engineers

- Notice to Proceed – August 24
- Jurisdictional Determination-USACOE-submit request-September 6
- Jurisdictional Determination-USACOE-decision (60 days or more-90 days max) before December 6
- When Determination is complete submit 404 and 401 applications 14 days after receipt of determination
- 100% DD (req'd for filing)
- File applications;404 Category 2 (USACOE) & 401 WQC (MA DEP)-November 6
- Review periods (96 day max)
- Issue permits - February 15, 2011 (worst case)

ENVIRONMENTAL- Natural Heritage & Endangered Species Program – Mass Endangered Species Act

- Notice to Proceed – August 24
- Submit to NHESP - October 6
- Review period (60 days max) – complete December 6
- NHESP Review Conservation & Management Plan (30 days typical) complete – January 6, 2011

ENVIRONMENTAL – Notice of Intent

- 60 % DD (req'd for filing NOI) – November 3



- Submit NOI to Conservation Commission – November 15
- Public Hearing – December 6 (assume one continuance) –
- Close Public Hearing – December 27
- Issue Order of Conditions – (within 21 days max) – January 17, 2011
- Appeal period (10 days max)- January 27, 2011

LOCAL PERMITTING (Subject to advice of Town Counsel)

- Informal meeting with Planning Board – September 8 (assume approval and/ or waivers req'd)
- 100% Design Development – October 6
- Submit Site Plan approval package to PB – October 12
- Public Notice – 14 days prior to public hearing – October 13
- Public Hearing – October 27 (assume one continuance)
- Close Public Hearing – November 10

MONTHLY REPORT

JULY 2010

CLIENT: TOWN OF UXBRIDGE
UXBRIDGE SCHOOL BUILDING COMMITTEE

PROJECT: UXBRIDGE HIGH SCHOOL

TASKS COMPLETED

- 07.14.10 MSBA Board Facilities Subcommittee Meeting
- 07.16.10 MSBA Project Scope and Budget Conference
- 07.19.10 Final FS/SD Materials submitted to MSBA
- 07.28.10 MSBA Approves Project Scope, Budget and Funding

1 MONTH LOOK AHEAD

- 08.04.10 Design Coordination Working Group meeting
- 08.05.10 School Building Committee Meeting
- 08.09.10 Board of Selectmen Meeting
- 08.10.10 Submit Central Register Ad and Compass Ad for CM at Risk RFQ
- 08.11.10 Application for CM at Risk to OIG
- 08.18.10 Issue CM at Risk RFQ
- 08.18.10 Design Coordination Working Group Meeting
- 08.18.10 School Building Committee Meeting
- 08.23.10 Board of Selectmen Meeting
- Weekly User Group Meetings

COMMUNITY EVENTS

All Uxbridge School Building Committee Meetings are televised, and the general public is encouraged to attend and engage. Community members with expertise in the design, planning and construction process have been encouraged to participate and to contact either of the co-chairs to express their interest.

ATTACHMENTS

- Current Project Budget, dated July 31, 2010
- Project Cash Flow Projection dated June 11, 2010
- Project Schedule dated July 19, 2010 per MSBA revised submittal

Uxbridge High School - Uxbridge, MA

print date: 08/10/10

Total Project Budget Status Report

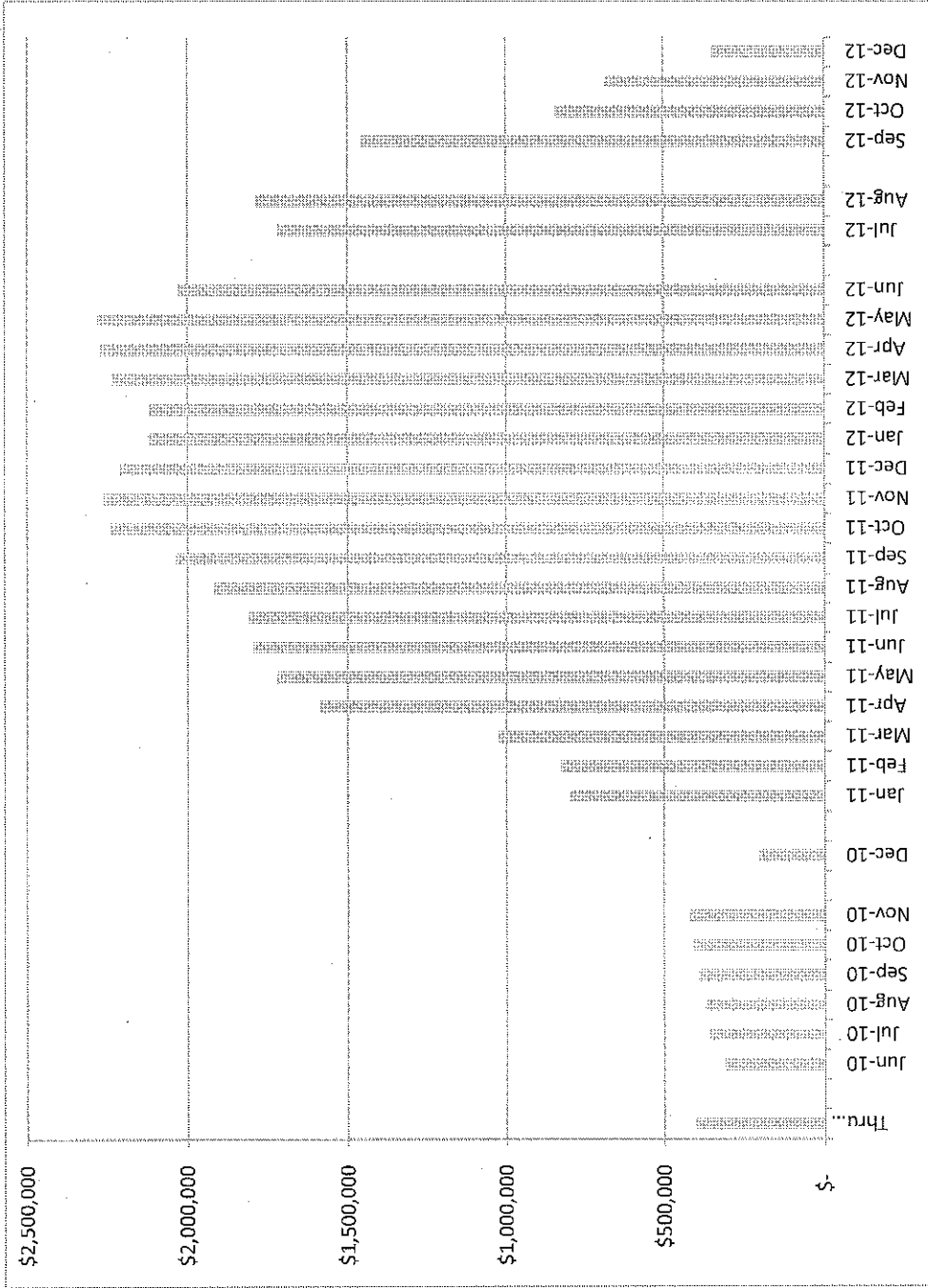
Date: 8/10/10

Proj. Code	Description	Total Project Budget	Approved Changes	Revised Total Budget	Total Committed	Actual Spent to Date	Actual Spent to Date Ratio	Spent to Date %	Projected Expenditure/Consultants	Balance to Spend	Comments
DESIGN											
0001-0000	OPM Feasibility Study/Schematic Design	\$ 133,500	\$ -	\$ 133,500	\$ 133,500	\$ 133,500	100%	100%	\$ -	\$ -	
0002-0000	A&E Feasibility Study/Schematic Design	\$ 361,160	\$ -	\$ 361,160	\$ 361,160	\$ 361,160	100%	100%	\$ -	\$ -	
0003-0000	Environmental & Site	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -	\$ -	
0004-0000	Other	\$ 260	\$ -	\$ 260	\$ 260	\$ 260	100%	100%	\$ -	\$ -	
	Subtotal	\$ 494,760	\$ -	\$ 494,760	\$ 494,760	\$ 494,760	100%	100%	\$ -	\$ -	
CONSTRUCTION											
0101-0000	Legal Fees	\$ 1,198,170	\$ -	\$ 1,198,170	\$ -	\$ -	0%	0%	\$ -	\$ 1,198,170	
0102-0000	Owner's Project Manager	\$ 53,000	\$ -	\$ 53,000	\$ -	\$ -	0%	0%	\$ -	\$ 53,000	
0102-0500	Design Development	\$ 212,000	\$ -	\$ 212,000	\$ -	\$ -	0%	0%	\$ -	\$ 212,000	
0102-0600	Construction Contract Documents	\$ 26,420	\$ -	\$ 26,420	\$ -	\$ -	0%	0%	\$ -	\$ 26,420	
0102-0700	Bidding	\$ 837,000	\$ -	\$ 837,000	\$ -	\$ -	0%	0%	\$ -	\$ 837,000	
0102-0800	Construction Contract Administration	\$ 69,750	\$ -	\$ 69,750	\$ -	\$ -	0%	0%	\$ -	\$ 69,750	
0102-0900	Closeout	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -	\$ -	
0102-1000	Extra Services	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -	\$ -	
0102-1100	Reimbursable Services	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -	\$ -	
0103-0000	Cost Estimates	\$ 70,000	\$ -	\$ 70,000	\$ -	\$ -	0%	0%	\$ -	\$ 70,000	
0104-0000	Advertising (and printing)	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -	\$ -	
0105-0000	Permits	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -	\$ -	
0105-0000	Owner's Insurance	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -	\$ -	
0199-0000	Other Administrative Costs	\$ 5,000	\$ -	\$ 5,000	\$ -	\$ -	0%	0%	\$ -	\$ 5,000	
	Subtotal	\$ 2,824,200	\$ -	\$ 2,824,200	\$ -	\$ -	0%	0%	\$ -	\$ 2,824,200	
OPERATION & MAINTENANCE											
0201-0000	A/E Basic Services	\$ 640,000	\$ -	\$ 640,000	\$ -	\$ -	0%	0%	\$ -	\$ 640,000	
0201-0500	Design Development	\$ 1,115,000	\$ -	\$ 1,115,000	\$ -	\$ -	0%	0%	\$ -	\$ 1,115,000	
0201-0600	Construction Contract Documents	\$ 80,000	\$ -	\$ 80,000	\$ -	\$ -	0%	0%	\$ -	\$ 80,000	
0201-0700	Bidding	\$ 895,000	\$ -	\$ 895,000	\$ -	\$ -	0%	0%	\$ -	\$ 895,000	
0201-0800	Construction Contract Administration	\$ 94,200	\$ -	\$ 94,200	\$ -	\$ -	0%	0%	\$ -	\$ 94,200	
0201-0900	Closeout	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -	\$ -	
0201-1000	Extra and Reimbursable Services	\$ 255,000	\$ -	\$ 255,000	\$ -	\$ -	0%	0%	\$ -	\$ 255,000	
0203-0000	Construction Testing	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -	\$ -	
0203-0200	Printing (over minimum)	\$ 35,000	\$ -	\$ 35,000	\$ -	\$ -	0%	0%	\$ -	\$ 35,000	
0203-9900	Other Reimbursable	\$ -	\$ -	\$ -	\$ -	\$ -	0%	0%	\$ -	\$ -	
0204-0200	Hazardous Material (incl. monitoring)	\$ -	\$ -	\$ -	\$ -	\$ -			\$ -	\$ -	
0204-0300	Geotechnical	\$ 100,000	\$ -	\$ 100,000	\$ -	\$ -	0%	0%	\$ -	\$ 100,000	
0204-0400	Site Survey	\$ 50,000	\$ -	\$ 50,000	\$ -	\$ -	0%	0%	\$ -	\$ 50,000	
0204-0500	Wetlands	\$ 70,000	\$ -	\$ 70,000	\$ -	\$ -	0%	0%	\$ -	\$ 70,000	
	Subtotal	\$ 3,800,000	\$ -	\$ 3,800,000	\$ -	\$ -	0%	0%	\$ -	\$ 3,800,000	

Total Project Budget Status Report

Page 2 of 2

Spent to Date to May 2010	
Thru May-10	\$ 404,725
Projected Amounts	
Jun-10	\$ 313,596
Jul-10	\$ 360,216
Aug-10	\$ 375,012
Sep-10	\$ 391,237
Oct-10	\$ 413,768
Nov-10	\$ 423,879
Bidding	
Dec-10	\$ 206,012
Construction	
Jan-11	\$ 798,238
Feb-11	\$ 824,359
Mar-11	\$ 1,023,456
Apr-11	\$ 1,587,683
May-11	\$ 1,724,052
Jun-11	\$ 1,795,741
Jul-11	\$ 1,810,237
Aug-11	\$ 1,917,528
Sep-11	\$ 2,034,929
Oct-11	\$ 2,239,098
Nov-11	\$ 2,262,234
Dec-11	\$ 2,207,817
Jan-12	\$ 2,119,724
Feb-12	\$ 2,115,560
Mar-12	\$ 2,233,404
Apr-12	\$ 2,273,279
May-12	\$ 2,280,228
Jun-12	\$ 2,028,209
Punch List; FFE; Technology	
Jul-12	\$ 1,717,727
Aug-12	\$ 1,785,517
Close-Out	
Sep-12	\$ 1,458,399
Oct-12	\$ 840,529
Nov-12	\$ 684,094
Dec-12	\$ 349,511
Total:	\$ 43,000,000



UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA
PROJECT SCHEDULE, SEPT 2012 OPENING
JULY 19, 2010



ID	Task Name	Duration	Start	Finish	Predecessors	2009	2010	2011	2012	2013
1	Execute OPMI Contract	0 days	Wed 4/8/09	Wed 4/8/09		Q1	Q2	Q3	Q4	Q1
2	Selection of Architect	65 days	Thu 4/9/09	Wed 7/8/09		Q1	Q2	Q3	Q4	Q1
12	Project Design	387 days	Thu 7/9/09	Wed 12/29/10		Q1	Q2	Q3	Q4	Q1
13	Feasibility Study - Design Program	63 days	Thu 7/9/09	Mon 10/5/09		Q1	Q2	Q3	Q4	Q1
25	Feasibility Study - Schematic Design	51 days	Mon 4/5/10	Mon 6/14/10		Q1	Q2	Q3	Q4	Q1
26	Schematic Design	51 days	Mon 4/5/10	Mon 6/14/10	51	Q1	Q2	Q3	Q4	Q1
27	Cost Estimate	16 days	Fri 5/21/10	Fri 6/11/10		Q1	Q2	Q3	Q4	Q1
28	Schematic Design Public Forum #1	0 days	Mon 4/5/10	Mon 4/5/10		Q1	Q2	Q3	Q4	Q1
29	Schematic Design Public Forum #2	0 days	Wed 5/12/10	Wed 5/12/10		Q1	Q2	Q3	Q4	Q1
30	Schematic Design Public Forum #3	0 days	Tue 6/15/10	Tue 6/15/10		Q1	Q2	Q3	Q4	Q1
31	Town Meeting - Project Approval	0 days	Sat 6/19/10	Sat 6/19/10		Q1	Q2	Q3	Q4	Q1
32	Town Election - Debt Exclusion	0 days	Mon 6/21/10	Mon 6/21/10		Q1	Q2	Q3	Q4	Q1
33	Design Development	50 days	Thu 7/29/10	Wed 10/6/10		Q1	Q2	Q3	Q4	Q1
34	Design Work	8 wks	Thu 7/29/10	Wed 9/22/10	32	Q1	Q2	Q3	Q4	Q1
35	Review Meetings	2 wks	Thu 9/23/10	Wed 10/6/10	34	Q1	Q2	Q3	Q4	Q1
36	Cost Estimate	2 wks	Thu 9/23/10	Wed 10/6/10	34	Q1	Q2	Q3	Q4	Q1
37	Construction Documents	70 days	Thu 9/23/10	Wed 12/29/10		Q1	Q2	Q3	Q4	Q1
38	Construction Documents - 60%	30 days	Thu 9/23/10	Wed 11/3/10	34	Q1	Q2	Q3	Q4	Q1
39	Design Work	4 wks	Thu 9/23/10	Wed 10/20/10	34	Q1	Q2	Q3	Q4	Q1
40	Review Meetings	2 wks	Thu 10/21/10	Wed 11/3/10	39	Q1	Q2	Q3	Q4	Q1
41	Cost Estimate	2 wks	Thu 10/21/10	Wed 11/3/10	39	Q1	Q2	Q3	Q4	Q1
42	Construction Documents - 90%	40 days	Thu 11/4/10	Wed 12/29/10		Q1	Q2	Q3	Q4	Q1
43	Design Work	4 wks	Thu 11/4/10	Wed 12/1/10	41	Q1	Q2	Q3	Q4	Q1
44	Review Meetings	2 wks	Thu 12/2/10	Wed 12/15/10	43	Q1	Q2	Q3	Q4	Q1
45	Cost Estimate	2 wks	Thu 12/2/10	Wed 12/15/10	43	Q1	Q2	Q3	Q4	Q1
46	Redi-check	2 wks	Thu 12/2/10	Wed 12/15/10	43	Q1	Q2	Q3	Q4	Q1
47	Final drawing review	2 wks	Thu 12/16/10	Wed 12/29/10	46	Q1	Q2	Q3	Q4	Q1
48	MSBA	401 days	Thu 4/16/09	Tue 10/26/10		Q1	Q2	Q3	Q4	Q1
49	MSBA approval of Design RFS	10 days	Thu 4/16/09	Wed 4/29/09	3	Q1	Q2	Q3	Q4	Q1
50	MSBA staff review alternatives/solution	125 days	Fri 10/9/09	Wed 3/31/10		Q1	Q2	Q3	Q4	Q1
51	MSBA board approval of preferred FS alternative	0 days	Wed 3/31/10	Wed 3/31/10		Q1	Q2	Q3	Q4	Q1
52	MSBA Project Scope & Budget Conf	0 days	Fri 7/16/10	Fri 7/16/10		Q1	Q2	Q3	Q4	Q1
53	MSBA Board Approval	0 days	Wed 7/28/10	Wed 7/28/10		Q1	Q2	Q3	Q4	Q1
54	Execute MSBA Funding Agreement	63 days	Fri 7/30/10	Tue 10/26/10	32	Q1	Q2	Q3	Q4	Q1
55	CM at Risk Selection; Trade Contractor Pre-Qual	121 days	Wed 7/14/10	Wed 12/29/10		Q1	Q2	Q3	Q4	Q1
56	Application to and Approval by OIG for CM at Risk	39 days	Wed 7/14/10	Mon 9/6/10		Q1	Q2	Q3	Q4	Q1
57	CM at Risk RFQ Process	20 days	Thu 7/22/10	Wed 8/18/10		Q1	Q2	Q3	Q4	Q1

Summary

Milestone

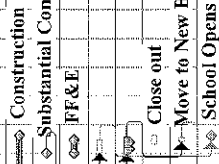
Task

Uxbridge High School
Date: Mon 7/19/10

UXBRIDGE HIGH SCHOOL - UXBRIDGE, MA
PROJECT SCHEDULE, SEPT 2012 OPENING
JULY 19, 2010

Project Management

ID	Task Name	Duration	Start	Finish	Predecessors	2009	2010	2011	2012	2013
58	CM at Risk RFP Process and Selection of CM	20 days	Thu 8/19/10	Wed 9/15/10	57					
59	Issue RFQ for Trade Contractors	0 wks	Wed 11/17/10	Wed 11/17/10	39FS+20 days					
60	Trade Contractor Sub-Bids Due	10 days	Thu 11/18/10	Wed 12/1/10	59					
61	Review contractors	4 wks	Thu 12/2/10	Wed 12/29/10	60					
62	Issue bid list	0 days	Wed 12/29/10	Wed 12/29/10	61					
63	Bidding and Contracting	25 days	Wed 12/29/10	Wed 2/2/11						
64	Issue invitation to bid to Trade Contractors	0 days	Wed 12/29/10	Wed 12/29/10	47					
65	Pre-bid conference	1 day	Tue 1/4/11	Tue 1/4/11	64FS+3 days					
66	Trade Contractor bids due	15 days	Thu 12/30/10	Wed 1/19/11	64					
67	GMP	2 wks	Thu 1/20/11	Wed 2/2/11	66					
68	Contract Execution	0 days	Wed 2/2/11	Wed 2/2/11	67					
69	Site Permitting	50 days	Thu 9/23/10	Wed 12/1/10						
70	Prepare and submit applications to required agencies	10 days	Thu 9/23/10	Wed 10/6/10	34					
71	Public Hearings	20 days	Thu 10/7/10	Wed 11/3/10	70					
72	Issue Approval	20 days	Thu 11/4/10	Wed 12/1/10	71					
73	Construction	550 days	Wed 7/21/10	Tue 8/28/12						
122	Substantial Completion	0 days	Tue 7/3/12	Tue 7/3/12	104					
123	Furniture and Technology Installation	30 days	Wed 7/4/12	Tue 8/14/12						
124	FF&E Installation	30 days	Wed 7/4/12	Tue 8/14/12	122					
125	Educational Technology	15 days	Wed 7/18/12	Tue 8/7/12	122FS+10 days					
126	Close out	20 days	Wed 8/1/12	Tue 8/28/12	121					
127	School Dept Moves into Project	2 wks	Wed 8/8/12	Tue 8/21/12	125					
128	School Opens	0 days	Tue 8/28/12	Tue 8/28/12	127,124,125					



Task Summary

Milestone

Task

Uxbridge High School
Date: Mon 7/19/10

DRAFT IN PROGRESS
Town of Uxbridge
School Building Committee

Request for Qualifications
For Construction Management at Risk Services

Uxbridge High School
Uxbridge, MA

Submission Deadline: 2:00 PM, Wednesday, September 8, 2010

Submit Statement of Qualifications to:

Uxbridge School Building Committee
c/o Joslin Lesser + Associates
44 Pleasant Street
Watertown, MA 02472
Attn: Jeffery Luxenberg

REQUEST FOR QUALIFICATIONS

**FOR
CONSTRUCTION MANAGER AT RISK SERVICES**

I. General Information

A. Project Information

Awarding Authority: Town of Uxbridge, through its School Building Committee

Project Title: Uxbridge High School
CM at Risk

Submission Deadline: 2:00 PM, Wednesday September 8, 2010

Submit one (1) original (unbound), ten (10) complete hard copies (each in three hole binders) and one (1) complete electronic copy on disk of the Statement of Qualifications ("SOQ") with all required forms, attachments, supporting documentation and information to:

Uxbridge School Building Committee
c/o Joslin Lesser + Associates
44 Pleasant Street
Watertown, MA 02472
Attn: Jeffery Luxenberg

Package(s) must be labeled on the outside with the following information:

"RFQ for Construction Management Services, Uxbridge High School",
and CM firm's name, business address and telephone number.

The SBC's official RFQ Informational Meeting will be held at:

3:00 PM, Wednesday, September 1, 2010 at the (existing) Uxbridge High School,
62 Capron Street, Uxbridge, MA 01569 in the Spartan Meeting Room.

Conceptual Estimated Construction Cost: \$30,000,000 to \$34,000,000

Estimated Construction Duration: Project will be complete for the beginning of the 2012/2013 school year, Substantial Completion is anticipated for early July, 2012

Project Team: Owners Project Manager: Joslin Lesser + Associates, Inc.
Designer: Raymond Design Associates, Inc.

Project Funding: Funding has been approved by the MSBA and the Town of Uxbridge.

B. Introduction

Firms interested in providing Public Construction Manager at Risk Services ("CM" or "CM at Risk") for the Uxbridge High School Project, ("Project") are invited to submit a Statement of Qualifications ("SOQ") to the Town of Uxbridge, through its School Building Committee ("SBC"). This CM at Risk services procurement is conducted pursuant to M.G.L. Chapter 149A, contained in Chapter 193 of the Acts of 2004. This Request for Qualifications ("RFQ") is the first phase of a two-phase procurement process as set forth in MGL Chapter 149A. The SBC acting through its Owner's Project Manager, Joslin Lesser + Associates ("OPM"), collectively referred to as "Owner" is pre-qualifying firms interested in providing public CM at Risk services for the project through this RFQ process. Submitted SOQ's will be evaluated based upon the identified evaluation criteria and the Prequalification Committee will select those respondents it deems qualified. Only those respondents deemed qualified will be invited to submit a Proposal in response to a detailed Request for Proposals ("RFP") which will be issued in the second phase of the procurement process. The RFP is expected to be available in mid-September, 2010. The project delivery method for construction will be public CM at Risk with a Guaranteed Maximum Price ("GMP") under M.G.L. Chapter 149A. **Firms interested in being pre-qualified must demonstrate that they have prior experience on at least three (3) projects of similar cost, complexity, type and size as this project as it is described further below.**

C. Project Description

The project is consists of 123,000 square feet of new construction on an undeveloped site, for a high school population of 600 students. The scope of work includes site work, parking lot construction, sports fields and extending all utilities to the site. The school will include classrooms, laboratories, media center, kitchen, cafeteria, gymnasium, auditorium, offices, etc. It is anticipated that the Construction Manager will be under contract while the construction documents are being developed, with possible early packages (such as site work and steel) to be released in late 2010, and substantial completion in July 2012 to allow for occupancy beginning in August 2012.

It is the intention of this project to produce a Massachusetts Certified High Performance School ("MA-CHPS") as defined by the Massachusetts School Building Authority (MSBA).

The project will be subject to the minimum wage rates set under the Massachusetts Prevailing Wage Laws. Workforce utilization goals apply to the project.

The project Minority Business Enterprise ("MBE") participation goal is 7.4%

The project Women Business Enterprise ("WBE") participation goal is 4.0%

The selected Construction Manager will be required to utilize or implement project management system software for project communication, tracking, etc. that is accessible and useable by the Owner and Architect via the internet.

There will be no scheduled site visit(s) during the RFQ phase, however interested firms may visit the site on September 1, 2010 prior to the Informational Meeting. Drawings and specifications will be available to respondents during the RFP phase.

D. Project Schedule

The architectural firm of Raymond Design Associates, Inc.. has completed the Schematic Design and is currently beginning work on the Design Development phase of this project. It is anticipated that the Construction Manager will be under contract prior at the end of the Design Development Phase. Construction is anticipated to start in the winter of 2011 and be completed time for the start of the 2012-2013 school year. Early packages for some trades may be issued in late 2010. It is intended that the building construction be completed and that the building and site be fully functional, commissioned and occupied by late August 2012.

E. Construction Manager at Risk Two-Phase Selection Process

The CM selection process is a two-phase process as set forth in M.G.L. c. 149A, contained in Chapter 193 of the Acts of 2004. Phase One, the Request for Qualifications (RFQ) phase, is the prequalification phase. Only firms selected during the Phase One prequalification phase will be permitted to participate in Phase Two, the Request for Proposals (RFP) phase used to select a CM firm. The RFQ phase will be used to pre-qualify construction management at risk firms. Interested firms must submit a Statement of Qualifications by the deadline set for submission. The Uxbridge School Building Committee has appointed a Prequalification Committee to review and evaluate the SOQ's received. The SBC anticipates concluding the RFQ evaluation process within 14 days from submission of SOQ's. **Only those firms determined to be qualified by the Prequalification Committee will be invited and permitted to submit a proposal in response to the Phase Two, RFP. Firms that are not deemed qualified by the Prequalification Committee and firms that do not participate in the RFQ phase will be precluded from participating in the RFP CM selection phase.**

This RFQ is Phase One of the procurement process. After the deadline for the submission of SOQ's has passed SBC will prepare a register of names of the firms submitting SOQ's which will be available for public inspection. The Prequalification Committee will review and evaluate the SOQ's submitted, information contained in the DCAM certification files, information on prior project performance, information obtained from references, information obtained from government agencies and entities, and such other information as may be obtained. SBC, at its sole discretion, may request additional information to clarify or supplement the information obtained.

Based upon its review and evaluation, the Prequalification Committee will evaluate each of the CM firms that have submitted materials as required by the RFQ. For each evaluation criteria the Prequalification Committee shall determine that the CM firm is "qualified" or "not qualified" or such additional rating as the Prequalification Committee finds reasonable. The Prequalification Committee will then develop a composite evaluation for each CM firm. CM firms receiving an overall composite rating of "not qualified" will not be deemed qualified. The Prequalification Committee shall endeavor to identify at least three CM firms which it deems qualified. If the Prequalification Committee does not rate at least three CM's as qualified, it will either repeat the RFQ process or procure the project under the provisions of the M.G.L. c. 149, §44A-44J. Owner shall complete the Phase One process by written notice to all firm's advising them as to whether they were pre-qualified or not and those CM firms deemed qualified will be invited to participate in Phase Two (RFP).

In Phase Two a detailed Request of Proposals for CM at Risk will be issued to the CM Firms deemed qualified in the Phase One pre-qualification process. The RFP Selection Committee (Selection Committee) will evaluate the proposals on multiple factors, rank the proposals based on the composite ratings including their fee proposal, make a recommendation for the preferred CM Firm to the SBC, and commence negotiations with the highest ranked CM at Risk Firm. In the event negotiations with the highest ranked firm will not result in a contract acceptable Owner, negotiations will be terminated and negotiations will commence with the next highest ranked firm, and the process will continue until Owner can reach an acceptable contract with one of the pre-qualified CM at Risk firms that submitted an advantageous proposal.

F. Treatment of Information submitted to SBC

Owner shall have no obligation to treat any information submitted in or in connection with a SOQ as proprietary or confidential, with the exception of the audited financial statement which is deemed confidential. Owner's obligation with respect to protection and disclosure of such information shall at all times be subject to applicable laws, including the Massachusetts Public Records law. The audited financial statement shall remain confidential and shall not be a public record to the fullest extent permissible under the law. Owner shall have the right to use all or portions of the SOQ and accompanying information, as it considers necessary or desirable in connection with the Project. By the submission of a SOQ, the respondent thereby grants to Owner an unrestricted license to use the SOQ, including all material submitted therewith, in connection with the Project.

G. Communication between Owner and Respondents

Prospective Respondents shall not communicate with the SBC, the project Architect, the Owner's Project Manager or any other person or entity participating on the Prequalification Committee or Selection Committee, at any time during the RFQ process except through written questions submitted prior to the deadline set forth herein. All questions must be submitted in writing by mail, email or fax, addressed to:

Joslin Lesser + Associates, Inc.
Attention: Jeffery Luxenberg
44 Pleasant Street
Watertown, MA 02472
Email: jluxenberg@joslinlesser.com
Fax: 617-924-3800

The deadline for receipt of written questions is **5:00 PM on Thursday, September 2, 2010**. The Owner will respond to all written questions which in the Owner's sole judgment may have a material effect on the RFQ by posting written responses on the Joslin, Lesser + Associates website, www.jlaprojects.com not later than 5:00 PM Friday, September 3, 2010.

Except as explicitly set forth herein, from the date of issuance of this RFQ, any respondent that contacts directly or indirectly any member of the SBC, the project Architect, the Owner's Project Manager or any other person or entity participating on the Prequalification Committee or Selection Committee in connection with the project is subject to disqualification.

H. Addenda

Any addenda developed either to modify this RFQ or which address those questions received by the Owner in accordance with Section G which, in the Owner's opinion, require clarification or interpretation, or will have a material affect on the RFQ (or the Project) will be posted on the Joslin Lesser website (www.jlaprojects.com). All Addenda will be distributed not less than two (2) days prior to the date on which submissions are due. The Owner may decline to answer any inquiry. It shall be the sole responsibility of firms desiring to submit Statements of Qualifications to ascertain the existence of any and all addenda issued by the Owner. Only written communications from the Owner shall be binding. Oral statements, clarifications or interpretations provided at any time will have no standing and may not be relied upon, except to the extent confirmed in a written addendum.

I. Status of Request for Qualifications

This Request for Qualifications is solely a request for information. It does not represent an offer nor does it confer any rights on any respondent. Owner shall not be responsible under any circumstances for any costs incurred by any respondents to this RFQ. Owner reserves the right to modify, suspend or cancel this procurement at any time at its sole discretion. The required Schedules A through L will be made available to respondents in Microsoft Word file format for use in completing Statements of Qualifications. In the event that a respondent modifies the forms and schedules to change the meaning of any terms or requirements, the original version as contained in this RFQ shall take precedence.

II. Scope of Services for Construction Management

The Construction Manager shall be responsible for complete construction management services for all phases of the project for a guaranteed maximum price. At each phase, Owner at its sole discretion will determine whether it will proceed to the next phase or terminate Construction Manager Services on the project. Certain trade construction work will be procured using procedures similar to the Mass General Laws Chapter 149 Files Sub-bid laws after a pre-qualification process. This procedure is specified in Chapter 193 of the Acts of 2004 in the new Mass. General Laws Chapter 149A. A detailed scope of services will be included in the Request for Proposals. The following is an outline of services anticipated.

A. Pre-Construction (Design) Phase

1. Review and recommend revisions, if appropriate, to the project master Schedule, Construction Budget and permitted plan developed by Owner.
2. Develop the scope of work and prepare bid packages in concert with the Designer for each trade to be bid and participate in the pre-qualification and qualification of each of the Trade Contractors and other subcontractors as defined by law.
3. Attend, and if requested by the Owner, schedule and lead periodic project meetings and special meetings for the exchange of information concerning the project, and review of design progress, permits and approvals.
4. Review the design documents and other construction documents and make recommendations to the Owner as to the value engineering, constructability, suitability of materials and equipment, scheduling, time, methods and sequence of construction, and the clarity, consistency and coordination of documentation.
5. Perform periodic detailed cost estimates for the entire construction and for phases or portions of the work as directed by the Owner, and work with the project designer to reconcile differences.
6. Perform detailed cost estimates and value engineering analyses during the development of Design Development, and Construction Documentation phase of the project. The CM shall work with the Designer to reconcile differences.
7. The Owner may require additional cost estimates to confirm budget due to modifications made via design workshops. The CM shall work with the Designer to reconcile differences.
8. The Owner shall assign a professional project scheduler possessing building and site design and construction experience. If deemed qualified by the Owner, the CM can assign an in-house scheduler. The scheduler shall develop a detailed critical path method (CPM) schedule that identifies all design activities, permits and all other activities required to be completed before construction activities can begin and a preliminary construction schedule. The CPM project schedules shall be developed using Primavera Project planner's latest version or other approved software, subject to formal written approval by the Owner.

9. Develop, in coordination with the Owner, a system for tracking project costs and cash flow.
10. Conduct activities relating to the procurement and award of Trade Contracts and all other contracts for the furnishing of labor, materials, equipment, or other services in connection with the construction of this project, in accordance with the procedures to be developed by the Owner and in a manner that will meet Minority Business Enterprise and Women Business Enterprise goals set by the Owner for the project.

B. Construction Phase

1. Obtain and pay for, with the exception of the building permit fees, all required construction related permits.
2. Furnish bonds and insurance as required by the contract documents.
3. Provide and maintain a construction site office and provide all site management and administration. Provide and maintain a separate construction site office for the Owner's Project Manager (including an office for the OPM Project Representative, an office for the Architect, and a meeting area).
4. Manage and coordinate all Trade Contractors and subcontractors and others engaged in the performance of work.
5. Meet the Minority Business Enterprise and Women Business Enterprise participation goals and minority work force goals for the Project.
6. Implement procedures for reviewing and processing requests for information or clarifications and interpretations of the contract documents; shop drawings, samples, and all other submittals, contract schedule adjustments, change order proposals, proposals for substitutions, payment applications, as-built drawings, and maintenance of logs using the internet-based system software.
7. Continuously supervise and observe all work in progress so as to ensure that the work is proceeding in accordance with the construction contract documents.
8. Attend and, if requested by the Owner, schedule and lead regular project and construction progress meetings, and conduct regular meetings at the site with each subcontractor.
9. Develop and implement a change order control system using the internet-based system software.
10. Establish and implement a Quality Control program including monitoring the quality programs of all subcontractors.
11. Develop and implement a project-wide safety program, including monitoring and enforcement of the program for Trade and subcontractors.

12. Monitor closely the progress of construction of each subcontractor, prepare construction schedule report at least monthly and, if necessary, prepare and submit recovery schedule.
13. Provide a part-time independent, project-dedicated schedule to develop, maintain and update the detailed CPM schedule.
14. Furnish monthly reports concerning the progress of the work which address: (a) compliance with the construction schedule, (b) status of testing and inspection activities performed by the CM and subcontractors, (c) status of shop drawings and submittals, (d) status of change orders, (e) status of MBE/WBE participation, and (f) other matters relating to the progress of work as directed by the Owner.
15. Determine when each subcontractor's work is substantially complete and prepare a list of incomplete work and work which does not conform to the requirements of the construction documents.
16. Maintain complete and accurate records, including (a) correspondence, (b) meeting notes and minutes, (c) shop drawings and submittals, (d) construction documents including change orders, (e) clarifications and interpretations of the construction documents issued by the project designer, and (h) all other project related documents including but not limited to those utilizing the internet based software system.

C. Post-Construction Phase

In accordance with the project designer and Owner, develop and implement procedures for orderly completion of "punch list" items, checkout of utilities, operational systems and equipment and initial start up and testing. Preparation and delivery to the Owner warranties, as-built drawings, maintenance manuals, and the like, and generally administer closeout of the project. Ensure performance of all warranty obligations, resolution of all claims, and other post-construction requirements.

III. Submission Instructions and Requirements and Evaluation Criteria

A. Submission Deadline

2:00 PM, Wednesday September 8, 2010

One (1) original (unbound), ten (10) complete hard copies (each in three hole binders) and one (1) complete electronic copy on disk of the Statement of Qualifications with all required forms, attachments, supporting documentation and information must be received by Owner on or before submission time and date set forth above as determined by Owner's date/time stamp. All envelopes must be labeled "**RFQ for Construction Management Services, Uxbridge High School**", with the **respondent firm's name, business address and telephone number** and be mailed or delivered to the following address:

Uxbridge School Building Committee
c/o Joslin Lesser + Associates
44 Pleasant Street
Watertown, MA 02472
Attn: Jeffery Luxenberg

Statements of Qualification received by Owner later than the submission deadline specified above will be rejected and returned to the respondent. Respondents are cautioned to allow sufficient time for mailed materials to be received. **Telecopied, faxed or e-mailed qualifications will not be accepted.** Immediately following the RFQ deadline there will be a public logging at the office of Joslin, Lesser + Associates. The only information that will be publicly available at the public logging is a listing of proposer names that submitted proposals. Qualification statements will not be opened or read publicly.

B. Submission Requirements

The respondent **must** submit all of the information and documentation listed below. Selection of the respondents for Phase One, the pre-qualification process will be based on the submitted information and materials, information on prior project performance, information obtained from references, information obtained from government agencies and entities, information contained within DCAM certification files, and such other information may be obtained.

Do not include superfluous material. Respondents must include the CM at Risk Statement of Qualifications Response Form attached below and signed by an authorized representative, and all of the forms and materials required for Schedules A through L. Respondents must give complete and accurate answers to all questions and provide all of the information requested. Respondents can not alter the text of the forms or schedules in anyway; any such alteration will be grounds for disqualification. Making a materially false statement in this submission is grounds for rejecting a Statement of Qualifications submission and may subject respondent to other civil or criminal penalties.

1. **Qualifications Application:** Respondent **must complete** the CM at Risk Qualifications Application **Schedule A** attached to the SOQ below. Joint ventures must provide information about each of the joint venture partners.

2. Executive Summary: Respondent must attach as Schedule B to the SOQ a cover letter or executive summary detailing the key elements and factors that differentiate the respondent firm from other firms. Joint ventures must provide information about the nature of the joint venture division of responsibility among the joint venture partners. This letter/executive summary should not exceed six (6) pages.
3. Management Personnel and Project Organizational Chart: Respondent **must complete Schedule C** attached to the SOQ below, and **must attach** at Schedule C *both*: i) an organizational chart *and* ii) a resume for each and every person who will have **any** management responsibility, direct or indirect, for the Project, including but not limited to project executives, project managers, field superintendents and field engineers. Joint ventures must identify the company that employs each individual listed.
4. Similar Project Experience: Respondent **must complete Schedule D** attached to the SOQ below, listing at least three (3) similar projects for the last five (5) years. The first page of Schedule D requests information for similar projects that used the construction manager at risk delivery method and the second part of Schedule D requests information on similar projects in general. For each project, respondent must include the name of the project, location, description of project, description of respondent firm's scope of work, original contract sum, final contract sum (with explanation), date completed and the name, organization, address and telephone contact information for the owner and project architect for each such project. For the purpose of this RFQ, "similar projects" shall mean projects where the construction cost is for an amount similar to the estimated construction cost of this Project; the project was one of similar complexity, similar public education program and was the approximate size of this Project or larger. Joint ventures must complete a Schedule D for each individual joint venture partner.
5. Terminations and Legal Proceedings: Respondent **must complete Schedule E** attached to the SOQ below. Schedule E requires two (2) separate listings: the first part requires a complete listing of each and every project on which the respondent firm was terminated or failed to complete the work within the past five (5) years; and the second part requires a complete listing of any conviction or fines incurred by the respondent firm or any of its principals for violations of any state or federal law within the past five (5) years and a complete list of any and all legal proceedings, administrative proceedings and arbitrations whether currently pending or concluded within the past five (5) years that involved a construction project or construction contract in which the respondent firm was a named party. Joint ventures must complete a Schedule E for each individual joint venture partner.
6. Safety Record: Respondent **must provide** its experience modifier for the past three (3) years by writing it in on the SOQ in the space provided and **must also attach** at **Schedule F** to the SOQ documentation from its insurance carrier of its Workers' Compensation Experience Modifier for the past three (3) years. Joint ventures must complete a Schedule F for each individual joint venture partner.
7. MBE/WBE and Workforce Compliance Record: Respondent **must complete Schedule G** attached to the SOQ below providing information on the firm's compliance record with respect to Minority Business Enterprise and Women's Business Enterprise participation goals and workforce inclusion goals for each and every project completed with the past five (5) years that had contractual MBE/WBE participation goals or minority and women workforce goals. In

addition, respondent **must attach** documentation supporting the actual participation and inclusion amounts it reports on Schedule G. Joint ventures must complete a Schedule G for each individual joint venture partner.

8. Audited Financial Statement: Respondent **must attach at Schedule H** to the SOQ a complete copy of its audited financial statement for the most recent fiscal year. Joint ventures must complete a Schedule H for each individual joint venture partner.
9. Letter from Surety Company Evidencing Bonding: Respondent **must attach at Schedule I** to the SOQ a letter from a surety company that is licensed to do business in the Commonwealth of Massachusetts and whose name appears on United States Treasury Department Circular 570 on the surety companies letterhead (or a letter from a surety agent with attorney in fact authority and an original power of attorney accompanying the letter) confirming that it will provide respondent firm with payment and performance bonds on the Project in an amount equal to or greater than 110 percent of the upper limit of the estimated construction cost range of the Project. This letter can either reference the joint venture's bonding or submit separate letters from each individual joint venture partner.
10. Certificate of Eligibility and Update Statement: Respondent **must attach at Schedule J** to the SOQ **both i)** a current **Certificate of Eligibility** (issued by DCAM) showing respondent is certified in General Building Construction with appropriate single project limits and aggregate limits based on the upper limit of the estimated construction cost range as set forth above, **and ii)** a completed **Update Statement**. Joint ventures which are not yet DCAM certified as a joint venture must submit a Certificate of Eligibility and Update Statement for each individual joint venture partner.
11. Examples of Project Management Reports and Operating Philosophy: Respondent **must attach at Schedule K** specific examples (no more than 3) of Project Management Reports that were prepared by respondent on one or more of the Construction Manager projects listed on Schedule D, Part A. In addition respondent **may**, at its option, include a brief statement of its operating philosophy. If information on respondent's operating philosophy is contained in its Executive Summary attached at Schedule B, the information should not be repeated at Schedule K, but can be referenced.
12. Examples of Prior Experience on Sustainable Construction and LEED—certified buildings: Respondent **must** complete **Schedule L** attached to the SOQ below, listing prior project experience involving sustainable construction, Massachusetts Certified High Performance Schools and LEED certified buildings. Joint ventures must complete a Schedule L for each individual joint venture partner.

C. Evaluation Criteria for Selection

The respondent must submit all of the information and documentation listed in this RFQ. Selection of the respondent for Phase One, the pre-qualification process will be based on the submitted information and materials, information on prior project performance, information obtained from references, information obtained from governmental agencies and entities, information contained within DCAM certification files, and such other information as may be obtained. Respondents must include the CM at Risk Statement of Qualifications Response Form and all of the materials required

for Schedules A through L. Respondents must give complete and accurate answers to all questions and provide all of the information requested. Altering the text of the forms or schedules in any way or making a materially false statement in this submission is grounds for rejecting a Statement of Qualifications submission and may subject the respondent to other civil or criminal penalties.

The Town of Longmeadow acting through the School Building Committee and the Town Manager as the Awarding Authority reserves the right to reject any and all Statement of Qualifications, waive minor informalities, and to award a contract in the best interest of the Town.

1. Minimum Requirements

a. Required Construction Manager at Risk Experience

All respondents must have prior experience on at least three (3) prior projects with a total construction cost in an amount similar to the estimated total construction cost of this Project and of similar complexity, similar size, and similar scope. All respondents must be licensed to do business in the Commonwealth of Massachusetts.

b. Bonding Capacity

The respondent **shall provide evidence of bonding capability** in an amount equal to or greater than 110 percent of the upper limit of the estimated construction cost range for this Project (as set forth in the General Information section above). The evidence of bonding capability shall be in the form of a letter from the surety company (or a surety agent with attorney in fact authority and an original power of attorney accompanying the letter). The surety company must be a surety licensed to do business in the Commonwealth of Massachusetts and whose name appears on the United States Treasury Department Circular 570.

c. DCAM Certification – Copy Form CQ7

The respondent **shall provide a copy of a current Certificate of Eligibility** (Form CQ7) issued by DCAM showing respondent is DCAM certified in General Building Construction with a single project limit in an amount equal to, or greater than, the upper limit of the estimated construction cost range for this Project (as set forth in the General Information section above).

To submit a proposal in response to this RFQ, a Respondent whether an individual firm or a joint venture, **must be certified in General Building Construction** by DCAM for a single project limit in the amount of the upper limit of the Estimated Construction Cost range set forth above for the Project or greater and must also be within the aggregate limit of its DCAM Certificate of Eligibility (Form CQ7), and a copy of the Respondent's current DCAM Certificate of Eligibility must be included in the SOQ. Note, however, that a joint venture team must be certified in General Building Construction by DCAM for a single project limit in the amount of the Project Estimated Construction Cost or greater and must also be within the aggregate limits of its DCAM Certificate of Eligibility, a copy of which must be included in the SOQ at the time it submits its RFQ. If a respondent to the RFQ is a proposed joint venture ("JV") that is newly formed or is not currently certified, then i) each party to the proposed joint venture must be individually certified by DCAM and must submit a copy of its DCAM Certificate of Eligibility with its SOQ; ii) the JV respondent must state in the SOQ that it will seek Certification from

DCAM as a joint venture in the category of General Building Construction for the required limits, and state that it understands and agrees that if JV respondent is selected to participate in the RFP phase it will be required to submit a DCAM Certificate of Eligibility for the joint venture with its response to the RFP; iii) at least one of the parties of the joint venture must be certified by DCAM in the category of General Building Construction for a single project limit in the amount of the Estimated Construction Cost for the Project and must be within the aggregate limits of its Certificate of Eligibility at the time the SOQ is submitted; and iv) the JV respondent shall provide evidence satisfactory to Owner of bonding capacity, in the form set above and satisfactory to Owner, for the proposed joint venture in the amount of the Estimated Construction Cost for the Project. In the second phase of the selection process the RFP phase, a JV respondent that has been selected in the RFQ process, will be required to have obtained a DCAM Certificate of Eligibility for the joint venture and must submit its DCAM Certificate of Eligibility for the joint venture meeting the above requirements with its proposal in response to the RFP.

For certification forms and additional information see DCAM's website:

<http://www.state.ma.us/cam/dlforms/eligible.pdf>

Or contact the Certification Office at:

DCAM Contractor Certification Office
One Ashburton Place
Boston, Massachusetts 02108
Telephone Number (617)727-4050 ext. 415

d. DCAM Update Statement – Use Form CQ3

A complete and signed update statement must be submitted as part of the SOQ. For Owner's analysis of the Aggregate Work Limit for this RFQ, the Estimated Construction Cost for the project as set forth above will be used with a construction duration for the Project as set forth above. Owner will compare the above numbers with the respondent's current annualized value of all incomplete work to determine eligibility within the Aggregate Work Limit.

If a respondent to the RFQ is a proposed joint venture and the proposed joint venture is not yet certified, then: i) each party to the proposed joint venture must be certified by DCAM and each must submit its own signed update statement (Form CQ3) as part of its SOQ; ii) at least one of the parties to the joint venture must be certified by DCAM in the category of General Building Construction for a single project limit equal to or greater than the Estimated Construction Cost of the Project and must be within the aggregate limits of its Certification of Eligibility. When the second phase of the selection process is undertaken through an RFP, a joint venture respondent that has been selected in the RFQ process will be required to submit its Certificate of Eligibility for the joint venture meeting the above requirements with its proposal to the RFP.

For the required Update Statement Form and individual information see DCAM website:

http://www.state.ma.us/camdlforms/fl_contractcert.html

Or contact the Certification Office at:

DCAM Contractor Certification Office
One Ashburton Place
Boston, Massachusetts 02108
Telephone Number (617)727-4050 ext. 415

2. Qualification Criteria

Firms meeting the minimum experience criteria set forth above, submitting a completed RFQ with Schedules and required attachments and the required Certificate of Eligibility, Update Statement and letter evidencing bonding capacity will be evaluated on the following criteria:

- Respondent's ability to demonstrate that they possess the capability, capacity and experience to perform construction management services for a project of the size and scope of the Project and on the terms set forth in this RFQ, including specifically the advisory services required for the Pre-Construction Phase and the construction, management, oversight and cost control services required during the Construction Phase.
- Respondent's ability to demonstrate that the proposed Project Superintendent, Project Manager and Team possess the capability, capacity and experience with projects of similar size, scope and delivery method are qualified to meet the specific requirements of this Project.
- Respondent's ability to demonstrate an understanding of the Project goals, particularly the quality standards required, the dates for substantial completion of each phase, and an ability and commitment to meet those goals and dates.
- Respondent's references from owners, architects, or engineers indicating that they have completed work similar to the project for which this Proposal is being submitted in a satisfactory and timely manner. If delays occurred, evidence explaining and exonerating the Respondent shall also be provided.
- Respondent's record of harmonious, cooperative, non-adversarial and honest relationships with Owners as well as with Architects, Engineers, Consultants, Subcontractors and Suppliers on the prior projects.
- Financial Status
- Prior Project Experience, including quality of performance on prior projects
- Litigation and Performance/Termination History
- Safety Record
- Volume of current work
- History of compliance with MBE/WBE participation and workforce goals
- Experience with sustainable construction and MA-CHPS and LEED certified buildings

As provided by law, Owner's decision on pre-qualification shall be final and binding and shall not be subject to appeal except on grounds of fraud or collusion.

STATEMENT OF QUALIFICATIONS SUBMISSION CHECKLIST
for Pre-qualification of CM at Risk Firms

PLEASE NOTE THAT INCOMPLETE OR LATE STATEMENTS OF QUALIFICATION FOR CM at RISK PRE-QUALIFICATION WILL NOT BE CONSIDERED. THEREFORE, BEFORE SUBMITTING YOUR FIRM'S RESPONSE TO THIS RFQ PLEASE REVIEW THE FOLLOWING:

- ☐ Respondent completed the CM at Risk Statement of Qualifications Form.
- ☐ Respondent has completed *Schedules A through L* and attached required documentation (i.e., application, resumes of all management personnel, organizational chart, commitment letter from bonding company, letter evidencing workers compensation experience modifier, sample firm project management reports, etc.).
- ☐ Respondent has submitted current DCAM Certificate of Eligibility and Update Statement (Schedule J).
- ☐ Respondent has submitted Audited Financial Statement (Schedule H).
- ☐ Respondent submission package includes one (1) original (unbound), six (6) complete hard copies (each in three hole binders) and one (1) complete electronic copy on disk of the Statement of Qualifications ("SOQ") with all required forms, attachments, supporting documentation and information.
- ☐ Respondent has provided current contact information for its firm and all of its project contacts/references.
- ☐ Respondent addressed the *SOQ* envelope correctly (i.e., to reference the Project and other required information set forth herein).

CM at Risk Statement of Qualifications Form (SOQ)

Firm Name: _____

Mailing Address: _____

Street Address (if different from mailing address): _____

Telephone Number: _____ Fax Number: _____

E-mail Address: _____

Contact Person: _____ Title: _____ Email: _____

Firm acknowledges Addenda numbered _____ (list all)

- A. Qualifications Application:** Respondent MUST complete the CM at Risk Qualifications Application **Schedule A** attached below. Joint ventures must provide information about each of the joint partners.
- B. Executive Summary:** Respondent MUST attach as **Schedule B** a cover letter or executive summary detailing the key elements and factors that differentiate the respondent firm from other firms. This letter/executive summary should not exceed six (6) pages. Joint ventures must provide information about the nature of the joint venture including the approximate percentage participation by each joint venture partner and the division of responsibility among the joint venture partners.
- C. Management Personnel and Project Organizational Chart:** Respondent MUST complete **Schedule C** attached below, provide an organizational chart and attach to it a resume for each and every person who will have **any** management responsibility, direct or indirect, for the Project, including but not limited to project executives, project managers, field superintendents and field engineers. Joint ventures must identify the company that employs each individual listed.
- D. Similar Project Experience:** Respondent MUST complete **Schedule D** attached below, listing similar projects for the last five (5) years. The first part of Schedule D requests information for similar projects that used the construction manager at risk delivery method and the second part of Schedule D requests information on similar projects in general. For each project, respondent must include the name of the project, location, description of project, description of respondent firm's scope of work, original contract sum, final contract sum (with explanation), date completed and the name, organization, address and telephone contact information for the owner and project architect for each such project. For the purpose of this RFQ, "similar projects" shall mean projects where the construction cost of the project was at least the amount of the estimated

construction cost of this Project; the project was one of similar complexity, required construction of a facility of the general type of this Project and was the approximate size of this Project or larger. Joint ventures must complete a Schedule D for each individual joint venture partner.

- E. Termination and Legal Proceedings:** Respondent MUST complete **Schedule E** attached below. Schedule E requires two (2) separate listings: first complete listing of each and every project on which the respondent firm was terminated or failed to complete the work within the past five (5) years; and second a complete listing of any conviction or fines incurred by the respondent firm or any of its principals for violations of any state or federal law within the past five (5) years; and a complete list of any and all legal proceedings, administrative proceeding and arbitrations whether currently pending or concluded within the past five (5) years that involved a construction project or a construction contract in which the respondent firm was a named party. Joint ventures must complete a Schedule E for each individual joint venture partner.
- F. Safety Record:** Respondent MUST insert below its experience modifier for the past three (3) years and attach at **Schedule F** documentation from its insurance carrier of its Workers' Compensation Experience Modifier for the past three (3) years. Joint ventures must attach a Schedule F for each individual joint venture partner.

<u>Year</u>	<u>Workers Compensation Experience Modifier</u>
_____	_____
_____	_____
_____	_____

- G. MBE/WBE and Workforce Compliance Record:** Respondent MUST complete **Schedule G** attached below providing information on the firm's compliance record with respect to Minority Business Enterprise and Women's Business Enterprise participation goals and workforce inclusion goals for each and every project completed within the past five (5) years that had a contractual MBE/WBE participation goals or minority and women workforce goals. In addition, respondent MUST ATTACH documentation supporting the actual participation and inclusion amounts on Schedule G. Joint ventures must complete a Schedule G for each individual joint venture partner.
- H. Audited Financial Statement:** Respondent MUST attach at **Schedule H** a complete copy of its audited financial statement for the most recent fiscal year. Joint ventures must attach a Schedule H for each individual joint venture partner.
- I. Letter for Surety Company Evidencing Bonding:** Respondent MUST attach at **Schedule I** a letter from a surety company that is licensed to do business in the Commonwealth of Massachusetts and whose name appears on United States Treasury Department Circular 570 on the surety company's letterhead (or a letter from a surety agent with attorney in fact authority and an original power of attorney accompanying the letter) confirming that it will provide respondent firm with payment and performance bonds on the Project in an amount equal to or

greater than 110 percent of the estimated construction cost of the Project. This letter can either reference the joint venture's bonding or submit separate letters for each individual joint venture partner.

- J. Certificate of Eligibility and Update Statement:** Respondent **MUST** attach at **Schedule J** *both* a current **Certificate of Eligibility** (issued by DCAM) showing respondent is certified in General Building Construction with appropriate single project limits and aggregate limits as set forth above *and* a completed **Update Statement**. Joint ventures which are not yet DCAM certified as a joint venture must submit a Certificate of Eligibility and Update Statement for each individual joint venture partner.
- K. Examples of Project Management Reports and Operating Philosophy:** Respondent **MUST** attach at **Schedule K** specific examples (no more than 3) of Project Management Reports that were prepared by respondent on one or more of the Construction Manager projects listed on Schedule D, Part A. In addition respondent **may**, at its option, include a brief statement of its operating philosophy. If information on respondents operating philosophy is contained in its Executive Summary attached Schedule B the information should not be repeated at Schedule K, but can be referenced.
- L. Examples of Prior Experience on Sustainable Construction and LEED—Certified Buildings:** Respondent **must** complete **Schedule L** attached to the SOQ below, listing prior project experience involving sustainable construction and LEED certified buildings. Joint ventures must complete a Schedule L for each individual joint venture partner.

Failure to accurately and completely provide the information requested may result in the disqualification of a respondent.

This form **MUST** be signed by an officer of the firm or an individual so authorized by an officer of the firm who has personal knowledge regarding the information contained herein and submitted with the SOQ.

To the School Building Committee:

The undersigned declares that he or she has carefully examined all the documents contained in the CM at Risk Request for Qualifications (RFQ) solicitation for **Longmeadow High School, Longmeadow, Massachusetts**, and certifies to the best of his/her knowledge, that this Statement of Qualifications fully complies with all of the requirements of the RFQ and all addenda and clarifications issued in regard to the RFQ.

The undersigned further certifies that he or she (or, if he or she is the authorized representative of a company, the company) is the only person interested in this Statement of Qualifications and any subsequent proposal; that is made without any connection with any other person making any submission for the same work; that no person acting for, or employed by, the Commonwealth of Massachusetts is directly or indirectly interested in this Statement of Qualifications or any subsequent proposal, or in any contract which may be made under it, or in expected profits to arise therefrom; that the undersigned Respondent has not influenced or attempted to influence any other person or corporation to file a Statement of Qualifications or subsequent proposal or to refrain from doing so or to influence the terms of the Statement of Qualifications or any subsequent proposal of any other person or corporation; and

that this submission is made in good faith without collusion or connection with any other person applying for the same work.

The undersigned further certifies under pains and penalties of perjury that the undersigned is not debarred from doing public construction work in the Commonwealth of Massachusetts under the provisions of section Twenty Nine F of Chapter Twenty Nine, or any other applicable debarment provision of any other chapter of the General Laws or any rule or regulation promulgated thereunder, and further is not debarred from doing public construction work under any law, rule or regulation of the federal government.

The undersigned states that he or she has carefully examined all of the information provided and representative made in this Statement of Qualifications and the documents submitted with the SOQ including all schedules, forms and materials, and certifies to the best of his/her knowledge, that this Statement of Qualifications in its entirety is complete, true and accurate.

SIGNED UNDER THE PAINS AND PENALTIES OF PERJURY

Signature: _____
(Signature of Authorized Representative)

Name: _____

Title: _____

Firm Name: _____

Date: _____

Schedule A – CM at RISK QUALIFICATIONS APPLICATION

Firm Name: _____

1. BUSINESS INFORMATION

Type of business entity (corporation, partnership, joint venture, etc.): _____

Number of years in business under current business name: _____

List all other business names firm has operated under and the time frames for each:

If firm is a corporation, provide the following information:

State of Incorporation: _____ Date of Incorporation: _____

Name of President: _____

Name of Vice President: _____

Name of Secretary or Clerk: _____

Name of Treasurer: _____

If firm is a foreign corporation, is it registered to do business in Massachusetts? _____

If firm is a foreign corporation and is selected, it is required under M.G.L. C 30, §. 39L to obtain from the Massachusetts Secretary of State, One Ashburton Place, 17th Floor, Boston, MA a certificate stating that the corporation is registered to do business in Massachusetts, and to furnish said certificate to the awarding authority prior to the award.

If firm is a partnership or joint venture, provide the following information:

Type of partnership/joint venture: _____ Date of organization: _____

Name of each partner or venture: _____

Is partnership or joint venture registered in Massachusetts? _____

If firm is a foreign limited partnership and is selected, it is required under M.G.L. C 30, §. 39L to obtain from the Massachusetts Secretary of State, One Ashburton Place, 17th Floor, Boston, MA a certificate stating that the corporation is registered to do business in Massachusetts, and to furnish said certificate to the awarding authority prior to the award.

For each general partner or venture that is a corporation, provide the following information (use additional sheets if necessary).

Name of corporation: _____
State of incorporation: _____
President: _____
Secretary or Clerk: _____
Treasurer: _____

Name of corporation: _____
State of incorporation: _____
President: _____
Secretary or Clerk: _____
Treasurer: _____

If firm is individually owned, provide the following information:

Name of Owner: _____

Date of organization: _____

Owner's Residence Address: _____

Names under which firm does business: _____

Business Address: _____

E-mail _____

If selected firm is an individual doing business under a different name then they must furnish evidence of any required DBA filings.

2. LICENSURE AND PERFORMANCE INFORMATION

List all jurisdictions and trade categories in which the firm is legally licensed or otherwise qualified to do business and for each jurisdiction provide registration and license numbers where applicable:

If the firm customarily provides scopes of work with its own force please identify types/areas of work below:

3. REFERENCES

Provide three (3) trade references below; include name of reference, current contact person, telephone number and address:

Provide two (2) bank references below; include name of reference, current contact person, telephone number and address:

SCHEDULE B

Schedule B – EXECUTIVE SUMMARY

Respondent must attach Executive Summary here

Not to Exceed 6 Pages

SCHEDULE C

Schedule C – MANAGEMENT PERSONNEL

Firm Name: _____

Respondent must provide the information requested below for each and every person who will have **any direct or indirect management responsibility for the Project**, including but not limited to project executives, project managers, field superintendents and field engineers. Respondents must **attach a copy of the resume for each person listed**. Respondents must also attach an **Organizational Chart** for the Project to this Schedule C. Attach additional sheets if necessary.

NAME	TITLE	ROLE/JOB RESPONSIBILITIES ON THIS PROJECT	# OR YEARS W/FIRM	EDUCATION & EXPERIENCE	COMPLETED PROJECTS (if resume lists all completed projects this section can reference resume)

SCHEDULE D

Schedule D – SIMILAR PROJECT INFORMATION

Firm Name: _____

Respondent is required to complete all three parts, Part A, B and C of Schedule D. List below all similar projects the firm has completed during the last five (5) years. For the purpose of this CM at Risk project “similar projects” shall mean projects where the respondent was the Construction Manager (Part A) or General Contractor (Part B) and the construction cost for the project was at least the amount of the estimated construction cost of this Project, the project was one of similar complexity, was of similar educational program, the project required construction of a new facility of the general type or this Project, and the project as the approximate size of this Project or larger. On Part C list the Contract information for the owner and designer for each and every project listed on Part A or Part B. Attach additional sheets if necessary.

Part A. CM PROJECTS – List only projects on which the firm was the Construction Manager on this section.

PROJECT NAME & LOCATION	PROJECT OWNER	PROJECT DESCRIPTION	DESCRIPTION OF SERVICES PROVIDED BY FIRM	ORIGINAL AND FINAL CONTRACT AMOUNT WITH EXPLANATION	PROJECT START AND COMPLETION DATE

Schedule D – SIMILAR PROJECT INFORMATION (continued)

Firm Name: _____

Part B. GENERAL CONTRACTOR PROJECTS – List only projects on which the firm was the General Contractor or Prime Contractor and was not the Construction Manager on this section.

PROJECT NAME & LOCATION	PROJECT OWNER	PROJECT DESCRIPTION	DESCRIPTION OF SERVICES PROVIDED BY FIRM	ORIGINAL AND FINAL CONTRACT AMOUNT WITH EXPLANATION	PROJECT START AND COMPLETION DATE

Schedule D – SIMILAR PROJECT INFORMATION (continued)

Firm Name: _____

Part C, PROJECT CONTACTS – Respondent must list below current contact information for the owner and designer on each of the projects listed on Schedule D Part A and Part B above. Be certain to confirm the contact information is current.

PROJECT NAME & LOCATION	COMPANY NAME	CONTACT PERSON/ADDRESS	TELEPHONE #	FAX #
	OWNER DESIGNER			
	OWNER DESIGNER			
	OWNER DESIGNER			
	OWNER DESIGNER			
	OWNER DESIGNER			
	OWNER DESIGNER			
	OWNER DESIGNER			
	OWNER DESIGNER			

SCHEDULE E

Schedule E – TERMINATIONS AND LEGAL PROCEEDINGS

Firm Name: _____

Respondent is required to complete both parts A and B of Schedule E. On Part A of Schedule E respondents are required to list each and every project on which the firm was terminated or failed to complete the work within the past five (5) years. On Part B of Schedule E respondents are required to list each and every conviction or fine incurred by the respondent firm or any of its principals for violations of any state or federal law within the past five (5) years, and, a complete list of any and all legal proceedings, administrative proceeding and arbitration whether currently pending or concluded within the past five (5) years that involved a construction project or a construction contract in which the respondent firm was a named party. Attach additional sheets if necessary.

Part A. TERMINATIONS AND INCOMPLETE PROJECTS

PROJECT NAME & LOCATION	PROJECT OWNER	SCOPE OF WORK PERFORMED	PROJECT START & END DATES	ESTIMATED CONTRACT AMOUNT	% COMPLETED	REASON FOR FAILURE TO COMPLETE OR TERMINATION

Schedule E – TERMINATIONS and LEGAL PROCEEDINGS (CONTINUED)

Firm Name: _____

Part B. LEGAL PROCEEDING, CONVICTIONS and FINES

PROJECT NAME, LOCATION & OWNER	DESCRIPTION OF CONVICTIONS, FINES and LEGAL PROCEEDINGS (include caption case, parties, location of proceeding, description of the dispute or enforcement action, dates action commenced and status and/or outcome)

SCHEDULE F

Schedule F – SAFETY RECORD

Respondents must list their workers compensation experience modifiers for the past three (3) years in the space provided on the Statement of Qualifications form and **must also attach here documentation from their insurance carrier** of their Worker's Compensation Experience Modifier for the past three (3) years.

SCHEDULE G

Schedule G – MBE/WBE and WORKFORCE COMPLIANCE RECORD

Firm Name: _____

Respondent is required to list below each and every project completed within the last five (5) years that had contractual MBE/WBE participation goals or minority and women workforce goals. For each project with goals list the contractually required MBE, WBE and workforce participation goals and the actual MBE, WBE and workforce participation achieved on the project. **Respondents must attach documentation from the project owner supporting the amount of actual MBE/WBE participation posted.** In addition, if the goals were not met, explain why and indicate whether any sanctions or penalties were imposed. Attach additional sheets if necessary.

PROJECT NAME, LOCATION & AWARDING AUTHORITY	CONTRACT VALUE	MBE GOAL	ACTUAL MBE PARTICIPATION	WBE GOAL	ACTUAL WBE PARTICIPATION	WORK FORCE GOALS	ACTUAL WORK FORCE PARTICIPATION	IF GOALS NOT MET EXPLAIN WHY	SANCTION OR PENALTY AND AMOUNT

SCHEDULE H

Schedule H – AUDITED FINANCIAL STATEMENT

Respondent must attach its most recent audited financial statement here.

SCHEDULE I

Schedule I – LETTER EVIDENCING BONDING CAPACITY

Respondent must attach here a letter from a surety company (or from an agent meeting the criteria set forth above) evidencing that the surety company will provide respondent with payment and performance bonds for the Project in an amount equal to or greater than 110% of the estimated construction cost of the Project. The surety company must meet the requirements set forth above.

SCHEDULE J

Schedule J – CERTIFICATE OF ELIGIBILITY AND UPDATE STATEMENT

Respondent must attach here two (2) documents:

- 1) a copy of its current **DCAM Certificate of Eligibility** (Form CQ7) meeting the requirements set forth above in this RFQ; and
- 2) a completed and signed **DCAM Update Statement** (Form CQ3)

SCHEDULE K

Schedule K – EXAMPLES OF PROJECT MANAGEMENT REPORTS and BRIEF STATEMENT OF OPERATING PHILOSOPHY

Respondent must attach here specific examples (no more than 3) of **Project Management Reports** that were prepared by respondent on one or more of the Construction Manager projects listed on Schedule D, Part A above. In addition respondent **may**, at their option, include a brief statement of its operating philosophy. If information on respondent's operating philosophy is contained in its Executive Summary attached at Schedule B the information should not be repeated here, but can be referenced.

SCHEDULE L

Schedule L – PROJECTS WITH SUSTAINABLE DESIGN and/or LEED CERTIFIED BUILDINGS

Firm Name: _____

Respondent is required to complete both parts A and B of Schedule L. List below all similar projects the firm has completed which involved sustainable design and/or LEED certified buildings. On Part B list the current Contact information for the owner and designer for each and every project list on Part A. Attach additional sheets if necessary.

Part A. List Projects Involving Sustainable Design and/or LEED Certified Buildings.

PROJECT NAME & LOCATION	PROJECT OWNER	PROJECT DESCRIPTION INCLUDING DESCRIPTION OF SUSTAINABLE DESIGN OR LEED CERTIFICATION	DESCRIPTION OF SERVICES PROVIDED BY FIRM	ORIGINAL AND FINAL CONTRACT AMOUNT WITH EXPLANATION	PROJECT START AND COMPLETION DATE

SCHEDULE L

Schedule L – PROJECTS WITH SUSTAINABLE DESIGN and/or LEED CERTIFIED BUILDINGS (continued)

Firm Name: _____

Part B. PROJECT CONTACTS – Respondent must list below current contact information for the owner and designer on each of the projects listed on Schedule L Part A above. Be certain to confirm the contact information is current.

PROJECT NAME & LOCATION	COMPANY NAME	CONTACT PERSON/ADDRESS	TELEPHONE #	FAX #
	OWNER DESIGNER			
	OWNER DESIGNER			
	OWNER DESIGNER			
	OWNER DESIGNER			
	OWNER DESIGNER			
	OWNER DESIGNER			
	OWNER DESIGNER			

Schedule L – PROJECTS WITH SUSTAINABLE DESIGN and/or LEED CERTIFIED BUILDINGS

Firm Name: _____

Respondent is required to complete both parts A and B of Schedule L. List below all similar projects the firm has completed which involved sustainable design and/or LEED certified buildings. On Part B list the current Contact information for the owner and designer for each and every project list on Part A. Attach additional sheets if necessary.

Part A. List Projects Involving Sustainable Design and/or LEED Certified Buildings.

PROJECT NAME & LOCATION	PROJECT OWNER	PROJECT DESCRIPTION INCLUDING DESCRIPTION OF SUSTAINABLE DESIGN OR LEED CERTIFICATION	DESCRIPTION OF SERVICES PROVIDED BY FIRM	ORIGINAL AND FINAL CONTRACT AMOUNT WITH EXPLANATION	PROJECT START AND COMPLETION DATE

Schedule L – PROJECTS WITH SUSTAINABLE DESIGN and/or LEED CERTIFIED BUILDINGS (continued)

Firm Name: _____

Part B. PROJECT CONTACTS – Respondent must list below current contact information for the owner and designer on each of the projects listed on Schedule L Part A above. Be certain to confirm the contact information is current.

PROJECT NAME & LOCATION	COMPANY NAME	CONTACT PERSON/ADDRESS	TELEPHONE #	FAX #
	OWNER DESIGNER			
	OWNER DESIGNER			
	OWNER DESIGNER			
	OWNER DESIGNER			
	OWNER DESIGNER			
	OWNER DESIGNER			
	OWNER DESIGNER			

JOSLIN, LESSER + ASSOCIATES, INC.

MEMORANDUM

To: Don Sawyer, Uxbridge Public Schools
 From: Jeffery A. Luxenberg - Joslin, Lesser + Associates, Inc.
 Date: August 03, 2010 (revised August 16, 2010)
 Re: Invoices: Uxbridge High School
 Cc: Uxbridge School Building Committee

Enclosed for processing are the following commitments and invoices to be considered at the August 5th, 2010 SBC Meeting. Now that the MSBA and local approvals have been received, both the OPM and Designer Contracts need to be amended to reflect the full project scope. OPM Amendment #2 includes fees for all remaining project phases and is consistent with the project budget. Attached please find the OPM fee proposal from Joslin Lesser including Revised Attachments A & B, and a copy of the OPM Contract as amended.

Design Services Amendment 3 includes design fees for all remaining project phases for Basic Services, and is consistent with the project budget. Attached please find the designer services fee proposal from RDA. Joslin Lesser has reviewed RDA's fee proposal and recommends approval.

COMMITMENTS (Fee Proposals)			
ProPay Code	Budget Category	Description of Services	Contract \$
OPM Amendment #2			
0102-0400	OPM: Design Development	Design Development	\$53,000
0102-0500	OPM: Construction Contract Documents	Contract Documents	\$212,000
0102-0600	OPM: Bidding	Bidding	\$26,420
0102-0700	OPM: Construction Contract Administration	Contract Administration	\$837,000
0102-0800	OPM: Closeout	Closeout	\$69,750
		Total Amendment #2	\$1,198,170
Design Services Amendment #3			
0201-0400	A/E Designer: Design Development	Design Development	\$640,000
0201-0500	A/E Designer: Construction Contract Documents	Contract Documents	\$1,115,000
0201-0600	A/E Designer: Bidding	Bidding	\$80,000
0201-0700	A/E Designer: Construction Contract Administration	Contract Administration	\$895,000
0201-0800	A/E Designer: Closeout	Closeout	\$94,200
		Total Amendment #3	\$2,824,200



Project Management

Monthly Invoice Summary

Page 2

Below is a summary of current invoices for processing. They include a JLA invoice for independent cost estimating services that was submitted in June and the final invoice for RDA for Feasibility/Schematic Design which was also submitted in June and a new invoice from RDA for the start of Design Development. Attached please find a copy of the JLA invoice, RDA's previous invoice (see attached June 30, 1010 Memorandum), and a new invoice for RDA.

INVOICES (Payments)					
ProPay Code	Vendor	Invoice #	Budget Category	Description of Services	Invoice \$
0102-0200	JLA	Consult-1	OPM Feasibility Study	OPM independent cost estimate	\$11,000
0201-0200	RDA	782	Architecture and Engineering – FS/SD	Designer Services: 05.22.10 - 06.15.10 (marks 100% of SD)	\$66,435
0102-0400	RDA	August 3, 2010	Architecture and Engineering-DD	20% Design Development	\$128,000

The Invoices listed above are consistent with the Total Project Budget and to the best of our knowledge are eligible for reimbursement from the Massachusetts School Building Authority. Joslin Lesser + Associates recommends that the Uxbridge High School Building Committee approve these invoices.