

ATTACHMENT A - Part 1

Narrative of the Selection Process

Formation of the Selection Committee:

A Selection Committee was formed by the Town of North Attleborough School Building Committee to prepare a Request for Services (“RFS”) for an OPM. The RFS is attached as Exhibit A.

The Selection Committee included the following members:

Name	Title	Description of related experience
John Antonucci	Superintendent, North Attleborough Public Schools	Mr. Antonucci has twenty-five years of experience as a Central Office administrator, including eighteen years as Superintendent.
Ernest Sandland	Facilities Director, North Attleborough Public Schools	Mr. Sandland has over forty years of experience as a tradesman, project manager, and facilities director. He also has significant experience with MSBA projects, including the Whitman-Hanson Regional High School.
Peter Haviland	Principal, North Attleborough High School	Mr. Haviland is an experienced building leader and oversees the daily operations of North Attleborough High School.
Catherine Blake	Assistant Superintendent, North Attleborough Public Schools	Ms. Blake serves as the Assistant Superintendent for Finance for the North Attleborough Public Schools. She is also MCPPO certified (3/8/2022),
Ethan Hamilton	Chair – Building Committee. Member, North Attleborough School Committee	Mr. Hamilton has served on the School Committee since 2016, including the last three years as Chair. Mr. Hamilton also has extensive accounting experience.
Cari Orsi	Civil Engineer, Parent	Ms. Orsi is an experienced Project Engineer whose responsibilities include preparing proposals, preparation and oversight of design and construction documents, local and state permitting, public presentations and permitting hearings, and construction administration services.
Kathryn Hobbs	Member, North Attleborough School Committee	Ms. Hobbs has served on the School Committee since 2018 and was also instrumental in the passage of an operational override in 2019.

Procurement administrator: Catherine Blake, Assistant Superintendent for Finance and Operations, MCPPO Certification Date 3/2/2022. The procurement administrator was a voting member of the Selection Committee.

Issuing the Request for Services:

On May 23, 2023, the Selection Committee presented the draft RFS to the School Building Committee. The School Building Committee approved the draft RFS, which was then submitted to MSBA for review. On June 6th, once all MSBA edits were finalized, the Selection Committee presented the final document to the School Building Committee. The School Building Committee then voted to approve the final document and authorized the subcommittee to advertise. The **certified** vote approving the RFS and authorizing the Selection Committee to issue the RFS is attached as Exhibit B.

On June 14, 2023, the Town of North Attleborough advertised an RFS for an OPM for a school construction project in the Central Register and local newspaper, the Sun Chronicle, as required by law. Copies of the Advertisement (with the name of the publisher visible) are attached as Exhibit C. An informational meeting and site inspection was held on June 20th and twelve (12) interested parties attended. One question was received from the interested parties and addressed in published answers and resulted in addenda to the RFS, which was sent to all potential respondents on Monday, June 26th.

Review of Responses Received:

Twenty-seven (27) potential respondents requested the RFS including:

Firm Name
1. Ai3 Architects
2. Allied Solution Enterprise
3. Anser Advisory
4. Atlantic Construction Management
5. CHA
6. Colliers Engineering
7. CREF
8. Dodge Construction Network
9. Dore and Whittier
10. Finegold Alexander
11. Gannett Fleming
12. HMFH Architects
13. Jacobs
14. JCJ Architecture
15. Jonathan Levi Architects
16. LeftField
17. LeMessurier
18. P3 Project Planning
19. Peer Consultants
20. Perkins Eastman
21. PMA Consultants
22. RGB Architects
23. Rider Levett Bucknall
24. Skanska USA
25. The LiRo Group
26. The Vertex Companies
27. Turner & Townsend

Eight (8) respondents submitted responses by the due date of July 12, 2023 at 2:00 PM as follows:

Firm Name
1. CHA
2. Colliers Engineering
3. Jacobs
4. LeftField
5. PMA Consultants
6. Skanska USA
7. Turner & Townsend
8. Vertex Company

The Selection Committee members each received copies of the responses that were received. The Selection Committee determined which responses comply with the minimum requirements set forth in M.G.L. c.149 §44A½ for an “owner’s project manager” and 963 CMR 2.00 *et seq.*

The Selection Committee then ranked the group of respondents that met the minimum requirements. They ranked this group based on the selection criteria listed in the RFS as described below.

- 1) Past performance of the Respondent, if any, with regard to public, private, Department Of Education funded and MSBA-funded school projects across the Commonwealth, as evidenced by:
 - a) Documented performance on recent previous projects as set forth in Attachment C, including the number of projects managed, project dollar value, number and percentage completed on time, number and dollar value of change orders, average number of projects per project manager per year, number of accidents and safety violations, dollar value of any safety fines, and number and outcome of any legal actions; **(5 points)**
 - b) Satisfactory working relationship with designers, contractors, Owner, the MSBA and local officials. **(5 points)**
- 2) Thorough knowledge of the Massachusetts State Building Code, regulations related to the Americans with Disabilities Act, and all other pertinent codes and regulations related to successful completion of the project. **(5 points)**
- 3) Thorough knowledge of Commonwealth construction procurement laws, regulations, policies and procedures, as amended by the 2004 Construction Reform laws. (If the Owner is contemplating utilizing a CM-At-Risk, knowledge and experience with CM-At-Risk Procurement methodology should be included as a preferred evaluation criteria.) **(5 points)**
- 4) Management approach: Describe the Respondent’s approach to providing the level and nature of services required as evidenced by proposed project staffing for a potential (hypothetical) proposed project for new construction of approximately 175,000 square feet or renovation of 175,000 square feet; proposed project management systems; effective information management; and examples of problem-solving approaches to resolving issues that impact time and cost. **(15 points)**
- 5) Key personnel: Provide an organizational chart that shows the interrelationship of key personnel to be provided by the Respondent for this project and that identifies the individuals and associated firms (if any) who will fill the roles of Project Director, Project Representative and any other key roles identified by the Respondent, including but not limited to roles in design review, estimating, cost and schedule control. Specifically, describe the time commitment, experience and references for these key personnel including relevant experience in the supervision of construction of several projects that have been either successfully completed or in process that are similar in type, size, dollar value and complexity to the project being considered. **(15 points)**

- 6) Capacity and skills: Identify existing employees by number and area of expertise (e.g. field supervision, cost estimating, schedule analysis, value engineering, constructability review, quality control and safety). Identify any services to be provided by sub-consultants. **(5 points)**
- 7) Identify the Respondent's current and projected workload for projects estimated to cost in excess of \$1.5 million. **(5 points)**
- 8) Familiarity with Northeast Collaborative for High Performance Schools criteria or US Green Building Council's LEED for Schools Rating System. Demonstrated experience working on high performance green buildings (if any), green building rating system used (e.g., NE-CHPS or LEED-S), life cycle cost analysis and recommendations to Owners about building materials, finishes etc., ability to assist in grant applications for funding and track Owner documentation for NE-CHPS or LEED-S prerequisites. **(5 points)**
- 9) Thorough knowledge and demonstrated experience with life cycle cost analysis, cost estimating and value engineering with actual examples of recommendations and associated benefits to Owners. **(10 points)**
- 10) Knowledge of the purpose and practices of the services of Building Commissioning Consultants. **(5 points)**
- 11) Financial Stability: Provide current balance sheet and income statement as evidence of the Respondent's financial stability and capacity to support the proposed contract. **(5 points)**
- 12) Plan to effectively seek input from all constituents. Describe timing, method, and how feedback would be integrated into the design of the building. **(15 points)**

The Selection Committee ranked the respondents as follows:

Firm Name	Cumulative Average Score (highest to lowest)
1. Skanska USA	95.14
2. Colliers Engineering	92.14
3. Vertex Company	91
4. LeftField	87.57
5. PMA Consultants	86.57
6. Turner & Townsend	86.29
7. CHA	74
8. Jacobs	70.57

The Selection Committee short-listed the following respondents:

Firm Name	Cumulative Average Score (highest to lowest)
1. Skanska USA	95.14
2. Colliers Engineering	92.14
3. Vertex Company	91
4. LeftField	87.57

The Selection Committee conducted interviews of the short-listed respondents on Wednesday, July 26th.

Interviews:

Four (4) respondents were interviewed and the following questions were asked.

Management approach (20 points)

Can you walk us through your typical project management approach for a school building project, from the initial planning phase to project completion?

What separates and/or differentiates your firm's qualifications to serve as North Attleborough's OPM over those of the other firms seeking to be selected and hired for this project?

Key personnel (20 points)

Discuss the level of engagement that your project team will have with school or town personnel. As an Owner's Project Manager, what steps do you take to maintain effective communication with the school administration, project team members, and other relevant parties throughout the project's lifecycle?

Capacity and skills (5 points)

What are the most common problems encountered with contractors during the construction phase of a large K-12 public school project, and how do you effectively manage them?

How do change orders occur in your work and what strategies do you employ to limit change orders throughout the design and construction process?

In school environments, safety and security are paramount. How do you ensure that safety measures are integrated into the project plan and diligently followed during construction?

How do you approach sustainability and energy efficiency in school building projects? Can you provide examples of sustainable practices you've implemented in the past?

Life cycle cost analysis and value engineering (15 points)

How do you approach the development of operating and life-cycle cost projections for a new school, and how important are they in the scoping and design processes?

Give some specific examples of value engineering from previous projects that were designed to reduce the budget which also created outcomes that the owner was less than satisfied with, and how did you resolve it?

Obtaining and integrating community feedback (20 points)

Describe your experience with soliciting community input and addressing stakeholder concerns during the feasibility and preliminary design phases of K-12 public school projects. What are some specific strategies or tools you have used in other communities, and elaborate on the successes and failures of those?

Can you describe a situation where you had to handle a dispute or conflict between stakeholders during a school building project, and how did you resolve it?

The Selection Committee used the following scoring system in assessing the interviewees, which was in accordance with the process outlined in the Owner's OPM RFS:

The interview questions will be based on management approach (20 points), key personnel (20 points), capacity and skills (5 points), life cycle cost analysis and value engineering (15 points) and obtaining and integrating community feedback (20 points). The interview and question period will not exceed 60 minutes.

The Selection Committee factored in the respondent's original responses with the interview scores, which was in accordance with the process outlined in the Owner's OPM RFS.

Below are narratives of each interview that the Selection Committee conducted.

Narrative from the interview with Vertex:

Project Director Tim Bonfatti stated his firm's philosophy is based on leadership, collaboration, and accountability. His project team will take our vision and make it a reality. Collaboration and communication are key to the success of the project. Mr. Bonfatti stated, "as a team we are proactive and passionate about the project and totally committed from start to finish." Mr. Bonfatti emphasized the years of experience his team has working together as well as with local towns, cities, communities and the MSBA. Their communications plan will be to create a collaboration portal and will include weekly, bi-weekly and monthly meetings to ensure all of the milestones are met throughout the course of the project. Team members are all accessible to all school personnel. The site manager will examine all plans and make himself familiar with all aspects of the project to reduce the risk of any problems during the construction phase of the project. The site manager dedicates his time in getting to know all the players and creating a collaborative team. The site manager takes an active role when he does his daily walk-throughs, identifying potential problems before they occur. He works intently to avoid any costly change orders.

Vertex strengths included their vast experience with similar school building projects, collaboration with MSBA, and the depth of knowledge and experience demonstrated by each team member. Additional strengths include project accounting support, which will assist North Attleborough staff in processing reimbursement requests to the MSBA in a timely manner. Throughout the course of the interview, the Vertex project team demonstrated a high level of confidence, drive, experience and cohesiveness, which led them to be ranked the highest of all candidates interviewed. The interview team did not have any concerns about Vertex's ability to serve as our OPM.

Narrative from the interview with LeftField:

Senior Project Manager Craig DiCarlo stated they were working on seven high schools right now, thirteen schools in total. He explained they would develop a website for project accessibility. He described his team as leaders and problem solvers who would advocate for us and foster a collaborative environment. Their team was made up of members with a range of experience from 15 years to 40 years. Mr. DiCarlo stated they would be involved in the early stages with experts to help us communicate our priorities. Work plans would be developed so we would know what is going on at all times. Maintaining a schedule is a top priority and would be constantly monitored to avoid any delays. The Project Engineer is a key position who focuses on the supply chain to ensure no delays. Their experience as a team has created innovative ways to keep a project on schedule. Tightly set up construction documents will help eliminate change orders. They will work closely with the design team and the Town's safety and security personnel to create a safe and secure environment. They will work diligently to dispel any misinformation and will educate the community on MSBA involvement.

Strengths demonstrated during LeftField's interview included their data analysis and thoroughness of presenting information, as well as the availability of key personnel and sub-consultants to work on our project. The OPMSC did feel that although Leftfield's team of projector members had significant experience, that several team members were new to the company, which may impact their ability to work as a cohesive team. Leftfield also lacked a financial support team member, which impacted their overall ranking. During the interview process, Leftfield's responses to each question posed was somewhat lengthy and repetitive. Their presentation and subsequent answers to follow-up questions were not as organized or consistent as other firms interviewed.

Narrative from the interview with Colliers:

Senior Director Alan Minkus stated their firm would advocate for us. They would hold bi-weekly and monthly meetings to keep everyone informed on the progress of the project. They would do a community outreach and communicate closely with the Town Council to ensure accurate information was being dispersed. An advantage they have over others is their in-house commissioning team who are assigned at the pre-design phase and continue from inception through occupancy. Designated team members are assigned specific activities during the various phases to keep everything on schedule. Collaboration is key so a team will be developed in the beginning including the OPM, the designer and the contractors to ensure we are working together. They will be held accountable for keeping the contractors accountable. They would involve safety and security teams during the design phase, so everyone is on the same page. A website would be developed along with social media accounts to keep the community informed on the process.

Strengths demonstrated during Collier's interview included their experience and expertise with sustainability and systems, as well as their ideas around community engagement. The committee questioned the cohesiveness of the project team. Notably, most of the project team members had limited participation during the interview process, and thus we weren't able to learn more about their background, management and communication style, etc. In addition, two key members had worked at Colliers for less than a year, and we questioned how well the team would work together.

Narrative from the interview with Skanska:

Project Director Mary Ann Williams stated our team will drive the process. We build relationships with all the stakeholders. Ms. Williams stated the site representative is there day and night whenever anything is happening at the site. He is the first to arrive and the last to leave every day. We are constantly updating our schedule. Our expertise as a team and our reputation speaks for itself and encourages us to check their references. She stated a subcommittee would be developed and communication lines opened to provide feedback. Their challenge will be to get a commitment from the team at the beginning and work diligently to ensure they stay focused on that commitment throughout the life of the project. Detailed plans in the development phase will limit change orders later. Those plans are reviewed by everyone and everyone will be held accountable. There will be a systematic plan for safety and security and we will meet with the entire team of safety and security personnel.

Strengths demonstrated during Skanska's interview include experience with local MSBA High School building projects, as well as a commitment to working with and engaging the community throughout the life of the project. Although Skanska had an excellent interview, there were some concerns about the cohesiveness of their project team. Most of the interview/follow-up questions were fielded by one project team member, leaving the interview committee questioning others' roles and how they fit into the overall project plan.

After the interviews, the Selection Committee ranked the four short-listed respondents as follows:

Firm Name	Cumulative Average Score (highest to lowest)
1. Vertex	78
2. Skanska	72.43
3. LeftField	70.71
4. Colliers	69.43

Cumulative average score out of 80 possible points.

Reference Checks:

The Selection Committee conducted three reference checks for each short-listed candidate in accordance with the process outlined in the Owner’s OPM RFS, and as summarized in the OPM Reference Checks Matrix (attached as Exhibit E).

Final Ranking of all Interviewees:

The Selection Committee ranked Vertex first based on:

- Expertise and Experience: Project team members have a long and proven track record with MSBA projects, including a 100% success rate at funding approval and ballot initiatives.
- Synergy amongst team members was evident during the interview process. It was clear they leveraged each member’s strengths and perspectives to produce high-quality work.
- Local Knowledge: Familiarity with the Massachusetts construction industry and regulatory landscape; additionally, key team members reside in close proximity to North Attleborough.
- On-site project personnel (Construction Site Manager and Construction Project Manager) were impressive during the interview process and their experience was validated through reference checks.
- Financial/Accounting support is strong.

The Selection Committee ranked Skanska second based on:

- Proven experience with MSBA projects
- Strong relationships with all stakeholders
- Commitment to communication and community engagement during the entire process
- Most of the interview/follow-up questions were fielded by one project team member, leaving the interview committee questioning others’ roles and how they fit into the overall project plan.

The Selection Committee ranked LeftField third based on:

- Proven experience with MSBA projects
- Commitment to building and maintaining a tight project schedule
- Commitment to maintaining open lines of communication with all stakeholders and the greater community
- Concerns about cohesiveness of project team

The Selection Committee ranked Colliers fourth based on:

- Strong communication and community outreach plans
- In-house commissioning team
- Commitment to holding themselves, and the building contractor, accountable at all stages of the process
- Apprehension about the synergy of the project team.
- Key project team members had limited experience at the firm.

Conclusion Statement:

The Vertex Companies, LLC and the Town of North Attleborough have completed negotiations and The Vertex Companies, LLC has signed the MSBA standard Contract for Project Management Services for a Design/Bid/Build or Construction Manager at Risk project, without modifications to its terms and conditions. The contract as signed only by The Vertex Companies, LLC is attached as Exhibit G.

Pursuant to section 3.2 of the Contract between the OPM and the Town of North Attleborough, the Eligible Applicant for the Town of North Attleborough has designated John Antonucci, Superintendent, and Michael Borg, Town Manager, as the individuals who shall have the authority to act on behalf of the Owner under this Contract and who shall be responsible for the day-to-day communication between the Owner and the OPM.

Based on the information as stated above, the undersigned hereby certify that: (1) all required local approvals in connection with the RFS have been obtained, (2) the Owner utilized a qualifications-based selection process, (3) the Owner followed the procurement process that was set forth in the RFS that was issued by the Owner, including the process for scoring and reference checks, (4) the final ranking of respondents accurately reflects the scores received by the respondents, and (5) the scoring sheets used in the selection process are true, complete and accurate. The Owner recommends the selection of The Vertex Companies, LLC as the most qualified respondent to provide OPM Services for the proposed North Attleborough High School project. The Owner requests that the MSBA approve its selection as required by 963 CMR 2.11(2).

Chief Executive Officer

Dated

Procurement Administrator (MCPPO Certified)

Dated