Pierce School Project
Owners Project Manager Interview Questions and Responses from Leftfield (LF)
9 July 2020

1. What other projects is/will each of you be assigned to during the project study, design and construction period of this project? What assurances can your firm provide that the proposed team will stay with the project for the duration and that they will not be overly assigned to other projects going forward? Finally, if in the opinion of the Town of Brookline that any of your staff are not the best match for the project, how would you expect that to be communicated to your firm and how would you address it?

Response:

J. Rogers recapped the slide from their presentation with regards this question. He stated not necessarily does one size fit all. Each person has varied strengths that are needed at various times. LF will be dedicating the same five individuals to the Pierce project that are serving on Driscoll. It is efficient and makes sense to LF. LF has 26 staff which is as large as or larger than their competitors. As to changes, ask J. Rogers and LF will comply.

2. This project may require occupancy or partial occupancy during construction and/or relocation of students off site? What is your experience with this including, safety, logistics, budget, scheduling and implementing of same?

Response:

At a project in Wachusett, modular buildings were used including some that were two stories. They were assembled, dismantled and relocated about the site as needed. In this way they were able to move students in and out as needed. The facility remained fully occupied and functional. LF assigned extra staff. These types of projects require a lot of coordination and planning.

3. Describe your firm’s experience with fossil free/sustainable projects and how specifically can your firm be helpful with regards it?

Response:

LF has done a number of sustainable projects including Harvard University which achieved LEED platinum. The Salem State Garage project was awarded sustainable by the green design board. J. Faxon and C. Montanez are the LF MEP experts. LF has lots of experience with high efficiency equipment and design. L. Stapleton mentioned one project that is net zero design. Driscoll School is their first fossil free school and they are learning from it. As far as tight sites such as Pierce School, East Somerville is similar. There they use wind turbines and PV arrays. If not enough space for geothermal, Pierce might consider all electric.

4. MSBA projects require participation by MBE/WBE firms by the contractor and others. What are the challenges to this and how specifically can your firm be helpful in our project meeting or exceeding with these expectations?

Response:

It’s been LF experience that all projects meet the goals when it comes to designer contracts. It’s more difficult with construction contracts because such a large percentage of the work is trade contractors (filed sub bidders). Bigger projects have more opportunity to meet diversity requirement, for example material suppliers.
5. What efforts has your firm made and what successes have you had, to ensure equal employment opportunities in your firm and to increase the diversity of your staff?

Response:

LF recapped the slide from their presentation part of the interview. LF has always tried to be an EEO employer and they feel the statistics of their firm lend that credence. Another goal is to help staff on their path to citizenship, where applicable.

6. In your role as a public sector OPM, please share the worst and best experience both your firm and an Owner had on a project. In the case of the worst, what was learned that you can apply to avoid a similar scenario with our project?

Response:

The best and worst is the Driscoll School. After the Town of Brookline vote for funding and the project moved to Design Development, the project got off to a rough start with communication and personality issues. LF had some difficulty understanding how Brookline works. But all parties stayed with it and found a good way forward. It’s their experience that all projects have their challenges.

7. Describe how your firm will maximize the efforts of the independent Commissioning agent before and during construction and at the time of commissioning itself. Commissioning, especially of complex systems such as temperature controls can be very challenging, share some specific examples of how your firm will manage it.

Response:

J. Faxon stated he is heavily involved in commissioning. Among the things he tries to do is learn the sequence of operations as best he can as he relies on experience gained over the years. He is familiar with DDC controls. He oversees commissioning and training. He encourages the Commissioning Agent to get out into the field and get directly involved. The Durfee School is a recent project in which J. Faxon has been deeply involved.
Pierce School Project
Owners Project Manager Interview Questions and Responses from Hill International (Hill)
9 July 2020

1. What other projects is/will each of you be assigned to during the project study, design and construction period of this project? What assurances can your firm provide that the proposed team will stay with the project for the duration and that they will not be overly assigned to other projects going forward? Finally, if in the opinion of the Town of Brookline that any of your staff are not the best match for the project, how would you expect that to be communicated to your firm and how would you address it?

Response:

V. Varbediar is the propose project director and she will make sure the Hill team has all the resources they need. She is currently working with the Town of Swampscott on feasibility and schematics for a new elementary school project. She is also working together with M. Mahoney in Watertown and on the Weymouth Library project. A. Crowley is working on projects in Weymouth as well at about 30% of his time. If the Town of Brookline has a staff issue they should contact V. Varbediar and determine the best way forward.

2. This project may require occupancy or partial occupancy during construction and/or relocation of students off site? What is your experience with this including, safety, logistics, budget, scheduling and implementing of same?

Response:

M. Mahoney and R. Boddie worked together for 20 years, including two school projects in Hingham and Abington (not with Hill), both built within 40 feet of existing schools. The Abington project included a more district-wide approach. It involved closing schools and centralizing locations into better and newer schools. Five or six schools and the central administration office were moved in a short time frame.

3. Describe your firm’s experience with fossil free/sustainable projects and how specifically can your firm be helpful with regards it?

Response:

Fossil free building is coming on fast. Hill has a number of projects with this component. Developing a program that is fossil free is challenging and costly. It starts with understanding the needs of the community and the budget. Hill worked with the Brookline Housing Authority to get them “greener” with their heating approach. A net zero project in Lexington is currently on hold. Congested areas have space limitations and every site is unique. For Pierce, this aspect would need to be tailored to the project and consider budget limitations. For tight urban sites, PV solar panels may not be best due to the economics of it. Geothermal would also present technical issues. Any solution would need to include other things such as lighting and lighting controls.

4. MSBA projects require participation by MBE/WBE firms by the contractor and others. What are the challenges to this and how specifically can your firm be helpful in our project meeting or exceeding with these expectations?

Response:

The MSBA and SDO provide some assistance. This should be included as part of designer selection together with the best experience for the Pierce project. Hill would provide outreach to both designers and contractors.
5. What efforts has your firm made and what successes have you had, to ensure equal employment opportunities in your firm and to increase the diversity of your staff?

Response:

Hill has always provided opportunities for minorities and women. As a team they push each other and help each other to expand in the industry. All individuals have different strengths and attributes and all work together. The different Hill offices collaborate between each other with diverse staffs and as a group to provide the best service to the client.

6. In your role as a public sector OPM, please share the worst and best experience both your firm and an Owner had on a project. In the case of the worst, what was learned that you can apply to avoid a similar scenario with our project?

Response:

M. Mahoney talked about the Hingham High School project which included adding a very large STEM addition and a renovated 1960s era wing. There was a constant struggle to maintain safe passage of students in areas adjacent to construction to get to cafeteria and other public spaces. In one of the phases related to the library and home economics area, a huge choke point was inadvertently created for the passage of students. The solution included having the contractors staff move out of the way during the change of classroom periods. This is an example of working with the school and contractor to find a solution. The lesson learned is to be willing to adapt and work as a team and to think of potential issues not from just a design or construction standpoint. The project completed on time and on budget. In response to a question about BHS insights, Hill noted the proposed team for Pierce is not the same as BHS. Need to include all stakeholders including the public and to know the project costs up front.

7. Describe how your firm will maximize the efforts of the independent Commissioning agent before and during construction and at the time of commissioning itself. Commissioning, especially of complex systems such as temperature controls can be very challenging, share some specific examples of how your firm will manage it.

Response:

Commissioning starts on day one and need a Commissioning Agent (CA) on board to work with the designer and to effectively plan. Need to understand the role of the CA and the subcontractors and communicate same to them. Temperature controls and the sequence of operations should not go to just the lowest bidder. Make sure the CA observes the “functional checklist” and include it as part of the Schedule of Values. Be sure the performance specs capture the requirements of complex systems such as lighting controls.
Pierce School Project
Owners Project Manager Interview Questions and Responses from Dore + Whittier (DW)
8 July 2020

1. What other projects is/will each of you be assigned to during the project study, design and construction period of this project? What assurances can your firm provide that the proposed team will stay with the project for the duration and that they will not be overly assigned to other projects going forward? Finally, if in the opinion of the Town of Brookline that any of your staff are not the best match for the project, how would you expect that to be communicated to your firm and how would you address it?

Response:

DW is involved with three MSBA projects that will soon be complete, so the firm is eager for new work. Wellesley Elementary School in Peabody is in designer selection. Maria Hastings School is in close-out. Manchester Memorial Elementary School is planned for completion in 2021. DW has a staff of 60, most of whom live in the greater Boston area. Considering the design side of the firm with the OPM side, DW has a lot of resources. If there are any issues with any staff person, the Town’s concerns should be communicated directly to M. Burton.

2. This project may require occupancy or partial occupancy during construction and/or relocation of students off site? What is your experience with this including, safety, logistics, budget, scheduling and implementing of same?

Response:

It is assumed the Old Lincoln School will be used as a swing space. That being stated, it does not appear to have the capacity for all operations. There will need to be another supplemental opportunity for swing space or possibly phased construction. As examples, the Manchester school is on a small site with phased construction within feet of the existing building. As far as experience working in tight urban areas like Pierce, M. Burton noted that in his experience with Turner most of his work was in downtown Boston. Some examples are MIT, a high rise near MGH, Genzyme in Allston. T. Hartford noted he has worked on many power plant projects in urban areas. DW will look at options for temporary measures.

3. Describe your firm’s experience with fossil free/sustainable projects and how specifically can your firm be helpful with regards it?

Response:

DW expects the Pierce project will be LEED silver at a minimum. The Maria Hastings School in Town of Lexington is an all-electric net zero project to be completed this September. DW will share “lessons learned”. The Pierce School has challenges for net zero partly because the site is small which limits geothermal opportunities. Consider placing the wells under the building, energy efficient windows and other measures. For example, the Hastings school has rooftop solar, community solar.

4. MSBA projects require participation by MBE/WBE firms by the contractor and others. What are the challenges to this and how specifically can your firm be helpful in our project meeting or exceeding with these expectations?

Response:

DW noted the revised participation goals as recently issued by the Commonwealth’s SDO office increasing design WBE/MBE goals from 17.9% to 21% and construction from 10.4% to about 12%. DW will work with the designer and contractor on meeting the goals, and they have experience with firms that can meet and exceed them. As far as outreach is concerned, DW will personally reach out to firms they know can provide MBE participation.
5. What efforts has your firm made and what successes have you had, to ensure equal employment opportunities in your firm and to increase the diversity of your staff?

Response:

DW recapped the slide from their presentation with respect to this question. Their staff is 35% women and they acknowledge they are not where they would like to be with respect to minority employment. To address this they are working on internships and co-ops with students both on the design and project management sides of the firm.

6. In your role as a public sector OPM, please share the worst and best experience both your firm and an Owner had on a project. In the case of the worst, what was learned that you can apply to avoid a similar scenario with our project?

Response:

The Maris Hastings School has been a very fun project to work on. There is an effective project team with both a great architect and CM@R firm. They lost time on the schedule owing to site work issues, but they were able to recover and finish on time. M. Burton stated he could not think of a bad experience with DW. Back when he was with Turner as OPM on the Newton South High School project in 1999, the general contractor went out of business at 60% construction. The remaining team had to figure out how to complete the project and succeeded in getting it done on time.

7. Describe how your firm will maximize the efforts of the independent Commissioning agent before and during construction and at the time of commissioning itself. Commissioning, especially of complex systems such as temperature controls can be very challenging, share some specific examples of how your firm will manage it.

Response:

T. Hartford noted the MSBA requires a commissioning agent (CA). The CA works with the entire team to ensure what is procured and installed is per plans and specs. Recent experiences includes a 300K sf vocational school. There will be issues with systems such as lighting and HVAC and commissioning is a constant and continual process. It is important to get a good CA firm. M. Burton stated the biggest potential failure points are with advanced technology systems. DW will work with the design team to require lots of training for staff.

M. Burton then offered some brief closing remarks to the effect that DW would really like the Pierce project, K-12 schools is all they do, they have knowledge from both the design and OPM perspective, they understand codes and have developed customized tools for the MSBA process.
Pierce School Project
Owners Project Manager Interview Questions and Responses from CHA
8 July 2020

1. What other projects is/will each of you be assigned to during the project study, design and construction period of this project? What assurances can your firm provide that the proposed team will stay with the project for the duration and that they will not be overly assigned to other projects going forward? Finally, if in the opinion of the Town of Brookline that any of your staff are not the best match for the project, how would you expect that to be communicated to your firm and how would you address it?

Response:

R. Marks is currently assigned to a project in Westport which he has been on for 15 months. He and T. Walton are both working on an elementary school in Randolph, which is nearing completion. M. McNulty is working on a library in Sherborn and a charter school in Lowell. D. Richardson, the MEP/Commissioning staff person is working on multiple projects. The firm has 33 staff people based in Boston including seven estimators so there are a lot of resources available. If the Town of Brookline (TOB) is having any issues with a particular staff person, someone should contact R. Marks and ask they be reassigned. As far as R. Marks time on this project, he stated it will vary from 25-30% to as much as 40-50% of his time.

2. This project may require occupancy or partial occupancy during construction and/or relocation of students off site? What is your experience with this including, safety, logistics, budget, scheduling and implementing of same?

Response:

Old Lincoln School will be the swing space. To do a project of this size the children need to be off site. There may need to be another location to house students as well. M. McNulty comes from a background with Suffolk Construction. An example of his experience with this is a summer project at MIT. Other CHA examples include Belmont High School, at 400K sf facility built adjacent to an occupied school, and two projects in the Town of Lincoln with Consigli Construction.

3. Describe your firm’s experience with fossil free/sustainable projects and how specifically can your firm be helpful with regards it?

Response:

Belmont High School has 300 geothermal wells at 300’ deep, with a full time inspector observing development of three wells per day. In the Town of Lincoln, PV systems are being installed on roof at no capital cost to the town. In a follow up question, specifically to the Pierce School project, CHA responded there may be opportunities for some geothermal wells, under the building for example. Other potential sources of energy would be off-site energy or on site PV arrays, likely to be a combination of sources. Wind energy is not likely applicable to the Pierce project.

4. MSBA projects require participation by MBE/WBE firms by the contractor and others. What are the challenges to this and how specifically can your firm be helpful in our project meeting or exceeding with these expectations?

Response:

R. Marks stated he has been engaged with this for 40 years. Strategies involve meeting with the contractor/CM@R and instruct as to the importance of this issue, verify and work hard to ensure compliance. M. McNulty indicated he was part of the diversity and inclusion group at Suffolk. The challenges include a limited pool of MBE subcontractors; General Air is one example of a MBE firm. T. Walton noted the difficulty in New Bedford in meeting workforce requirements. One strategy that may help is to break up scope of work in non-trade contractors where applicable.
5. What efforts has your firm made and what successes have you had, to ensure equal employment opportunities in your firm and to increase the diversity of your staff?

Response:

CHA is passionate about this, with a 33 person Boston office, 10 of whom are not majority, believe in the "melting pot". The seven estimators are from seven different countries. A fifteen year long term employees is African American and three of six project managers are female.

6. In your role as a public sector OPM, please share the worst and best experience both your firm and an Owner had on a project. In the case of the worst, what was learned that you can apply to avoid a similar scenario with our project?

Response:

The worst is the West Tisbury project. The team in that town worked for two years on the project only to have votes not approve funding. The best is when a school opens and seeing the students in the building for the first time; Dearborn is a recent example.

7. Describe how your firm will maximize the efforts of the independent Commissioning agent before and during construction and at the time of commissioning itself. Commissioning, especially of complex systems such as temperature controls can be very challenging, share some specific examples of how your firm will manage it.

Response:

Commissioning really starts in the design phase with discussions with the user agency to make sure all their goals are met including maintenance and system requirements. Next systems should be selected that can be maintained by staff. Control systems need to be designed properly and any value engineering efforts should not hinder operability of systems. CHA has on staff an electrician who is very familiar with lighting controls. Commissioning is a continuous process into the O&M and warranty phases.

R. Marks then offered some brief closing remarks to the effect that CHA can keep the project on budget, work with COVID as it is and that they would very much like to be the OPM on the John R. Pierce Project.
Meeting Minutes

Name of Committee: Pierce School Owner's Project Manager Selection Committee
Meeting Date: 8 July 2020 Time: 9:00 a.m. and 9 July 2020 Time: 2:00 p.m. Meeting Location: Zoom
Next Meeting: 16 July 2020 at 1:00 p.m. via Zoom

Topic: Meeting Minutes - Meeting Minutes of 24 June 2020 unanimously approved by roll call vote after moved by H. Charlupski and seconded by S. Federspiel

Topic: Interviews

See attached notes and presentation materials of the four short-listed firm's interviews which took place as follows;

8 July 2020

9:00 a.m. CHA
10:00 Dore + Whittier

9 July 2020

2:00 p.m. Hill International
3:00 Leftfield

Respectfully submitted,
Anthony Guigli
Project Administrator
✓ Educational K-12 is our firm's focus
✓ Provide Project Management and Design expertise on Massachusetts public schools
✓ Deep bench with vast expertise
✓ Local relationships
✓ Successful working with the MSBA
✓ Detailed & knowledgeable process managers
✓ Team leaders & collaborators
Staffing Plan

Mike Burton
- Project Director
- Partner
- 28 years of building experience
- Team leadership
- Net Zero experience
- Risk management
- Schedule & cost
- Building oversight

Christina Shefferman
- Project Manager - Process
- MSBA process management
- SBC leadership
- Meeting manager & facilitator
- Communication manager

Mike Cox
- Project Manager - Controls
- Financial manager
- Budget & ProPay management
- Change management
- MSBA budget coordination

Terry Hartford
- On-Site Project Manager
- On-site troubleshooting
- Daily communication w/Owner's team
- Transition training & turnover
- Commissioning & punch list manager

Rachel Donner
- Assistant Project Manager
- Documentation & record management
- Meeting minutes
- Communication coordinator
- Assist other team members

Jon Donner
- On-Site Project Representative
- On-site daily activity record keeping
- Drawing & specification compliance verification
- 3rd party inspection coordinator

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TIME COMMITTED TO THIS PROJECT---

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What interests your firm about the Pierce project and what challenges do you foresee?
✓ Opportunity to create relationships with Brookline
✓ Opportunity to build a vehicle for students of Brookline to be successful in their studies for 50+ years
✓ Project aligns with our team's expertise, skillset, and capacity
✓ Complex site will require highest level of planning and teamwork
Transparency  
Consistency  
Collaboration  
Community  
Participation  

✓ Stakeholder communications  

OPM Project Team  

Teachers & Administrators  

Students & Parents  

Neighbors & The Community  

School Building Committee  

Local Authorities & Inspectional Services  

MSBA  

All Project Phases
Q: Discuss management of the project including budget, schedule, designer and contractor procurement (including participation of MBE/WBE firms in same).
Managing Budget

✓ Confirm Brookline goals for program and cost. Establish realistic total project budget w/ MSBA.

✓ Multiple estimates during design / value engineering

✓ Quality bid documents / OPM design review

✓ Construction Manager at Risk (Ch. 149a)
Managing Budget

✓ MSBA ProPay budget system
  ▪ Dashboard (D+W)
✓ Live audit
✓ Simplify monthly submissions
Managing Schedule

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- Establish realistic goals from beginning
- CM-at-Risk / Early Release Packages (ERP)
- Monthly schedule review and analysis
- On-site management
- Build a successful team (capacity/skillset)
Forming the Team

- OPM – MSBA OPM Selection Committee
- Designer – MSBA Designer Selection Panel
- CM/GC – Ch. 149 vs 149a
- Contractors (FSB/NFSB)
- Build a successful team that aligns with project vision and goals
MBE/WBE

✓ D+W has worked with 40+ MBE/WBE firms across MA

✓ As of July 1, DCAMM set new MBE/WBE participation goals on state funded building projects
  - Overall Annual Program Goals for Design:
    MBE – 6.6%  WBE – 5%
  - Overall Annual Program Goals for Construction:
    MBE – 4.2%  WBE – 8.8%

Work with the GC/CM subcontractors that will help achieve the goal

▪ Project specific goals developed by awarding authority on an individual project by project basis
Q: Discuss management of designer and contractor after procurement.
Managing Project Team

✓ Collaborative approach
✓ Hold all parties accountable
✓ Lead project team meetings
✓ Constant monitoring & evaluation
Q: Describe your firm's experience with MSBA systems including a clean, successful and timely audit at the end of the project.
MSBA Systems

✓ Understand all modules and requirements for MSBA submissions
✓ Monthly reporting
✓ Work hand-in-hand with MSBA project management team
✓ 3011 development (total project budget) eligible and ineligible
✓ Budget revision requests
✓ ProPay / dashboard
✓ Commissioning
✓ Closeout
"Working with D+W has been a great experience. They manage the project as if it were their own school—it is like having an extension of our staff. They know the project inside and out and the team is on top of every detail. They are collaborative in their process and do a great job keeping a large committee informed and working efficiently.

The combination of collaboration and decisive decision-making set them apart from other Project Managers. Our complicated project on a very tight site is on time and on budget!"

—Pam Beaudoin, Superintendent, Manchester Essex Regional School District"
QUESTIONS?
## Current Projects

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<th>Manchester ES</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
<th>2024</th>
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<tr>
<td></td>
<td>JASON</td>
<td>JFMAM</td>
<td>JASON</td>
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<td>JASON</td>
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<tr>
<td></td>
<td>Phase 1</td>
<td>Phase 2</td>
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</table>
AGENDA

- WHO WE ARE
- YOUR PROJECT TEAM
- PROJECT UNDERSTANDING
- MSBA EXPERIENCE
- MANAGEMENT APPROACH
- MEP / COMMISSIONING
- SUSTAINABILITY
- QUESTIONS & ANSWERS
Who We Are — Hill International Inc.

Worldwide Leader in:
- Project Management Services
- Construction Management Services
- Construction Estimating Services
- Construction Scheduling Services
- Owner’s Representative Services

Founded in 1976. Headquartered in Philadelphia, PA
2,700 Professionals in 50 Offices Worldwide

Massachusetts Presence since 1996 (Became Hill in 2013) Needham, MA
Managed More than $1 Billion in Public Projects in Massachusetts
39 Professionals Cover New England
Your Project Team

Vivian Varbedian, MCPPO | Project Director

Vivian has successfully managed several MSBA Grant funded projects throughout the Commonwealth. Her strength lies in her ability to manage the team, the complexities of the project, and the expectations of the town, design team, and contractor.

Mary Mahoney, MCPPO | Project Manager

Mary has over 33 years of experience providing project management and owner’s representative services, and has successfully managed several MSBA Grant funded projects throughout the Commonwealth.

Alex Crowley | Assistant Project Manager

Alex has worked well with Mary and Roger on several similar projects and his expertise includes helping clients meet reporting needs, tracking budgets and schedules, leading technical meetings, and assessing worksite conditions.

Richard "Rick" Anderson, MCPPO | MEP

Rick Anderson has more than 35 years of project management experience in the planning, pre-construction, procurement, design, construction administration/owner’s representation, commissioning, and delivery of a wide variety of projects.
Your Project Team

- **Feasibility Study & Schematic Design**
  - Vivian Varbedian, MCPPO

- **Design Development**
  - Approximately 20%; as needed
  - Mary Mahoney, MCPPO

- **Construction Documents**
  - Approximately 50%
  - Approximately 30%
  - Alex Crowley
  - Rick Anderson, MCPPO

- **Construction & Closeout**
  - MEP Subject Matter Expert - As Needed
  - Roger Boddie

Full Time
Project Understanding

Achieving Excellence
- Educational Vision
- Budget – Cost Certainty
- Site Utilization
- Enrollment from PreK – 8th Grade
- Achieving Consensus for all Stakeholders
- Public Outreach

Challenges We Foresee:
- The District’s mission to accommodate its growing population in a singular location.
- Maximum utilization of existing site – Town of Brookline wishes to examine expanding in place options. Will Need to study the efficient use of the existing 198,000 gross square feet area.
- The addition of the prekindergarten population to the John R. Pierce School. The current enrollment of 842 students is expected to increase to 958 students by 2022 then around 940 students from 2023 through 2027.
- Achieving consensus with all the stakeholders throughout the process.
Project Understanding

Achieving Consensus

Our Style...
We are skilled Facilitators
We will be Present
Engage the Community and the various Stakeholders
Listen to Everyone
Pay attention to "The Little Things"
Project Understanding

COMMUNICATION

Stakeholder Groups
Future Focused
Design Patterns
Guiding the Process
Project Understanding

Develop a plan for to communicate to All the Stakeholders and Execute
MSBA Experience

East Bridgewater High School
$76 million
New grade 7-12 Model School

Paul Revere School
$17.4 million, 50,000 sf new elementary school

Maria Weston Chapman MS,
Weymouth
$164.2M, 252,000 new and renovation, 1470 students

Middleton Howe Manning
New Elementary School
$35 million New 83,000 sf school for 533 students - CHPS

Millbury Shaw Elementary School
$63 million New 3-6, 550 students

Town of Braintree East Middle School
$83 million, 1,128 student renovation

Estabrook Elementary School (CM at Risk project), Lexington, MA
$41 million - new 90,000 SF Elementary School

Park Ave. Elementary School,
Webster, MA
$47 million - new construction

Jonas Clarke Middle School
$22 million - Middle School Renovation and Addition

West Revere School Complex
$38.5 million - New Whelan Elementary School and Susan B. Anthony Middle School.
First MSBA Project

McKinley Elementary School
City of Revere
$40 million - New McKinley Elementary School

Southeastern Regional Vocational Technical High School - $33 million
High School Renovation

Diamond Middle School
$ 45 million - Middle School Renovation and Addition

Holyoke ARP
$15 million, three building program

New Everett High School
$82 million
325,000 sf building

Rumney Marsh Academy Revere
$32.6 million New 95,030 sf middle school for 564 students

Town of Natick, High School
$89 million - New high school

Medford Public School Ph 2
Roberts Elementary School
$16 million Elementary school for 604 students

Town of Dracut
$60 million
High School Add/Renovation

South Middle School, Braintree
$80M, New construction
MSBA Experience

Preliminary Timeline for Modules 2 through 5
Feasibility Study and Schematic Design

September 2020 – July 2022

- OPM Selected MSBA Approved September 2020
- Preliminary Design Program to the MSBA April 2021
- Preferred Schematic Report to the MSBA November 2021
- MSBA Board of Directors Preferred Schematic Approval January 2022
- Schematic Design Submittal to the MSBA May 2022
- Project Scope and Budget approval MSBA Board, July 2022
- Designer Selection November 2020
- Facility Assessment Subcommittee (FAS) Meeting December 2021
- Project Scope and Budget Conference, June 2022
MSBA Experience

Key items to include in the RFS for Designer Selection:

1. Education Planning and Potential Grade Re-configuration
2. District wide review of overall facilities needs and enrollment increases.
3. Explore alternate site locations and site logistics.
4. Design for Team Teaching and Student Staff collaboration.
5. Design to include fine arts performing arts programs.
6. Look at both renovation and new construction options.
7. Address Special needs and ELL learning requirements.
8. Address MA CHPS or LEED Certification and MSBA Green School Incentives
9. Project Delivery Method Hard Bid Chapter 149 or CM @ Risk Chapter 149a
10. Understanding of MA-DOER "Green Community" designation and principles of climatic action change
MSBA Experience

- MSBA's Designer Selection Panel is made up of 13 appointed members and three representatives of the District

- The three members who are representatives of the District includes:
  - one member designated by the school committee;
  - the superintendent of schools or his/her designee;
  - the chief executive officer of the city or town or his/her designee
MSBA Experience

Project Development

Meetings

Public Facilities Department
Public Visioning Sessions
School Department
School Staff and Teachers
City Departments
Public Safety
Town Committees/Boards/Commissions

Surveys

Existing Conditions Analysis
Geo-technical and Environmental Investigations
Site Survey
Traffic Study
Energy Model
Life Cycle Analysis
Climate Action Analysis

✓ Program and Building Design
✓ Safety and Security
✓ MEPFP Design
✓ Landscape
✓ Sustainability Elements
✓ Furniture, Fixture and Equipment
✓ Technology
How do you guide a Building Committee through the decision of Design/Bid/Build vs. CM-at-Risk?

Chapter 149

All risk factors need to be addressed prior to filed sub-bid process without input of GC

✓ Lowest price on bid day
✓ Traditional delivery system
✓ Tight Documents are essential
✓ Variation from bid day plan can result in exposure to cost and schedule risk

Chapter 149A

CM engaged in pre-construction process to address risk factors prior to issuing trade and non-trade bid packages

✓ CM can be engaged early for logistical planning
✓ Allows flexibility to fast track project
✓ Contractor input is received before bidding
✓ Contract is open book and costs are audited

“It's all about Risk Management”
Consensus Through Engagement

MSBA Experience

"Best Possible Community Solution"

Sustainability / Energy

Accessibility / Wayfinding

Phasing / Disruption

Educational Vision

Traffic / Site Opportunities

Design Option A
Design Option B
Design Option C
Design Option D
Design Option E
### Preferred Option Cost Analysis

<table>
<thead>
<tr>
<th>PROGRAM</th>
<th>Enrollment</th>
<th>Total Area of Renovation</th>
<th>Total Area of New Construction</th>
<th>Total Building Area</th>
<th>Construction Start</th>
<th>Project Duration</th>
<th>School Opens</th>
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<tbody>
<tr>
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<td>275</td>
<td>275</td>
<td>275</td>
<td>275</td>
<td>275</td>
<td>275</td>
<td>Jan-17</td>
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<tr>
<td>All B: Shirley Elem School Renovation</td>
<td>45,619</td>
<td>45,619</td>
<td>45,619</td>
<td>45,619</td>
<td>45,619</td>
<td>45,619</td>
<td>Feb-17</td>
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<tr>
<td>All C: Stanley Elem School Renovation</td>
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<td>40,163</td>
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<td>40,163</td>
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<td>Feb-17</td>
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<tr>
<td>All D: Stanley Elem School Enhanced AddReno</td>
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<tr>
<td>All E: New 2 Story School at Stanley Elem Site (M/V Lincoln School Hotel)</td>
<td>635</td>
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<td>All F: New 2 Story Elem School at Stanley Site</td>
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<tr>
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<td>59,488</td>
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<td>59,488</td>
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<tr>
<td>All I: Renovations of Stanley, Shirley and Clarke over time: Data Repair Open</td>
<td>111,982</td>
<td>111,982</td>
<td>111,982</td>
<td>111,982</td>
<td>111,982</td>
<td>111,982</td>
<td></td>
</tr>
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</table>

### TOTAL PROJECT BUDGET

| PROJECT TOTALS | 19,472,680.00 | 23,663,400.00 | 19,472,400.00 | 21,262,400.00 | 25,778,450.00 | 39,718,650.00 | 39,172,650.00 | 38,263,900.00 | 39,774,000.00 |
| Total Reimbursable Costs | - | - | - | - | - | - | - | - | - |
| Total Non-reimbursable Costs | 19,472,400.00 | 23,663,400.00 | 19,472,400.00 | 21,262,400.00 | 25,778,450.00 | 39,718,650.00 | 39,172,650.00 | 38,263,900.00 | 39,774,000.00 |
| Estimated MSBA Reimbursement | - | - | - | - | - | - | - | - | - |
| Estimated Swampscott Share | 19,472,680.00 | 23,663,400.00 | 19,472,400.00 | 21,262,400.00 | 25,778,450.00 | 39,718,650.00 | 39,172,650.00 | 38,263,900.00 | 39,774,000.00 |

Subject to MSBA Invitation
### Total Project Budget

**Southeastern Regional School District**  
**Southeastern Regional Vocational Technical High School**  
3/8/2011

<table>
<thead>
<tr>
<th>Category</th>
<th>Estimated Budget</th>
<th>*Cost/Scope Items Excluded from the Total Facilities Grant</th>
<th>*Ineligible Costs</th>
</tr>
</thead>
<tbody>
<tr>
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<td>$0</td>
<td>$0</td>
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<tr>
<td>FF&amp;E Subtotal</td>
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<tr>
<td>Owner's Contingency</td>
<td>$394,375</td>
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<tr>
<td>Soft Costs that exceed 26% of Contingent Cost</td>
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<tr>
<td>Total Project Budget</td>
<td>$32,977,475</td>
<td>$491,716</td>
<td>$0</td>
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<tr>
<td>Alternates</td>
<td>$1,282,812</td>
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<td>Ineligible cost</td>
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<tr>
<td>Scope items excluded</td>
<td>$491,716</td>
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<tr>
<td>Estimated Basis of Total Facilities Grant</td>
<td>$32,485,759</td>
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<tr>
<td>Reimbursement Rate</td>
<td>80.00%</td>
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<tr>
<td>Estimated Total Maximum Facilities Grant</td>
<td>$25,988,607.56</td>
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<tr>
<td>School District Share</td>
<td>$8,271,979.79</td>
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<td>$34,260,287.35</td>
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**Southeastern Regional School District**  
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3/8/2011

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<td>$0</td>
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<tr>
<td>Ineligible cost</td>
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<td>$25,988,607.56</td>
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<tr>
<td>School District Share</td>
<td>$8,271,979.79</td>
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<td>$34,260,287.35</td>
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**NOTE:** This document was prepared by the MSBA based on a preliminary review of information and estimates provided by the Southeastern Regional School District for the Southeastern Regional Vocational Technical High School project. Based on this preliminary review, certain budget, cost, and scope items have been determined to be ineligible for reimbursement; however, this document does not contain a final, exhaustive list of all budget, cost, and scope items which may be ineligible for reimbursement by the MSBA. The Authority shall determine, in its sole discretion whether any such budget, cost, or scope items are eligible for reimbursement. The MSBA may determine that certain additional budget, cost, and scope items are ineligible for reimbursement.

**NOTE:** Pursuant to Section 5.0 of the Project Funding Agreement and the applicable policies and guidelines of the Authority, any project costs associated with the realization or transfer of funds from the Owner's contingency or the Construction contingency to other budget line items shall be subject to review by the Authority to determine whether any such costs are eligible for reimbursement by the Authority.
Management Approach

Project Accomplishments this Month
- Completion of exterior framing and Air Vapor Barrier
- Roofing complete
- MEP is on-going on 1st and 2nd floor
- Window installation
- Elevator pit is dug and concrete is on-going

Projected Major Tasks next Month
- Continue exterior brickwork
- Complete building systems coordination and rough-in piping
- Continue interior MEP rough-in
- Continue window installation
- Ground floor insulation and drywall

Schedule Summary - Upcoming Milestones

<table>
<thead>
<tr>
<th>Task</th>
<th>Planned Start</th>
<th>Planned Finish</th>
<th>Actual Start</th>
<th>Actual Finish</th>
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<tr>
<td>GMP with Shawmut</td>
<td>7/5/18</td>
<td>11/16/18</td>
<td>6/24/18</td>
<td>11/16/18</td>
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<tr>
<td>Phase 1B - New Cafeteria / Temp Guidance</td>
<td>5/29/18</td>
<td>8/15/18</td>
<td>5/29/18</td>
<td>8/15/18</td>
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<tr>
<td>Phase 1B - Foundation - Phase 1</td>
<td>8/4/18</td>
<td>10/9/18</td>
<td>8/15/18</td>
<td>9/15/20</td>
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<tr>
<td>Steel Erection - Phase 1 - New Bldg</td>
<td>6/14/18</td>
<td>8/24/18</td>
<td>6/14/18</td>
<td>8/24/18</td>
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<td>Phase 1A - Summer 2018 - Demo</td>
<td>9/26/18</td>
<td>10/12/18</td>
<td>9/12/18</td>
<td>10/15/20</td>
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<tr>
<td>Topping Off Steel - Phase 1 - New Bldg</td>
<td>8/4/16</td>
<td>10/12/16</td>
<td>7/8/16</td>
<td>10/15/20</td>
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<td>Underground utilities - Phase 1</td>
<td>7/15/18</td>
<td>10/12/18</td>
<td>7/15/18</td>
<td>10/11/18</td>
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<tr>
<td>Site Phase 1 - New Construction</td>
<td>8/4/16</td>
<td>10/12/18</td>
<td>4/9/16</td>
<td>10/11/18</td>
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<tr>
<td>Slab on Deck</td>
<td>9/17/18</td>
<td>10/11/18</td>
<td>9/17/18</td>
<td>10/11/18</td>
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<tr>
<td>Exterior framing</td>
<td>10/15/18</td>
<td>11/15/18</td>
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<tr>
<td>Roof construction</td>
<td>10/5/18</td>
<td>12/23/18</td>
<td>12/21/18</td>
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<tr>
<td>Exterior substantially complete Phase 1</td>
<td>9/17/18</td>
<td>10/11/18</td>
<td>9/17/18</td>
<td>10/11/18</td>
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<tr>
<td>Phase 1 substantial completion</td>
<td>7/13/19</td>
<td>11/18/19</td>
<td>7/13/19</td>
<td>11/18/19</td>
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PROJECT FINANCIAL OVERVIEW

<table>
<thead>
<tr>
<th>Description</th>
<th>Baseline Budget</th>
<th>Authorized Changes</th>
<th>Approved Budget</th>
<th>Committed Costs</th>
<th>Uncommitted Costs</th>
<th>Forecast Costs</th>
<th>Total Project Costs</th>
<th>Expenditure in Date</th>
<th>Balance To Spend</th>
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<tbody>
<tr>
<td>Construction</td>
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<td>($1,323,763)</td>
<td>$66,562,936</td>
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<td>Administrative</td>
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<td>F&amp;E</td>
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<td>$2,832,000</td>
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<td>SUBTOTAL</td>
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<td>$79,329,105</td>
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<td>Owner's Soft Cost Contingency</td>
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<td>$83,472,111</td>
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<td>$83,472,111</td>
<td>$55,897,613</td>
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## Project Budget and Cost Summary

**Description**

<table>
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<tr>
<th>Description</th>
<th>Budget</th>
<th>Authorized Changes</th>
<th>Approved Budget</th>
<th>Baseline</th>
<th>(Com. Cost tab)</th>
<th>Forecast</th>
<th>Total Project Cost</th>
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<td>20 Construction</td>
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<td>$3,625,736</td>
<td>$3,461,972</td>
<td>$163,764</td>
<td>$3,625,736</td>
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<td>30 Architectural &amp; Engineering</td>
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<td>Designer - Basic Services (Lead)</td>
<td>$50,000</td>
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<td>$42,374</td>
<td>$475,000</td>
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<tr>
<td>Administrative Costs</td>
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<td>$17,380</td>
<td>$238,094</td>
<td>$220,714</td>
<td>$17,380</td>
<td>$238,094</td>
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<tr>
<td>Owner’s Project Manager Basic Services</td>
<td>$37,884</td>
<td>$17,380</td>
<td>$55,264</td>
<td>$37,884</td>
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<td>OPM Reimbursables &amp; Other Services</td>
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<td>$0</td>
<td>$0</td>
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<tr>
<td>Other Adsorbs Cost</td>
<td>$220,714</td>
<td>$17,380</td>
<td>$238,094</td>
<td>$220,714</td>
<td>$17,380</td>
<td>$238,094</td>
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<tr>
<td>Furniture, Fixtures and Equipment &amp; Misc</td>
<td>$170,000</td>
<td>- $20,090</td>
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<tr>
<td>Furniture, Fixtures and Equipment (Base)</td>
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<td>Technology</td>
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<tr>
<td>Construction Testing &amp; Inspection</td>
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<td>Moving Cost</td>
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<td>$191,549</td>
<td>$280,000</td>
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<td>Total</td>
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<td>$15,290</td>
<td>$4,498,300</td>
<td>$4,383,000</td>
<td>$15,290</td>
<td>$4,498,300</td>
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<tr>
<td>Project Sub-Total</td>
<td>$736,831</td>
<td>$3,831,076</td>
<td>$178,468</td>
<td>$4,768,175</td>
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</table>
MSBA Commissioning Certificate of Completion

The undersigned Commissioning Consultant hereby certifies that all requirements for commissioning have been completed in accordance with the Master Commissioning Services Agreement dated __________ and Work Order No. __________ dated __________ between the Commissioning Consultant and the MSBA.

Commissioned Systems:

<table>
<thead>
<tr>
<th>Available</th>
<th>Not Available</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Windows and Doors</td>
</tr>
<tr>
<td></td>
<td>Roofing Systems</td>
</tr>
<tr>
<td></td>
<td>Boiler Systems</td>
</tr>
</tbody>
</table>

Other (specify):  

1. Functional performance tests for each sub-system and system as established by the Commissioning Plan have been executed and satisfactory performance has been achieved.
2. All items listed on the Issues Log have been appropriately resolved.
3. A Final Commissioning Report has been submitted to the MSBA and the Owner.

Certified: Commissioning Consultant (sign)
Firm: ________
Type name: ________
Title: ________
Date: ________

The Owner’s Project Manager acknowledges:

1. Functional performance tests for each sub-system and system as established by the Commissioning Plan have been executed and satisfactory performance has been achieved.
2. All items listed on the Issues Log have been appropriately resolved.
3. A Final Commissioning Report has been submitted to the MSBA and the Owner.

Acknowledged: Owner’s Project Manager (sign)
**MEP / Commissioning**

UMass Dartmouth - School for Marine Science and Technology

Project Document Review - Comments and Responses

September, 2015

Reviewer: Hallam-ICS

### Design Development Documents Review

<table>
<thead>
<tr>
<th>Item</th>
<th>Drawing/Specification</th>
<th>Reference</th>
<th>Comments</th>
<th>Response Date</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Drawings</strong></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>General</td>
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<tr>
<td></td>
<td>Civil</td>
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<tr>
<td></td>
<td>Landscape</td>
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<tr>
<td></td>
<td>Structural</td>
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<tr>
<td></td>
<td><strong>Architectural</strong></td>
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<tr>
<td></td>
<td>Fire Protection</td>
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<tr>
<td></td>
<td><strong>Mechanical</strong></td>
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<td></td>
<td><strong>Electrical</strong></td>
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<tr>
<td></td>
<td><strong>Plumbing</strong></td>
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</tr>
<tr>
<td>1</td>
<td>P2.0</td>
<td>Col D.8/11</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Consider not routing plumbing vents horizontally below grade for the two mechanical room floor drains.</td>
<td></td>
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</tr>
<tr>
<td>2</td>
<td>P4.0</td>
<td>General</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Coordinate access panels with plumbing isolation valves serving fixtures, consider locating valves out in ACT areas if restroom ceilings will be gyp board. It would allow the restroom ceilings not to be so cluttered.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>3</td>
<td>P4.0</td>
<td>General</td>
<td></td>
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<tr>
<td></td>
<td>Consider adding wall clean outs for waste laterals in walls serving wall hung water closets.</td>
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<tr>
<td>4</td>
<td>P3.1</td>
<td>General</td>
<td></td>
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<tr>
<td></td>
<td>Consider locating exterior hose bibs if owner wants them, it appears none are shown at this time.</td>
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<tr>
<td>5</td>
<td>P4.3</td>
<td>GWH-1 and 2</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Exhaust Venting and intake venting routes seem long. Verify heaters can be installed with venting routes proposed. This venting is also shown on H1.1. Consider not showing it on both drawings to avoid duplicate scopes.</td>
<td></td>
<td></td>
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</tbody>
</table>

### HVAC

<table>
<thead>
<tr>
<th>Item</th>
<th>Reference</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>General</td>
<td>Consider adding some general ventilation/fans in the Boiler Room to allow for heat removal from the heat generating equipment.</td>
</tr>
<tr>
<td>2</td>
<td>AHU</td>
<td>Consider adding notes and information for coil pull removal and access.</td>
</tr>
<tr>
<td>3</td>
<td>General</td>
<td>Consider showing clearance for chiller tube bundle removal and cleaning and adding notes for required clearance around chiller control panels per the NEC.</td>
</tr>
<tr>
<td>4</td>
<td>Normal Elect Rm 218</td>
<td>Consider adding some general ventilation/fans in the Elect Room to allow for heat removal from the heat generating equipment.</td>
</tr>
</tbody>
</table>
Sustainability

Hill is aware of Brookline's Climate Action Committee

LEED Credit Categories

- Sustainable Sites
- Water Efficiency
- Energy & Atmosphere
- Materials & Resources
- Indoor Environmental Quality
- Innovation in Operations & Regional Priority

LEED Projects:

- Watertown 3 Schools, LEED/ Net Zero
- UMass Amherst Design Building, LEED Gold (Net Zero Design)
- UMass Amherst South College, LEED Gold
- Webster ES, LEED Gold
- Estabrook ES, LEED Silver
- East Bridgewater HS, LEED Silver
- Natick HS, LEED Silver
- Northeastern ISEC, LEED Gold
- Braintree East Middle School, LEED Silver
- Swampscott Hadley Elementary School, LEED
Your Success is Our Success

"It's All About the Brookline Community"

- Your Opinions
- Your Ideas
- Your School
- Maintain budget and schedule
- Keep the stakeholders/community informed and aware
Questions and Answers
Community Engagement

Project Charter

Definition of Project Success

The top ranked items voted by the community, the committee, and the project team that will make the Concord Middle School a success are listed below.

The Goals for the Bird Middle School are:

✓ Provide a new 21st Century School for Middle School Students
✓ Resolve the challenges with aging building systems
✓ Resolve the issues of traffic flow
✓ Unify the Town in support of the project.
✓ Be a safe and secure building incorporating the latest security features in design with CCTV monitoring
✓ Construction will be of the highest quality, a building designed to last
✓ Be age appropriate and scaled for the middle school age group
✓ Have the latest technology with easy access to IT and media for students, a 21st Century learning environment
✓ Have low energy and maintenance costs
✓ Incorporate Green Technologies and Sustainable Design
✓ Have open and welcoming spaces with central access point
✓ Be easy to navigate for students
✓ Serve as a community resource with spaces for community use.
✓ Use the building process to engage and excite the community
✓ Responsible Visible Value
✓ Provides an excellent healthy safe environment for occupants
✓ The School will be delivered on time and on budget.

INPUT & COMMUNITY SUPPORT THROUGH FEASIBILITY STUDY

- March 2, 2017  SBC Meeting
- March 9, 2017  SBC Meeting
- April 25, 2017  SBC Meeting
- June 6, 2017  2 Public Forums in One Day
- June 20, 2017  SBC Meeting
- July 26, 2017  SBC Meeting
- August 8, 2017  SBC Meeting
- August 22, 2017  SBC Meeting
- October 3, 2017 Visioning Session
- October 17, 2017 Visioning Session
- October 30, 2017 Visioning Session
- January 3, 2018  SBC Meeting
- January 16, 2018  SBC Meeting
- January 30, 2018  SBC Meeting
- April 23, 2018  SBC Meeting
- May 17, 2018  SBC Meeting
- June 11, 2018  Public Forum
- June 19, 2018  SBC and SC Meeting
- July 24, 2018  SBC Meeting

Additional 20+ meetings with the School and Town Departments have taken place
COMMUNITY SURVEY (668 RESPONDENTS)

The issue of parity was raised during the review of alternatives. How important is it that all middle school students of the same grades receive the same educational experience from the School Building project?

- Extremely Important: 67%
- Very Important: 21%
- Somewhat Important: 7%
- Not So Important: 3%
- Not at all Important: 1%

How important is a solution that reduces the amount of transitions between schools?

- Extremely Important: 44%
- Very Important: 31%
- Somewhat Important: 18%
- Not So Important: 7%
- Not at all Important: <1%

How important is a solution that also helps to address the District's ability to provide All Day Kindergarten?

- Extremely Important: 47%
- Very Important: 25%
- Somewhat Important: 16%
- Not So Important: 3%
- Not at all Important: 4%

The School Building Committee narrowed the viable options to two final designs. Which of the following design alternatives provides the best long-term solution for educating Weymouth middle school children?

- Option D: 88%
- Option C: 8%
- Another Option: 4%
- I don't support a new Chapman: <1%
# Management Approach

## Risk Register

<table>
<thead>
<tr>
<th>Risk</th>
<th>Open Close</th>
<th>Issue Date</th>
<th>Risk Description</th>
<th>Category</th>
<th>Likelihood</th>
<th>Impact</th>
<th>Risk Rating</th>
<th>Score Rating</th>
<th>Action</th>
<th>Risk Owner</th>
<th>Date Due</th>
<th>Risk Level</th>
<th>Group</th>
<th>Required Date</th>
<th>Stage 1 of 2</th>
<th>Stage 2 of 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td></td>
<td>25-Oct-17</td>
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<td>16</td>
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<td>3-Dec-17</td>
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<td>17</td>
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<td>13-Dec-17</td>
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<td>18</td>
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<td>12-Jan-17</td>
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</tbody>
</table>

- **Risk 8** is marked as 'Open' and has a due date of 25-Oct-17.
- **Risk 16** is marked as 'Open' and has a due date of 3-Dec-17.
- **Risk 17** is marked as 'Open' and has a due date of 13-Dec-17.
- **Risk 18** is marked as 'Open' and has a due date of 12-Jan-17.
- **Risk 19** is marked as 'Open' and has a due date of 6-Jan-17.
- **Risk 20** is marked as 'Open' and has a due date of 5-Jan-17.
- **Risk 21** is marked as 'Open' and has a due date of 17-Feb-17.
- **Risk 22** is marked as 'Open' and has a due date of 6-Feb-17.
- **Risk 23** is marked as 'Open' and has a due date of 15-Feb-17.

**Notes:**
- Risk 8: Additional work required due to changes in project scope.
- Risk 16: Budget constraints may impact delivery time.
- Risk 17: Environmental concerns need to be addressed immediately.
- Risk 18: Equipment failure may delay project completion.
- Risk 19: Vendor capacity issues affecting project timelines.
- Risk 20: Material shortages may cause delays.
- Risk 21: Supply chain disruptions impacting project delivery.
- Risk 22: Weather conditions affecting construction timelines.
- Risk 23: Resource allocation needs to be reviewed.

**Actions:**
- Review project scope and adjust accordingly.
- Revise budget to accommodate constraints.
- Implement environmental strategies to address concerns.
- Source alternative equipment or services.
- Implement alternative sourcing strategies.
- Adjust timelines and resources accordingly.
- Monitor weather conditions and plan contingency measures.
- Reassess resource allocation and adjust as necessary.
- Conduct regular monitoring and review project timelines.
### Management Approach

#### Value Management Log

<table>
<thead>
<tr>
<th>Item #</th>
<th>VE/VAM Item</th>
<th>Trade</th>
<th>Risks</th>
<th>Comments</th>
<th>Ball in Court</th>
<th>Estimated Value</th>
<th>Cost to Implement</th>
<th>Net Savings</th>
<th>Status</th>
<th>Accepted Value</th>
<th>Rejected/Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>LEVEL 1: Items, if accepted would not affect/ would minimally affect the Program/ Design Intent</td>
<td>Site / Electric</td>
<td>Loss of lead point, loss of identity between buildings, green initiative.</td>
<td>Owner accepted. Will allow for more parking, should not affect overall design, certification.</td>
<td>Estimators</td>
<td>$300,000</td>
<td>$0</td>
<td>$300,000</td>
<td>Accept</td>
<td>$30,000</td>
<td>$0</td>
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<tr>
<td>02</td>
<td>Reduce the amount of Curtain wall on the north side of the Gym. Step 1 (Approximately 1,500 sf)</td>
<td>Brick / Curtain wall</td>
<td>Light reduction of natural light.</td>
<td>Owner accepted. Noting anything to reduce cost on the Gym north side should be done.</td>
<td>Estimators</td>
<td>$106,000</td>
<td>$52,000</td>
<td>$54,000</td>
<td>Accept</td>
<td>$53,000</td>
<td>$5</td>
</tr>
<tr>
<td>03</td>
<td>Reduce the amount of Curtain wall on the north side of the Gym. Step 2 (Total reduction 300 sf)</td>
<td>Brick / Curtain wall</td>
<td>Could further reduce natural lighting.</td>
<td>Owner accepted. Noting anything to reduce cost on the Gym north side should be done.</td>
<td>Design Team</td>
<td>$53,000</td>
<td>$25,000</td>
<td>$26,500</td>
<td>Accept</td>
<td>$26,500</td>
<td>$9</td>
</tr>
<tr>
<td>04</td>
<td>Reduce the amount of Curtain wall on the north side of the Gym. Step 3 (less item 3 &amp; 4 above)</td>
<td>Brick / Curtain wall</td>
<td>Could further reduce natural lighting.</td>
<td>Owner noted additional savings on the north side of the gym could be reviewed. Design team to continue to review options, through Design.</td>
<td>TBD</td>
<td>Under Review</td>
<td>$0</td>
<td>$50</td>
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<tr>
<td>05</td>
<td>Reduce door/masonry assemblies on the north side of the Gym. Also look at other areas.</td>
<td>Brick</td>
<td>Could affect the overall design light visual down grade.</td>
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</tr>
<tr>
<td>06</td>
<td>Terrazzo Flooring. Step 2: Adjust area, reduce Terrazzo area.</td>
<td>Terrazzo/Porcelain Flooring</td>
<td>Would affect the overall design down grade and potential savings.</td>
<td></td>
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</tr>
<tr>
<td>07</td>
<td>LEVEL 2: Items, if accepted could affect Program/ Design Intent</td>
<td></td>
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<tr>
<td>08</td>
<td>Reduce windows at corner rooms, and replace with brick. In classrooms that already have 1 wall of windows, they will not have a second wall of windows (approx. 3ft. x 3ft.)</td>
<td>Brick / Curtain wall</td>
<td>Light reduction of natural light.</td>
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</tr>
<tr>
<td>09</td>
<td>Link for alternatives to metal panel and curtain wall systems. Evaluate if Curtain wall could be adjusted to storefront in some locations.</td>
<td>Curtain wall / Metal Panels</td>
<td>Could affect the overall design down grade depending on size.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Meet the scope of replacing the modular classroom from the project.</td>
<td>Specialty sub</td>
<td>Units have to be moved, no change just moving from the</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>LEVEL 3: Items, if accepted will affect the Program/ Design Intent</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Review options for HVAC, Reductions in the gym or other areas.</td>
<td>HVAC</td>
<td>Would impact the program to be slight.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Target reduction in light fixture costs</td>
<td>Electric</td>
<td>Would impact the program to be slight.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Target Reduction in Science areas to be where the school replaces the</td>
<td>Various</td>
<td>Need BIBA Approval</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Property Services - Project Risk & Issue Log

<table>
<thead>
<tr>
<th>#</th>
<th>Risk Description</th>
<th>Impact</th>
<th>Risk Probability</th>
<th>Risk Mitigation, Precautionary Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>HVAC Cost</td>
<td>High</td>
<td>Medium</td>
<td>Reduce HVAC costs by selecting more efficient equipment.</td>
</tr>
<tr>
<td>2</td>
<td>Site Access</td>
<td>Medium</td>
<td>High</td>
<td>Implement security measures to ensure site access.</td>
</tr>
<tr>
<td>3</td>
<td>Construction Schedule</td>
<td>High</td>
<td>High</td>
<td>Develop a detailed construction schedule to track progress.</td>
</tr>
</tbody>
</table>

---

**Hill International**

**MDS**

**BPS**

**Owner's Project Manager Services for the Pierce School | 31**
Management Approach

INPUT & COMMUNITY SUPPORT THROUGH FEASIBILITY STUDY

- March 2, 2017
- March 9, 2017
- April 25, 2017
- June 6, 2017
- June 20, 2017
- July 26, 2017
- August 8, 2017
- August 22, 2017
- October 3, 2017
- October 17, 2017
- October 30, 2017
- January 3, 2018
- January 16, 2018
- January 30, 2018
- April 23, 2018
- May 17, 2018
- June 11, 2018
- June 19, 2018
- July 24, 2018

SBC Meeting
SBC Meeting
SBC Meeting
2 Public Forums In One Day
SBC Meeting
SBC Meeting
SBC Meeting
Visioning Session
Visioning Session
Visioning Session
SBC Meeting
SBC Meeting
SBC Meeting
SBC Meeting
SBC Meeting
SBC Meeting
SBC and SC Meeting
SBC Meeting

Additional 20+ meetings with the School and Town Departments have taken place
Management Approach – Commissioning

Question:
When do Commissioning Activities begin?

Answer:
The day the project starts!

- Early planning – Bring on Cx during Design Development Phase
- Define systems for Functional Performance Testing (FPT)
- Insuring that Startup & Commissioning activities are an integral part of the project schedule and not an “after thought” (allow time for activities)
- Make all stake holders accountable – Architect, Engineers, Construction Manager, Subcontractors, Equipment Vendors
- Checking out each piece of equipment and system prior to FPT
- Pre-Functional Performance Testing by subcontractors prior to Functional Performance Testing with the commissioning agent
- Functional Performance Testing and Acceptance
Life-Cycle Cost Analysis

<table>
<thead>
<tr>
<th>OPTION 1</th>
<th>OPTION 2</th>
<th>OPTION 3</th>
<th>OPTION 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Variable Flow Refrigerant with Supplement Hydronic Heat</td>
<td>Variable Air Volume with Terminal Hydronic Reheat</td>
<td>4-Pipe Fan Coil Unit System</td>
<td>Geothermal Water Source Heat Pump</td>
</tr>
</tbody>
</table>
Management Approach

Proposed Schedule per Elementary School

- are based on a conceptual schedule and not a verified construction schedule
PUBLIC SCHOOLS OF BROOKLINE

JOHN R. PIERCE SCHOOL FEASIBILITY STUDY

JULY 9, 2020

Interview for Owner's Project Management Services
DERIVATION OF LEFTFIELD

left field

NOUN

leftfield (noun)

Why the name leftfield? It wasn't solely because of our love of baseball, but rather more of an idea or a passion for thinking out of the box. We have found that sometimes, the best ideas are the ones that come out of “leftfield” and may not necessarily meet the more mainstream methods or ideologies. Our “leftfield” thinking was developed through our experiences and understanding that there is not a “one size fits all” approach to a project or a program. Every client, every project, and every challenge is unique, and as such require a unique approach to achieving a successful outcome. Because of this, we embrace our “leftfield” thinking and wanted a name that accurately described our approach and our culture.
ABOUT LEFTFIELD

- LEFTFIELD is a full service Owner's Project Management Firm; having been in business for 13 years
- LEFTFIELD's staff has completed over $2 Billion in Public Construction in Massachusetts
- LEFTFIELD's staff has worked with the MSBA since its inception
- LEFTFIELD's staff has completed over $1.5 Billion in MSBA K-12 projects in Massachusetts
- LEFTFIELD has significant experience and success managing complex construction logistics and challenging sites
- With a staff of 26, LEFTFIELD's size is comparable to any other nationally owned OPM firm in Boston

SERVICES PROVIDED:
- Owner Representation
- Clerk of the Works
- Cost Management and Reporting
- Construction Administration
- Audit Services
- MEP Expertise

DEPTH OF OUR FIRM:
- 1 Principal
- 16 Project Managers
- 6 Clerks
- 2 MEP Specialists
- 1 Administrator

PUBLIC SCHOOLS of BROOKLINE
## ABOUT LEFTFIELD

### Diversity

<table>
<thead>
<tr>
<th>Staff Member</th>
<th>Gender</th>
<th>Demographic/Background</th>
<th>Hire Date</th>
<th>Position</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gina Gomes</td>
<td>W (M)</td>
<td>Black/Cape Verdean</td>
<td>2017</td>
<td>Project Manager</td>
<td>Boston Area</td>
</tr>
<tr>
<td>Sally Rogers</td>
<td>W (M)</td>
<td>Black/Cape Verdean</td>
<td>2008</td>
<td>Marketing</td>
<td>Other</td>
</tr>
<tr>
<td>Lynn Stapleton</td>
<td>W</td>
<td>Caucasian</td>
<td>2015</td>
<td>Project Executive</td>
<td>Boston Area</td>
</tr>
<tr>
<td>Linda Lipoto</td>
<td>W</td>
<td>Caucasian/Swedish</td>
<td>2020</td>
<td>Project Director</td>
<td>Boston Area</td>
</tr>
<tr>
<td>Eileen Long</td>
<td>W</td>
<td>Caucasian</td>
<td>2019</td>
<td>Project Manager</td>
<td>Boston Area</td>
</tr>
<tr>
<td>Jennifer Carlson</td>
<td>W</td>
<td>Caucasian</td>
<td>2019</td>
<td>Project Manager</td>
<td>Other</td>
</tr>
<tr>
<td>Agnes Kula¹</td>
<td>W</td>
<td>Caucasian/Born in Poland¹</td>
<td>2018</td>
<td>Accountant</td>
<td>Boston Area</td>
</tr>
<tr>
<td>Paul Gransaull</td>
<td>M (M)</td>
<td>Caucasian/Born in Trinidad²</td>
<td>2013</td>
<td>Project Executive</td>
<td>Other</td>
</tr>
<tr>
<td>Hamdi Cobanoglu¹</td>
<td>M (M)</td>
<td>Asian/Born in Turkey¹</td>
<td>2019</td>
<td>Project Manager</td>
<td>Other</td>
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</tbody>
</table>

¹LEFTFIELD sponsored Citizenship status

<table>
<thead>
<tr>
<th>Consultant</th>
<th>Type of Services</th>
<th>MBE/WBE</th>
</tr>
</thead>
<tbody>
<tr>
<td>TERVA Corporation</td>
<td>Construction Administration</td>
<td>MBE</td>
</tr>
<tr>
<td>Dharam Consulting</td>
<td>Cost Estimating</td>
<td>MBE</td>
</tr>
<tr>
<td>Panorama Consulting</td>
<td>BIM Support</td>
<td>MBE</td>
</tr>
<tr>
<td>Pamela Perini Consulting</td>
<td>Security Consulting</td>
<td>MBE</td>
</tr>
<tr>
<td>Rickes Associates Inc.</td>
<td>Planners</td>
<td>WBE</td>
</tr>
</tbody>
</table>

---

![LEFTFIELD Numbers](LEFTFIELD Numbers.png)

**LEFTFIELD Numbers**

- Women: 27%
- Minorities: 15%
- Both: 35%

---

**LEFTFIELD**

*THE RIGHT CHOICE IN PROJECT MANAGEMENT*

**PUBLIC SCHOOLS of BROOKLINE**
<table>
<thead>
<tr>
<th>1. Introductions</th>
<th>Project Team</th>
<th>4. Management of Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Individual Experience</td>
<td>a. Designer Procurement</td>
<td></td>
</tr>
<tr>
<td>b. Team Experience Together</td>
<td>b. MSBA Module Knowledge</td>
<td></td>
</tr>
<tr>
<td>c. Team Capacity</td>
<td>c. Site Selection</td>
<td></td>
</tr>
<tr>
<td>d. Competitive Advantages</td>
<td>d. CM Procurement</td>
<td></td>
</tr>
<tr>
<td>2. Past Performance</td>
<td>Experience</td>
<td>e. Monthly Project Reporting</td>
</tr>
<tr>
<td>a. Public Entities</td>
<td>f. Budget Management</td>
<td></td>
</tr>
<tr>
<td>b. MSBA Projects</td>
<td>g. Change Management</td>
<td></td>
</tr>
<tr>
<td>3. John R. Pierce School</td>
<td>5. Sustainability</td>
<td></td>
</tr>
<tr>
<td>a. What Interests Us?</td>
<td>6. MEP &amp; Commissioning Knowledge</td>
<td></td>
</tr>
<tr>
<td>b. Challenges</td>
<td>7. Community Outreach</td>
<td></td>
</tr>
<tr>
<td>c. MSBA Feasibility Schedule Analysis</td>
<td>8. MSBA Systems Experience</td>
<td></td>
</tr>
<tr>
<td>d. Budget Analysis – New versus Renovation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTIONS | PROJECT TEAM

Staff Chart

Jim Rogers
MCPPO
Project Director
13 Years

Lynn Stapleton
MCPPO, AIA, LEED AP
Project Executive
5 Years

Jen Carlson
MCPPO
Project Manager
1 Year

Mark Lafleur
MCPPO, CSL, OSHA
Site Representative
3 Years

Specialized Expertise

Matt Casey
MCPPO
Construction Expert
1 Year

Adam Keane
MCPPO
Utilities Expert
7 Years

Jay Faxon
Carlos Montanez, LEED
MEP Specialists
8 Years

PUBLIC SCHOOLS of BROOKLINE

LEFTFIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT
# LEFTFIELD PROJECT TEAM

**Experience Together**

- Driscoll School, Brookline
- Durfee High School, Fall River
- Dale Street School, Medfield
- Amesbury Elementary School, Amesbury
- Galvin Middle School, Wakefield
- Thurgood Marshall Middle School, Lynn
- University Crossing, UMass Lowell

---

**LEFTFIELD**

*THE RIGHT CHOICE IN PROJECT MANAGEMENT*

---

**PUBLIC SCHOOLS of BROOKLINE**
## LEFTFIELD TEAM CAPACITY
### Active Projects

<table>
<thead>
<tr>
<th>TEAM MEMBER</th>
<th>TITLE</th>
<th>John R. Pierce School, Brookline*</th>
<th>Tyngsboro Middle School, Tyngsboro</th>
<th>Driscoll School, Brookline</th>
<th>Waltham High School, Waltham</th>
<th>Durfee High School, Durfee</th>
<th>Gerry School, Marblehead</th>
<th>Florence Roche, Groton-Dunstable</th>
<th>Dale Street School, Medfield</th>
<th>CAPACITY TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jim Rogers</td>
<td>Project Director</td>
<td>25%</td>
<td>10%</td>
<td>25%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>85%</td>
</tr>
<tr>
<td>Lynn Stapleton</td>
<td>Project Executive</td>
<td>10%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>20%</td>
<td>75%</td>
</tr>
<tr>
<td>Jen Carlson</td>
<td>Project Manager</td>
<td>25%</td>
<td>25%</td>
<td>25%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>75%</td>
<td>75%</td>
</tr>
<tr>
<td>Adam Keane</td>
<td>Utilities Expert</td>
<td>15%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>20%</td>
<td>40%</td>
<td>90%</td>
</tr>
<tr>
<td>Matt Casey</td>
<td>Construction Expert</td>
<td>15%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>40%</td>
<td>70%</td>
</tr>
<tr>
<td>Jay Faxon</td>
<td>MEP Specialist</td>
<td>5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>5%</td>
<td>5%</td>
<td>40%</td>
</tr>
<tr>
<td>Mark LaFleur</td>
<td>Site Representative</td>
<td>100%</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100%</td>
</tr>
</tbody>
</table>

*LEFTFIELD*

THE RIGHT CHOICE IN PROJECT MANAGEMENT

PUBLIC SCHOOLS of BROOKLINE
LEFTFIELD TEAM

Competitive Advantages

- Our staff has the knowledge and experience of working in Brookline
  - Building Commission, School Committee, School Building Advisory Committee, Design Advisory Committee, Transportation Board, Planning Board, Engineering, Public Safety
  - We feel we have great synergy with the stakeholders from Brookline

- Our staff’s MSBA knowledge is second to none
  - Lynn has worked with the MSBA since its inception
  - Jen worked for the MSBA previously
  - MSBA is main focus and core part of business

- Lynn’s prior experience working in and with school districts will prove useful during the educational program planning and visioning

- Jay’s HVAC expertise will prove critical when looking at an add/reno alternative

- LEFTFIELD’s team approach to applying specific job knowledge where appropriate

- Monthly reporting is something that LEFTFIELD excels at as a firm

- Unlike the other firms, LEFTFIELD is a locally owned OPM firm – focusing singularly on OPM activities – not architecture, CM wcrk, or estimating. When there is an issue, there is one person to call.
PAST PERFORMANCE | EXPERIENCE
PRIOR MSBA PROJECTS – SAMPLING

$67.7M Thurgood Marshall Middle School, Lynn

$54M Morton Middle School, Fall River

$74.4M Wachusett Regional High School*

Wachusett Regional School District (5 Towns/Cities)
PAST PERFORMANCE | EXPERIENCE
CURRENT PROJECTS – SAMPLING

$62M Isenberg School of Management, UMass Amherst
In Close Out; on schedule and under budget

$260M BMC Durfee High School, Fall River
In Construction; on schedule and under budget

$176M Billerica Memorial High School, Billerica
94% complete; on schedule and under budget

$56M Elbridge Gerry Elementary School, Marblehead
In construction / bidding; on schedule and under budget
JOHN R. PIERCE SCHOOL
Why is LEFTFIELD Interested?

- EFFICIENCY, CONTINUITY, SYNERGY: We've assigned the same LEFTFIELD team for the Pierce School that is currently working on the Driscoll School. It works very well for our team that as we transition to the construction phase with the Driscoll School, we can begin the design phase with the Pierce School. We know our client very well!

- We appreciate the history and diversity associated with the Pierce School. We're excited to help make it a resounding success.

- We have a robust team that enjoys tackling challenging projects and thinking outside the box.
JOHN R. PIERCE SCHOOL
Challenges

- The concrete core of the existing Pierce School coupled with the open design make the building a real challenge to effectively renovate to meet the educational program.

- There is not a lot of available land in Brookline for potential new schools.

- The Pierce School is located on a tight urban site.

- The structures of the parking garage and school are intricately tied.

- With COVID-19, the current financial climate will make obtaining a vote at Town meeting very challenging.
JOHN R. PIERCE SCHOOL
Feasibility and Schematic Design Schedule

---

**2020**
- OPM Selection, Contract Execution, September 14, 2020 MSBA OPM Panel Approval
- Designer Selection Process (MSBA OSP Meetings anticipated for month of December 1, 15, 2020)

**2021**
- Preliminary Design Program (PDP) MSBA Staff Review Only, April 15, 2021
- Development of Alternatives
- Preferred Schematic Report (PSR) - PREFERRED OPTION IS SELECTED - September 8, 2021
- MSBA Board Approval of PSR - October 27, 2021
- Schematic Design Documentation
- Prepare Cost Estimates and Project Budget
- Schematic Design Submission to the MSBA - May 4, 2022
- Finalize Project Scope and Budget with the MSBA
- June 28, 2022 - MSBA Board Approval
- Town Meeting - May 2022
- Secure Funding (520 days from MSBA Approval)
- Execute Project Funding Agreement with MSBA

**2022**
- 3-4 Months

---

**LEFTFIELD**
The Right Choice in Project Management

---

**PUBLIC SCHOOLS of BROOKLINE**
# JOHN R. PIERCE SCHOOL

Feasibility and Schematic Design Schedule

<table>
<thead>
<tr>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>DPM Selection, Contract Execution, September 14, 2020 NSBA DPM Panel Approval</td>
<td>Designer Selection Process (NSBA DSP Meetings anticipated for month of December 1, 15, 2020)</td>
<td>Preliminary Design Program (PDP) NSBA Staff Review Only, April 15, 2021</td>
<td>Development of Alternatives</td>
</tr>
</tbody>
</table>

Analyze Alternatives & Select Preferred Option
JOHN R. PIERCE SCHOOL
Feasibility and Schematic Design Schedule

2020
- OPM Selection, Contract Execution, September 14, 2020
- MSBA OPM Panel Approval

2021
- Designer Selection Process (MSBA DSP Meetings anticipated for months of December 1, 15, 2020)
- Preliminary Design Program (PDP) MSBA Staff Review Only, April 15, 2021
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2022
- Preferred Schematic Report (PSR) - PREFERRED OPTION IS SELECTED - September 8, 2021
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- Prepare Cost Estimates and Project Budget
- Schematic Design Submission to the MSBA - May 4, 2022
- Finalize Project Scope and Budget with the MSBA - June 28, 2022
- MSBA Board Approval
- Execute Project Scope & Budget Agreement
- Town Meeting - May 2022
- Secure Funding (120 days from MSBA Approval)
- Execute Project Funding Agreement with MSBA

2023

LEFTFIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT

PUBLIC SCHOOLS of BROOKLINE
JOHN R. PIERCE SCHOOL
Feasibility and Schematic Design Schedule

22 +/- months shown; could be condensed based on multiple factors
# JOHN R. PIERCE SCHOOL

## Cost Comparisons per SF

**Elementary Schools**

<table>
<thead>
<tr>
<th>Town</th>
<th>School</th>
<th>Start of Construction</th>
<th>Gross Square Footage</th>
<th>Site Cost (incl. site utilities)</th>
<th>Site Cost / Bldg GSF</th>
<th>Building Cost</th>
<th>Building Cost / Bldg GSF</th>
<th>Total Construction Cost</th>
<th>Construction Cost / Bldg GSF</th>
<th>Voter Original Total Project Cost</th>
<th>Total Project Cost</th>
<th>Total Project Cost / Bldg GSF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brookline</td>
<td>Michael Driscoll Elementary School 800 students</td>
<td>DD</td>
<td>155,632</td>
<td>$8,212,203</td>
<td>$53</td>
<td>$4,607,360</td>
<td>$544</td>
<td>$92,909,568</td>
<td>$597</td>
<td>$115,300,000</td>
<td>$115,300,008</td>
<td>$741</td>
</tr>
<tr>
<td>Lexington</td>
<td>Maria Hastings Elementary School 645 students</td>
<td>Jun-18</td>
<td>110,000</td>
<td>$9,518,724</td>
<td>$87</td>
<td>$4,454,694</td>
<td>$395</td>
<td>$52,973,418</td>
<td>$482</td>
<td>$65,339,418</td>
<td>$594</td>
<td>$543</td>
</tr>
<tr>
<td>Taunton</td>
<td>James L. McIracey Elementary School 735 students</td>
<td>Jan-19</td>
<td>119,683</td>
<td>$5,563,899</td>
<td>$46</td>
<td>$4,410,306</td>
<td>$372</td>
<td>$50,074,205</td>
<td>$418</td>
<td>$64,971,831</td>
<td>$546</td>
<td>$543</td>
</tr>
<tr>
<td>Springfield</td>
<td>Brightwood Elementary School 800 students</td>
<td>Aug-19</td>
<td>150,500</td>
<td>$5,940,700</td>
<td>$39</td>
<td>$5,169,200</td>
<td>$387</td>
<td>$64,109,900</td>
<td>$426</td>
<td>$82,201,771</td>
<td>$546</td>
<td>$546</td>
</tr>
<tr>
<td>Danvers</td>
<td>Ivan G Smith Elementary School 485 students</td>
<td>Jan-20</td>
<td>82,728</td>
<td>$4,989,938</td>
<td>$55</td>
<td>$3,748,335</td>
<td>$453</td>
<td>$42,074,273</td>
<td>$509</td>
<td>$52,000,000</td>
<td>$629</td>
<td>$629</td>
</tr>
<tr>
<td>Wareham</td>
<td>Minot Forest Elementary School 1020 students</td>
<td>Feb-20</td>
<td>159,989</td>
<td>$10,507,942</td>
<td>$58</td>
<td>$6,358,436</td>
<td>$385</td>
<td>$62,367,956</td>
<td>$480</td>
<td>$19,216,667</td>
<td>$78,381,201</td>
<td>$603</td>
</tr>
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</table>

**Total: $7,388,901**
# JOHN R. PIERCE SCHOOL

Cost Comparisons per SF

## Middle Schools

<table>
<thead>
<tr>
<th>Town</th>
<th>School</th>
<th>Start of Construction</th>
<th>Gross Square Footage</th>
<th>Site Cost (incl. site utilities)</th>
<th>Site Cost / Bldg GSF</th>
<th>Building Cost</th>
<th>Building Cost / Bldg GSF</th>
<th>Total Construction Cost</th>
<th>Construction Cost / Bldg GSF</th>
<th>Voter Original Total Project Cost</th>
<th>Total Project Cost</th>
<th>Total Project Cost / Bldg GSF</th>
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</thead>
<tbody>
<tr>
<td>Lynn</td>
<td>Pickering Middle School</td>
<td>Apr-18</td>
<td>131,295</td>
<td>$6,854,901</td>
<td>$52</td>
<td>$59,838,796</td>
<td>$456</td>
<td>$66,693,687</td>
<td>$698</td>
<td>$83,661,511</td>
<td>$637</td>
<td>$83,661,511</td>
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<tr>
<td></td>
<td>652 students (LF Project)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Framingham</td>
<td>Fuller Middle School</td>
<td>Jun-19</td>
<td>136,970</td>
<td>$9,782,890</td>
<td>$71</td>
<td>$68,152,539</td>
<td>$498</td>
<td>$77,935,429</td>
<td>$569</td>
<td>$98,276,876</td>
<td>$718</td>
<td>$98,276,876</td>
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<tr>
<td></td>
<td>630 students (JLA Project)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Natick</td>
<td>John F. Kennedy Middle School</td>
<td>Mar-20</td>
<td>182,195</td>
<td>$50,533,093</td>
<td>$52</td>
<td>$78,046,797</td>
<td>$428</td>
<td>$87,588,890</td>
<td>$481</td>
<td>$77,412,197</td>
<td>$425</td>
<td>$77,412,197</td>
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<tr>
<td></td>
<td>1000 students</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
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</table>

**Total:**

- $8,716,961
- $59,679,377
- $461
- $77,396,339
- $519
- $0

- $86,450,196
- $593
## JOHN R. PIERCE SCHOOL

### Conceptual Budget Range Analysis

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>725</th>
</tr>
</thead>
<tbody>
<tr>
<td>MSBA ISS per student (NSF)</td>
<td>81,200</td>
</tr>
<tr>
<td>Space beyond MSBA guidelines</td>
<td>15,000</td>
</tr>
<tr>
<td>Net Building Square Footage</td>
<td>96,200</td>
</tr>
<tr>
<td>Assumed Net to Gross factor [1.5] GSF</td>
<td>48,100</td>
</tr>
<tr>
<td><strong>Total Building GSF</strong></td>
<td><strong>144,300</strong></td>
</tr>
<tr>
<td>Cost Per Square Foot New Construction</td>
<td>$597</td>
</tr>
<tr>
<td>Construction Costs</td>
<td>$86,147,100</td>
</tr>
<tr>
<td>Escalation Costs (3.5% for 2 years)</td>
<td>$6,030,297</td>
</tr>
<tr>
<td><strong>Adjusted Construction Cost</strong></td>
<td><strong>$92,177,397</strong></td>
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<tr>
<td>Soft Costs (25% of Hard Costs)</td>
<td>$23,044,349</td>
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<tr>
<td><strong>Anticipated Total Project Cost</strong></td>
<td><strong>$115,221,746</strong></td>
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</table>

$115M

<table>
<thead>
<tr>
<th>Enrollment</th>
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<tbody>
<tr>
<td>MSBA ISS per student (NSF)</td>
<td>81,200</td>
</tr>
<tr>
<td>Space beyond MSBA guidelines</td>
<td>15,000</td>
</tr>
<tr>
<td>Net Building Square Footage</td>
<td>96,200</td>
</tr>
<tr>
<td>Assumed Net to Gross factor [1.5] GSF</td>
<td>48,100</td>
</tr>
<tr>
<td><strong>Total Building GSF</strong></td>
<td><strong>144,300</strong></td>
</tr>
<tr>
<td>Cost Per Square Foot New Construction</td>
<td>$560</td>
</tr>
<tr>
<td>Construction Costs</td>
<td>$80,808,000</td>
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<tr>
<td>Escalation Costs (3.5% for 2 years)</td>
<td>$5,656,560</td>
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<tr>
<td><strong>Adjusted Construction Cost</strong></td>
<td><strong>$86,464,560</strong></td>
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<tr>
<td>Soft Costs (25% of Hard Costs)</td>
<td>$21,616,140</td>
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<tr>
<td><strong>Anticipated Total Project Cost</strong></td>
<td><strong>$108,080,700</strong></td>
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$108M
# Conceptual Budget Range Analysis

### Renovation

<table>
<thead>
<tr>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment</td>
<td>725</td>
</tr>
<tr>
<td>MSBA ISS per student (NSF)</td>
<td></td>
</tr>
<tr>
<td>Space beyond MSBA guidelines</td>
<td></td>
</tr>
<tr>
<td>Net Building Square Footage</td>
<td></td>
</tr>
<tr>
<td>Assumed Net to Gross factor [1.5] GSF</td>
<td></td>
</tr>
<tr>
<td><strong>Total Building GSF</strong></td>
<td><strong>198,000</strong></td>
</tr>
<tr>
<td>Cost Per Square Foot Renovation</td>
<td>$400</td>
</tr>
<tr>
<td>Construction Costs</td>
<td>$79,200,000</td>
</tr>
<tr>
<td>Escalation Costs (3.5% for 2 years)</td>
<td>$5,544,000</td>
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<tr>
<td><strong>Adjusted Construction Cost</strong></td>
<td><strong>$84,744,000</strong></td>
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<tr>
<td>Soft Costs (25% of Hard Costs)</td>
<td>$21,186,000</td>
</tr>
<tr>
<td>Relocation/Modular Classrooms</td>
<td>$3,000,000</td>
</tr>
<tr>
<td><strong>Anticipated Total Project Cost</strong></td>
<td><strong>$108,930,000</strong></td>
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</table>

**Total: $109M**

### Renovation

<table>
<thead>
<tr>
<th>Description</th>
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<tbody>
<tr>
<td>Enrollment</td>
<td>725</td>
</tr>
<tr>
<td>MSBA ISS per student (NSF)</td>
<td>81,200</td>
</tr>
<tr>
<td>Space beyond MSBA guidelines</td>
<td>15,000</td>
</tr>
<tr>
<td>Net Building Square Footage</td>
<td>96,200</td>
</tr>
<tr>
<td>Assumed Net to Gross factor [1.5] GSF</td>
<td>48,100</td>
</tr>
<tr>
<td><strong>Total Building GSF</strong></td>
<td><strong>144,300</strong></td>
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<tr>
<td>Cost Per Square Foot Renovation</td>
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<tr>
<td>Construction Costs</td>
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<td>Escalation Costs (3.5% for 2 years)</td>
<td>$4,040,400</td>
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<td>Soft Costs (25% of Hard Costs)</td>
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<tr>
<td>Relocation/Modular Classrooms</td>
<td>$3,000,000</td>
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<tr>
<td><strong>Anticipated Total Project Cost</strong></td>
<td><strong>$80,200,500</strong></td>
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**Total: $80M**
# Management of Project

**Designer Procurement**

## Examples of Custom Reference Check Categories

<table>
<thead>
<tr>
<th>Communication</th>
<th>Budget Control</th>
<th>Document Quality</th>
<th>Schedule Control</th>
<th>Construction Control</th>
<th>LeftField/District Added Categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>Excellent</td>
<td>Excellent</td>
<td>Excellent</td>
<td>Excellent</td>
<td>Understands MSBA procedures and follows them</td>
</tr>
<tr>
<td>Good</td>
<td>Good</td>
<td>Good</td>
<td>Good</td>
<td>Good</td>
<td>Listens to Client (follows directions)</td>
</tr>
<tr>
<td>Poor</td>
<td>Poor</td>
<td>Poor</td>
<td>Poor</td>
<td>Poor</td>
<td>Listens to OPM (follows directions)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Would you work with the firm again?</td>
</tr>
</tbody>
</table>

### Examples of RFS Additions:
- Evaluation of five (5) sites that are being considered if new construction is deemed (in conjunction with the MSBA) as the preferred solution, including, at a minimum, a Phase 1 Initial Site Assessment conforming to 310 CMR 40.00 and performed by a licensed site professional.
- Consideration of alternative grade configurations (Grades 9-12 or Grades 8-12);
- CM-at-Risk Delivery Method and the ability to provide early release bidding packages for a potential fast track project that may be procured as Ch. 149A, CM-R;
MANAGEMENT OF PROJECT
MSBA Module Knowledge

Getting To A Preferred Solution

PDP  MSBA STAFF REVIEW  PSR  MSBA FAC  MSBA BOD  SCHEMATIC  MSBA FAC  MSBA BOD
Ed. Programming  Exist. Conditions  Site Development  Prelim. Evaluation

LEFTFIELD
THE RIGHT CHOICE IN PROJECT MANAGEMENT

PUBLIC SCHOOLS of BROOKLINE
## MANAGEMENT OF PROJECT

Determining Optimum Site/Option - Qualitative Analysis

### Billerica Memorial High School

**EVALUATION SUMMARY**, includes Casey scores in various categories

<table>
<thead>
<tr>
<th>Legend</th>
<th>0</th>
<th>Not preferable</th>
<th>1</th>
<th>Poor</th>
<th>2</th>
<th>Satisfactory</th>
<th>3</th>
<th>Advantageous</th>
<th>4</th>
<th>Highly Advantageous</th>
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</thead>
</table>

<table>
<thead>
<tr>
<th>PSR Evaluation Criteria</th>
<th>Option 3 Hybrid - HS</th>
<th>Option 4A-alt New - HS</th>
<th>Option 4B New - Cider</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Delivery of the Educational program</td>
<td>1.43</td>
<td>2.93</td>
<td>3.27</td>
</tr>
<tr>
<td>2. Responsible design (program organization, sustainability, facility maintenance, etc)</td>
<td>1.21</td>
<td>3.43</td>
<td>3.57</td>
</tr>
<tr>
<td>3. Traffic (external to the site)</td>
<td>1.71</td>
<td>2.13</td>
<td>1.60</td>
</tr>
<tr>
<td>4. Traffic (internal to the site)</td>
<td>1.57</td>
<td>2.53</td>
<td>2.93</td>
</tr>
<tr>
<td>5. Impact to neighbors</td>
<td>2.21</td>
<td>2.47</td>
<td>1.47</td>
</tr>
<tr>
<td>6. Achieves athletic program needs</td>
<td>1.64</td>
<td>2.60</td>
<td>3.20</td>
</tr>
<tr>
<td>7. Cost effective / value</td>
<td>0.64</td>
<td>2.80</td>
<td>1.60</td>
</tr>
<tr>
<td>8. Impact to educational program/facilities during construction</td>
<td>0.43</td>
<td>1.60</td>
<td>3.60</td>
</tr>
<tr>
<td>9. Design flexibility</td>
<td>0.50</td>
<td>2.36</td>
<td>3.36</td>
</tr>
<tr>
<td>10. Achieves parking expectations, inclusive of educational events</td>
<td>1.50</td>
<td>2.14</td>
<td>2.57</td>
</tr>
<tr>
<td>11. Schedule effectiveness</td>
<td>1.14</td>
<td>2.21</td>
<td>2.86</td>
</tr>
<tr>
<td>12. Cost risk</td>
<td>0.93</td>
<td>2.40</td>
<td>2.33</td>
</tr>
<tr>
<td>13. Schedule risk</td>
<td>0.86</td>
<td>2.14</td>
<td>3.14</td>
</tr>
<tr>
<td>14. Permitting</td>
<td>2.14</td>
<td>2.27</td>
<td>2.07</td>
</tr>
<tr>
<td>15. Pedestrian access</td>
<td>2.00</td>
<td>2.67</td>
<td>1.87</td>
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</table>

Total: 19.93 | 36.49 | 39.43
# MANAGEMENT OF PROJECT
Comparative Cost Analysis & Reimbursement Knowledge

## COMPARATIVE PROJECT COST ANALYSIS

## REIMBURSEMENT ANALYSIS

---

PUBLIC SCHOOLS of BROOKLINE
# MANAGEMENT OF PROJECT

## CM Procurement - Qualitative

<table>
<thead>
<tr>
<th>BOGID Building</th>
<th>Castigli Construction</th>
<th>Gibbons</th>
<th>Schiavo</th>
<th>Weeks Brothers</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>CM Procurement</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>CM Procurement Team</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>John Harris, Director</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Christopher Blumberg</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>James Burke, Business</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Steve Mancini, VP Ope</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Steve Whalen, Director</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Chris Mancini, VP Ope</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Peter Zenkel, Director</td>
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<td></td>
</tr>
<tr>
<td></td>
<td>Christopher Blumberg</td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>James Burke, Business</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Steve Mancini, VP Ope</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Steve Whalen, Director</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Chris Mancini, VP Ope</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Management Personnel

<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
<th>Phone</th>
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<tbody>
<tr>
<td>Management Team</td>
<td>John Harris, Director</td>
<td>617-793-3400</td>
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<td></td>
<td>Christopher Blumberg</td>
<td></td>
</tr>
<tr>
<td></td>
<td>James Burke, Business</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Steve Mancini, VP Operations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Steve Whalen, Director</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Chris Mancini, VP Operations</td>
<td></td>
</tr>
</tbody>
</table>

## Similar Project Experience

- Quincy South School Middle School
- Wakefield School
- Boston Public Schools
- Framingham Public Schools

## Management Team Experience

- Quincy South School Middle School
- Wakefield School
- Boston Public Schools
- Framingham Public Schools

## Expertise with EDP Projects

- Yes
- Yes
- Yes
- Yes
- Yes
- Yes

## Centralization of the Project Team Members

<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
<th>Phone</th>
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</thead>
<tbody>
<tr>
<td>Project Manager</td>
<td>John Harris, Director</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Christopher Blumberg</td>
<td></td>
</tr>
<tr>
<td></td>
<td>James Burke, Business</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Steve Mancini, VP Operations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Steve Whalen, Director</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Chris Mancini, VP Operations</td>
<td></td>
</tr>
</tbody>
</table>

## Public Schools of Brookline

- LEAYIELD
- The Right Choice in Project Management
# MANAGEMENT OF PROJECT

## CM Procurement - Qualitative

<table>
<thead>
<tr>
<th>Task Description</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Detailed Project Approach during the Pre-Construction phase. Specifying challenges and proposed solutions.</td>
<td>HA</td>
</tr>
<tr>
<td>Construction Management Plan: Approach to control costs, schedules, quality, documents and claims.</td>
<td>HA</td>
</tr>
<tr>
<td>Identifications of the Project and Existing Challenges, assessing safety of staff and students, access for health and emergencies.</td>
<td>HA</td>
</tr>
<tr>
<td>Effective Value Engineering and Quality Control Plan.</td>
<td>A</td>
</tr>
<tr>
<td>Sustained Construction Progress Schedule.</td>
<td>HA</td>
</tr>
<tr>
<td>Controlled and Reduced Change Order Costs.</td>
<td>A</td>
</tr>
<tr>
<td>Effective Project Safety Plans.</td>
<td>A</td>
</tr>
<tr>
<td>Effective Communication and Management of Trade Subcontractors/Subconsultants.</td>
<td>A</td>
</tr>
<tr>
<td>Cooperation and Coordination with the Owner.</td>
<td>A</td>
</tr>
<tr>
<td>Ensuring of Claims and Disputes.</td>
<td>A</td>
</tr>
<tr>
<td>Overall Technical Proposal.</td>
<td>Ranking: 1.0</td>
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</tbody>
</table>

## Overall Technical Evaluation

Reference Check

- NA

Price Proposal

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Budget 1</th>
<th>Budget 2</th>
<th>Difference</th>
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<tbody>
<tr>
<td>Total Construction</td>
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<td>$5,142,283</td>
<td>$3,264,293</td>
</tr>
<tr>
<td>Total Construction, Inc.</td>
<td>$8,406,576</td>
<td>$5,142,283</td>
<td>$3,264,293</td>
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<tr>
<td>Overall Price Proposal</td>
<td>Ranking: 1.5</td>
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Overall Proposal

- 3

<table>
<thead>
<tr>
<th>Overall Ranking</th>
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<tbody>
<tr>
<td>Rating: 1.0</td>
<td>1</td>
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</table>

**Public Schools of Brookline**

**LEFTFIELD**

**The Right Choice in Project Management**
# MANAGEMENT OF PROJECT

**CM Procurement - Quantitative**

<table>
<thead>
<tr>
<th>LINE ITEM</th>
<th>Bond</th>
<th>Consigli</th>
<th>Gilbane</th>
<th>Suffolk</th>
<th>Walsh</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overhead &amp; Profits</td>
<td>$2,025,000</td>
<td>$1,578,000</td>
<td>$2,670,000</td>
<td>$1,600,000</td>
<td>$2,000,000</td>
</tr>
<tr>
<td>Total Pre-Construction Fee</td>
<td>$168,250</td>
<td>$235,866</td>
<td>$180,000</td>
<td>$272,707</td>
<td>$134,224</td>
</tr>
<tr>
<td>DD Pre-Construction Fee</td>
<td>$188,250</td>
<td>$235,866</td>
<td>$180,000</td>
<td>$272,707</td>
<td>$134,224</td>
</tr>
<tr>
<td>DD Pre-Construction Duration (months)</td>
<td>10</td>
<td>12</td>
<td>8</td>
<td>8</td>
<td>13</td>
</tr>
<tr>
<td>DD Pre-Construction Monthly Fee</td>
<td>$16,025</td>
<td>$10,655</td>
<td>$22,500</td>
<td>$34,085</td>
<td>$10,324</td>
</tr>
<tr>
<td>Total Fees (Not incl Pre-Con)</td>
<td>$2,213,250</td>
<td>$2,213,250</td>
<td>$2,250,000</td>
<td>$2,172,707</td>
<td>$2,134,224</td>
</tr>
</tbody>
</table>

The Costs below are estimates and can be negotiated/adjusted based on Schedule Duration, Staffing, Construction Cost and Project Requirements.

<table>
<thead>
<tr>
<th>Bonds</th>
<th>$684,750</th>
<th>$552,000</th>
<th>$601,680</th>
<th>$752,257</th>
<th>$644,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insurance</td>
<td>$1,047,000</td>
<td>$1,279,850</td>
<td>$832,830</td>
<td>$1,958,093</td>
<td>$490,406</td>
</tr>
<tr>
<td>General Liability</td>
<td>$910,000</td>
<td>$1,104,000</td>
<td>$795,800</td>
<td>$920,000</td>
<td>$340,400</td>
</tr>
<tr>
<td>Builder's Risk</td>
<td>$137,000</td>
<td>$175,650</td>
<td>$69,230</td>
<td>$178,063</td>
<td>$150,000</td>
</tr>
<tr>
<td>Total Insurance + Bonds</td>
<td>$2,232,750</td>
<td>$2,534,800</td>
<td>$1,697,500</td>
<td>$3,810,257</td>
<td>$1,434,800</td>
</tr>
<tr>
<td>General Conditions (excluding staffing)</td>
<td>$1,312,750</td>
<td>$1,312,750</td>
<td>$1,312,750</td>
<td>$1,312,750</td>
<td>$1,312,750</td>
</tr>
<tr>
<td>Total CM Staffing Costs</td>
<td>$4,226,796</td>
<td>$4,226,796</td>
<td>$4,226,796</td>
<td>$4,226,796</td>
<td>$4,226,796</td>
</tr>
<tr>
<td>Total General Conditions</td>
<td>$5,545,576</td>
<td>$5,545,576</td>
<td>$5,545,576</td>
<td>$5,545,576</td>
<td>$5,545,576</td>
</tr>
<tr>
<td>Total Estimated CM Cost</td>
<td>$9,494,576</td>
<td>$9,494,576</td>
<td>$9,494,576</td>
<td>$9,494,576</td>
<td>$9,494,576</td>
</tr>
</tbody>
</table>

Total Estimated CM Cost can vary based on the items that the CM includes in the estimated General Conditions. At the time of the GMP, additional items could be added to or eliminated from the total project cost. Note on the Detail Sheet, items listed as Cost of Work will be included in the GMP costs.
# MANAGEMENT OF PROJECT

## Budget and Pro-Pay Management

### BUDGET

- We'll track every expenditure
- We'll report where you started, where you are and where you are going
- We'll track all budget transfers
- All commitments and expenditures are transparent
**MANAGEMENT OF PROJECT**

Management of Two Budgets (TPB and District Share)

<table>
<thead>
<tr>
<th>Unspent Budget [F]=[D]-[E]</th>
<th>Remaining Budget [G]=[C]-[D]</th>
<th>% Complete</th>
<th>CTC [H]=[E]/[D]</th>
<th>Anticipated C @ C [J]=[D]+[I]</th>
<th>Variance [K]=[J]-[C]</th>
<th>Ineligible</th>
<th>Ineligible</th>
</tr>
</thead>
<tbody>
<tr>
<td>$46,776,197</td>
<td>$12,098,879</td>
<td>$0</td>
<td>$7,549,319</td>
<td>$173,199,715</td>
<td>$(2,897,574)</td>
<td>$43,950,873</td>
<td>$3,855,741</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**REIMBURSABLE DASHBOARD**

- Anticipated C @ C: $173,199,715
- Anticipated ineligibles: $47,806,614
- Est. basis of total grant: $125,393,101
- Reim rate: 56.99%
- Est. max. grant: $71,461,528
- Est. District share (spending 100% of all contingencies): $101,738,187
- Adjusted Est. District share ($2m feasibility study value removed): $99,738,187
- Original District Share Goal: $100,000,000
- Delta: $(261,813)
MANAGEMENT OF PROJECT
Change Event Tracking

CHANGE MANAGEMENT

CLIENT COMMUNICATION, REVIEW AND APPROVAL TOOLS; HIGH LEVEL TO DETAIL COMMUNICATION AND PRESENTATION SKILLS

DETAILED TRACKING OF CHANGE ORDERS TO CATEGORIZE CHANGE ORDER COSTS BY ORIGIN, LOCATION AND TRADE

<table>
<thead>
<tr>
<th>Change Order 1</th>
<th>Net Deducted</th>
<th>Net Added</th>
<th>Eligible</th>
<th>Building</th>
<th>Site</th>
<th>Demo / Abatement</th>
<th>Design Issue</th>
<th>New Scope by Owner</th>
<th>New Scope by Trade</th>
<th>Differing Conditions</th>
<th>Structural</th>
<th>Site</th>
<th>Utilities</th>
<th>Plumbing</th>
<th>Electrical</th>
<th>HVAC</th>
<th>Misc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDR-141</td>
<td>$20,000</td>
<td>$-10,000</td>
<td>$10,000</td>
<td>$-10,000</td>
<td>$10,000</td>
<td>$10,000</td>
<td>$10,000</td>
<td>$-10,000</td>
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<td>$10,000</td>
<td>$10,000</td>
<td>$10,000</td>
<td>$10,000</td>
</tr>
<tr>
<td>CDR-256</td>
<td>$10,000</td>
<td>$0</td>
<td>$10,000</td>
<td>$10,000</td>
<td>$10,000</td>
<td>$10,000</td>
<td>$10,000</td>
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<td>$10,000</td>
<td>$10,000</td>
</tr>
<tr>
<td>CDR-29</td>
<td>$0</td>
<td>$10,000</td>
<td>$10,000</td>
<td>$10,000</td>
<td>$10,000</td>
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</tr>
<tr>
<td>CDR-28</td>
<td>$10,000</td>
<td>$0</td>
<td>$10,000</td>
<td>$10,000</td>
<td>$10,000</td>
<td>$10,000</td>
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<td>$10,000</td>
<td>$10,000</td>
</tr>
</tbody>
</table>

TOTAL COSTS:

- Building: $20,000
- Site: $10,000
- Demo / Abatement: $10,000
- Design Issue: $10,000
- New Scope by Owner: $10,000
- New Scope by Trade: $10,000
- Differing Conditions: $10,000
- Structural: $10,000
- Site: $10,000
- Utilities: $10,000
- Plumbing: $10,000
- Electrical: $10,000
- HVAC: $10,000
- Misc.: $10,000

PUBLIC SCHOOLS OF BROOKLINE
SUSTAINABILITY Experience

- Lynn Stapleton and Carlos Montanez are both LEED certified
- 17 LEED projects over the past 5 years – with almost all being LEED Gold. Billerica – 1st in State for LEEDv4 Silver Certification.
- Managed the $75M Stem Cell and Regenerative Biology project at Harvard University which had the distinction of having the most LEED points of any project nationally as a LEED Platinum project.
- We have participated in many sustainable initiatives, including: PV, Solar Thermal, Mini Wind Turbines and Geothermal wells.
- We believe an appropriate approach with the proper utilization of building controls can be a path to both solid preventative maintenance practices as well as significant energy savings.
- Hired by Eversource as a part of their Onsite Facility Operator Training Program. We are the only OPM firm in the State to hold this distinction.
LEFTFIELD has the in-house MEP expertise from both a construction and operational perspective that will help the Owner specify efficient, yet simple to operate and maintain, equipment that will allow the Owner to manage the systems in a manner that will maximize their useful life.
PUBLIC OUTREACH
Outreach and Social Media Presence

https://www.durfeerising.com
@DurfeeRising
#BuildingForTheFuture
Facebook.com/DurfeeRising
@DurfeeRising
Local Talk Radio
FALL RIVER COMMUNITY MEDIA
Local Cable News
PUBLIC SCHOOLS OF BROOKLINE
MSBA SYSTEMS & AUDIT
Experience and Success

- LEFTFIELD has 100% MSBA report rating over the last 5 years
- LEFTFIELD manages Pro-Pay on behalf of most of our Districts
- The MSBA recommends that LEFTFIELD work in Pro-Pay on behalf of Districts
- When LEFTFIELD manages Pro-Pay, projects close out timely and efficiently
- LEFTFIELD has successfully managed the 10-month enhanced commissioning phase with little to no issues remaining
Project Management

• Designer and contractor procurement
  – (including MBE/WBE)

• Management of designer and contractor after procurement

• Experience with MSBA systems
  – Regular ProPay submissions and monthly reports
  – Follow the rules
  – Keep them informed
  – Successful audit
GIA Certification - Leadership in Energy and Environmental Design (LEED) and Collaborative for High Performance Schools (CHPS)

- Project Execution
  - Design, Sizing, Construction, Acceptance, Project Closeout, and Post Occupancy
  - Training, Operation & Maintenance, Troubleshooting, and Energy Analysis

- Partnership with the Town of Brookline
  - Fault Detection and Diagnostics (FDD) Tools
  - Continuous Commissioning and Monitoring Based Commissioning (MBCx)
  - Measurement & Verification (MV

- Alternatives for Commissioning (CX)

- Cost Effective Zero Net Energy (ZNE) Design

Energy Management and Commissioning
A comprehensive scheduling review is available to provide construction schedule and task to make certain that all project objectives and deliverables are met. Our team will create, update, and monitor both an overall project schedule and a project resources.

Critical paths and project milestones are assessed utilizing Primavera pg.
Cash Flow reports on a monthly basis.

Understanding of the total cost of the project, we will also provide updated
details both construction costs and soft costs to give the project team a full
We will establish, update, and maintain a comprehensive project budget that

Mitigating Risk
Approach to Controlling Cost, Driving Schedule, and
CIWA

- High quality construction
- Public health plus pedestrian and retailers
- Work with audit teams, minimize disruption to library, town hall, police and
- Work successfully with MSBA, have a real partnership
- Continue Brookline's legacy of great public buildings
- Have a strong public process during the pandemic
- Keep the project on budget
- Find a great architect for this challenging site and program

Challenges

- This is what we do!
- Project posses tremendous design challenges and opportunities
- Richard Marks a long term Brookline resident
- We specialize in high quality school construction
- Interest

Project Interest and Challenges
Introductions

Richard Marks
Project Director
- 35 Years Experience
- Both of his children attended Brookline Schools for 13 years

Derek Richardson
Certified Energy Manager and Commissioning Specialist
- 7 Years Experience

Treshia Walton
Assistant Project Manager
- 15 Years Experience

Michael McNulty
Project Manager
- 15 Years Experience
Agenda

• Q&A
• Experience with MSBA Systems
• Management of Project
• Project Interest and Challenges
• Similar Projects
• Introductions