



Owner's Project Management Services Amesbury Elementary School

City of Amesbury

Amesbury, Massachusetts

August 7, 2017

HEERY

August 7, 2017

Joan Liporto
Director of Finance & Operations
Amesbury Public schools
5 Highland Street
Amesbury, MA 01913
978.388.0507

RE: Owner's Project Management (OPM) Services (RFS) for Amesbury Elementary School

Dear Ms. Liporto and Members of the OPM Selection Committee:

The Amesbury Elementary School project which the City of Amesbury is embarking is a once in a lifetime opportunity. Providing the right educational environment for your future students, teachers and staff is dependent upon getting the right team in place to assist you with this monumental project. The selection of your project team is the most important task your Committee will achieve and will ultimately determine the ability of the project to reach a successful outcome.

Having the right team in place, one which not only has the expertise required, but a firm that truly becomes part of your leadership team is important to getting your project started off and headed in the right direction. Assessing the relevant experience and the expertise of the project team is critical to this task.

Heery International (Heery) has significant experience successfully managing school projects in Massachusetts over the past 25 years. Our commitment is to provide the City of Amesbury with a Project Director highly experienced in the design and construction of public schools in Massachusetts. Our Project Director, Chris Lawson, PE, CCM, LEED Green Associate, MCPPO/OPM has significant design and construction management experience. His nearly 30 years of experience, includes more than 10 years of experience as an OPM Project Director. He has led MA public school projects of similar scope and complexity to the Amesbury Elementary School project.

Our experience working with numerous municipalities within the Commonwealth of Massachusetts, as well as working on new and occupied/renovated school projects of comparable size and scope, will prove to be invaluable in producing a successful outcome for your community.

Our reputation is extremely important to us. We work hard to earn the trust of our clients each and every day. As a result, the best references, who can endorse Heery's ability to work effectively as your OPM, are our current clients. We encourage you to contact our clients who have projects of similar size and scope to discuss how Heery worked directly with them to achieve outstanding school projects. A listing of our client references has been included in Section 2 of the Evaluation Criteria. We encourage you to reach out to them.

Heery International, Inc.

80 Blanchard Road, Suite 108, Burlington, Massachusetts 01803
Telephone 781 494-9000 Fax 781 494-9007

Offices Nationwide

As requested in the RFS, Heery acknowledges the following:

- a) We acknowledge there were no addenda issued to the RFS.
- b) We have read the Request for Services and take no exceptions to the RFS.
- c) We have read the Standard MSBA OPM Contract and do not take exception to the requirements outlined in the agreement. Heery has executed this agreement on multiple projects.
- d) We exceed the minimum requirements identified in the RFS:
 - Mr. Lawson has over 25 years of project management experience in diverse design and construction environments. He is effective in building client and contractor relationships.
 - Heery and our proposed staff members possess all necessary current licenses and registrations to qualify under Massachusetts law to perform the function of the OPM. Mr. Lawson maintains OPM certification in the Massachusetts Certified Public Purchasing Officer Program (MCPPO), a copy follows this cover letter and is included as a part of this submission.
 - Our Project Representative, Dennis Pacitti, will be assisting Mr. Lawson during the construction phase as the on-site project representative. Mr. Pacitti has over 30 years of experience in the construction industry. He has been responsible for overseeing all phases of construction on several Massachusetts K-12 projects, including the new Bresnahan Elementary School in Newburyport.
- e) Heery has been performing OPM services for more than 40 years, and in the Commonwealth of Massachusetts for over 25 years, primarily managing K-12 school programs. We are a professional services organization with design, management and construction professionals, providing all services "in-house." Heery was founded in 1952 and is a financially solid firm of over 500 professionals nationwide.
- f) As the New England Area Manager and Principal-in-Charge, I, Thomas E. Ellis, Jr., have been authorized to negotiate the contract for OPM services which will be executed by Heery's North Region Manager, Bob Holt.
- g) Requests for additional information should be directed to:
Thomas E. Ellis, Jr., Vice President / New England Area Manager
80 Blanchard Road, Suite 108, Burlington, MA 01803
e-mail address: tellis@heery.com
Office phone: 781-494-9000 / Cell phone: 617-823-6883

Our New England office works with each of our clients on a one-on-one basis, becoming an integral part of your leadership team. Heery's corporate culture allows us to work with our clients the way a small company does, however, with substantial in-house resources at our disposal without needing to engage outside sub-consultants. Our team provides a great benefit, both in experience and in economy, to our clients.

We look forward to meeting with you and the Amesbury Elementary School Building Committee to discuss how we can work together collaboratively to achieve a successful, on-time and on-budget project which the City of Amesbury envisions.

Sincerely,
HEERY INTERNATIONAL, INC.

A handwritten signature in blue ink, reading "Thomas E. Ellis, Jr.", written in a cursive style.

Thomas E. Ellis, Jr., AIA, LEED AP BD+C, MCPPO
Vice President / New England Area Manager



*The Commonwealth of Massachusetts
Office of the Inspector General
One Ashburton Place, Boston, MA 02108*



Massachusetts Certified Public Purchasing Official Program

Hereby presents this Certificate of Completion to

Christopher Lawson

for attendance in the seminar entitled

Recertification for School Project Designers & Owner's Project Managers

Boston, Massachusetts

November 23, 2015



7 CPE Credits – "In accordance with the standards of the National Registry of CPE Sponsors, CPE credit has been granted based upon a 50 minute hour." The Commonwealth of Massachusetts Office of the Inspector General is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org. Sponsor ID#103866.

Field of Study: Specialized Knowledge and Applications
Instructional / Delivery Method: Group-Live



Qualifies for 7 Professional Development Points based on the State Plan for Professional Development.

Qualifies for 0 MCPPO points toward recertification.

Hema A. Cole

Inspector General

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1) PAST PERFORMANCE

Since opening its Boston area office in 1989, Heery has managed 33 school projects in Massachusetts under both DOE and DESE/MSBA programs, as well as numerous other significant capital building programs for federal, state, municipal and private clients. Heery has provided comprehensive Owner's Project Management services to our Massachusetts clients for more than 25 years, well before the passing of the Construction Reform Laws of 2004. These projects have been managed by primarily the same project staff/leadership, averaging over 20 years of employment at Heery. Your project will benefit from our project team which has exceptional MA K-12 school experience.

Attachment C provides a complete listing of Massachusetts Chapter 149 & 149A public construction projects which we have managed over the past 10 years, from feasibility study to closeout. On this list, you will find a significant number of elementary, middle, and high school projects, proving our ability to successfully complete educational projects of similar size, scope and complexity.

Specializing in K-12 education program management since 1966, Heery has an extensive resume of successfully completed education projects. In addition to some of the largest K-12 programs in the country, the table below highlights a number of our MA K-12 programs, where we successfully delivered Owner's Project Management services. These projects include new buildings, addition/renovations and fully occupied renovation projects utilizing both design/bid/build and construction manager at-risk (CMAR) delivery methods.

CLIENT	PROJECT	PROGRAM VALUE*	COMPLETE	NEW/AR+
City of Newburyport	Bresnahan Elementary School	\$37M	12/2014	New
City of Newburyport	Nock Middle/Molin Elementary School**	\$26.9M	12/2014	R
Town of Westborough	Sarah Gibbons Middle School**	\$26.7M	12/2017 (Est)	R
City of Worcester	Worcester South High Community School**	\$200M (Est)	7/2021 (Est)	TBD
City of Lawrence	Lawrence High School	\$161M*	8/2007	New
City of Beverly	Beverly Middle School**	\$110.7M*	9/2018 (Est)	New
City of Beverly	Beverly High School	\$100M*	9/2009	A/R
North Middlesex Regional School District	North Middlesex Regional HS	\$88.2M*	Phase 1 - 9/2017 Phase 2 - 9/2018	New
So. Worcester County Regional School District	Bay Path Regional Vocational Technical HS**	\$85M*	9/2015***	A/R
Town of Tewksbury	Tewksbury Memorial HS	\$82M*	8/2013	New
Town of Westborough	Westborough HS	\$70.1M*	9/2002	A/R

*Escalated to 2017 costs

**Project utilized/utilizing the Chapter 149A / Construction Management at Risk Delivery Method

*** Project completed earlier than original projected schedule

+ A/R - Addition/Renovation
R - Renovation Only
New - Total New Construction

Heery has substantial experience in managing K-12 projects which are new, renovated and/or additional/renovated facilities. As you may be aware, Heery successfully managed the new Bresnahan Elementary School project in nearby Newburyport. Our project team worked closely with the City, the School Administration and School Staff to successfully deliver that project. Key staff members from that team will be actively involved in this project, which will be a substantial benefit to your project.

Overall Performance Statistics

The projects we have managed achieve change order rates that are consistently lower than the typical industry average, in part due to our comprehensive, in-house constructability reviews with the architect during the design phases. This lower-than-average rate is also a result of our experienced field staff members providing detailed reviews of all proposed construction changes, which are reviewed for scope comparison with the base contract work as well as for cost justification of any additional work. We have developed innovative approaches to mitigating potential claims from contractors for time extensions due to unforeseen conditions or impacts from additional owner scope changes during construction. Despite many challenges on our projects, Heery's diligent efforts have enabled each of our school projects to open in time for classes to start as scheduled.



Average Number of Projects per Project Manager per Year

Over the past five years, Heery has managed an average of five to seven ongoing K-12 projects in various stages of design and construction. In consensus with discussions with MSBA staff, our project directors manage a limited number of projects concurrently. Depending upon the size and complexity of the project, our project directors may manage anywhere from one to three projects in various stages of design and construction. The MSBA staff understands that the MSBA project budgets do not normally allow the Project Director to be assigned 100% to each project from the very beginning of design through the end of construction. This requirement necessitates that each Project Director manages a limited number of projects concurrently, with support from other team members. We pursue projects in which our Project Director's work load will allow them to fully engage with your project team. Our proposed Project Director, Chris Lawson, PE, CCM, LEED Green Associate, MCPPO/OPM has an assigned workload which will allow him to immediately start on your project as soon as we are selected.

Project Safety / Claims

The safety of students, staff, contractors and your neighbors is our first priority on every project, whether it's an occupied renovation, a phased addition and renovation, or new construction adjacent to an existing facility. Occupied schools in tight residential locations require special attention and care beyond the normal aspects of the pre-construction and construction process. We consider the daily activities of teachers, students and staff, and we work with the contractor/CM to develop a safety plan to protect them during construction activities. Utilizing a Construction Management at Risk (CMR) delivery method can help improve the planning and implementation of work to maximize safety performance on the projects as well as reduce the risk for claims on the project.



Each contractor is responsible for protecting the health and safety of the workers while providing a safe and healthy place to work. Although Heery is not responsible for the safety performance and means and methods of the contractor or construction manager, which includes the on-site safety program, Heery's Project Director will monitor contractor and/or construction manager implementation and application of their respective safety and health programs at the work site.

Heery has never been cited for an OSHA violation or fined for work performed by our staff in Massachusetts and has never had any legal claims asserted against any of its clients on its OPM work in Massachusetts. All of our staff have OSHA 10-hour Certificates as well as Certificates in First Aid, CPR and use of AED devices. Safety is a primary concern at Heery.

Working Relationships with Project Stakeholders

It takes an entire project team to achieve a successful project. Heery is committed to building a strong working relationship with the City of Amesbury, the Amesbury Elementary School Building Committee and with the project design team early in the design process. This commitment extends to the contractor or construction manager when they become part of the team. The reputation of our company has been built on our professional approach, on our leadership, and on our role as a trusted advisor. Our most successful projects are ones in which all project team members have experience managing programs of similar size and complexity. This collective understanding allows the entire project team to “all pull on the rope in the same direction” allowing the expertise of each professional organization to contribute to the success of the project in a collaborative manner. The greatest testament to the success of this philosophy is seen through our work with repeat clients. When given the chance to hire an OPM on another project which we pursue with existing/former clients, the question is “Do they rehire us?” The answer is Yes! Often for other municipal projects within their community.



The relationships we have developed with designers, contractors and construction managers over the past 25 years has been based on mutual respect, on our thorough knowledge of Massachusetts Chapter 149 and 149A procurement guidelines, and our detailed knowledge of the requirements for each and every project. Many of our project managers are licensed architects and professional engineers, and/or hold professional certifications in addition to formal degrees in design or construction engineering programs. Our objective is to establish the appropriate quality standards on your project and to oversee the work in order to maintain and control those standards. Being fair but firm with designers, contractors and construction managers is the best way to establish respect with the construction team on your behalf, and to achieve a high quality project. It is also important that we establish a clear line of communication with your management team so that we can talk openly and honestly with you about the challenges, opportunities and limitations which may exist with respect to your project. Our experience allows us to identify key issues early on, and to resolve those issues as early as possible in order to achieve a successful project outcome.

We have worked directly with numerous MSBA staff members over the past 13 years since their creation under the Construction Reform Laws of 2004. These valuable working relationships have been important to helping us understand the evolving policies and procedures of the MSBA, to obtaining the necessary approvals, and keeping projects on schedule and on budget. Having worked on 18 projects with the MSBA since their inception, our project directors have a clear understanding of the requirements, standards and policies of the MSBA, allowing us to achieve your program, budget and schedule goals.



Below we highlight owners, contractors and designers with whom we are currently working or with whom we have recently worked on successful school projects in Massachusetts. We encourage you to speak with them regarding Heery's ability to work constructively and cooperatively with the project team to achieve a successful project.

CLIENT REFERENCES		ARCHITECT REFERENCES	CONTRACTOR REFERENCES
Mayor Donna D. Holaday City of Newburyport (978) 465-4413 DHoladay@CityofNewburyport.com	Richard Montuori Tewksbury Town Manager (978) 640-4300 rmontuori@tewksbury-ma.gov	Ai3 Architects L. Scott Dunlap, Principal (508) 358-0790 dunlap@ai-3.com	Consigli Construction Vance Freymann (508) 458-0310 VFreyman@consigli.com
David Gelineau Purchasing Agent City of Beverly (978) 605-2350 dgelineau@beverlyma.gov	Dr. Christine L. McGrath Former Tewksbury Superintendent of Schools (781) 879-8916 cmcgrath@massupt.org	Kaestle Boos Associates, Inc. Michael McKeon, Principal (508) 549-9906 x401 mmckeon@kba-architects.com	Bacon / Agostini Steve Agostini, President (401) 431-1200 stevea@baconconstruction.com
John LaFleche Superintendent Bay Path Regional Technical High School (508) 248-5971 JLaFleche@baypath.net	Jill Dagilis Former Commissioner of Code Enforcement for the City of Worcester (508) 754-1176 ext. 120 jdagilis@wcac.org	HMFH Architects, Inc. Laura Wernick, FAIA, Principal (617) 947-5813 (c) wernick@hmfh.com	Fontaine Bros Mark Abdella Vice President (617) 413-6801 Mabdella@fontainebros.com

2) KNOWLEDGE OF MASSACHUSETTS STATE BUILDING CODE AND OTHER CODES

Many of our staff members are licensed professionals, including architects, engineers and licensed construction supervisors who have an in-depth, working knowledge of building code requirements. These professionals provide the City of Amesbury and the Amesbury Elementary School Building Committee with an extensive understanding of the responsibilities of the design and construction team in order to comply with the Massachusetts State Building Code, MAAB, and with the Americans with Disabilities Act. Our proposed Project Director, Chris Lawson PE, CCM, LEED Green Associate, MCPPO/OPM, is a Certified Construction Manager and Professional Engineer, so he is well-versed in pertinent codes and regulations from his experience on multiple K-12 school projects in Massachusetts. We have worked on numerous projects under the jurisdiction of the 8th Edition of the Massachusetts Building Code, which is comprised of the International Building Code 2009 (IBC), several companion I-codes and a separate package with the Massachusetts amendments to the I-codes. We are preparing for the transition to the 9th Edition Massachusetts Building Code, which will be in effect on January 1, 2018, and will be applicable to your project during the design and construction phase.

While most of the design elements contained within the building code are the responsibility of the design team to incorporate into the design, several sections are the responsibility of the Owner and/or the Contractor. Heery professionals have the expertise to assist owners in meeting the requirements of the State Building Code throughout the design and construction process. Many of our project directors, project managers and project field representatives are Licensed Construction Supervisors (LCS) within the Commonwealth of Massachusetts. Not only do they understand the Massachusetts Building Code, but they also have a firm working knowledge of the code, the experience to apply it in the field and the credentials to prove their competence.

3) KNOWLEDGE OF COMMONWEALTH PROCUREMENT LAWS, REGULATIONS

Heery has worked in Massachusetts for more than 25 years, providing OPM services on large K-12 school projects. We are especially knowledgeable of all the regulations, policies, and procedures of the Commonwealth of Massachusetts public construction laws. All of our project directors and most of our construction representatives have successfully completed and maintain their credentials under the "Certification for School Project Designers and Owner's Project Managers" program as administered by the Massachusetts Certified Public Purchasing Officials program under the direction of the Office of the Inspector General of the Commonwealth of Massachusetts. This program outlines the procurement processes under Massachusetts General Laws Chapter 30B and Chapters 149/149A, which will be applicable to your project.

4) MANAGEMENT APPROACH

Heery's management approach begins with the assignment of a senior, experienced Project Director who has expertise in managing the design and construction of K-12 facilities. This needs to be someone with the personality, communication skills, and leadership skills to manage the complex logistics and the implementation of your program. Our proposed Project Director, Chris Lawson, PE, CCM, LEED Green Associate, MCPPO/OPM. Heery is currently working on six MSBA projects either in design, construction or MSBA audit/closeout that utilize the MSBA OPM Contract. This current experience allows us to understand what is required of us to successfully complete our work under the terms of the MSBA OPM agreement. Having a seasoned project team leader who knows how to listen to your needs and can work together with the Amesbury Elementary School Building Committee, the Architect and the General Contractor or Construction Manager is the key to a successful project. Our management approach is detailed below in response to a hypothetical project for new construction of a school or a total renovation and/or expansion of the existing 43,560 SF school with a potential cost ranging from \$20 million to \$45 million.



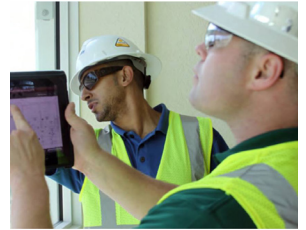
Other than hiring the Owner's Project Manager, the selection of the Designer is the single most important decision contributing to a successful project outcome. We will work with your project leadership to understand and establish the scoring rubric (point values) for the Designer Selection process, which is outlined by the MSBA. We will work with your leadership team to understand the specific requirements and experience which the Amesbury Elementary School Building Committee believes is important and critical for their needs. While the designer selection is ultimately made by the MSBA Designer Selection Committee, outlining and documenting the important skills and experience of the Designer is a key task as it will communicate the important project issues and concerns of the Building Committee to the MSBA Designer Selection Committee. This effort will assist in the proper evaluation and in the selection of the most qualified Designer for your project.

Over the course of the project design, our proposed Project Director, Chris Lawson, will be supported by our skilled and experienced in-house design review, cost estimating and scheduling staff to keep your project on schedule, within budget and to meet your educational program objectives. Heery does not need any third-party consultants in the performance of our contractual responsibilities on this project. All cost estimating, scheduling and design review services are provided by Heery staff. Within our staff are licensed engineers and architects who are presently employed with us, so we will be able to provide more in-depth, in-house professional resources than any of our competitors. What this means for the City of Amesbury is that we control all 'in-house' of the services that are required for your project as well as provide the same project support staff that have worked on all 18 of our MSBA-funded projects. This staffing arrangement is a significant benefit to your project.

During construction, we provide experienced and qualified field staff, many of whom are registered professional engineers or architects, and/or hold professional certifications from industry recognized organizations such as the US Green Buildings Council (USGBC) and the Construction Management Association of America (CMAA). Our goal during construction is to work hand-in-hand with your school administration team to both plan the work and to allow teaching and learning to proceed with minimal impact. While we believe construction projects within academic facilities can provide unique classroom learning opportunities, we also understand that education within an occupied building under total renovation must be allowed to continue. Proper planning and communications with the administration staff will provide for minimal disruption, should the Town decide to proceed with a renovation project.

Proposed Project Management System / Effective Information Management.

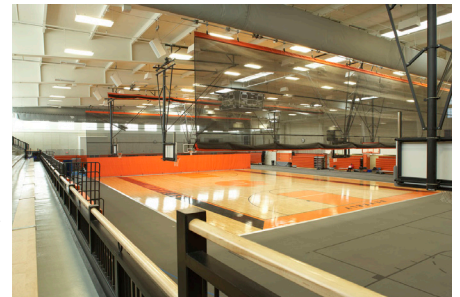
Heery established an enterprise agreement with e-Builder as our primary electronic project management (EPM) platform throughout the company. E-Builder provides complete and comprehensive document control through which the entire project team can communicate and collaborate on all aspects of the project in real time. This system can be used to post design documents for review by the project team as well as to track all review comments and to follow up with modification of the project scope. During the bidding phase, Heery highly recommends distributing all bid documents and addenda electronically to speed along the bidding process. Heery has utilized services, such as Projectdog and BidDocs Online, for electronic document distribution to save our clients many thousands of dollars in printing and distribution costs, savings which go directly back into the project budget for hard construction. We have recently completed paperless electronic bidding on a number of our MA public projects, which simplifies the process and reduces the cost to you for bidding administration.



Heery has experience managing projects utilizing Building Information Modeling (BIM) to aid in more detailed planning, design and scheduling in advance of construction. These efforts assist in the design coordination, minimize disruptions and limit the number of construction changes in the field. Heery also utilizes other complementary software systems and information services, such as BIM 360 Field, Navisworks and Multi-Vista for specialized project information management on our projects. Software, such as Navisworks or Synchro, can be used on projects which utilize a 3-dimensional BIM model for clash detection and for systems coordination in concert with the design and construction team's efforts. Heery staff have wireless access to project documents in the field as well as immediate access to all electronic/cloud based project management systems through hand-held devices (tablets and smart phones). These tools allow the entire project team to have immediate real-time access to all project information at all times.

Examples of Problem Solving Approaches / Impact Time and Cost

[Worcester Technical High School](#) – Although many communities are under substantial pressure to quickly improve their facilities for accreditation compliance, doing things too fast can be cost prohibitive. Under the previous DOE program where the Designer could be hired before the OPM, the design team had proposed compressing the construction duration in order to save general conditions costs. Upon our selection, Heery immediately reviewed the proposed schedule and quickly concluded that meeting the original, overly aggressive scheduled target date was going to substantially increase the construction costs of the project. Unknowingly, the City was about to pay a premium of approximately \$6 million to accelerate the construction schedule and potentially risk not meeting an overly aggressive construction schedule. In the end, the construction bids confirmed our prediction that a more traditional schedule would cost less and also allowed for a more reasonable time to furnish the building and to complete the contractor's punch list prior to the start of school. The lesson here is having the right schedule for your project to maximize your construction budget, with a schedule which is not costing more either to extend or to compress to achieve the school's occupancy goal.



[Lynnfield Public Schools](#) – Lynnfield's original budget of \$48.6 million was developed prior to the selection of Heery as the OPM; however, within the first 60 days, we discovered that the size and complexity of the program was substantially under-funded to meet the desired educational program. Working closely with the Town of Lynnfield School Building Committee, Heery was able to provide detailed cost estimates and options at a conceptual level that allowed for a better understanding of the real project costs, which ultimately totaled \$63 million. After reassessing the program, the Town decided to proceed with the original program scope and to seek additional funding support from the citizens. This decision was feasible because it was made early in the project, and there was time to build consensus among the various stakeholders within the community. The lesson learned here is that the value of accurate cost estimating and budgeting early in the design phase should not be underestimated.

5) KEY PERSONNEL

Heery proposes a project team with significant depth of experience in Massachusetts elementary school design and construction programs. Our project team is made up of key individuals who will offer their expertise throughout the design and construction phases. Proposed Project Director, Chris Lawson, PE, CCM, LEED Green Associate, MCPPO/OPM, has successfully overseen the construction of more than ten Massachusetts K-12 school projects over the past 15 years. He has managed several large elementary school and high school projects. Dennis Pacitti, MCPPO/OPM is our Project Representative with over 30 years of experience and with the requisite MCPPO/OPM certification. Mr. Pacitti is currently overseeing the construction of the new 231,500 SF Beverly Middle School. He most recently oversaw the construction of the Bresnahan Elementary School, the City of Newburyport's new model elementary school - adjacent to an existing, occupied school. We anticipate additional field staff will be required to support Mr. Pacitti once construction starts due to the extent of the anticipated scope of work and the project size, including staff with experience in managing work under environmental oversight.



Our organizational chart is included in Attachment C, along with resumes for our Project Director and Project Representative as well as our other key personnel: Professional Estimator, Greg Ridgely, LEED AP BD+C; and Scheduler, Ken Kropa. We are including information demonstrating their time commitment and relevant experience in the supervision of multiple, successfully completed projects similar in type, size, dollar value and complexity to the Amesbury Elementary School Project. Each team member has managed, administered, estimated or provided schedules on Massachusetts public projects which vary but range from \$10 million to more than \$200 million in construction value. Our proposed leadership team has worked exclusively on school projects for more than 15 years and on projects of various sizes, many similar in size to your proposed project as outlined in Attachment C. We have provided the estimated average time commitment (% of full time equivalent or FTE) of each key staff members on the organization chart.

Your project requires an OPM firm with experience working on both occupied renovations and on new elementary school projects. Heery has worked on a significant number of large elementary schools. From the site tour held for the perspective OPM firms, it is clear that keeping the elementary school campus at its current location is the 'best and appropriate use' for this site. As such, having experience phasing the design and construction in a fully occupied school is extremely important should that option be pursued. Heery's experience managing similar elementary school programs, new or renovated, will be valuable in working with your staff during the design phase of this project. The insight we have gained working with other schools will allow our project team to work together efficiently from the first day to position your project to achieve its goals.

6) CAPACITY AND SKILLS

Heery offers the City of Amesbury our in-house support for all necessary expertise and does not require the outsourcing of any basic services to any subconsultants. Total North Region staff, by discipline, is outlined in Attachment C, Item 3. Specifically within our North Region, Heery has six Cost Estimators available for Value Engineering, 24 Architects/Engineers for constructability reviews, and eight Construction Inspectors for Quality Assurance/Quality Control. Heery has additional support staff in other regions of the company, totaling 532 employees, should we need additional support or more specialized services. This complete, in-house team provides the Amesbury Elementary School Building Committee with centralized accountability and with the synergy of diverse professionals who have worked together successfully on 33 Massachusetts school projects over the past 25 years. Heery has the most experience, MA K-12 experience and capacity in-house of all of the OPM firms you are evaluating. The benefit that our depth of resources and K-12 experience brings to the Amesbury Elementary School Project is that these resources are utilized for a limited amount of time, with a high level of expertise in their specific area, making them extremely cost effective for your project.

All of our firm resources are under the direct supervision of Area Manager, Tom Ellis, who will make sure that proposed Project Director Chris Lawson has the appropriate resources available to him at all times. Mr. Ellis is a registered architect and has served as the Project Director for numerous school projects in the Commonwealth of Massachusetts over the past 20 years. He will bring his knowledge as an active participant in the management of your project. He will be available to assist with your public presentations for Town meetings and will provide executive oversight on this project.



7) WORKLOAD

Our current workload of nine projects includes five active K-12 projects, three active municipal projects, plus one school in MSBA audit closeout. These projects are being managed by three different project directors. All of our current projects in excess of \$1.5 million, including their status of completion, are shown in Section 8 of Attachment C. We have the capacity to immediately start work on your project.

Most of our project directors manage, on average, two to three concurrent projects, depending upon the project size, which is in line with the expectations of the MSBA. Heery has additional project management staff assigned to other projects in various capacities that will not be affected by the award of this project to our firm. Heery has sufficient staff to manage and support the current workload of projects from our Burlington office. The in-house support staff of cost estimators, schedulers, design review team members and value engineers will be assigned on an as-needed basis throughout the course of your project. These support staff work on a number of projects concurrently throughout the year, and we will schedule their time to support the City of Amesbury after we prepare a definitive project schedule.

Mr. Lawson, our proposed Project Director, will have no other project commitments at the time our services will start and is immediately available to lead the Amesbury Elementary School District's project upon our selection as your OPM. Our proposed Project Representative, Dennis Pacitti, MCPPO/OPM, will have completed his current construction assignment with the Beverly Middle School project long before the time construction commences on your project.

8) FAMILIARITY WITH NORTHEAST-CHPS/LEED FOR SCHOOLS GUIDELINES

In the 1970s, Heery began advocating practices in support of energy conservation and sustainable design. Since that time, we have worked on over 1,000 buildings representing 25 million SF in 18 states of LEED certified and sustainable projects. Many of our clients regularly achieve energy cost savings of 20% to 40% with little or no increase in initial cost. Designing, managing, and constructing buildings with sustainability and renewable energy goals is entrenched in our professional DNA.

We have specific experience managing high performance green school building projects in Massachusetts using green building rating systems (i.e., MA CHPS and LEED for Schools) addressing site, water, energy, materials, indoor air quality and operations. All of the buildings we have constructed under MSBA funding guidelines with green school goals have reached their CHPS or LEED goals for the maximum 2% reimbursement by the MSBA. We are currently working on projects which have received approval of the Preferred Schematic Design by the MSBA Board after July 29, 2015, which is subject to their new sustainable building guidelines, as described in the MSBA update on Sustainable Building Design Guidelines & Policy Recommendations, dated March 18, 2015. This update outlines the transition from MA-CHPS to NE-CHPS and updates the LEED for Schools sustainable guidelines.

Many of our project managers hold certifications as LEED Accredited Professional or LEED Green Associate and have extensive experience managing projects with sustainability and renewable energy goals. Chris Lawson, who is a LEED Green Associate, will oversee the sustainability aspects of your project. We will track the proposed credits during the design phase to confirm the building design is able to meet the desired energy and sustainable design goals of the Amesbury Elementary School project. Our experience working with owners to make informed decisions on sustainable/renewable building materials and finishes is contained in Section 9, in addition to addressing life cycle costing.

Lastly, Heery will work with you to review any eligible grant/funding programs in place at the time the project is being designed and will assist the Owner/design team consultants in preparing the program applications. Heery will work with the MSBA to assess the impact, if any, of 'third party' funding directed toward incentive programs applicable under the MSBA Project Funding Agreement with the City of Amesbury.

9) LIFE CYCLE COSTS, COST ESTIMATING, AND VALUE ENGINEERING

During the design phase, Heery works with the entire architecture/engineering team, reviewing and assessing the design as it relates to the program, budget and schedule to minimize conflicts in the field during construction and to reduce change orders. We look at project costs from both life-cycle analysis and value engineering perspectives, determining what each system needs to do and then how best to achieve that desired performance in the most cost effective manner.

An excellent example of how we work in collaboration with the Owner in assessing life cycle costs of building materials is our recommendation to install terrazzo flooring in the major hallways of the Beverly High School in lieu of using the more traditional, and less expensive, vinyl composition tile (VCT). We teamed with the facility manager in Beverly to identify the initial costs for installing traditional VCT flooring and analyzed the daily/periodic maintenance and replacement costs to arrive at this recommendation which provided a 23 year payback in this capital investment. Heery will provide this type of assessment on all building systems on your project, giving you, the Owner, the best life cycle value for your design and construction dollar.

The majority of our clients participate in energy incentive programs provided by the utility companies within their communities. Establishing a baseline of systems performance early in the design process and incorporating it into the final construction documents is important to determining the real value of participation in available energy programs. Heery has participated in programs which resulted in significant energy rebates for our clients through programs provided by or administered through National Grid / Eversource.

Cost estimating is crucial to monitoring construction costs during the design phase. With a sizable K-12 cost database, our in-house cost estimators are consistently 'hitting the bull's eye' on behalf of our clients, establishing accurate cost models early in the design process and, more importantly, predicting bid results far in advance of bid day. An example of this success comes from our experience as OPM on the complex high school addition/renovation in the City of Beverly. Our final cost estimate predicted a construction bid of \$67,538,000, which ultimately concluded in a contract award of \$66,990,000 on the project. Our estimate was less than 1% from the final contract award value. Every school project which we have managed during the design phase and for which we performed complete costs estimates have allowed the Owner to award the contract immediately following bidding. Heery's success in receiving bids with consistently tight bid ranges indicates our consistent understanding of project scopes.

The bottom line is that Heery's approach to life cycle analysis, cost management and value engineering is fully integrated into our overall management approach for your project. Each day we focus on planning ahead to eliminate surprises, on keeping the Elementary School Building Committee updated and informed, and working to make sure that the project maintains its balance of program, cost and schedule.

10) BUILDING COMMISSIONING AGENTS

Since 1999, Heery has provided full service commissioning through design, construction, and acceptance as well as during the warranty service period. Our firm was recently named a Certified Commissioning Firm, one of only 39 such companies in the nation. The designation, granted by the independent Building Commissioning Certification Board through a program with the Building Commissioning Association, recognizes companies that "demonstrate a high level of competence and experience for the building commissioning process."



We have also successfully managed the services of independent commissioning consultants on projects where Heery has served as the OPM. We have successfully completed the final commissioning phase on all of our school projects under the oversight and funding of MSBA. Prior to the Construction Reform Law of 2004, Heery provided commissioning services as part of our OPM scope of services on a number of our school projects. We have an understanding of the value of commissioning services for our clients and have done so for nearly two decades.

11) FINANCIAL STABILITY

Heery is a 65-year-old, financially stable firm, repeatedly receiving favorable ratings by such financial watchdogs as Dun and Bradstreet and the A.M. Best Co. With offices and projects throughout the US, we manage more than \$5 billion in contracted work annually for public and private clients.

Audited financials have been submitted under separate cover.

two



1. Project Name/Location for Which Firm is Filing:

Owner's Project Management (OPM) Services for Amesbury Elementary School, Amesbury, MA

1a.

2a. Respondent, Firm (Or Joint-Venture) - Name And Address Of Primary Office To Perform The Work:	2b. Name And Address Of Other Participating Offices Of The Prime Applicant, If Different From Item 3a Above:				
Heery International, Inc. / Boston Area Office 80 Blanchard Road, Suite 108 Burlington, MA 01803	*See note below.				
2c. Date Present And Predecessor Firms Were Established:	2d. Name And Address Of Parent Company, If Any:				
Heery & Heery, Inc. - 1959 Heery & Heery (partnership) - 1952 C. Wilmer Heery, Architect - 1946	Balfour Beatty, LLC 1011 Centre Road, Suite 310 Wilmington, DE 19805				
2e. Federal ID #:	2f. Name of Proposed Project Director:				
580827945	Chris Lawson, PE, CCM, LEED Green Associate, MCPPO/OPM				
3. Personnel From Prime Firm Included In Question #2 Above By Discipline (List Each Person Only Once, By Primary Function -- Average Number Employed Throughout The Preceding 6 Month Period. Indicate Both The Total Number In Each Discipline):					
Accountants	2	Construction Managers	7	MICS / Information	1
Acoustical Engineers	0	Cost Engineer/Estimator	6	Project Manager	65
Administrative	19	Electrical Engineers	1	Safety/Occupational	1
Architects	17	Environmental Engineers	0	Schedulers	2
CADD Technician	0	Fire Protection Engineers	0	Structural Engineers	0
Civil Engineers	11	Interior Designers	3	Technician/Analyst	1
Code Specialists	0	Mechanical Engineers	7	Commissioning Agent	5
Construction Inspectors	7	Licensed Site Professionals	0	Total	155
*The Amesbury Elementary School project will be managed and staffed by the Boston Area office with limited support from other area offices. The total personnel shown above is for the entire north region who provide in-house service and support the Boston area office staff of 11 project managers.					
4. Has this Joint-Venture previously worked together?			<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	N/A

5. List ONLY Those Prime and Sub-Consultant Personnel identified as Key personnel in the Response to Request for Services. This Information Should Be Presented Below In The Form Of An Organizational Chart modified to fit the firm's proposed management approach. Include Name of Firm And Name Of The Person:



6. Brief Resume for Key Personnel ONLY as indicated in the Request for Services. Resumes Should Be Consistent With The Persons Listed On The Organizational Chart In Question # 5. Additional Sheets Should Be Provided Only As Required For The Number Of Key Personnel And They Must Be In The Format Provided. By Including A Firm As A Subconsultant, The Prime Applicant Certifies That The Listed Firm Has Agreed To Work On This Project, Should The Team Be Selected.	
a. Name And Title Within Firm: Chris Lawson, PE, CCM, LEED Green Associate, MCPPO/OPM	a. Name And Title Within Firm: Dennis Pacitti, MCPPO/OPM Associate
b. Project Assignment: Project Director	b. Project Assignment: Construction Representative
c. Name And Address Of Office In Which Individual Identified In 6a Resides: Heery International, Inc 80 Blanchard Road, Suite 108 Burlington, MA 01803	c. Name And Address Of Office In Which Individual Identified In 6a Resides: Heery International, Inc 80 Blanchard Road, Suite 108, Burlington, MA 01803
d. Years Experience: With This Firm: <u><1</u> With Other Firms: <u>28</u>	d. Years Experience: With This Firm: <u>4</u> With Other Firms: <u>33</u>
e. Education: Degree(s) /Year/Specialization Bachelor of Science, Civil Engineering, Northeastern University, 1988	e. Education: Degree(s) /Year/Specialization Associate of Science, Digital Electronics, Hesser College
f. Date of MCPPO Certification: Original Certification: 11/23/2015	f. Date of MCPPO Certification: Original Certification: 5/21/2015
g. Applicable Registrations and Certifications: MCPPO/OPM Certification, Registered Engineer (MA), Certified Construction Manager, LEED Green Associate, Licensed Construction Supervisor (MA), OSHA 40-Hour, OSHA HAZWOPER	g. Applicable Registrations and Certifications: MCPPO/OPM Certification, OSHA 30-Hour Certification, OSHA 10-Hour Certification
h. Current Work Assignments And Availability For This Project Available immediately to provide support for the Amesbury Elementary School Project.	h. Current Work Assignments And Availability For This Project: Project Representative will be Available when Construction Starts for the Amesbury Elementary School Project
i. Other Experience And Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed , If Not Current Firm): Mr. Lawson is a highly experienced and very knowledgeable senior construction management professional responsible for the consistent delivery of high quality public and private projects on time, on schedule and on budget. He is a registered Massachusetts Professional Engineer, Certified Construction Manager and Massachusetts Construction Supervisor with vast experience in all aspects of design, management and construction means and methods. Mr. Lawson's prime function is to protect the Owner's interests in the successful management of the OPM construction projects. He is an outstanding manager and team leader with exemplary skills in team building and customer relations. Mr. Lawson's specific project experience includes: <u>*Adams Cheshire Middle/High School</u> , Adams, MA – Project Director, \$40.5 million addition/renovation of the LEED Gold Certified project. <u>*Worcester North High School</u> , Worcester, MA – Project Executive, \$72.8 million at-risk construction of the High School. <u>*MSBA Accelerated School Repair Program</u> , Worcester, MA and Canton, MA - Project Executive, five accelerated renovation projects totaling \$10 million. <u>*Auburn High School</u> , Auburn, MA – Project Director, sports upgrades. <u>*New Bus Maintenance Facility</u> , Worcester, MA – Senior Project Manager, 150,000 SF, \$75 million bus maintenance facility for the Worcester Regional Transportation Authority. <u>*IRS Service Center</u> , Andover, MA – Construction Manager, 380,000 SF, \$115 million renovation. *Completed prior to pending employment with Heery.	i. Other Experience And Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Mr. Pacitti has over 30 years of experience in the construction industry. He has been responsible for overseeing all phases of construction, from major site preparation and utility infrastructure through foundations, superstructure, building envelope, MEP and Tele/data rough-in/finish, systems testing and commissioning, interior finishes and tenant fit-out. Mr. Pacitti's representative projects are noted below, with project experience prior to Heery being marked with an asterisk (*): <u>Beverly Middle School</u> , Beverly, MA - \$110 million new construction, new 1,395 student middle school. <u>Bresnahan Middle School</u> , Newburyport, MA - \$30 million new construction of the Elementary School, 112,000 SF, 450 Students. <u>*Shore Country Day School</u> , Beverly, MA - \$10 million renovation for a new center for creativity. <u>*Manchester-Essex Middle/High School</u> , Manchester, MA - \$49 million phased construction. <u>*Ipswich High School</u> , Ipswich, MA - \$32 million phased construction. <u>*Masconomet High/Middle School</u> , Topsfield, MA - \$54 million for a new high school. <u>*St Mark's Academy & Milton Academy</u> , - Milton, MA – Campus Master improvements.

6. Brief Resume for Key Personnel ONLY as indicated in the Request for Services. Resumes Should Be Consistent With The Persons Listed On The Organizational Chart In Question # 5. Additional Sheets Should Be Provided Only As Required For The Number Of Key Personnel And They Must Be In The Format Provided. By Including A Firm As A Subconsultant, The Prime Applicant Certifies That The Listed Firm Has Agreed To Work On This Project, Should The Team Be Selected.					
a.	Name And Title Within Firm: Greg Ridgely, LEED AP, Executive Associate		a.	Name And Title Within Firm: Ken Kropa, EIT, Associate	
b.	Project Assignment: Professional Estimator		b.	Project Assignment: Scheduler	
c.	Name And Address Of Office In Which Individual Identified In 6a Resides: Heery International, Inc 8201 Corporate Drive, Suite 850 Landover, MD 20785		c.	Name And Address Of Office In Which Individual Identified In 6a Resides: Heery International, Inc 8201 Corporate Drive, Suite 850 Landover, MD 20785	
d.	Years Experience: With This Firm: <u>21</u> With Other Firms: <u>10</u>		d.	Years Experience: With This Firm: <u>5</u> With Other Firms: <u>4</u>	
e.	Education: Degree(s) /Year/Specialization Bachelor of Science, Industrial Technology, University of Maryland, 1984		e.	Education: Degree(s) /Year/Specialization Bachelor of Science, Civil Engineering, Georgia Institute of Technology, 2008	
f.	Date of MCPPO Certification: N/A		f.	Date of MCPPO Certification: N/A	
g.	Applicable Registrations and Certifications : LEED Accredited Professional		g.	Applicable Registrations and Certifications: Engineer-in-Training	
h.	Current Work Assignments And Availability For This Project: Various, available immediately to provide support for the Amesbury Elementary School Project		h.	Current Work Assignments And Availability For This Project Various, available immediately to provide support for the Amesbury Elementary School Project	
i.	Other Experience And Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm): Mr. Ridgely has over 30 years of experience in the construction industry. He has prepared specialized estimates in UNIFORMAT and for all C.S.I. Divisions. His duties have included quantity surveys, bid pricing, scope review, plan and specification acquisition, contract administration and performing project management on several projects. He leads an experienced team of estimators covering all disciplines related to a project. Mr. Ridgely has provided Cost Estimating and cost analysis services for over 20 K-12 school projects in Massachusetts and performing arts centers in Pennsylvania, including the following: <u>Bresnahan/ES, Newburyport, MA – 112,000 SF new model school totaling \$37.3M.</u> <u>Worcester South Community High School, Worcester, MA – est. \$193 million program</u> <u>Worcester Technical HS, Worcester, MA – 400,000 SF, \$90 million new technical high school.</u> <u>Beverly M.S., Beverly, MA - \$109 million, new 1,395 student middle school.</u> <u>Beverly H.S., Beverly, MA - \$65 million, 260,000 SF, occupied addition and renovation.</u> <u>Bay Path Reg. Voc. Tech. HS, Charlton, MA – 189,000 SF renovation, 50,000 SF addition.</u> <u>Tewksbury High School, Tewksbury, MA – - Construction of a new 218,000 SF high school for 1,100 students, including demolition of the existing school.</u> <u>Town of Sharon Public Schools - \$67 million in construction and renovations to three schools.</u> <u>Douglas MS/ES, Douglas, MA – 84,000 SF new ES, 89,000 SF repair of MS.</u> <u>Fall River Public Schools Program, Fall River, MA – 7-school program, including 26,000 SF renovation and 30,000 SF new const. to John J. Doran Elementary; 96,000 SF North End ES.</u> <u>Lynnfield School Building Program, Lynnfield, MA – additions/renovations to 4 schools.</u> <u>Town of Westborough Public Schools, Westborough, MA – \$55 million program.</u> <u>North Middlesex Regional HS, Townsend, MA – 180,000 SF new construction totaling \$89M.</u> <u>Nock/Molin MS/ES, Newburyport, MA – \$26.5 million phased renovations to 160,000 SF.</u>		i.	Other Experience And Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed , If Not Current Firm): Mr. Kropa has nine years of experience in construction project controls and scheduling, along with a background in civil engineering design and drafting. He has developed and maintained comprehensive planning, procurement and construction schedules for a diverse range of projects, including educational facilities, office buildings, power plants, and manufacturing facilities. His specific project experience includes: <u>Bresnahan Elementary School, Newburyport, MA – 112,000 SF new model school totaling \$37.3 million.</u> <u>Beverly Middle School, Beverly, MA – new 1,395 students 223,000 SF \$109 million facility.</u> <u>South High Community School, Worcester, MA - \$110 million program to replace or renovate the existing 246,000 SF school.</u> <u>North Middlesex Regional High School, Townsend, MA – 180,000 SF new construction totaling \$89 million.</u> <u>Discovery Elementary School, Arlington, VA – 90,000 SF new elementary school.</u> <u>Millersville University Gordinier Hall Renovation, Millersville, PA – 22,000 SF two story addition to the Gordinier Dining Hall, along with existing facility renovations.</u> <u>Kutztown University Lytle Hall Renovations, Kutztown, PA – Scheduling services.</u> <u>United States Diplomacy Center, Washington, DC – New \$25 million museum and educational center.</u>	

Past Performance: List all Completed Projects, in excess of \$1.5 million, for which the Prime Applicant has performed, or has entered into a contract to perform Owner's Project Management Services for all Public Agencies within the Commonwealth within the past 10 years.										
a.	Project Name And Location Project Director	b. Brief Description Of Project And Services (Include Reference To Areas Of Similar Experience)	c. Project Dollar Value	d. Completion Date (Actual Or Estimate)	e. On Time (Yes Or No)	f. Original Construction Contract Value	g. Change Orders	h. # of Safety Violations, Accidents	i. Value of Safety fines	j. Number & Outcome Of Legal Actions
(1)	World War Memorial Stadium Newburyport, MA - Tony Pruner	OPM services for renovation of a Football Stadium	\$3,900,000	09/16	Yes	\$ 3,398,500	5 – \$70,394	0	0	0
(2)	Newburyport Senior Center Newburyport, MA - Tony Pruner	OPM services for construction of a new 16,500 SF Senior Community Center.	\$6,500,000	11/15	Yes	\$5,762,162	8 – \$182,162	0	0	0
(3)	Westborough Town Hall, Westborough, MA– Peter Collins	OPM services for improvements to the 19,337 SF town hall.	\$7,800,000	11/15	Yes	\$5,394,700	16 – \$696,507	0	0	0
(4)	Bay Path Vocational School, Charlton, MA – Mark Lydon	OPM services for the additions/renovations of the existing 1,100 student high school.	\$73,800,000	09/15	Ahead of schedule	\$57,024,455 (GMP)	\$4,402,300 (19 CO)	0	0	0
(5)	Westborough Fire Station Westborough, MA – Peter Collins	OPM services for construction of new community fire station.	\$11,208,000	06/15 (Phase 2)	Yes	\$8,267,700	13- \$271,138.82	0	0	0
(6)	Nock MS/ Molin ES, Newburyport, MA - Tony Pruner	OPM services for upgrades to 160,000 SF facility, including M/E/P, structural and envelope systems.	\$26,997,326	10/14	Yes	\$22,517,703	27 - \$1,640,289	0	0	0
(7)	Douglas MS/ES, Douglas, MA Tom Ellis	OPM Services for existing 89,000 SF MS and 84,000 SF new ES. *Delayed due to insurance claim settlement.	\$50,749,389	09/14	No *See b. - insurance claim	\$36,226,678	26 - \$968,320 (\$252,496 reimb. claim)	0	0	0
(8)	Bresnahan ES, Newburyport, MA Tony Pruner	OPM services for new, 112,000 SF ES (Pre-K – 3 rd Grade) part of the Model Schools Program.	\$37,118,204	08/14	Yes	\$29,283,589	14 – \$1,093,589	0	0	0
(9)	Tewksbury HS, Tewksbury MA Peter Collins	OPM services for a new 1,100 student HS MSBA Model School.	\$67,710,158	06/14	Yes	\$51,600,000	29 - \$3,709,331	1	0	0
(10)	Lynnfield HS Expand, Town of Lynn Field, MA Mark Lydon	OPM services for a 12,000 SF Academic classroom expansion.	\$4,500,000	05/14	Yes	\$3,110,346	5 - \$259,285	1	0	0
(11)	Beverly HS, Beverly, MA Thomas Ellis	OPM services for new 166,000 SF classroom wing for 1200 students with core facility renovation of 94,000 SF.	\$82,000,000	12/11	Yes	\$67,134,217	22 - \$860,792	0	0	0
(12)	Westford Town Hall Addition/Renovations Westford, MA - Thomas Ellis	PM Construction phase services only for the renovation of and addition to the Town Hall. Services not provided for design or bidding phase.	\$3,300,000	12/10	Yes	\$2,705,570	7 - \$243,000	0	0	0
(13)	Whittier Regional HS, Haverhill, MA - Mark Lydon	OPM services for design, bid/award, and construction oversight for 160,000 SF complete roof replacement.	\$2,147,762	10/10	Yes	\$1,542,000	7 – Net Credit Overall	0	0	0
(14)	David Mindess School Ashland, MA - Peter Collins	OPM services for re-Roofing with Skylight and ceiling replacement at ES consisting of approximately 80,000 SF.	\$2,384,021	10/10	Yes	\$1,719,000	2 - \$149,901 *Owner Initiated	0	0	0
(15)	Cameron Senior Center Addition/Renovations Westford, MA - Thomas Ellis	PM Construction phase services only for the renovation and addition to a Senior Center. Services not provided for design or bidding phase.	\$4,000,000	07/10	Yes	\$3,307,539	4 - \$152,445	0	0	0
** asterisks to projects below indicate project for which our services were primarily construction phase oversight.										


(16)	Public Safety Building, Westborough, MA - Peter Collins	OPM services for (design phase only), for a 63,000 SF Public Safety Facility (separated into two projects).	\$30,000,000	N/A project suspended	N/A project suspended	N/A	N/A	N/A	N/A	N/A
(17)	Greater Lowell Technical High School, Tyngsboro, MA - Tony Pruner	OPM services during feasibility study phase for 550,000 SF renovation.	\$30,000,000 to \$40,000,000	N/A	N/A	N/A	N/A	N/A	N/A	N/A
(18)	Slade ES **, Fall River, MA Mark Lydon / Al Calcagno	PM constr. phase services only for a new 121,455 SF ES for 682 students.	\$31,000,000	10/08	Yes	\$24,896,700	\$565,114	0	0	0
(19)	Small ES **, Fall River, MA Mark Lydon / Al Calcagno	PM constr. phase services only for new 100,000 SF ES for 526 students.	\$31,270,000	10/08	Yes	\$24,951,310	\$595,629	0	0	0
(20)	Kuss MS **, Fall River, MA Al Calcagno	PM constr. phase services only for a new 157,000 SF MS for 800 students.	\$58,050,000	10/08	Yes	\$44,785,700	\$775,640	0	0	0
(21)	Alfred S. Letourneau ES **, Fall River, MA Mark Lydon / Al Calcagno	PM Construction phase services only for a new 100,000 SF elementary school for 526 students.	\$29,330,000	09/08	Yes	\$24,657,000	\$228,255	1 Safety Violation* (A)	0	0
(22)	Lawrence HS, ** MA Tony Pruner	PM Construction phase services only for new 565,000 SF high school for 3,000 students.	\$110,000,000	06/08	Yes	\$77,252,000	\$3,825,820	0	0	0

Note: (A) – J&J Contractors

7b.	Past Performance: Provide the following information for those completed Projects listed above in 7a for which the Prime Applicant has performed, or has entered into a contract to perform Owner's Project Management Services for all Public Agencies within the Commonwealth within the past 10 years.						
a.	Project Name And Location Project Director	b. Original Project Budget	c. Final Project Budget	d. If different, provide reason(s) for variance	e. Original Project Completion	e. Actual Project Completion On Time (Y/N)	f. If different, provide reason(s) for variance
(1)	World War Memorial Stadium, Newburyport, MA – Tony Pruner	\$3,398,500	\$3,900,000	On budget.	09/16	Yes	
(2)	Newburyport Senior Center, Newburyport, MA – Tony Pruner	\$5,762,162	\$6,5000,000	On budget.	11/15	Yes	
(3)	Westborough Town Hall, Newburyport, MA – Tony Pruner	\$7,674,000	\$7,800,000	On budget.	11/15	Yes	
(4)	Bay Path Vocational School, Charlton, MA – Mark Lydon	\$73,800,000	\$72,200,000	Under budget.	12/15	08/15, ahead of schedule	
(5)	Westborough Fire Station, Westborough, MA - Peter Collins	\$11,208,000	\$11,208,000	On budget.	06/15	Yes	
(6)	Nock MS/ Molin ES, Newburyport, MA; Tony Pruner	\$26,997,326	\$26,997,326	On budget.	12/14	Yes	
(7)	Douglas MS/ES, Douglas, MA Tom Ellis	\$52,000,000	\$50,749,389	Under budget. *Delayed due to building risk insurance claim settlement.	03/14	08/14	*See note in d.
(8)	Bresnahan ES, Newburyport, MA; Tony Pruner	\$39,818,204	\$37,118,204	Under budget.	12/14	Yes	
(9)	Tewksbury HS, Tewksbury, MA Peter Collins	\$80,000,000	\$67,710,158	Under Budget.	08/13	Yes, as Noted	*See note in d.
(10)	Lynnfield High School, Lynnfield, MA Mark Lydon	\$4,500,000	\$4,500,000	On budget. *Opened on schedule. Schedule extended due to remediation of increased nickel levels.	03/13	No	*See note in d.

(11)	Beverly High School Beverly, MA – Tom Ellis	\$84,400,000	\$80,155,000	Under budget.		12/11	Yes		
(12)	Westford Town Hall , Westford, MA Thomas Ellis	\$3,300,000	\$3,300,000	On budget.		12/10	Yes		
(13)	Whittier Regional HS , Haverhill, MA - Mark Lydon	\$3,294,627	\$2,147,762	Under budget.		10/10	Yes		
(14)	David Mindess School , Ashland, MA - Peter Collins	\$3,111,370	\$2,384,021	Under budget.		10/10	Yes		
(15)	Cameron Sr. Center Addition/Renovations , Westford, MA; Tom Ellis	\$4,000,000	\$3,307,539	Under budget.		07/10	Yes		
(16)	Public Safety Building , Westborough, MA - Peter Collins	\$30,000,000	\$30,000,000	Project was suspended at end of construction document phase. Redesigned separate new Fire Station project noted in current/ongoing projects Section 8.		N/A	N/A		
(17)	Greater Lowell Technical High School , Tyngsboro, MA Tony Pruner	\$30,000,000 - \$40,000,000	N/A	Project services completed at end of feasibility study/schematic design phase.		N/A	N/A		
(18)	Slade ES , Fall River, MA Mark Lydon / Al Calcagno	\$31,000,000	\$31,000,000	On budget.		10/08	Yes		
(19)	Small ES , Fall River, MA Mark Lydon / Al Calcagno	\$31,270,000	\$31,270,000	On budget.		10/08	Yes		
(20)	Kuss MS , Fall River, MA Mark Lydon	\$58,050,000	\$58,050,000	On budget.		10/08	Yes	Early completion of project	
(21)	Alfred S. Letourneau ES* Fall River, MA Mark Lydon / Al Calcagno	\$29,330,000	\$29,330,000	On budget.		09/08	Yes		
(22)	Lawrence HS , Lawrence, MA Tony Pruner	\$110,000,000	\$107,000,000	Under budget.		06/08	Yes		
8.	Capacity: Identify all current/ongoing Work by Prime Applicant, Joint-Venture Members or Subconsultants. Identify project participants and highlight any work involving the project participants identified in the response.								
Project Name And Location Project Director		b. Brief Description Of Project And Services (Include Reference To Areas Of Similar Experience)	c. Original Project Budget	d. Current Project Budget	e. Project Completion Date	f. Expected completion date On Time (Y/N)	f. Original Construction Contract Value	g. Number and dollar value of Change Orders	h. Number and dollar value of claims
1. Tewksbury E.S. Tewksbury, MA Peter Collins		Project Management Services for the addition and/or renovation of the existing 40,350 SF, 256 student Elementary School.	\$45 million - \$70 million	TBD	TBD	N/A – in feasibility study	N/A – in feasibility study	N/A	N/A
2. Worcester South H.S. , Worcester, MA Mark Lydon		Project Management Services for the replacement of the existing 1,288-student High School.	Est. \$200 million	TBD	TBD	N/A	N/A In Design	N/A	N/A
3. Newburyport Parking Garage , Newburyport, MA Tony Pruner		Project Management Services for construction of a new 200-car parking/intermodal facility in the historic waterfront district.	Est. \$11.5 million	\$13,416,372	N/A In Design	12/2018 Yes	N/A In Design	N/A	N/A

4. Westborough Municipal Building , Westborough, MA Peter Collins	Renovation of the existing police station and municipal offices for the town.	\$11 million (2012)	\$15.0 million	06/2019	Yes	\$10,516,168	\$0 Construction just started	N/A
5. Westborough Library , Westborough, MA Peter Collins	Feasibility study for an additional/renovation to the existing Library.	Est. \$23.9 million	Pending Funding – Feasibility Phase	TBD Pending Funding	N/A	N/A	N/A	N/A
6. Beverly MS , Beverly MA Mark Lydon	OPM services for new 223,000 SF MS for 1,395 students.	\$70 to \$90 million	\$110,711,000	09/18	Yes	\$90,128,105	No CO to date	None
7. N. Middlesex HS , Townsend, MA Peter Collins	OPM services for new 180,530 SF HS for 870 students.	\$89,084,977	\$88,183,582	Ph. 1 – 8/17 Ph. 2 – 10/18	Yes	\$64,995,000	12 - \$383,000	None
8. Sarah Gibbons MS Westborough, MA Peter Collins	OPM services for renovation to 110,000 SF MS including M/E/P and building envelope.	\$18,000,000 to \$22,000,000	\$26,700,000	12/2017	Yes	\$21,418,655	9 - \$650,000	None
9. References: Provide the following information for completed and current Projects listed above in 7 and 8 for which the Prime Applicant has performed, or has entered into a contract to perform Owner's Project Management Services for all Public Agencies within the Commonwealth within the past 10 years.								
a. Project Name And Location Project Director	Client's Name, Address and Phone Number. Include Name of Contact Person	Project Name And Location Project Director		Client's Name, Address and Phone Number. Include Name of Contact Person		Project Name And Location Project Director		Client's Name, Address and Phone Number. Include Name of Contact Person
1) Worcester Technical HS Worcester, MA Thomas Ellis	Jill Dagilis, Executive Director (Formerly Worcester Dept. of Health & Human Services) Community Action Council, Inc. 484 Main Street 2nd Floor Worcester, MA 01608 (508) 754-1176	6) Town of Westborough Municipal Projects and Sarah Gibbons MS Westborough, MA Peter Collins		Bob Brown, Chairman Municipal Building Committee 34 West Main Street Westborough, MA 01581 (508) 366-7834 Steve Doret (Sarah Gibbons) (508) 264-3241		11) North Middlesex Regional HS North Middlesex, MA Peter Collins		Joan Landers, Superintendent North Middlesex Regional School District 45 Main Street Pepperell, MA 01463 (879) 597-8713 ext. 1200
2) Lawrence HS Lawrence, MA Tony Pruner, Peter Collins	Dr. Mary Lou Bergeron, Assistant Superintendent Lawrence Public Schools 255 Essex Street Lawrence, MA 01840 (978) 975-5905 Ext. 340	7) David Mindess ES Ashland, MA Peter Collins		Alan Graham (former Ashland Client) Saugus Public Schools agraham@saugus.k12.ma.us Work- (781) 231-5000 x112 Mobile – (617) 877-5413		12) Lynnfield HS Lynnfield, MA Mark Lydon (2011 Program)		Timothy Doyle, Chairman Lynnfield HS Bldg. Committee 55 Summer Street Lynnfield, MA 01940 (781) 245-1127
3) Beverly HS Beverly, MA Thomas Ellis Beverly MS Beverly, MA Mark Lydon	Michael Collins Commissioner of Public Services City of Beverly - City Hall 191 Cabot Street Beverly, MA 01915 (978) 921-6053	8) Tewksbury HS Tewksbury ES Tewksbury, MA Peter Collins		Jamey Cutelis, Chairman Town of Tewksbury School Building Committee 1147 Main Street – Suite 104 Tewksbury, MA 01876 (978) 640-4300 Richard Montuori, Town Mgr. 1009 Main St. Tewksbury, MA 01876		13) Senior Community Center World War Memorial Stadium Newburyport Intermodel Parking Garage Newburyport, MA Tony Pruner		Geordie Vinning Senior Project Manager Office of Planning and Development City of Newburyport City Hall, 60 Pleasant Street Newburyport, MA 01950 (978) 465-4400

4) Nock/Molin & Bresnahan ES Newburyport, MA Tony Pruner	Steve Bergholm, Facility Director Newburyport Public Schools 70 Low Street Newburyport, MA 01950 (978) 465-4440	9) Town of Douglas – MS/ES Douglas, MA Tom Ellis	Paul Fowkes, Project Manager Massachusetts School Building Authority 40 Broad Street – Suite 500 Boston, MA 02109 (617) 720-4466	14) Whittier Regional HS Haverhill, MA Mark Lydon	Brett Murphy Bldg & School Committee 115 Amesbury Line Road Haverhill, MA 01830 (978) 373-4101
5) Bay Path Regional Vocational Technical HS Charlton, MA Mark Lydon	John LaFleche, Superint./Dir. Bay Path Regional Vocational Technical High School 57 Old Muggett Hill Road Charlton, MA 01507 (508) 248-5971	10) Cameron Senior Center & Town Hall Addition/Renovations Westford, MA Thomas Ellis	Thomas Mahanna, Chairman Westford Permanent Building Committee 55 Main Street Westford, MA 01886 (978) 692-1913	15) Worcester South High Community School 170 Apricot St. Worcester, MA 01603 Mark Lydon	Russell Adams, P.E., Asst. Commissioner City of Worcester 20 East Worcester Street Worcester, MA 01604 (508) 799-1454
9. Use This Space to Provide Any Additional Information Or Description Of Resources Supporting The Qualifications Of Your Firm And That Of Your Subconsultants. If Needed, Up To Three, Double-Sided 8 ½" X 11" Supplementary Sheets Will Be Accepted. APPLICANTS ARE REQUIRED TO RESPOND SPECIFICALLY IN THIS SECTION TO THE AREAS OF EXPERIENCE REQUESTED.					
As you have seen, Heery has over 25 years of OPM experience managing public design and construction projects in the Commonwealth with all services being provided by in-house staff. Our project team has the required certifications and experience overseeing projects of similar scope and size.					
10. I hereby certify that the undersigned is an Authorized Signatory of Firm and is a Principal or Officer of Firm. The information contained in this application is true, accurate and sworn to by the undersigned under the pains and penalties of perjury.					
Submitted By (Signature) 		Printed Name And Title <u>Thomas E. Ellis, Jr., AIA, LEED AP</u> <u>BD+C, MCPPO - Vice President</u>		Date <u>8/7/2017</u>	

ADDITIONAL GRAPHIC MATERIALS

ADDITIONAL GRAPHIC MATERIALS



FRANCIS T. BRESNAHAN ELEMENTARY SCHOOL

Heery provided Owner's Project Manager services for the new \$37.3 million Francis T. Bresnahan Elementary School to replace the existing 1950s-era school. Responsibilities included assisting with designer selection; managing the design process to control scope, budget and schedule; and cost estimating services. The new 112,000-SF facility, which was part of the Massachusetts School Building Authority's Model Schools Program, houses pre-Kindergarten through third grade students.

In addition, Heery led the team effort for the contractor prequalification and bidding process as outlined by M.G.L. chapter 149A guidelines. When construction began, Heery provided full-time on-site construction management services from the notice to proceed through closeout activities.

LOCATION:

Newburyport, MA

CLIENT:

City of Newburyport

SIZE:

112,000 SF

CONSTRUCTION COST:

\$37.3 million

COMPLETED:

December 2014

STUDENTS:

490





RUPERT A NOCK MIDDLE SCHOOL / EDWARD G. MOLIN UPPER ELEMENTARY SCHOOL

The \$21.8 million renovation of the Rupert A. Nock Middle School/Edward G. Molin Upper Elementary School focused on mechanical and electrical upgrades for the 160,000 SF, 855-student facility. The project also included new lighting and installation of life safety system upgrades and sprinklers throughout the school. In addition, the project addressed structural issues that have emerged over the years.

The Nock/Molin School was built in 1972, with no additions to the building since that time. At the time of the renovation, the building housed the Nock Middle School consisting of approximately 490 students in grades six through eight, as well as the Molin Elementary School consisting of approximately 365 students in grades four and five. In 2006 the science lab area was renovated using private donations, and in 2007 the Molin Elementary School was formed during a reconfiguration of the District.

The project addressed building deficiencies, including severe masonry cracking due to localized settlement; outdated and inefficient mechanical and electrical systems; a subpar fire alarm system; a lack of smoke detectors with fire doors that were not tied into the system; building-wide fire sprinkler system; old restrooms; building envelope issues, including water

infiltration; and old, door hardware that was not ADA compliant. An upgrade of interior and exterior walkways and grounds was required for the building to be in full compliance with accessibility codes. Heery also oversaw the upgrade of the data network backbone as well as the addition of electrical outlets in classrooms to meet current and future technology needs.

Heery worked with an extremely lean budget established by the Client and was able to identify 28 "Cost Saving Options/Alternatives" for the School Building Committee's consideration. Heery provided and presented cost estimates and technical descriptions, reviewing these options with the Committee, thus allowing them the ability to prioritize the final list so that the budget constraint was met. The final bid documents were adjusted and selective alternates were added into the bid.

As with all Heery projects, student safety was identified early on as one of the most important parameters for the project. Working with the Prequalification Subcommittee, Heery established scoring criteria that allowed the most qualified and safest CM at-Risk contractor to be selected. For this phased, occupied project, Heery worked with the team to establish the appropriate phasing limits and construction controls to keep the staff and students safe.

LOCATION:

Newburyport, MA

CLIENT:

City of Newburyport

SIZE:

160,000 SF

CONSTRUCTION COST:

\$21.8 million

TOTAL PROGRAM COST:

\$26.5 million

CONSTRUCTION COMPLETE

October 2014

STUDENTS

855



DISCOVERY ELEMENTARY SCHOOL

**2016 CMAA Award – Project Achievement for Build
(New Construction/Renovation), Constructed Value Less
Than \$50 Million
National Capital Chapter**

As part of the ongoing contract with Arlington Public Schools, Heery provided construction management and cost estimating services for the new 97,588 SF Discovery Elementary School. The building consists of a two-story, steel frame superstructure with Insulated Concrete Form (ICF) bearing walls. The new school is collocated on the site of the previously existing Williamsburg Middle School in North Arlington. It has the distinction of being the County's first new elementary in 11 years.

During the design, Heery provided a full-time project manager along with in-house support personnel for design review and estimating services. During construction, Heery maintained a full-time

LOCATION:

Arlington, VA

CLIENT:

Arlington Public Schools

SIZE:

New: 97,588 SF

CONSTRUCTION COST:

\$33 million

COMPLETED:

August 2015

STUDENTS:

540

onsite presence with five team members at the peak of construction, including a Project Manager, Project Engineer, Architectural/Structural Quality Control Superintendent, MEP QC Superintendent, and Building Envelope Specialist. Heery provided full construction management services for the project's duration.

Net-Zero Energy School

Heery oversaw the construction phase of the new building and delivered the school as the first "net zero energy" school on the East Coast of the United States. In order to achieve net zero energy, the building contained many sustainable features including 1,706 roof-mounted solar panels, a geothermal well field, solar pre-heat of domestic water, 100% LED lighting, and exterior ICF walls with high thermal mass.

Heery managed and coordinated many self-performed quality control measures for most of the aforementioned sustainable features; provided a full-time building envelope specialist to inspect installation of the air vapor barrier, curtainwall/storefront assemblies, brick veneer and fiber cement siding; contracted and managed the building envelope commissioning agent that performed full-time inspections of roof installations and periodic inspections on other envelope assemblies to assist Heery's building envelope specialist.

ADDITIONAL GRAPHIC MATERIALS

continued

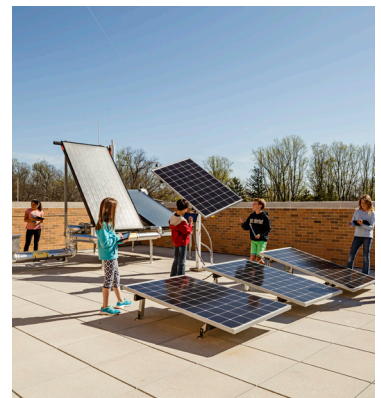
Heery's commitment to obtain a high level of quality ensured that net zero critical systems were installed in accordance with the contract documents and functioned as designed. Obtaining net zero energy for this facility will return approximately \$120,000 annually to APS' operating budget, while allowing the school community to enjoy the environmental benefits of a fully offset carbon footprint.

Client Customer Service

In addition to Heery's focus on getting the contractor to the finish line, the team also had to consider the Owner's FF&E deliveries and teacher move-ins in a much more compressed schedule. The team implemented a phased move-in approach that turned over groups of grade-level rooms and support spaces sequentially. The school staff embraced the approach, rallied PTA volunteers and teamed up to work as a village in groups of rooms as they became available.

Clear lines of communication and coordination were critical throughout this process as Heery managed the move.

The design provided for a 21st Century autonomous elementary school with its own age appropriate play areas, gymnasium, kitchen/dining and Administration with entry control provisions. The holistic project promoted collaboration, community, and connection and emphasizes the next generation of learning environments. This project was completed on time in August of 2015.





SARAH W. GIBBONS MIDDLE SCHOOL

Westborough Public Schools is improving the infrastructure of the Sarah W. Gibbons Middle School, originally built in 1956 serving 550 students in grades seven and eight. Due to the age of the facility, the District decided to pursue funding through the Massachusetts Schools Building Authority (MSBA) so as to mitigate a substantial amount of the rehabilitation cost to the Town's taxpayers.

The bulk of the work impacting this 110,000 SF facility provides for improvements to the structural integrity of the building envelope, including windows, roof, and exterior walls. Work includes replacement and upgrade to the entire mechanical heating, cooling and ventilation system less the boilers; replacement of electrical distribution and feeders wiring to include sub panels, emergency power, lighting, power receptacles, fire alarm, technology, security and communication wiring and equipment; replacement of water piping distribution, on demand hot water, student and staff bathrooms upgrades throughout science lab acid waste detection; and installation of a new fire protection sprinkler system throughout the 1956 wing comprised of approximately 75% of the overall building square footage.

LOCATION:
Westborough, MA

CLIENT:
Westborough Public Schools

SIZE:
110,000 SF

PROGRAM COMPLETED:
Ongoing -
December 2017

CONSTRUCTION COST:
\$21.6 million

STUDENTS:
550

Interior finishes include: new ceilings, painting, selective flooring, doors and hardware and marker board. Other work includes upgrades to the science lab; classroom improvements; auditorium upgrades; and Americans with Disabilities Act upgrades. Electrical and technology upgrades were addressed so as to improve the instructional technology in accordance with the Massachusetts Curriculum Frameworks. The District is investigating alternatives for generating electricity, such as solar energy and other appropriate alternatives.

Heery is providing Owners Project Management Services for all phases (design through closeout) during this complex multi-phased occupied construction project. Heery is working closely with the School Department and the Contractor to maintain an uninterrupted educational environment for the students and staff.



ATTACHMENT D - REQUIRED CERTIFICATIONS

Attachment D
Required Certifications

Certificate of Non-Collusion

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Tax Compliance Certification

Pursuant to M.G.L. c. 62C, §49A, I certify under penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting of child support.

Conflict of Interest Certification

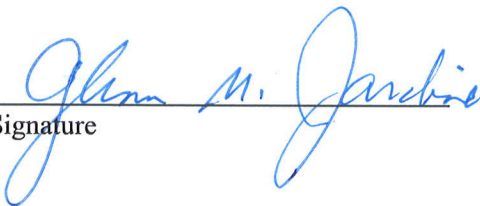
The undersigned certifies that the Responder understands that the Massachusetts Conflict of Interest Law, Chapter 268A of the Massachusetts General Laws, applies to the Responder with respect to the services outlined in the Request for Services. The undersigned also certifies that the Responder understands that the Responder, its officers, employees, agents, subcontractors and affiliated agencies, shall not participate in any activity which constitutes a violation of the Massachusetts Conflict of Interest Law or which creates an appearance of a violation of the Massachusetts Conflict of Interest Law.

Non-Debarment Certification

The undersigned certifies under the penalties of perjury that the company/corporation is not presently debarred from entering into a public contract in the Commonwealth of Massachusetts under the provisions of M.G.L. c. 29, §29F, as amended, c. 152, as amended or any other applicable debarment provision of any other chapter of the Massachusetts General Laws or any rule or regulation promulgated thereunder.

Hold Harmless Certification

The undersigned agrees to indemnify and hold harmless the City of Amesbury, its officers, employees, and agents from and against any and all liabilities, claims, damages or expenses resulting from on incurred in connection with work performed under this contract. The undersigned agrees to indemnify and hold the City of Amesbury harmless from and against any and all suits, causes of action, judgments or damages including attorneys' fees, arising out of or resulting from bodily injury or death or destruction of property, in connection with work performed under this contract.


Signature

August 7, 2017

Date

Glenn Jardine, Executive Vice President / Chief Operations Officer

Name of person submitting proposal

Heery International, Inc.

Name of business



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(781) 494-9000
www.heery.com



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