



**Town of Lincoln
Request for Qualifications
for**

Project Manager Services for Town Offices Building Feasibility Project

The Town of Lincoln, Massachusetts, invites qualified applicants to submit proposals to provide Project Management Services for a Town Offices Building Feasibility Study project. All applicants must submit in conformance with the Request for Qualifications documents which are available in the Town Administrator's Office at 16 Lincoln Road, Lincoln MA ; open Mon – Fri 8:30 am to 4:00 pm. This RFQ shall be governed by the designer selection law, M.G.L. c. 7, §§38A½-O. Proposals shall be received by 2:00 p.m. on Thursday June 3, 2010 in the Town Administrator's Office at 16 Lincoln Road, Lincoln MA.

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Addendum 1. Insurances

a. Section V D. on page 9 is corrected to read as follows:

D. Provide evidence of insurance as follows:

General Liability of at least \$1,000,000 Bodily Injury and Property Damage Liability, Combined Single Limit with a \$3,000,000 Annual Aggregate Limit.

Automobile Liability (applicable for any contractor who has an automobile operating exposure) of at least \$1,000,000 Bodily Injury and Property Damage per accident.

Workers' Compensation Insurance as required by law.

Umbrella Liability of at least \$1,000,000/occurrence, \$2,000,000/aggregate.

Professional Services Liability of at least \$1 million

b. Section VIII A. shall be corrected to read as follows:

A. The OPM must have all necessary insurances as provided below:

General Liability of at least \$1,000,000 Bodily Injury and Property Damage Liability, Combined Single Limit with a \$3,000,000 Annual Aggregate Limit.

Automobile Liability (applicable for any contractor who has an automobile operating exposure) of at least \$1,000,000 Bodily Injury and Property Damage per accident.

Workers' Compensation Insurance as required by law.

Umbrella Liability of at least \$1,000,000/occurrence, \$2,000,000/aggregate.

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Appendix A: Required Designer/PM Application Form

I. General Information and Submission Requirements

The Town of Lincoln, Massachusetts, invites qualified applicants to submit proposals to provide Project Management Services for a Town Offices Building Feasibility Study project. All applicants must submit in conformance with the Request for Qualifications documents which are available in the Town Administrator's Office at 16 Lincoln Road, Lincoln MA ; open Mon – Fri 8:30 am to 4:00 pm. This RFQ shall be governed by the designer selection law, M.G.L. c. 7, §§38A½-O. Proposals shall be received by 2:00 p.m. on Thursday June 3, 2010 in the Town Administrator's Office at 16 Lincoln Road, Lincoln MA.

The project consists of assisting the Town with the following: a) ensuring the town offices building is the best site for continued operation of town offices, b) review options for additional town owned facilities to be used for off-site office or meeting purposes, c) conducting various technical studies at the Town Offices Building site such as hazardous materials survey, site survey, geo-tech testing, and d) in obtaining the services of an architectural firm for feasibility study which shall include the peer review of two past building needs studies, as well as the development of building renovation options, conceptual and schematic plans and cost estimates. Project may include possible expansion of the building footprint. Should funds be allocated by the Town for full design of the project, the project manager shall act as an owner's agent throughout the final design phase and bid phase. If funds are allocated for construction, the project manager firm shall act as owner's agent throughout the construction phase. Separate contracts are intended to be executed with the Project Management firm for each separate phase.

Note: The chosen applicant shall be an agent of the Town and as such will be responsible for compliance with all state ethics laws.

A. Submission Deadline & Instructions

Sealed proposals shall be submitted on or before Thursday, June 3, 2010 at 2pm to the Office of the Town Administrator 16 Lincoln Road, Lincoln MA and must be submitted including the Designer Selection Board application form (Appendix A). Proposal must be in a sealed envelope marked "**OPM Services for Town Offices Feasibility Study**" with the applicant's name and address. Applicants must also execute and include in the sealed submission the Certificate of Non-Collusion and Certificate of Tax Compliance included in this RFQ, as required by law. Proposers should provide one (1) signed original bid and nine (9) copies of the proposal. The Town reserves the right to accept any proposal in whole or in part, and to reject any and all proposals if it shall be deemed in the best interests of the Town to do so.

The Town will negotiate the fee with the chosen as a lump sum including all direct expenses unless otherwise agreed, following agreement on a final scope of work. The selected Project Manager will execute the Town's Standard Contract for Designer/PM Services.

Proposals must be signed as follows: 1) if the bidder is an individual, by her/him personally; 2) if the bidder is a partnership, by the name of the partnership, followed by the signature of each general partner; and 3) if the bidder is a corporation, by the

authorized officer, whose signature must be attested to by the Clerk/Secretary of the corporation and the corporate seal affixed.

If, at the time of the proposal submission deadline, Town Offices are closed due to uncontrolled events such as fire, snow, ice, wind, or building evacuation, the deadline will be postponed until 2:00 p.m. on the next normal business day. Proposals will be accepted until that date and time.

B. Questions, Addendum or Proposal Modification

Questions concerning this Request for Qualifications must be submitted in writing to: Anita Scheipers, Assistant Town Administrator, Town Offices Building, 16 Lincoln Road, Lincoln MA 01773 ; scheipers@lincolntown.org. Only those inquiries received five or more days prior to the opening will be considered. Questions may be delivered, mailed, or emailed. Written responses will be mailed or emailed to all proposers on record as having received the RFQ.

If any changes are made to this RFQ, an addendum will be issued. Addenda will be mailed or faxed to all proposers on record as having received the RFQ.

All proposals submitted in response to this RFQ shall remain firm for ninety (90) days following the bid opening. The contract will be awarded within ninety (90) days after the opening. The time for award may be extended for up to forty-five (45) additional days by mutual agreement between the Town and the highest ranked responsive and responsible applicant.

An applicant may correct, modify, or withdraw a proposal by written notice received by the Town prior to the time and date set for the opening. Proposal modifications must be submitted in a sealed envelope "**OPM Services for Town Offices Feasibility Study**" with the applicant's name and address, and **clearly labeled "Modification No. ___."** Each modification must be numbered in sequence, and must reference the original RFQ.

After the opening, an applicant may not change any provision of the proposal in a manner prejudicial to the interests of the Town or fair competition. Minor informalities will be waived or the applicant will be allowed to correct them.

C. Pre-bid Conference/Walk-through

A pre-bid conference at the Town Offices Building located at 16 Lincoln Road, Lincoln MA will be held on Tuesday, May 25, 2010 conducted at 10:00am. Answers provided during the conference are for information only. Only verified responses provided in writing by the Town of Lincoln shall be considered official for purposes of this RFQ.

II. Project Background

The Town of Lincoln has undertaken two separate building needs analysis for the renovations of the Lincoln Town Offices. (Copies of these reports will be available for viewing by proposers.) The Town is now ready to complete all remaining tasks associated with a feasibility study for the renovation project. These steps will include the completion of

any remaining testing needed to inform the designers review of options and for schematic design, as well as a peer review of existing reports. It is intended that the OPM will assist the Town in oversight of this project and in conducting some or all of the necessary testings required. The OPM will also be expected to assist the Town with a review of available space options in other town facilities which may be used for additional town office or meeting space in order to minimize or negate the need for additional space to be added to the existing footprint of the building.

Project Budget and Timeline Considerations

Town Meeting has approved a TOTAL of \$135,000.00 for all costs associated with the feasibility study phase. A portion of these funds will be used to pay for the project management services during the feasibility study phase.

With regard to the project timeline, it is the expectation that all location considerations, all technical testing, shall be completed by September 1, 2010. The Town expects to have an architectural consultant/designer chosen by mid-June, 2010 to allow the firm to begin the peer review of existing building studies, and to review the results of any technical testing completed thus far, and to develop the project conceptual plans and construction estimates by the end of the calendar year. We recognize that we have a tight timeframe relative to completing the feasibility study phase, and will need the project management firm to assist with keeping the town and its committee, as well as all vendors, on track with the work schedule.

III. Scope of Services

The final scope of services to be executed under the contract for this feasibility study phase, as well as any future phases) will be subject to negotiation with the Town. The following tasks are such items as are expected to be included in the scope of services for each phase:

Feasibility Study Phase:

- A. Assist town resident building committee to review existing town offices programmatic needs study.
- B. Provide or obtain the necessary services for completion of tasks such as site survey, geo-tech studies, septic system testing and design, hazardous materials survey, etc .
- C. Assist the Town with acquiring the services of an architectural consultant/designer for the feasibility study, preliminary conceptual plans, development of bid documents and building renovation project cost estimates; as well as for the project design and bid documents should the Town allocate the necessary funding.
- D. Review and critique the architectural consultant's conceptual plans, and project cost estimates.
- E. In consultation with the designer, oversee the bidding process to ensure compliance with public bidding requirements.
- F. Attend meetings with the Committee during this phase. Number TBD.

G. Provide to the Town a Feasibility Study Close-out package including the details of and results of all testing and work completed during this phase.

Design Phase (if funds are allocated):

- A. Review and critique the designer's conceptual plans, and project cost estimates, resulting bid documents, for cost, constructability issues, missing items, coordination, and compliance with the requirements of M.G.L. 149, SS 44A-44L and all other applicable laws and regulations.
- B. Assist with value engineering of the project details as needed.
- C. Ensure bid documents created by the designer are complete and meet all legal obligations under procurement law.
- D. Assist with the Town and designer with the bid opening and contract award phase.

Construction Phase (if funds are allocated):

- A. Monitor progress and quality of construction.
- B. Oversee Designer's performance on construction related issues.
- C. Facilitate weekly job-site meetings with the architect and General Contractor during the construction phase of the project as the Awarding Authority's representative.
- D. Coordinate the flow of information among Town Officials, the Designer, General Contractor and other parties.
- E. Advise the Designer and the Contractor regarding any issues that arise requiring resolution by either party.
- F. Review change order requests and provide the Committee and Town Administrator with a recommendation regarding those requests.
- G. Review the progress of construction, compare progress to construction schedules, and advise the Contractor, Designer, and the Town Administrator regarding any concerns with the progress of construction,
- H. Prepare a full monthly written report summarizing the progress of design and construction of the project, highlighting important events and raising pending issues that must be addressed.
- I. Provide the services of a Clerk-of-the-Works as needed to ensure quality control and specification compliance. The Clerk-of-the-Works shall be acceptable to the Town.
- J. Review weekly payrolls and certify compliance with prevailing wage requirements for all individuals employed on the project, as required by State law.
- K. Attend Building Committee meetings, as necessary.

- L. Maintain a complete project file, including but not limited to, a file of correspondence, monthly reports, daily reports, payment records, photographs, videos, schedules, and files on particular issues as they arise. Inspect and observe the General Contractor's work with respect to quality, contract standards, labor standards, safety, and site security and provide final accounting to the Committee and Town Administrator at the completion of the project.
- M. Obtain satisfactory performance from each Contractor and each Subcontractor. Recommend courses of action to the Committee and Town Administrator when the requirements of the contract are not being fulfilled and the non-performing party will not take satisfactory corrective action.
- N. Advise the Building Committee of necessary or desirable changes to the project, assist in negotiation of the Contractor's proposals for these changes, submit recommendations to the Designer, Committee and the Town Administrator, and if accepted, prepare or cause the Contractor to prepare change orders for the Designer's review and the Town Administrator's approval. Establish and implement a system for monitoring and reporting on change orders, including approved change orders, pending change orders, and anticipated change orders.
- O. Develop and implement procedures for prompt review and processing of applications for payment for the Contractor for progress and final payments, including certification requirements by the Designer. Make recommendations to the Committee and Town Administrator for payment(s).
- P. At the conclusion of the project, assist in obtaining the as-build drawings and all other construction related documents and all materials necessary for occupancy and full operation of the facility. Collect all O&M manuals and instructions, warranties, record drawings and as-builts; ensure that Contractor(s) perform equipment testing and train Town employees on equipment usage and maintenance.
- Q. Ensure punch list close-out and site clean-up by contractors.
- R. At the conclusion of the project, prepare a standard contractor evaluation form for the Division of Capital Asset Management concerning the Designer, General Contractor and Subcontractor's performance as required.

IV. Requirements for Application

Each applicant must submit a written Application on the Designer Selection Board application form , a copy of which is attached as Appendix A. The following information is specifically required:

1. Name and address of applicant.
2. Brief resume of principals and of the staff to be assigned to the Project.
3. List of completed projects that would best illustrate qualifications for the Project. References must be included.
4. List of all ongoing projects with anticipated schedule(s) for completion.
5. Names and qualifications of engineers and other consultants that may be used for the Project.
6. Statement of the scope and type of services proposed for the Project. The applicant should describe the process and methodology to be used in the completion of services with specific reference to examples of similar projects in which this methodology has been used.
7. Work plan and schedule which reflects timetable for completion of the Project.
8. Statement of any legal administrative proceedings pending or concluded adversely to the applicant within the past five (5) years which relate to the applicant's performance of this type of work.
9. Appropriate certificates of insurance.
10. Evidence of financial stability.

V. Minimum Qualifications

Each applicant must demonstrate that it meets the following minimum qualifications:

- A. Minimum of five years experience in the design and renovation of public projects of a similar nature for the principals assigned to the project, including work with historic buildings in Massachusetts. In documenting this qualification, the applicant should describe the professional background of the firm and the extent of previous experience of firm personnel or consultants to be assigned to the project and identify the anticipated role that each will play in the project.
- B. Knowledge of, and experience in, legal and administrative requirements, procedures, and practices related to the design, funding and construction of Massachusetts public building projects including the State Building Code, regulations of the Architectural Barriers Board and Massachusetts public building and procurement law.
- C. Possess all necessary current licenses and registrations, either within the firm or through independent consultants, to qualify under Massachusetts law to perform the function of the Project Manager for the Project.

- D. Provide evidence of insurance for general liability (\$2 million combined single limit), automobile (\$2 million combined single limit), worker's compensation (statutory) and professional services liability (\$2 million minimum).
- E. Provide detailed description of at least two recent similar projects on which the Project Manager has performed similar services, identifying references with the owners of those projects as well as the personnel who worked on them and stating whether those individuals will be assigned to the Project.
- F. Not be debarred under M.G.L. c. 149, sec. 44C or disqualified under M.G.L. c. 7, sec. 38D.

VI. Comparative Criteria

The Awarding Authority will make further review of all Applications found to be responsive and check such references as may be appropriate. This further review will be based upon the following comparative criteria:

1. Experience managing similar public renovation/addition projects involving historically significant public buildings in Massachusetts
2. Proposed approach to the Project which will minimize the Project Management costs while ensuring high quality standards and maximize efficiency
3. Prior successful experience with similar projects
4. Quality of past project management work of all phases, as well as project bidding
5. Reliability in cost estimating for public sector construction projects including the estimate to low bid price and bid price to final construction cost
6. Ability to work with multiple and varied Town committees, officers, architects and contractors
7. Record of managing projects that are completed as designed, on time and within budget, and the degree of satisfaction of the owner
8. Depth and breadth of experience and qualifications for personnel to be assigned to the Project
9. Identity and qualifications of any engineers or other consultants whom the applicant proposes to employ to assist in the Project
10. Demonstrated capacity of the applicant in terms of staffing and resources to handle the proposed project schedule and deadlines
11. Financial stability of applicant

The Town may request that one or more applicants provide additional information during the process to permit it to complete the evaluation process. Based upon the minimum and comparative criteria contained in this RFQ, the Town will select no fewer than the three top-ranked finalists and will interview those finalists. The finalists will then be ranked and a recommendation will be made to the Town Administrator for award of the contract.

If the Town is unable to negotiate a contract, including the fee, with the top-ranked finalist, the Town will then commence negotiations with the next ranked finalist and so on, until a contract is successfully negotiated, and approved by the Town Administrator.

VII. Non-Collusion Form and Tax Compliance Form

Applicants submitting a bid or proposal to provide supplies or services to the Town, or to purchase supplies from the Town, must complete and submit the following certification of non-collusion and tax compliance with the bid or proposal.

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.

Signature of individual submitting bid or proposal

Name of business

TAX COMPLIANCE CERTIFICATION

Pursuant to M.G.L. c. 62C, §49A, I certify under the 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 child support.

Signature of person submitting bid or proposal

Name of business

VIII. Additional Contract Terms and Conditions

- B. The OPM must have all necessary insurances as provided below:
- **General Liability** of at least \$1,000,000 Bodily Injury and Property Damage Liability, Combined Single Limit with a \$3,000,000 Annual Aggregate Limit.
 - **Automobile Liability** (applicable for any contractor who has an automobile operating exposure) of at least \$1,000,000 Bodily Injury and Property Damage per accident.
 - **Workers' Compensation Insurance** as required by law.
 - **Umbrella Liability** of at least \$2,000,000/ occurrence, \$2,000,000/aggregate.
- C. Copies of all plans and reports created as a result of the scope of services contained in this RFQ shall be provided to the Town in an electronic format acceptable to the Awarding Authority. The Town shall own all rights to any reports, plans and materials produced under this RFQ, Section III. Scope of Services.
- D. The selected Project Management firm shall execute the Town's Standard Contract for Designer/PM Services within ten (10) days of the notice of award.

Appendix A

Required Designer/PM Application Form