

## Selection and Assignment of Designers Green Repair Program

On June 16, 2010, in response to a Request for Qualifications (RFQ), the MSBA received 21 responses from Designers interested in participating in the MSBA's Green Repair Program. On June 29, 2010, the MSBA's Designer Selection Panel (DSP) reviewed and considered these 21 applicants. The DSP voted unanimously to pre-qualify applicants in the categories of work submitted for participation in the MSBA Green Repair Program.

As noted in the RFQ, there is no guarantee that a Designer pre-qualified by the DSP for the Green Repair Program will be selected for a project. Also, this pre-qualification of Designers by the DSP is solely for the purposes of the Green Repair Program, and pre-qualification for the Green Repair Program has no bearing on the selection of a Designer for projects that are not part of the Green Repair Program.

For each Green Repair project approved by the MSBA, Districts will select from a list of potential Designers tendered by the MSBA. The District will choose from the same evaluation criteria set forth in the RFQ and may add selection criteria reasonably related to the particular project, subject to the approval of the MSBA. If necessitated by schedule, scope of work or capacity issues, the MSBA reserves the right to assign a Designer from the above list without a District selection process.

As discussed in more detail below, the Designer selected for a project and approved by the MSBA will enter into a contract with the city, town or regional school district, using the MSBA's standard Green Repair Program Contract for Designer Services, a copy of which was available on the MSBA's website.

### MSBA Assignment Process

MSBA staff shall prepare a prioritized listing of all School Districts that are ready to select a Designer for a Green Repair Project. The MSBA then will review the District's specific project scope, estimated construction budget and timeline to select a list of potential Designers from the appropriate category of work to participate in a District selection process, as noted in the steps below. Once the MSBA has determined the appropriate category of work, the MSBA will select a list of pre-qualified applicants for the District selection process.

The MSBA has established the list of pre-qualified applicants in a random order, as follows:

### Roofs, Windows and Boilers

- LPBA/Architects, Inc.
- Cannon Design
- Reinhardt Associates, Inc.
- DiMarinisi & Wolfe Architects Urban Designers
- Knight, Bagge and Anderson, Inc.
- Durland Van Voorhis Architects, Inc.
- Baker/Wohl Architects

- CGKV Architects, Inc.
- CSS Architects, Inc.
- Turowski2 Architecture, Inc.
- Tighe & Bond, Inc.
- ICON Architecture
- Habeeb and Associates
- Bradley Architects, Inc.

#### Roofs and Windows

- Russo Barr Associates
- Gale Associates, Inc.

#### Boilers

- SED Assoc. Corp.
- BVH Integrated Services, Inc.
- RDK Engineers
- Hesnor Engineering (Self-limited to Western Massachusetts)
- BLW Engineers, Inc.

When determining which firms to tender to the School District, the MSBA will begin at the top of the list of pre-qualified applicants in the selected category of work and select applicants to tender to the district based on the complexity of the project's scope, the estimated costs of the project, the number of schools involved and/or the geographical location of the project. It should be noted that the MSBA will utilize the Boiler category for Districts whose scope of work is limited to boiler work. If capacity among the Boiler applicants becomes a factor, then the MSBA will include applicants in the Roof, Windows and Boilers category on its lists for Districts with strictly boiler projects. In addition, for Districts whose scope of work may be Roofs and Windows, the MSBA will select from both the applicants for Roofs and Windows and the applicants for Roofs, Windows and Boilers.

MSBA staff shall prepare a prioritized listing of all school districts that are ready to select a Designer. The MSBA will strive to select a minimum of three firms for each District selection process and will review each firm's application to ensure that:

- a. The Firm is independent of the Project and is not participating in any other role or function related to the Project;
- b. The Firm's experience as submitted in its application is best suited to the specific scope of work as defined by the District; and
- c. The Firm has adequate resources and capacity to accomplish the work based on their current workload, geographic location and the number of assignments received as part of the MSBA Green Repair Program.

If the MSBA determines that the a firm does not satisfy all of the above objectives for a particular Project, the MSBA will not select that firm for the Project and will proceed to the next firm on the

pre-qualified list until it finds a firm that satisfies each of the objectives for that Project. The passed-over firm will be considered for the next Green Repair Project and the MSBA will perform the same analysis to determine whether it meets the above objectives.

#### District selection process

*The District must complete the following selection process in two weeks.*

- 1) The District shall assemble a review committee, which shall include, at a minimum, one member designated by the school committee, the superintendent of schools or his/her designee and the chief executive officer of the city or town or his/her designee. The Owner's Project Manager also will participate in the process and assist the District with submitting its selection criteria, reviewing the applications, recording the review and preparing the final recommendation of selection to the MSBA.
- 2) Prior to reviewing the applications, the District shall submit to the MSBA the selection criteria it will use to perform its selection. See attached Selection Criteria Form.
- 3) The District ***must*** utilize the following selection criteria in its selection, at a minimum, but may utilize all of the criteria established in the RFQ and may add additional criteria as may be relevant to the specific project scope, subject to approval by the MSBA.
  - a. Prior similar experience
  - b. Personnel qualifications and key personnel assigned to the work
  - c. Current workload and capacity

If the District would like to utilize evaluation criteria in addition to those set forth in the RFQ, such proposed additional criteria must be set forth in the Selection Criteria Form and approved by the MSBA before the District begins its review of the applications.

- 4) Upon receipt and acceptance of the District's Selection Criteria Form, the MSBA Green Repair Project Managers shall forward a list of pre-qualified Designers to the District and a copy of their applications.
- 5) The District shall review each of the applications received from the MSBA. After review of the applications, the District may opt to conduct interviews, provided the interviews are complete within the 2-week timeframe. If the District decides to conduct interviews, it must notify the MSBA of the date and time and submit the interview questions for acceptance by the MSBA. The MSBA may choose to participate in the interview process.
- 6) The District shall select a Designer in accordance with the approved selection criteria. The District, with assistance from the OPM, then shall prepare the Record of Selection form and submit the signed selection form to the MSBA for its consideration. After accepting the selection of a Designer, the MSBA will complete the Designer Record of Selection form and forward it to the District.

7) Upon receipt of the MSBA's acceptance of the Designer Selection Form, the District, with assistance from the OPM, will negotiate the fee with the Designer and execute the Green Repair Program Contract for Designer Services. Prior to commencing negotiations, the District, with assistance from the OPM, will provide the Designer with a specific project scope, estimated construction budget, scope of services and a timeline for completion of the work, each of which shall have been approved by the MSBA. The District shall submit a copy of the executed Green Repair Program Contract for Designer Services to the MSBA.

#### Role of the OPM

- 1) The OPM will be the primary point of contact for project specific information related to the District selection process.
- 2) The OPM will assist the District in preparing its selection criteria and submitting it to the MSBA for approval.
- 3) The OPM must arrange for site visits, as may be requested by the District or the potential respondents.
- 4) The OPM must arrange for interviews, as may be required, and obtain MSBA acceptance and arrange for MSBA participation, if required.
- 5) The OPM shall check the references of the applicants and provide the District with a summary of the reference checks.
- 6) The OPM shall review and provide the MSBA with a record of the District's selection comment on each of the submitted proposals.
- 7) The OPM shall assist the District in negotiating and finalizing the fee with the Designer and submitting the executed contract to the MSBA.

#### Standard letters, contracts and deliverables

- 1) MSBA e-mail notification of District Designer selection applications
- 2) District Selection Criteria form
- 3) Record of Selection form
- 4) Green Repair Program Contract for Designer Services  
([http://www.massschoolbuildings.org/program\\_ektid652.aspx](http://www.massschoolbuildings.org/program_ektid652.aspx))
- 5) District Transmittal of Executed Designer Contract and project schedule workplan

**[Letterhead of City/Town/Regional School District]**

**Selection Criteria Form**  
**Designer**  
**Green Repair Program**

1) District Selection Committee

In accordance with “Selection and Assignment of Designers – Green Repair Program,” assembled for your review and approval is the membership of the Selection Committee for \_\_\_\_\_ . Committee Members include the following:

(Please provide name, title, address and phone number of each member.)

| <b>Designation</b>  | <b>Name and Title</b> | <b>E-Mail Address and Phone Number</b> |
|---|-----------------------|--|
| School Committee Member*  |                       |  |
| Superintendent of schools or his/her designee*  |                       |  |
| Local Chief Executive Officer or his/her designee*  |                       |  |
| Other members (Please add lines, if necessary, to indicate additional members of selection committee) |                       |  |

\*Required members

2) District Selection Criteria

In accordance with “Selection and Assignment of Designers – Green Repair Program,” assembled for your review and approval is the Selection Criteria that the District intends to use as noted by a check below for selecting a designer from the applicants pre-selected through the Green Repair Program for (NAME OF SCHOOL). Selection Criteria include the following:

| a.) Selection Criteria               | Criteria selected |
|--------------------------------------|-------------------|
| <b>Prior Similar Experience</b>      | X                 |
| <b>Personnel Qualifications</b>      | X                 |
| <b>Current Workload and Capacity</b> | X                 |

|   |  |
|---|--|
| Experience with Stretch Energy Code     |  |
| Knowledge of Energy Efficiency Programs |  |
| Financial Stability                     |  |
| Additional Criteria                     |  |

(Bold selection criteria must be utilized by the District in its evaluation.)

b) Description of rating system to be used for the Selection Criteria:  
 (NOTE: The MSBA recommends use of a numerical rating rather than least/advantageous and highly advantageous.)

3) District Interviews

If the District chooses to conduct interviews after review of the applications, the District will notify the MSBA of the time and submit the interview questions for acceptance by the MSBA. The MSBA may choose to participate in the interview process.

The (NAME OF DISTRICT) recommends as outlined in steps 1 and 2 above the District Selection Committee Members and the Selection Criteria and agrees to notify the MSBA before conducting interviews, if any.

Sincerely,

By: \_\_\_\_\_  
 Authorized signature for District

Title: \_\_\_\_\_

Date: \_\_\_\_\_

\_\_\_\_\_  
 Accepted by MSBA Date

**[Letterhead of City/Town/Regional School District]**

**Record of Selection Form**  
**Designer**  
**Green Repair Program**

1) District Selection

In accordance with “Selection and Assignment of Designers – Green Repair Program,” assembled for your review are the evaluation results of the District using the Selection Criteria approved by the MSBA for selecting a designer from the applicants pre-selected through the Green Repair Program for (NAME OF SCHOOL). The results from the evaluation of received responses are as follows:

*(Please add columns, if necessary, dependent upon the number of responses received from the MSBA for evaluation.)*

| a.) Selection Criteria                  | Criteria selected | Designer: | Designer: | Designer: |
|---|-------------------|-----------|-----------|-----------|
| <b>Prior Similar Experience</b>         | X                 |           |           |           |
| <b>Personnel Qualifications</b>         | X                 |           |           |           |
| <b>Current Workload and Capacity</b>    | X                 |           |           |           |
| Experience with Stretch Energy Code     |                   |           |           |           |
| Knowledge of Energy Efficiency Programs |                   |           |           |           |
| Financial Stability                     |                   |           |           |           |
| Additional Criteria                     |                   |           |           |           |
| Total                                   |                   |           |           |           |

(Bold selection criteria must be utilized by the District in its evaluation.)

b) Description of rating system used for the Selection Criteria:

(NOTE: The MSBA recommends use of a numerical rating rather than least/advantageous and highly advantageous.)

The District shall evaluate the Designers using the rating system described by the District and accepted by the MSBA on the “Selection Criteria Form – Designer – Green Repair Program.”

Upon completion of its review of received responses, the (NAME OF DISTRICT) selects Designer: \_\_\_\_\_ . The District hereby designates (NAME(S)), as the individual(s) who shall have the authority to act on behalf of the District under the Contract and who shall be responsible for the day-to-day communication between the District and the Designer. The District shall execute the Authority's Standard Contract for Designer Services for Green Repair Program with the Designer without modification to its terms and conditions.

Sincerely,

By: \_\_\_\_\_  
Authorized signature for District

Title: \_\_\_\_\_

Date: \_\_\_\_\_

\_\_\_\_\_  
Accepted by MSBA                      Date

Note to District:

The Authority's approval is further subject to the execution of a contract between the District and the Designer in a form that is satisfactory to the Authority, utilizing any standard contracts, forms, and provisions that the Authority may require. At your earliest convenience, please forward a copy of the fully executed contract between the District and the Designer to Jennifer Connarton at 40 Broad Street (Suite 500), Boston, MA 02109.