

The Commonwealth of Massachusetts

Executive Office of Administration and Finance

Designer Selection Board

One Ashburton Place, 10th Floor, Room #1004

Boston, Massachusetts 02108

TEL: (617) 727-4046

FAX: (617) 727-0112

PUBLIC NOTICE #16-15

November 16, 2016

This Board will accept applications from architects, engineers, or other disciplines as noted, whichever is designated for the projects described in the attached Public Notice identified as **List #16-15**. Applicants are requested to submit a separate Designer Selection Board Application Form (**16 COPIES**) for each project for which they wish to be considered. **An electronic copy of the DSB Master File Brochure and the DSB Application Form (updated July 2016) are available from the Web site address www.mass.gov/dcam/dsb. Please be sure to use the latest forms. Application closing date for projects on DSB List #16-15 is 2:00 p.m., WEDNESDAY, December 7, 2016.** The advertisements may be found on the web by going to the DSB web-site at www.mass.gov/dcam/dsb. Please send all correspondence to the Designer Selection Board, ONE ASHBURTON PLACE, ROOM 1004, BOSTON, MA 02108.

This Public Notice, including attachments, may be duplicated by any and all interested.

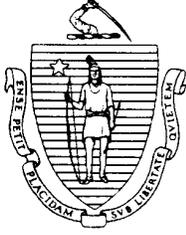
Please note the following: This Public Notice #16-15 includes: (a) the procedures for conforming to M.G.L. C.7C, § 6, Executive Orders 526, 559 and 565 regarding Affirmative Market, Minority and Women Owned Business Participation and Service Disabled Veteran Owned Business Enterprises and Veteran Owned Business Enterprises Benchmark.

**ALL APPLICATIONS MUST BE SUBMITTED ON THE DSB APPLICATION FORM (Updated July 2016)
(ENCLOSED HEREIN)**

FAILURE TO USE THE ABOVE FORM MAY BE THE BASIS FOR REJECTION OF YOUR APPLICATION.

Claire G. Hester

**Claire G. Hester, Program Coordinator
DESIGNER SELECTION BOARD**



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PUBLIC NOTICE

**TO: Boston Herald
The Republican**

(Email) P.O. Box 55843, Legal Ads
(Email) 1860 Main Street, Legal Ads

**Boston, 02205
Springfield, 01101**

FROM: Designer Selection Board

DATE: November 8, 2016

SUBJECT: Classified Legal Advertisement

On November 18, 2016, please insert one day only, the below approximate 2 column 2 inch classified legal advertisement of the Designer Selection Board. Submit proof of advertisement attached to your invoice. Please refer to P.O. #GAE *23620 .

A handwritten signature in cursive script that reads "Claire G. Hester".

Claire G. Hester
Program Coordinator
DESIGNER SELECTION BOARD

PUBLIC NOTICE

DESIGNER SELECTION BOARD

PUBLIC NOTICE

Architects and engineers are advised that DSB Project List #16-15, dated November 16, 2016 describing 02 Designer Selection Board project(s) is now available at www.mass.gov/dcam/dsb

PUBLIC NOTICE

DESIGNER SELECTION BOARD

PUBLIC NOTICE

APPLICANTS PLEASE NOTE:

The following requirements were implemented on the following dates and continue to be requirements.

July 2016

DSB Application Form and Master File Brochure Form Updated

Please use the updated version of the DSB Application Form and Master File Brochure Form updated July 2016. You can download the forms from our website at www.mass.gov/dcam/dsb

May 2014

Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Include Resumes of Project Managers. Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.

May 2013

Reasons for Rejection of Applicants

The following list which would result in a Board determination that the application missing the following information will be considered ineligible for further review and the applicant is ineligible for selection either as a result of violation of provisions of law, provisions of Executive Order or rules properly established by the Board would include:

1. Application not signed by a Principal of the firm.
2. Applicant firm is not a designer as defined in Chapter 7C.
3. Applicant firm is not of the type (i.e. A, A/E, E) requested in the advertisement.
4. The P.I.C. of the prime applicant does not meet the requirements of the advertisement.
5. Failure to include resume of one or more of personnel listed on the organizational chart or otherwise required.
6. Application does not include both MBE and WBE.
7. MBE and/or WBE goals are met with non-requested prime or sub-consultants.
8. Ownership requirements as defined by Chapter 7C not fulfilled.
9. Application does not include all requested sub-consultants.
10. All sub-consultants must be registered in the Commonwealth of Massachusetts when such registration is available.
11. Section #12 of the application is not answered with "Yes" or "No".

12. No Master File Brochure on file.
13. Failure to supply sub-consultants acknowledgement form.
14. Failure to supply Out of State Registration Certificate - All Out of State firms applying to advertisements to the Designer Selection Board must insure they are registered to do business with the Secretary of the Commonwealth of MA.
15. Applications that are incomplete will be rejected.

DSB MASTER FILE BROCHURE (Updated July 2016)

In addition to the individual application form separately filed for each specific project, architects, engineers, planners, construction managers, and related construction industry consultants who wish to be considered for appointment as program consultants, designers, or construction managers on state projects under the jurisdiction of the Designer Selection Board must submit current (within one year of application) credentials in the form of a master brochure as specified on the new DSB Master File Brochure (Updated July 2016), (attached herein). Applicants may supplement the required material with their printed brochure, including pictures and illustrations and any other information which the applicant deems essential to be representative of his or her capabilities. Please utilize return receipt if an acknowledgment is desired. All material shall become the property of the Commonwealth, may be disposed of without notification, and shall be considered public information.

Electronic copies of the forms are available at the following Commonwealth's Web site: www.mass.gov/dcam/dsb

CHAPTER 579

In accordance with Chapter 579 of the Acts of 1980 all contracts for designer services for all capital facility projects entered into on or after January 1, 1982 shall conform to those provisions specified in this act. Some of the major changes mandated by this legislation include the following:

1. Lump sum design fees may be set by the Commissioner prior to DSB selections process, or negotiated after the DSB selection process. (See M.G.L. C.7C, §50). If designer's fee is negotiated, he must file a truth-in-negotiations certificate. (Revised to M.G.L. C.7C, §50 per Chapter 165 of 2012).
2. There can be no change in consultants from those named on the DSB application unless approved by the Commissioner and reported to the DSB. The director may require a Consultant employed by the designer to obtain and maintain liability insurance.

Section 50

- (a) In the selection of a designer when the fee for design services has been set by the commissioner prior to the selection process, the commissioner shall appoint a designer from among the list transmitted to him or her under §49. If the commissioner appoints any designer other than the one ranked first by the board, he or she shall file a written justification of the appointment with the board.
- (b) When the fee for design services is to be negotiated, the commissioner shall review the list transmitted by the board, and may exclude any designer from the list if a written explanation of the exclusion is filed with the board. The commissioner shall then appoint a designer based on successful fee negotiation. The commissioner or persons designated by him or her shall first negotiate with the first ranked designer remaining on the list. Should the commissioner be unable to negotiate a satisfactory fee with the first ranked designer within thirty days, negotiations shall be terminated and negotiations undertaken with the remaining designers, one at a time, in the order in which they were ranked by the board, until an agreement is reached. In no event may a fee be negotiated which is higher than a maximum fee set by the commissioner prior to selection of finalists. Should the commissioner be unable to negotiate a satisfactory fee with any designer initially selected as a finalist by the board, the board shall recommend additional finalists in accordance with the provisions of this chapter. The commissioner may require a finalists with whom a fee is being negotiated to submit a fee proposal and include with it such information as the commissioner requires to provide current cost and pricing data on the basis of which the designer's fee proposal may be evaluated.
- (c) All fees shall be stated in designer's contracts and in any subsequent amendment thereto as a total dollar amount. Contracts may provide for equitable adjustments in the event of changes in scope or services.

ELIGIBILITY REQUIREMENTS FOR ALL APPLICANTS TO THE DSB

1. Submission of the DSB Master File Brochure (Updated July 2016) in the format required, and at least annually, continuously update same.
2. Updating of the DSB Master File Brochure (Updated July 2016) when there are significant principal or key personnel changes in a firm.
3. Receipt of applications from designers who are full time employees of another firm shall disqualify the applicant.
4. A person may not submit more than one application as a "prime" applicant on the same project. The applications of any such applicant shall be considered disqualified. This rule does not preclude a person applying as a "prime" applicant even though that applicant is also listed as a consultant on one or more other "prime" applications on the same project. For the purposes of this paragraph the term "person" means an individual, corporation, association, partnership or other legal entity.
5. Simultaneous receipt of applications from individuals or group of individuals who are associates or who are involved in an association or corporation filing for the same project shall disqualify the applicants.
6. Applicants agree to execute the current forms of the Commonwealth of Massachusetts Contract.
7. Chapter 7C, § 51 requires that on public design contracts where the total design fee is expected to exceed \$10,000 or for the design of a project for which the estimated construction cost is expected to exceed \$100,000 the designer shall:
 - a) File its latest CPA or PA audited financial statement with the Division of Capital Asset Management and Maintenance (DCAMM), and continue to do so annually throughout the term of the contract;
 - b) Submit a statement from a CPA or PA that states that they have examined management's internal auditing controls, and expresses their opinion regarding those controls.
8. Every application or statement filed pursuant to this section shall be sworn to under penalties of perjury. A designer, programmer or construction manager who has been determined by the Board to have filed materially false information under this section shall be disqualified by the Board from further consideration for any project for such time as the Board determines is appropriate. **UNSIGNED APPLICATIONS WILL NOT BE CONSIDERED BY THE BOARD.**

ADDITIONAL REQUIREMENTS FOR DESIGNERS PROVIDING PLANS & SPECIFICATIONS

(a) Certification that the applicants' legal entity, if applying to perform design services other than preparation of studies, surveys, soil testing, cost estimates, programs, or construction management is a designer as defined. The definition of a design professional as listed in M.G.L. C.7C, §44 follows:

"Designer," an individual, corporation, partnership, sole proprietorship, joint stock company, joint venture, or other entity engaged in the practice of architecture, landscape architecture, or engineering, which satisfies the following:

- (i) if an individual, the individual is a registered architect, landscape architect, or engineer; (registered in the Commonwealth of Mass.)*
- (ii) if a partnership, a majority of all the partners are persons who are registered architects, landscape architects, or engineers; (registered in the Commonwealth of Mass.)*
- (iii) if a corporation, sole proprietorship, joint stock company or other entity, the majority of directors or a majority of the stock ownership and the chief executive officer are persons who are registered architects, landscape architects or engineers, and the person to be in charge of the project is registered in the discipline required for the project.*

[Note: This requires that the chief executive officer and a majority of the directors or a majority of the stock ownership be registered architects, landscape architects or engineers, and that the person to be in charge of the project be registered in the discipline required for the project. "Registered" means registered in the Commonwealth of Massachusetts.]

(iv) if a joint venture, each joint venturer satisfies the requirements of this section.

(b) As a condition of application, each applicant agrees to carry, if selected for the new project, (other than a master plan, program, or construction management) professional liability insurance in the amount equal to 10% of the estimated construction cost of the project, in conformance with the provisions of Article 12 of study contract and Article 12 of the design contract, i.e. minimum coverage of \$250,000 and maximum coverage of \$5,000,000. Note that the requirement for professional liability insurance shall apply to the Commonwealth of Massachusetts Contract for Study, Final Design and Construction Administration Services (June 2016) when a project is advertised by both study and design services.

CRITERIA FOR SELECTION OF SEMI-FINALISTS AND FINALISTS

IN CONFORMANCE WITH CHAPTER 7C, SECTION 49

1. Prior similar experience best illustrating current qualifications for this project.
2. Identity and qualifications of the key persons and consultants who will work on this project.
3. Depth of the firm with respect to size and complexity of the project.
4. Past performance on public and private projects.
 - a. Quality, clarity, completeness and accuracy of contract documents and design contract.
 - b. Effectiveness of meeting established program requirements and function within allotted budget.
 - c. Accuracy of cost estimates including assessment of contractors' requisitions for payment and change order proposals.
 - d. Management ability to meet schedules including submission of design and contract documents and processing of shop drawings, contractors' requisitions and change orders.
 - e. Coordination and management of consultants.
 - f. Working relationship with contractors, subcontractors, Division of Capital Asset Management and Maintenance (DCAMM) staff and agency representatives.
5. Financial stability - including prompt payment of consultant fees.
6. Current workload with DCAMM and other public agencies.
7. Geographical location of the firm with respect to the proposed project.
8. Participation of MBEs and WBEs as prime consultants or sub-consultants in a role consistent with the participation goals set forth for the project.
 - a. The Designer Selection Board adheres to M.G.L. C.7C, § 6, Executive Orders 526, 559 and 565 as implemented by the Division of Capital Asset Management and Maintenance establishing goals for Minority Business Enterprise (MBE) and Women Business Enterprise (WBE) participation on all design contracts unless otherwise noted. (See attached pages 4-8) and a separate Service Disabled Veteran Owned Business Enterprises (SDVOBE) and Veteran Owned Business Enterprises (VBE) Benchmark of 3%

- b. The Minority Business Enterprise and Woman Business Enterprise participation goals established for each contract are set forth on the first page of the “Designer Selection Board Project Criteria” solicitation for that contract.

PARTICIPATION BY MINORITY OWNED BUSINESSES AND WOMAN OWNED BUSINESSES

Pursuant to M.G.L. C.7C, § 6, Executive Orders 526,559 and 565, the Commissioner of the Division of Capital Asset Management and Maintenance (DCAMM), as designee of the Secretary of Administration and Finance, has developed the following goals and procedures to encourage full participation by minority business enterprises (MBEs) and women businesses enterprises (WBEs) (collectively MBE/WBEs) on contracts for design services entered into by DCAMM and other public awarding authorities with MBE/WBE Participation Programs.

GOALS

Subject to the terms of this memorandum, the following MBE/WBE participation goals shall apply to the total dollar value of all study and design contracts awarded for DCAMM projects:

The Minority Business Enterprise and Women Business Enterprise (MBE/WBE) participation goal is a combined goal of 17.9%.

Applicants must utilize a mix of both MBE and WBE firms whose participation, when added together, meets the overall combined goal set for the Contract. The combined goal requires a reasonable representation of both MBE and WBE firm participation. The Combined MBE/WBE goal must be met within the list of requested prime and sub-consultants. All applicants must indicate in the prime firm’s application how they or their consultants will meet these goals and will be evaluated on that basis.

Applications from MBE and WBE firms as prime consultant are encouraged. Applicants that are themselves MBE or WBE certified will be required to bring a reasonable amount of participation by a firm(s) that holds the certification which is not held by the applicant to the project. Proposed MBE/WBE participation plans that include solely MBE or solely WBE participation, or have only nominal participation by one or the other to meet the combined goal, will not be considered responsive. Applicants are strongly encouraged to utilize multiple disciplines and firms to meet the MBE/WBE goal. Consultants to the prime can team within their disciplines in order to meet the MBE/WBE goal, but must state this relationship on the organizational chart.

If the contracting design firm is not itself an MBE or WBE, then MBE/WBE participation credit will be given for the value of any work under the contract that is actually performed by each MBE or WBE consultant, subcontractor or sub-consultant (hereafter “subcontractors”) to the Designer.

Although the contract contains a combined goal, participation by MBE and WBE firms must be reported and tracked separately.

MODIFICATION OF M/WBE PARTICIPATION GOALS FOR PARTICULAR PROJECTS

DCAMM reserves the right to reduce or waive the MBE/WBE participation goals stated above for a particular project prior to the receipt of applications to the Designer Selection Board upon its own initiative or upon the request of any applicant if DCAMM determines that it is not feasible for a non-MBE/WBE design firm to meet the MBE/WBE goal established for the project based upon any or all of the following: (i) actual MBE/WBE availability, (ii) the geographic location of the project to the extent related to MBE/WBE availability, (iii) the contractual scope of work, (iv) the percentage of work available for subcontracting to MBE/WBEs, or (v) other relevant factors as determined by DCAMM.

The MBE/WBE participation goals established for each project are set forth in the Designer Selection Board Project Criteria published for that project.

After a project is advertised, requests from prospective applicants to reduce or waive the MBE/WBE participation goals for that project, with all supporting documentation, must be submitted with the application, with a copy to DCAMM's Compliance Office, One Ashburton Place, 15th Floor, Boston, MA 02108. Except as provided below, DCAMM will not consider any request to reduce or waive the MBE/WBE participation goals for a project if the request is received after this deadline.

DETERMINATION OF MBE/WBE STATUS

A minority owned business shall be considered an MBE only if it has been certified as a minority owned business by the Supplier Diversity Office ("SDO") (formerly SOMWBA). A woman owned business shall be considered a WBE only if it has been certified as a woman owned business by SDO. Certification as a disadvantaged business enterprise ("DBE"), certification as an MBE/WBE by any agency other than SDO, or submission of an application to SDO for certification as an MBE/WBE shall not confer MBE/WBE status on a firm.

Minority owned businesses and woman owned businesses are strongly encouraged to submit applications for certification as MBE/WBEs to SDO. Information is available from SDO, One Ashburton Place, 13th Floor, Boston, MA 02108 (617) 502-8831 and at www.mass.gov/sdo

IDENTIFICATION OF MBE/WBE PARTICIPANTS BY THE SELECTED DESIGNER

The current SDO Certification Letters showing that the MBE/WBE is certified in the area of work for which it is listed on the application must be submitted for each and every MBE and WBE firm listed on the application, and must be submitted with the application.

Not later than five (5) working days after the Designer receives notice of selection for the advertised project, (A-5 Letter), the Designer shall submit to DCAMM's Compliance Office (i) a Letter of Intent for each of the M/WBEs that will perform work under the contract, and (ii) a Schedule of MBE/WBE Participation. The form of Letter of Intent and Schedule of MBE/WBE Participation are included in this application package.

Within five (5) working days after receipt of the Letters of Intent, DCAMM's Compliance Office shall review and either approve or disapprove the Designer's submissions. Without limitation, DCAMM reserves the right to reject the Letter of Intent of any MBE/WBE that is to perform work in a category that is not listed in its SDO certification, or if the price to be paid for the MBE/WBE Work as stated in the Letter of Intent does not bear a reasonable relationship to the value of such work as reasonably determined by DCAMM. If the Designer has not submitted an appropriate Schedule of MBE/WBE Participation and appropriate Letters of Intent and SDO certification letters establishing that the MBE/WBE participation goal for the project will be met, the Designer may be considered ineligible for award of the contract and DCAMM may award the contract to the second ranked Designer, subject to that Designer's compliance with these conditions.

DCAMM reserves the right to reduce or waive the MBE/WBE participation goals for a project prior to the final selection of a designer, provided that no such reduction or waiver shall be granted except under the following circumstances: the Designer must establish and document that it has been unable to obtain commitments from MBE/WBE subcontractors sufficient to meet the MBE/WBE goals for the project after having made a diligent, good faith effort to do so; all such documentation must accompany the Designer's request to reduce or waive the MBE/WBE participation goal submitted with its application and shall include, at a minimum, the following:

- A list of all items of work under the contract that the Designer made available for subcontracting to MBE/WBEs. The Designer shall identify all items of work that the Designer did not make so available and shall state the reasons for not making such work available for subcontracting to MBE/WBEs. The Designer shall also demonstrate that, where commercially reasonable, tasks were divided into units capable of being performed by MBE/WBEs.
- Evidence that the Designer sent written notices soliciting proposals to perform the items of work made available by the Designer for subcontracting to MBE/WBEs to all MBE/WBEs qualified to perform such work. The Designer shall identify (i) each MBE/WBE solicited, and (ii) each MBE/WBE listed in the SDO directory under the applicable work

category who was not solicited and the reasons therefor. The Designer shall also state the dates notices were mailed and provide a copy of the written notice(s) sent.

- Evidence that the Designer made reasonable efforts to follow up the written notices sent to MBE/WBEs with telephone calls or personal visits in order to determine with certainty whether the MBE/WBEs were interested in performing the work. Phone logs or other documentation must be submitted.
- A statement of the response received from each MBE/WBE solicited, including the reason for rejecting any MBE/WBE who submitted a proposal.
- Evidence of efforts made to assist MBE/WBEs that need assistance in obtaining insurance, or lines of credit with suppliers if the inability of MBE/WBEs to obtain, insurance, or lines of credit is a reason given for the Designer's inability to meet the MBE/WBE goals.
- The Designer also shall submit any other information reasonably requested by DCAMM to show that the Designer has taken all actions which could be reasonably expected to achieve the MBE/WBE participation goals.

The Designer may submit any other information supporting its request for a waiver or reduction in the MBE/WBE participation goals, such as evidence that the Designer placed advertisements in appropriate media and trade association publications announcing the Designer's interest in obtaining proposals from MBE/WBEs, and/or sent written notification to MBE/WBE economic development assistance agencies, trade groups and other organizations notifying them of the contract and the work to be subcontracted by the Designer to MBE/WBEs.

Requests by a selected Designer to reduce or waive the M/WBE participation goals for a particular project based upon the Designer's inability to obtain commitments from MBE/WBE subcontractors sufficient to meet the MBE/WBE goals after having made a diligent, good faith effort to do so must be received by DCAMM not later than with that firm's application to the DSB.

The Designer's compliance with these procedures and goals is a prerequisite for award of the contract, provided that DCAMM reserves the right to waive minor defects in documents and extend time limits in its sole discretion.

SCHEDULE FOR PARTICIPATION
BY MINORITY/WOMEN BUSINESS ENTERPRISES
DIVISION OF CAPITAL ASSET MANAGEMENT AND MAINTENANCE

DCAMM Project Number _____ Project Location _____

Project Name _____

This form must be submitted to DCAMM's Compliance Office by the Designer within five (5) working days after the Designer receives notice of selection (A-5 Letter). A Letter of Intent and SDO certification letter for each MBE/WBE must be submitted with this Schedule of MBE/WBE participation.

DESIGN FIRM CERTIFICATION:

The undersigned Design firm agrees that it will subcontract with the following listed firms for the work described and for the dollar amounts listed below. For purposes of this commitment, the MBE and WBE designation means that a business has been certified by SDO as an MBE, WBE or M/WBE. The Designer must indicate the MBE/WBE firms it intends to utilize on the contract as follows (attach additional sheets if necessary):

Company Name & Address	MBE or WBE	Describe MBE/WBE Scopes of Work	Total Dollar Value of Participation
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			

Combined MBE/WBE Goal \$ _____

Total Dollar Value of MBE Commitment: \$ _____

Total Dollar Value of WBE Commitment: \$ _____

The undersigned hereby certifies that he/she has read the terms and conditions of the contract with regard to MBE/WBE participation and is authorized to bind the Designer to the commitment set forth above.

Name of Designer Firm _____

Authorized Signature _____

Business Address _____

Print Name _____

Title _____

Telephone No. _____ Fax No. _____

Date _____

THIS OFFICIAL FORM MAY NOT BE ALTERED
POLICY ON EMPLOYMENT OF STUDY CONSULTANTS FOR SUBSEQUENT DESIGN PROJECTS

Amended by the Designer Selection Board on December 15, 2000

1. The Commissioner may appoint a designer to perform continued or extended services if the following conditions are met:
 - (i) *a written statement is filed with the Board explaining the reasons for the continuation or extension of services;*
 - (ii) *the program for the design services is filed with the Board if one is required by the regulations of the division; and*
 - (iii) *the Board approves the appointment of the designer for continued or extended services and states the reasons therefor.*

2. When the Board has required that applicants list consultants which the applicants may employ, in no event shall a consultant be used who is debarred pursuant to Section forty-four C of Chapter one hundred and forty-nine as amended, and any change or addition to the consultants named in the application and allowed by the Board upon appointment must be approved by the Deputy Commissioner and reported to the Board, along with a written statement by the designer or construction manager of the reasons for the change.



OPERATIONAL SERVICES DIVISION
SUPPLIER DIVERSITY OFFICE

THE COMMONWEALTH OF MASSACHUSETTS
Executive Office for Administration and Finance
OPERATIONAL SERVICES DIVISION
One Ashburton Place, Suite 1017
Boston, MA 02108-1552

Charles D. Baker
Governor
Karyn E. Polito
Lieutenant Governor
Kristen Lepore
Secretary
Gary J. Lambert
Assistant Secretary for
Operational Services

Memorandum

To: All Public Awarding Authorities
From: Bill McAvoy, Deputy Assistant Secretary for Supplier Diversity and Chief Legal Counsel
Supplier Diversity Office of the Operational Services Division
Date: April 21, 2016
Re: MBE Certification Status of Portuguese-Owned Businesses

The purpose of this memorandum is to inform you that, effective April 12, 2016, all Portuguese-owned Minority Business Enterprises (MBEs), as certified by the Supplier Diversity Office (SDO), will no longer be considered MBEs but will instead be considered Portuguese Business Enterprises (PBEs). This change complies with an order of the Superior Court of the Commonwealth of Massachusetts in a case entitled Federal Concrete, Inc. v. Executive Office of Administrative & Finance et al., No. 1684CV00627. The change also complies with the language of SDO's current regulation.

The SDO's current regulations, 425 C.M.R. § 2.02, define "Portuguese" for purposes of certification as follows: "All persons having Portuguese origin. Portuguese persons shall only be included in the definition of minority if specifically set forth in programs funded by state transportation bond statutes which include such persons as eligible participants." As such, PBEs shall be eligible for participation in programs funded by state transportation bond statutes where such statutes include Portuguese businesses as eligible participants.

SDO has posted notice of this change on our website at www.mass.gov/sdo. We have also removed Portuguese-owned businesses from our certification database and lists of eligible MBEs. Later this week we will add such businesses back onto our certification database and lists, but as PBEs instead of MBEs. We will also inform the Portuguese-owned firms impacted by this change.

Awarding authorities are hereby advised that, for any bids submitted by a prime bidder after April 12, 2016, the SDO will not recognize, and the awarding authority should not recognize, an MBE certification issued to a Portuguese-owned firm. (In contrast, if the bid was submitted by the prime bidder to the Awarding Authority on or before April 12, 2016, any Portuguese-owned businesses included as MBEs on the prime bidder's list of MBE subcontractors may remain on that list and count toward the project's M/WBE participation goal.) Any bids submitted after April 12 may not count Portuguese-owned businesses toward the contract's M/WBE participation goals, unless PBE participation is permitted in the project as stated in the SDO regulation. If any Awarding Authority or prime bidder is unsure as to the current MBE or PBE status of a particular subcontractor, we encourage you to visit our website, as our records will be updated by the end of this week to reflect this change.

Recipients of this memo should feel free to forward this to other interested parties. If you have any questions about this change or about bids submitted after April 12, 2016, please feel free to contact our office at john.b.fitzpatrick@state.ma.us.

Tel: (617) 720-3300

www.mass.gov/osd

TDD: (617) 727-2716

Follow us on Twitter: @Mass_OSD

Fax: (617) 502-8841

GENERAL INSTRUCTIONS FOR FILING APPLICATIONS

1. As of 07/2016, the application form required for submission to the Designer Selection Board has been updated. The form is as follows: DSB Application Form (Updated July 2016) (included herein). All specific project applications must be submitted on the DSB (Updated July 2016) Application form. Failure to supply above documents will result in rejection of application.
2. Please mail One Original copy of the Master File Brochure to: **Designer Selection Board, One Ashburton Place, Room 1004, Boston, MA 02108**. Electronic copies are not accepted.
3. An electronic copy of the DSB Master File Brochure (Updated July 2016) and the DSB Application Form (Updated July 2016) are available for download from the Web site address: www.mass.gov/dcam/dsb.
4. Applications should be limited to the application plus a maximum of **3 supplementary pages** (double sided) unless otherwise noted. **Please ensure that the Original copy of the application that contains the sub-consultant acknowledgement and the SDO certifications are clearly marked ORIGINAL.** Computer generated forms are allowed provided they do not substantially deviate from the DSB format. **Submit 16 copies. Please duplicate forms double-sided, if possible, to minimize paper waste.**
5. No cover letters, binders and superfluous material. **Please staple upper right corner, landscape.**
6. DSB recommends that the principal who would be in charge of the project make sure that the form is complete including appropriate signature. Unsigned applications will not be considered.
7. Out of State Prime Firms MUST be registered with the Secretary of State. Please attach (one copy only with Original application) firm's State Registration Certificate – Registered to do business with the Commonwealth of Massachusetts.
8. When citing work performed by the applicant while employed by another firm, make certain said firm is properly identified including the individual's level of responsibility.
9. By including a firm as a sub-consultant the applicant certifies that the listed firm has been advised that it was being included in the applicants team and it has agreed to work on this Project should the team be selected. It is a requirement that all applicants supply a signed DSB SC-A's (Sub-Consultant Acknowledgement). There can be no change in consultants from those named unless approved by DCAMM and reported to the Designer Selection Board (C.7C, §51) It is a requirement that all applicants supply the signed document, attached to the application, by the listed sub-consultants stating that they are aware and agree to being nominated by said applicant. Failure to supply above documents may result in rejection of application.
10. DCAMM contracts require that the Prime and Sub-Consultant personnel must be registered by the Commonwealth of Massachusetts in their respective disciplines and therefore, when applicable, the DSB **requires** registration in the disciplines listed in order to satisfy DCAMM contract requirements.
11. A person may not submit more than one application as a "prime" applicant on the same project. The applications of any such applicant shall be considered disqualified. This rule does not preclude a person applying as a "prime" applicant even though the applicant is also listed as a consultant on one or more other "prime" applications on the same project. For the purposes of this paragraph the term "person" means an individual, corporation, association, partnership or other legal entity.
12. Eligibility requirements are set forth in this Public Notice in item 8(a). Sub-paragraph (iii) of item 8(a) requires: 1) the majority of directors or a majority of the stock ownership to be persons who are Mass. registered architects, landscape architects or engineers; 2) the chief executive officer to be a person who is so registered; and 3) the person to be in charge of the project to be so registered in the discipline required for the project.
13. When the Prime applicant is to fulfill any of the requested consultant roles in the advertisement, then that role shall be defined in the organization chart as the applicant. It should also be referenced in Section 7 (resume) and Section 8 (experience) such that it proves the applicant is skilled in supplying these roles on the project.
14. Current SDO Certification Letters showing that the MBE/WBE is certified in the area of work for which it is listed on the application must be submitted for each and every MBE and WBE firm listed on the application, and must be submitted with the original application.
15. Applicants are advised to apply only for those projects for which they are demonstrably qualified, as it reflects negatively on the applicant's credibility if the firm applies for every job advertised when only marginally qualified.
16. Applications should be mailed to the **Designer Selection Board, One Ashburton Place, Room 1004, Boston, MA 02108**.
17. The Board relies almost exclusively on the information submitted on the applications to arrive at a short list of semi-finalists. Therefore, do not include statements that refer to the Master File Brochure for additional information. The Master File Brochures are usually considered upon request of a DSB member when additional supplementary information is needed.

18. Joint ventures are not encouraged. However, they may be advantageous for complex building types in which the participants have a combination of unique skills with a previous successful record of working together.
19. Current workload with DCAMM, other public agencies and the private sector are taken into consideration, however, usually only after the DSB has narrowed down the original applicants to a short list of qualified semi-finalists. The Board fosters effective broad-based participation in public work within the design professions.

NOTE **CMR 810 Publication/Instructions for Designers** (Form 9) was replaced by Designers Procedures Manual available on the Web site: <http://www.mass.gov/anf/docs/dcam/dlforms/designers-procedures-manual-aug08.pdf>

Commonwealth of Massachusetts DSB Master File Brochure (Updated July 2016)	1. Firm Name (or if not an entity, individual's name), and Business Address	2. Year Present Firm Established:	3. Date Prepared:
	Telephone No.:	4. Specify type of ownership and check 1, 2 or 3 below, if applicable.	
	1a. Submittal is for _____ Parent Company _____ Branch or Subsidiary Office	<input type="checkbox"/> (1) SDO Certified Minority Business Enterprise (MBE)	
	1b. Federal ID#:	<input type="checkbox"/> (2) SDO Certified Woman Business Enterprise (WBE)	
		<input type="checkbox"/> (3) SDO Certified Minority Woman Business Enterprise (M/WBE)	
		<input type="checkbox"/> (4) SDO Certified Service Disabled Veteran Owned Business Enterprise (SDVOBE)	
	<input type="checkbox"/> (5) SDO Certified Veteran Owned Business Enterprise (VBE)		

5. Name of Parent company, if any:	5a. Former Company Name(s), if any, and Year(s) Established:
------------------------------------	--

6. Name of Sole Proprietor or Names of ALL Firm Partners and Officers							
Name	Title	MA.Reg. #	Status/Discipline	Name	Title	MA.Reg. #	Status/Discipline
a.				d.			
b.				e.			
c.				f.			

7. If Corporation, or Other Entity Other than a Partnership, provide Names of ALL Members of the Board of Directors:							
Name	Title	MA.Reg. #	Status/Discipline	Name	Title	MA.Reg. #	Status/Discipline
a.				d.			
b.				e.			
c.				f.			

8. Names of ALL Owners (Stocks or Other Ownership):									
Name	Title	Ownership	MA Reg. #	Status/Discipline	Name	Title	Ownership	MA Reg. #	Status/Discipline
a.					d.				
b.					e.				
c.					f.				

9. Personnel by Discipline: (List each person only once, by primary function -- average number employed throughout the preceding 6 month period. Indicate both the total numbers in each discipline and, within brackets, the total number holding Massachusetts's registrations.)									
Admin. Personnel	_____ (_____)	Ecologists	_____ (_____)	Licensed Site Profs.	___ (_____)	Other	_____ (_____)		
Architects	_____ (_____)	Electrical Engineers	_____ (_____)	Mechanical Engrs.	___ (_____)		_____ (_____)		
Acoustical Engrs.	_____ (_____)	Environmental Engrs.	_____ (_____)	Planners: Urb./Reg	___ (_____)		_____ (_____)		
Code Specialists	_____ (_____)	Fire Protection Engrs	_____ (_____)	Specification Writers	___ (_____)		_____ (_____)		
Civil Engrs.	_____ (_____)	Geotech. Engrs.	_____ (_____)	Structural Engineers	___ (_____)		_____ (_____)		
Construction Inspectors	_____ (_____)	Industrial Hygienist	_____ (_____)	Surveyors	___ (_____)		_____ (_____)		
Cost Estimators	_____ (_____)	Interior Designers	_____ (_____)		___ (_____)		_____ (_____)		
Drafters	_____ (_____)	Landscape Architects	_____ (_____)		___ (_____)	Total	_____ (_____)		

10.	Summary of Professional Services Fees Received: (insert Index number)	Last 5 Years (most recent year first)					Ranges of Professional Services Fees			
		2011	2010	2009	2008	2007	INDEX			
	Federal Work	_____	_____	_____	_____	_____	1.	Less than \$100,000	5.	\$1 million to \$2 million
	Commonwealth of Massachusetts work	_____	_____	_____	_____	_____	2.	\$100,000 to \$250,000	6.	\$2 million to \$5 million
	All other domestic and foreign work	_____	_____	_____	_____	_____	3.	\$250,000 to \$500,000	7.	\$5 million to \$10 million
							4.	\$500,000 to \$1 million	8.	\$10 million or greater

Experience Profile Code Numbers for use with questions 11, 12 and 13

001	Acoustics; Noise Abatement	037	Fisheries; Fish Ladders	065	Microclimatology; Tropical Engineering	100	Special Environments; Clean Rooms, Etc.
002	Aerial Photogrammetry	038	Forestry & Forest Products	066	Military Design Standards	101	Structural Design; Special Structures
003	Agricultural Development; Grain Storage; Farm Mechanization	039	Garages; Vehicle Maintenance Facilities; Parking Decks	067	Mining and Mineralogy	102	Surveying; Platting; Mapping; Flood Plain Studies
004	Air Pollution Control	040	Gas Systems (<i>Propane; Natural, Etc.</i>)	068	Missile Facilities (<i>Silos; Fuels; Transport</i>)	103	Swimming Pools
005	Airports; Navais; Airport Lighting; Aircraft Fueling	041	Graphic Design	069	Modular Systems Design; Pre-fabricated	104	Storm Water Handling & Facilities
006	Airports; Terminals & Hangars; Freight Handling	042	Harbors; Jetties, Piers, Ship Terminal Facilities Structures or Components	070	Naval Architecture; Off-Shore Platforms	105	Telephone <i>Systems (Rural; Mobile Intercom; ; Etc.)</i>
007	Arctic Facilities	043	Heating, Ventilating, Air Conditioning	071	Nuclear Facilities; Nuclear Shielding	106	Testing & Inspection Services
008	Auditoriums & Theaters	044	Health Systems Planning	072	Office Buildings; Industrial Parks	107	Traffic & Transportation Engineering
009	Automation; Controls; Instrumentation	045	Highrise; Air-Rights-Type Buildings	073	Oceanographic Engineering	108	Towers (Self-Supporting & Guyed Systems)
010	Barracks; Dormitories	046	Highways; Streets; Airfield Paving; Parking Lots	074	Ordnance; Munitions; Special Weapons	109	Tunnels & Subways
011	Bridges	047	Historical Preservation	075	Petroleum Exploration; Refining	110	Urban Renewals; Community Development
012	Cemeteries	048	Hospital and Medical Facilities	076	petroleum and Fuel (<i>Storage and Distribution</i>)	111	Utilities (<i>Gas & Steam</i>)
013	Chemical Processing & Storage	048A	Medical Facilities - Mental Health	077	Pipelines (<i>Cross-Country - Liquid & Gas</i>)	112	Value Analysis; Life-Cycle Costing
014	Churches; Chapels	048B	Medical Facilities - Acute Care	078	Planning (<i>Community, Regional</i>)	113	Warehouses & Depots
015	Codes; Standards; Ordinances	048C	Medical Facilities - Ambulatory Care, Clinics	079	Planning (<i>Site, Installation, and Project</i>)	114	Water Resources; Hydrology; Ground Water
016	Cold Storage; Refrigeration; Fast Freeze	049	Hotels, Motels	080	Plumbing and Piping Design	115	Water Supply; Treatment and Distribution
017	Commercial Building (<i>low rise</i>); Shopping Centers	050	Housing (Residential, Multi-Family; Apartments; Condominiums)	081	Pneumatic Structures, Air-Support Buildings	116	Wind Tunnels; Research/Testing Facilities Design
018	Communication Systems; TV; Microwave	050A	Housing - Residential Mental Health	082	Postal Facilities	117	Zoning; Land Use Studies
019	Computer Facilities; Computer Service	050B	Housing - Resid. Mental Ret. /Group Home	083	Power Generation, Transmission, Distribution	201	_____
020	Conservation and Resource Management	050C	Housing - Elderly	084	Prisons & Correctional Facilities	202	_____
021	Construction Management	050D	Housing - Assisted Living	084A	Correctional Facilities - Minimum Security	203	_____
022	Corrosion Control; Cathodic Protection; Electrolysis	051	Hydraulics and Pneumatics	084B	Correctional Facilities - Medium Security	204	_____
023	Cost Estimating	052	Industrial Buildings; Manufacturing Plants	084C	Correctional Facilities - Maximum Security	205	_____
024	Dams (<i>Concrete; Arch</i>)	053	Industrial Processes; Quality Control	084D	Correctional Facilities - Youth Detention		
025	Dams (<i>Earth; Rock</i>); Dikes; Levees	054	Industrial Waste Treatment	084E	Public Safety Facilities - Police/Fire Stations		
026	Desalination (<i>Process & Facilities</i>)	055	Interior Design; Space Planning	084F	Public Safety Facilities - Training		
027	Dining Halls; Clubs; Restaurants	056	Facilities Management	085	Product, Machine & Equipment Design		
028	Ecological & Archeological Investigations	057	Irrigation; Drainage	086	Radar; Sonar; Radio & Radar Telescopes		
029	Educational Facilities; Classrooms	058	Judicial and Courtroom Facilities	088	Recreation Facilities (<i>Parks, Marinas, Etc.</i>)		
029A	Educational Facilities; Higher Ed	058A	Laboratories; Medical Research Facilities	088A	Recreation Facilities - Ice Rinks		
029B	Educational Facilities; Secondary Ed	058B	Laboratories; Commercial	088B	Recreation Facilities - Senior/Community Centers		
029C	Educational Facilities; Elementary Ed	058C	Laboratories; Higher Ed Research Sciences	088C	Park Support Facilities (<i>Bath House; Visitor Center</i>)		
029D	Educational Facilities; Child Day Care	058D	Laboratories; Heavy Equipment	089	Rehabilitation (<i>Buildings; Structures; Facilities</i>)		
030	Electronics	059	Laboratories; Pathology, Medical Examiner	090	Resource Recovery; Recycling		
031	Elevators; Escalators; People Movers	060	Laboratories; Crime Investigation	091	Radio Frequency Systems & Shieldings		
032	Energy Conservation; New Energy Sources	061	Landscape Architecture	092	Rivers; Canals; Waterways; Flood Control		
032A	Sustainable Design	062	Libraries; Museums; Galleries	093	Safety Engineering; Accident Studies, OSHA Studies		
033	Environmental Impact Studies, Assessments or Statements	063	Lighting (Interiors; Display; Theatre, Etc.)	094	Security Systems; Intruder & Smoke Detection		
034	Fallout Shelters; Blast-Resistant Design	064	Lighting (<i>Exteriors</i>)	095	Seismic Designs and Studies		
035	Field Houses; Gyms; Stadiums		Materials Handling Systems; Conveyors; Sorters	096	Sewage Collection, Treatment and Disposal		
036	Fire Protection		Metallurgy	097	Soils & Geologic Studies; Foundations		
				098	Solar Energy Utilization		
				099	Solid Wastes; Incineration; Land Fill		
				099A	Hazardous materials Abatement		

11. Profile of Firm's Project Experience, Last 5 Years									
	Profile Code	No. of Projects	Total Gross Fees (in thousands)	Profile Code	No. of Projects	Total Gross Fees (in thousands)	Profile Code	No. of Projects	Total Gross Fees (in thousands)
1.				11.			21.		
2.				12.			22.		
3.				13.			23.		
4.				14.			24.		
5.				15.			25.		
6.				16.			26.		
7.				17.			27.		
8.				18.			28.		
9.				19.			29.		
10.				20.			30.		

12. List all current Projects (except for work for the Commonwealth) for which Prime Applicant is performing or is under contract to perform any design services (add/subtract rows as needed).

Profile Code	Role P, C, JV *	Phases St., Sch., D.D., C.D.,A.C. *	Project Name, Location & Principal-in-Charge	Owner Name & Address (Include Contact name and phone number)	Project Cost (in thousands)	Completion Date (Actual or Estimated) (R)Renovation or (N)New
			1.			
			2.			
			3.			
			4.			
			5.			
			6.			
			7.			

			8.			
			9.			
			10.			
			11.			
			12.			
			13.			
			14.			
			15.			
			16.			
			17.			
			18.			
			19.			

13. List all Projects completed within the past 5 years for which Prime Applicant has performed, or has entered into a contract to perform any design services for all public agencies within the Commonwealth (add/subtract rows as needed).

Profile Code	Role P, C, JV	Phases St., Sch., D.D., C.D.,A.C.	Project Name, Location & Principal-in-Charge	Owner Name & Address (Include Contact name and phone number)	Project Cost (in thousands)	Completion Date (Actual or Estimated) (R)Renovation or (N)New
			1.			
			2.			
			3.			
			4.			
			5.			
			6.			
			7.			
			8.			

14. Professional Liability Insurance:
Professional Liability Policy Certificate Number Present Policy Expiration Date Aggregate Amount Payable

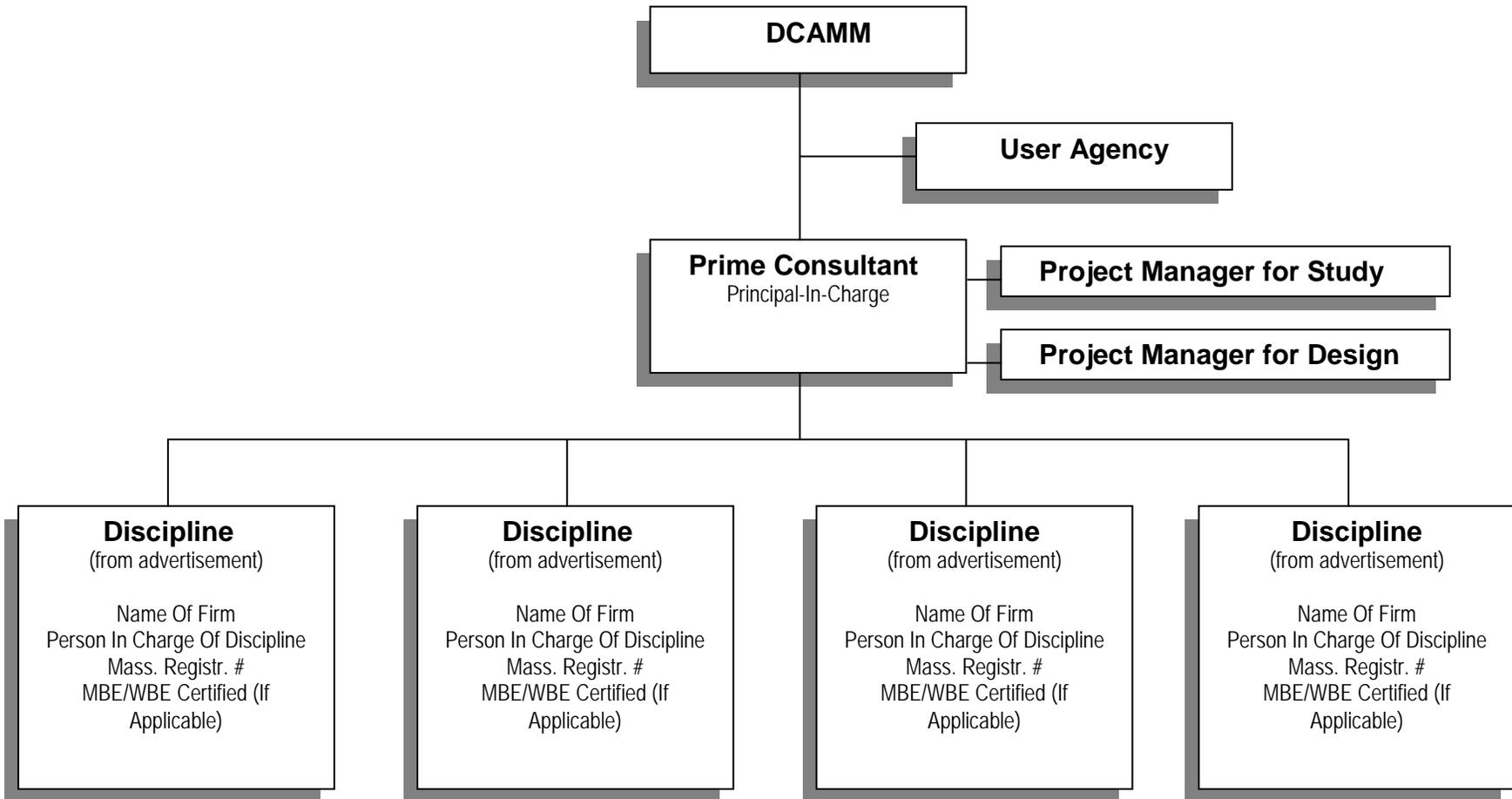
15. I certify that all information is submitted under the penalties of perjury and that I am familiar with the Mass. State Building Code and also Mass. General Laws, Chapter 149, Section 44A-44H, Section 44M, and Chapter 30, Section 39M. I also certify that the undersigned is an Authorized Signatory of the Firm and is a Principal or Officer of the Firm.

Submitted by (Signature) _____ Printed Name and Title _____ Date _____

* P = Principal; C = Consultant; JV = Joint Venture; St. = Study; Sch = Schematic; D.D. = Design Development; C.D. = Construction Documents; A.C. = Administration of Contract

Commonwealth of Massachusetts DSB Application Form (Updated July 2016)	1. Project Name/Location for Which Firm is Filing:	2a. DSB #	Item #
		2b. Mass. State Project #	
3a. Firm (Or Joint-Venture) - Name and Address Of Primary Office To Perform The Work:	3e. Name Of Proposed Project Manager: For Study: (if applicable) For Design: (if applicable)		
3b. Date Present and Predecessor Firms Were Established:	3f. Name and Address Of Other Participating Offices Of The Prime Applicant, If Different From Item 3a Above:		
3c. Federal ID #:	3g. Name and Address Of Parent Company, If Any:		
3d. Name and Title Of Principal-In-Charge Of The Project (MA Registration Required): Email Address: Telephone No: Fax No.:	3h. Check Below If Your Firm Is Either: (1) SDO Certified Minority Business Enterprise (MBE) <input type="checkbox"/> (2) SDO Certified Woman Business Enterprise (WBE) <input type="checkbox"/> (3) SDO Certified Minority Woman Business Enterprise (M/WBE) <input type="checkbox"/> (4) SDO Certified Service Disabled Veteran Owned Business Enterprise (SDVOBE) <input type="checkbox"/> (5) SDO Certified Veteran Owned Business Enterprise (VBE) <input type="checkbox"/>		
4. Personnel From Prime Firm Included In Question #3a 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 And, Within Brackets, The Total Number Holding Massachusetts Registrations):			
Admin. Personnel	_____ (_____)	Ecologists	_____ (_____)
Architects	_____ (_____)	Electrical Engrs.	_____ (_____)
Acoustical Engrs.	_____ (_____)	Environmental Engrs.	_____ (_____)
Civil Engrs.	_____ (_____)	Fire Protection Engrs.	_____ (_____)
Code Specialists	_____ (_____)	Geotech. Engrs.	_____ (_____)
Construction	_____ (_____)	Industrial Hygienists	_____ (_____)
Cost Estimators	_____ (_____)	Interior Designers	_____ (_____)
Drafters	_____ (_____)	Landscape Architects	_____ (_____)
		Licensed Site Profs.	_____ (_____)
		Mechanical Engrs.	_____ (_____)
		Planners: Urban./Reg.	_____ (_____)
		Specification Writers	_____ (_____)
		Structural Engrs.	_____ (_____)
		Surveyors	_____ (_____)
		Other	_____ (_____)
		Total	_____ (_____)
5. Has this Joint-Venture previously worked together? <input type="checkbox"/> Yes <input type="checkbox"/> No			

6. List **ONLY** Those Prime and Sub-Consultant Personnel Specifically Requested In The Advertisement. This Information Should Be Presented Below In The Form Of An Organizational Chart. Include Name Of Firm and Name Of The One Person In Charge Of The Discipline, With Mass. Registration Number, As Well As MBE/WBE Status, If Applicable:



7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. <u>Include Resumes of Project Managers</u> . Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, 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:	a. Name and Title Within Firm:
b. Project Assignment:	b. Project Assignment:
c. Name and Address Of Office In Which Individual Identified In 7a Resides: <div style="text-align: right;"> MBE <input type="checkbox"/> WBE <input type="checkbox"/> SDOVBE <input type="checkbox"/> VBE <input type="checkbox"/> </div>	c. Name and Address Of Office In Which Individual Identified In 7a Resides: <div style="text-align: right;"> MBE <input type="checkbox"/> WBE <input type="checkbox"/> SDOVBE <input type="checkbox"/> VBE <input type="checkbox"/> </div>
d. Years Experience: With This Firm: _____ With Other Firms: _____	d. Years Experience: With This Firm: _____ With Other Firms: _____
e. Education: Degree(s) /Year/Specialization	e. Education: Degree(s) /Year/Specialization
f. Active Registration: Year First Registered/Discipline/Mass Registration Number	f. Active Registration: Year First Registered/Discipline/Mass Registration Number:
g. Current Work Assignments and Availability For This Project:	g. Current Work Assignments and Availability For This Project
h. Other Experience and Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):	h. Other Experience and Qualification Relevant To The Proposed Project: (Identify Firm By Which Employed , If Not Current Firm):

8a. Current and Relevant Work By Prime Applicant Or Joint-Venture Members. Include ONLY Work Which Best Illustrates Current Qualifications In The Areas Listed In The DSB Advertisement (List Up To But Not More Than 5 Projects).					
a. Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Areas Of Experience Listed In DSB Advertisement)	c. Client's Name, Address and Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
				Construction Costs(Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was Responsible.
(1)					
(2)					
(3)					
(4)					
(5)					

8b. List Current and Relevant Work By Sub-Consultants Which Best Illustrates Current Qualifications In The Areas Listed In The Advertisement (Up To But Not More Than 5 Projects For Each Sub-Consultant). Use Additional Sheets Only As Required For The Number Of Sub-Consultants Requested In The Advertisement and They Must Be In The Format Provided.

Sub-Consultant Name:

a. Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Areas Of Experience Listed In DSB Advertisement)	c. Client's Name, Address and Phone Number (Include Name Of Contact Person)	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
				Construction Costs (Actual, Or Estimated If Not Completed)	Fee for Work for Which Firm Was Responsible
(1)					
(2)					
(3)					
(4)					
(5)					

9. List All Projects Within The Past 5 Years For Which Prime Applicant Has Performed, Or Has Entered Into A Contract To Perform, Any Design Services For All Public Agencies Within The Commonwealth.

# of Total Projects:		# of Active Projects:	Total Construction Cost (In Thousands) of Active Projects (excluding studies):		
Role P, C, JV *	Phases St., Sch., D.D., C.D.,A.C. *	Project Name, Location and Principal-In-Charge:	Awarding Authority (Include Contact Name and Phone Number)	Construction Costs (In Thousands) (Actual, or Estimated if Not)	Completion Date (Actual or Estimated) (R)Renovation or (N)New
		1.			
		2.			
		3.			
		4.			
		5.			
		6.			
		7.			
		8.			
		9.			
		10.			

* P = Principal; C = Consultant; JV = Joint Venture; St. = Study; Sch. = Schematic; D.D. = Design Development; C.D. = Construction Documents; A.C. = Administration of Contract

10. Use This Space To Provide Any Additional Information Or Description Of Resources Supporting The Qualifications Of Your Firm And That Of Your Sub-Consultants For The Proposed Project. If Needed, Up To Three, Double-Sided 8 1/2" X 11" Supplementary Sheets Will Be Accepted. **APPLICANTS ARE ENCOURAGED TO RESPOND SPECIFICALLY IN THIS SECTION TO THE APPLICATION EVALUATION - PROJECT EXPERIENCE REQUESTED IN THE ADVERTISEMENT.**

Be specific – No Boiler Plate

11. Professional Liability Insurance:

Name of Company	Aggregate Amount	Policy Number	Expiration Date
-----------------	------------------	---------------	-----------------

12. Have monies been paid by you, or on your behalf, as a result of Professional Liability Claims (in any jurisdiction) occurring within the last 5 years and in excess of \$50,000 per incident? Answer **YES** or **NO**. If YES, please include the name(s) of the Project(s) and Client(s), and an explanation (attach separate sheet if necessary).

13. Name Of Sole Proprietor Or Names Of All Firm Partners and Officers:

Name	Title	MA Reg #	Status/Discipline	Name	Title	MA Reg #	Status/Discipline
a.				d.			
b.				e.			
c.				f.			

14. If Corporation, Provide Names Of All Members Of The Board Of Directors:

Name	Title	MA Reg #	Status/Discipline	Name	Title	MA Reg #	Status/Discipline
a.				d.			
b.				e.			
c.				f.			

15. Names Of All Owners (Stocks Or Other Ownership):

Name and Title	% Ownership	MA Reg.#	Status/Discipline	Name and Title	% Ownership	MA Reg.#	Status/Discipline
a.				d.			
b.				e.			
c.				f.			

16. I hereby certify that the undersigned is an Authorized Signatory of Firm and is a Principal or Officer of Firm. I further certify that this firm is a "Designer", as that term is defined in Chapter 7C, Section 44 of the General Laws, or that the services required are limited to construction management or the preparation of master plans, studies, surveys, soil tests, cost estimates or programs. The information contained in this application is true, accurate and sworn to by the undersigned under the pains and penalties of perjury.

Submitted By _____ Printed Name and Title _____ Date _____
 (Signature)

The following forms MUST be attached to only ONE (ORIGINAL Copy) application: 1. SDO Certification required for MBE/WBE Firms; 2. Sub-Consultant Acknowledgment.

DSB S-CA	Commonwealth of Massachusetts Designer Selection Board SUB-CONSULTANT ACKNOWLEDGMENT
-------------	--

Project: _____

Applicant Designer: _____

Sub-consultant: _____

SUB-CONSULTANT ACKNOWLEDGMENT

The sub-consultant named above hereby certifies that it has been notified by the Applicant Designer that it has been nominated to perform work on the Applicant Designer's team for the above Project, which is under consideration at the Designer Selection Board.

Signature of Sub-Consultant Duly Authorized Representative

Print Name and Title

Date _____

It is a requirement that all applicants supply this document signed, attached to the Original application, for each of the listed sub-consultants stating that they are aware and agree to being nominated by said applicant designer. Electronic signatures are accepted.

**COMMONWEALTH OF MASSACHUSETTS
DESIGNER SELECTION BOARD PROJECT CRITERIA**

DSB LIST # 16-15 ITEM # 1 DSB PUBLIC NOTICE DATE: November 16, 2016

LAST DATE FOR FILING APPLICATION IS: December 7, 2016 at 2:00 PM

The Board requests applications to be submitted by any of the following firms:

() Architect () Engineer
() Architect/Engineer (A/E) () Other:

PROJECT NUMBER: **DCP1641 ST1**

PROJECT TITLE: **John W. McCormack Building: Comprehensive Facilities Plan and Infrastructure Upgrades**

PROJECT LOCATION: **One Ashburton Place, Boston, MA 02108**

AWARDING AGENCY: **Division of Capital Asset Management and Maintenance (DCAMM)**

APPROPRIATION SOURCE: **Chapter 237, Acts of 2014, 1102-2009**

AVAILABLE AMOUNT: **\$52,700,000** for Total Project Cost

ESTIMATED CONSTRUCTION COST: **\$38,450,000** (ECC to be confirmed by Study)

TOTAL FEE, excluding reimbursables or any authorized per diem payments, based on scope of work and services authorized if project is completed.

(<input checked="" type="checkbox"/>) Lump Sum Established Set Fee for Study Phase Per M.G.L. C.7C, §50	<u>\$600,000</u>	dollars
(<input checked="" type="checkbox"/>) Lump Sum Established Set Fee for Schematic Design Per M.G.L. C.7C, §50	<u>\$460,000</u>	dollars
(<input checked="" type="checkbox"/>) Lump Sum Established Set Fee (<u>subject to a credit in the amount for the Lump Sum Fee established for Schematic Design above</u>) for Final Design Phase Per M.G.L. C.7C, §50, based on the approved estimated construction cost in the certified study.	<u>8.0%</u>	percent

IMMEDIATE SERVICES AUTHORIZED:

() CERTIFIABLE BUILDING STUDY
() SCHEMATIC PLANS AND OUTLINE SPECIFICATIONS
() OTHER: COMPREHENSIVE FACILITIES PLAN

It is intended that the following continued services will be required of the selected Designer, and approval of the Designer by the DSB for the study phase shall also constitute approval of the Designer for continued services at the Awarding Authority's discretion. If the Awarding Authority determines that the continued services will not be required of the Designer then the Awarding Authority must notify the Designer and the Board, upon making that determination.

() DESIGN DEVELOPMENT PLANS AND SPECIFICATIONS
() CONSTRUCTION PLANS AND SPECIFICATIONS
() ADMINISTRATION OF CONSTRUCTION CONTRACT
() OTHER:

MBE/WBE PARTICIPATION:

In accordance with M.G.L. C.7C, §6 and Executive Orders 526, and 565, DCAMM has established a minimum combined MBE/WBE participation goal of 17.9% of the overall value of the study and final design contracts for this project. Applicants must utilize a mix of both MBE and WBE firms whose participation, when added together, meets the overall combined goal set for the Contract. The combined goal requires a reasonable representation of **both** MBE **and** WBE firm participation. The Combined MBE/WBE goal must be met within the list of requested prime and sub-consultants. All applicants must indicate in the prime firm's application how they or their consultants will meet these goals and will be

evaluated on that basis. Further information about the MBE/WBE Program appears in the DSB Public Notice at pages 4-8 titled "Participation by Minority Owned Businesses and Woman Owned Businesses," in the Commonwealth of Massachusetts Contract for Study, Final Design, and Construction Administration Services (June 2016) at Attachment C, and on the Supplier Diversity Office (formerly SOMWBA) website: <http://www.mass.gov/sdo>. Applications from MBE and WBE firms as prime consultant are encouraged. Applicants that are themselves MBE or WBE certified will be required to bring a reasonable amount of participation by a firm(s) that holds the certification which is not held by the applicant to the project. Proposed MBE/WBE participation plans that include solely MBE or solely WBE participation, or have only nominal participation by one or the other to meet the combined goal, will not be considered responsive. Applicants are strongly encouraged to utilize multiple disciplines and firms to meet the MBE/WBE goal. Consultants to the prime can team within their disciplines in order to meet the MBE/WBE goal, but must state this relationship on the organizational chart (Section 6 of the application form).

APPROPRIATION LANGUAGE:

Chapter 237 of the Acts of 2014, Section 2, line 1102-2009: an act providing for capital facility repairs and improvements for the Commonwealth.

GENERAL SCOPE OF WORK:

The Division of Capital Asset Management and Maintenance (DCAMM) seek expert professional services for the capital renewal of the John W. McCormack Building (McCormack). **Part One**, a Comprehensive Facilities Plan, will prepare an overall plan for infrastructure upgrades and repairs through an evaluation of the building envelope, building systems and common areas. The plan will also review building occupancy plans and prioritize projects for implementation over ten years as funding becomes available. **Part Two**, is a Certifiable Study (including schematic design) for a prioritized group of projects selected from the Comprehensive Plan along with final design and construction administration.

The purpose of **Part One**, the Comprehensive Facilities Plan, is to develop a phased renovation plan for McCormack that will ensure the building's serviceability for the next 50 years. Due to the nature of the work in an occupied building and because of the complexity, size and cost of the building repairs, DCAMM is taking this opportunity to develop a Comprehensive Facilities Plan for the near and long term that employs the most efficient, coordinated, least disruptive and most cost effective approach to renovate and upgrade the building, focusing on high priority projects. Metrics for the success of this project must account for operating costs, energy conservation, ease of maintainability, improved accessibility and enhanced resilience in the face of ever escalating climate change and societal threats.

Building infrastructure components include, but are not limited to; the envelope (structural and architectural including but not limited to the foundation, precast concrete exterior wall panels, curtainwall, all fenestration elements and various roof systems); building systems (including but not limited to mechanical, electrical, plumbing, elevators, fire protection, fire alarm, telecommunications and security systems); and interior common areas (including but not limited to the lobbies, conference center, loading dock, support and operations areas, service floors (7 and 22), cafeteria and retail spaces, stairs and toilet rooms), garage, and surrounding site and plaza. Critical for the design of the MEP systems is designing a tight envelope and an understanding of the 2012 report identifying important energy and water conservation measures.

Part Two, the Certifiable Study, will be the first capital project identified from the Comprehensive Plan. The Designer for this Study can expect to certify, design and administer construction for all phases of the Certifiable Study.

This study, as well as the design and construction process, will involve an interactive process with the Designer's team and the DCAMM team comprised of representatives from various DCAMM offices, including: programming, design and construction, leasing, energy, accessibility, facilities management & maintenance, security, MassIT and the Interiors Design, Planning and Management (IDPM) unit that is responsible for the interiors planning and updating of the McCormack Building's program space. It is expected that the selected Designer will facilitate the discussions and workshops necessary to bring together the diverse and numerous stakeholders and guide them through the decision making process.

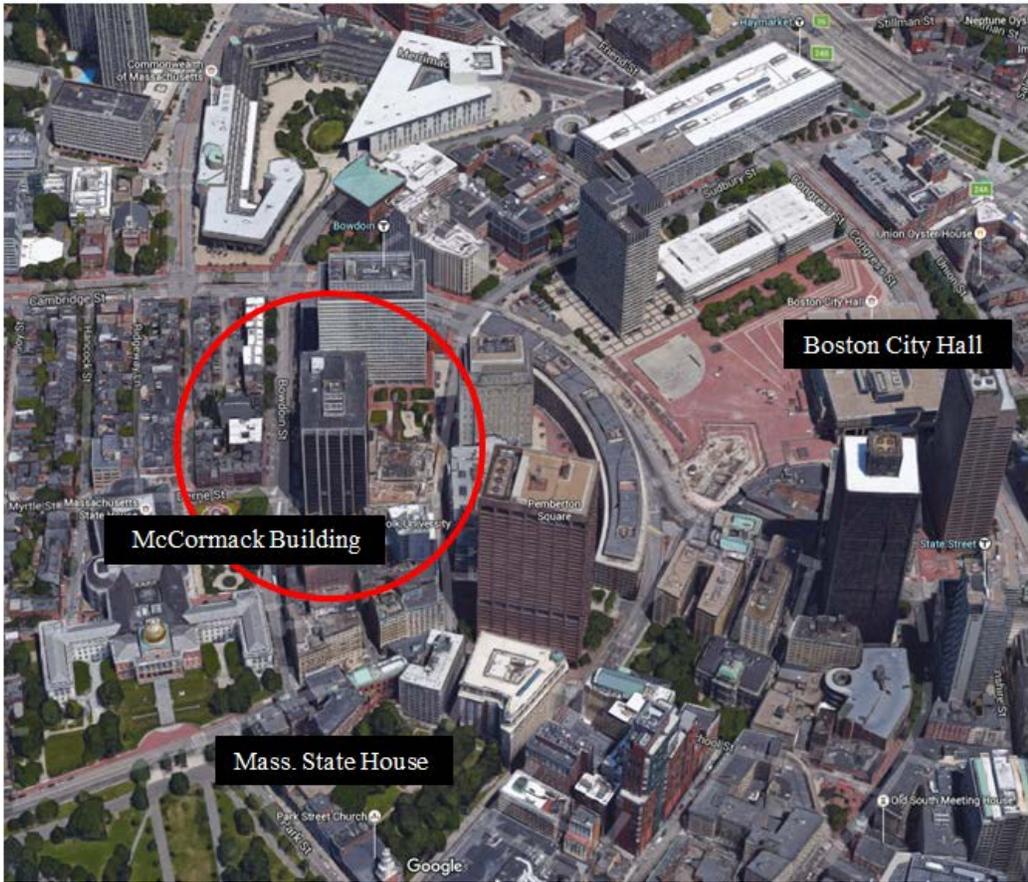
The McCormack Site

The McCormack Building has served as one of the Commonwealth's primary office buildings in the Greater Boston area since its opening in 1975. Currently McCormack houses a multitude of Commonwealth agencies, divisions and departments as well as a cafeteria, public meeting spaces, a child care center and the Boston Regional Office of the MA State Lottery. See listing of agencies located at McCormack in the Additional Supporting Documents section.

The McCormack Building is located in the Government Center area of downtown Boston in close proximity to the Massachusetts State House and Boston City Hall. The building shares a city block with the Saltonstall Building and the new

Suffolk University Academic Building. Three plazas interconnect these buildings: the McCormack Building Upper Plaza, the Saltonstall Plaza and the Roemer Plaza.

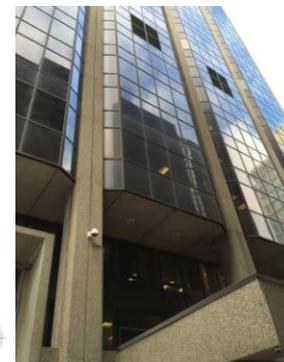
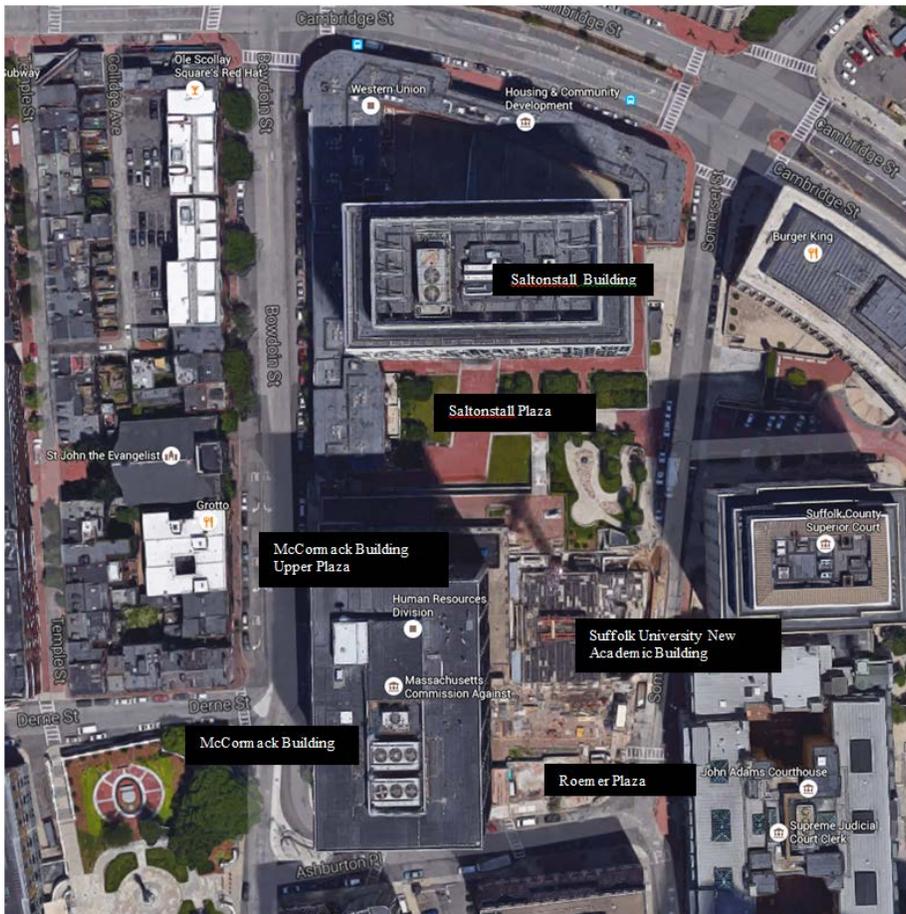
There is considerable vehicular and pedestrian traffic to and around the building given the approximately 3,000 Commonwealth employees that work in the building and the nearly 1,000 members of the public that visit the building daily. Staff in the McCormack Building support State House functions and, as a result, there is consistent and considerable back and forth pedestrian traffic between the State House and the McCormack Building. Understanding the flow and volume of vehicles and pedestrians that access the site and building will be important to the planning process as the renovation of the McCormack Building presents an opportunity to address access throughout the building and site.



Aerial Photo showing the McCormack Building in the context of Government Center in downtown Boston

Building

The McCormack Building is an approximately 800,000 gross square foot, 22 story high-rise with a four level below-grade garage. It is the 25th highest building in the City of Boston. The firm of Hoyle, Doran and Berry Architects designed the building and oversaw the completion of its construction in 1975. It is a Type 2 non-combustible building, constructed of heavy weight steel trusses and cast-in-place concrete. It is 240’ long by 150’ wide and 401’ high. For a full description of the buildings and building systems see the Facility Condition Assessment in the **Additional Supporting Documents** section.

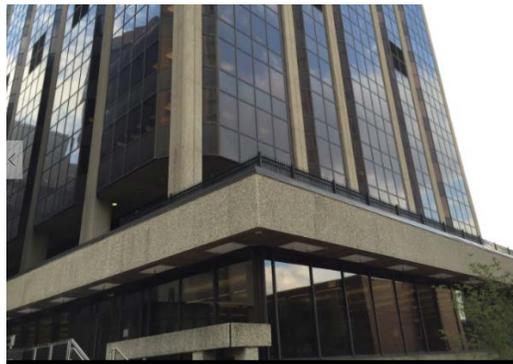


Aerial

photo showing the McCormack Building and neighboring Saltonstall Building and New Suffolk University Academic Building

Deferred Maintenance

As might be expected, for a building of this vintage numerous deficiencies need to be addressed. The primary objective of this study is to address and prioritize for implementation the building’s infrastructure deficiencies. This includes, but is not limited to; aging mechanical systems and need for corresponding improvement in energy efficiency, deteriorated concrete parking garage slabs, outdated plumbing systems, worn finishes, water infiltration, the original switch gear with limited floor panel board expansion capability, and outdated inefficient fluorescent lighting. A key element of the Comprehensive Facilities Plan will be to develop a water tight envelope which will then enable the design for energy efficient mechanical systems. The selected Designer will review prior studies, reports and cost estimates and propose any additional evaluations required to compile findings for the Comprehensive Facilities Plan. See the sections **Recently Completed Infrastructure Studies and Additional Supporting Documents** for more information. Recent facilities efforts have replaced or upgraded the elevators, fire alarm system and garage drains.



From left - Front entry plaza, view of the north-west façade and north plaza

Operations and Maintenance

The increase in building occupancy (density) along with the increase in foot traffic from visitors, the State House and surrounding state facilities have strained operational resources at the McCormack Building along with the aging infrastructure, maintenance staff reductions and increased security needs. The Design Team, working with McCormack managers, will review operations and maintenance procedures to identify areas for improvement.

The Design Team will:

- Evaluate public lobbies and common areas, loading dock operations, physical plant operations, restroom facilities, housekeeping (including trash and recycling) and determine areas for improvement and propose space changes.
- Incorporate the renovations that are currently in process. For the main lobby and connecting floors and recommend additional strategies to improve traffic flow and public use.
- Work with the building facility managers to identify ongoing deferred maintenance issues and incorporate solutions into the Comprehensive Facilities Plan. Ensure that recommended solutions can be maintained by existing staff.
- Evaluate current methods of servicing McCormack, considering access and circulation for employees, visitors, vehicles as well as goods, and propose recommendations to improve operations. The streams of materials include, but are not limited to, general office supplies, mail and packages, custodial supplies, facilities services, food, various streams of general waste and recycling. Diagram and evaluate current building service space use and identify future space needs.
- Provide separate restrooms evaluation and phasing plan.
- Incorporate best practices for operations maintenance and serviceability in the design specifications.

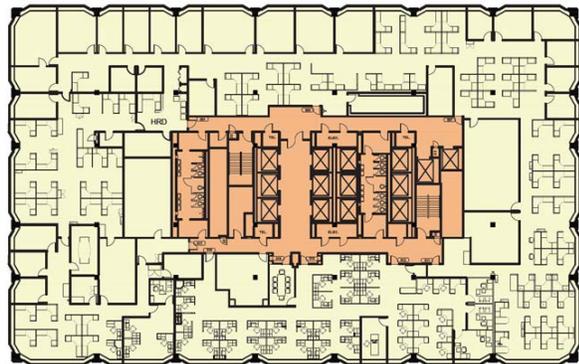


From left - Plaza level office copy and storage area, cafeteria and loading dock entrance.

Office Planning

The Design Team, working with DCAMM’s Interior Planning Design and Management (IPDM) unit will:

- Compile and document current office layouts and prepare graphic presentations and statistical analysis of density and space usage to evaluate floor occupancy use, capacity, density and best practices.
- Incorporate findings and planning decisions into the Comprehensive Facilities Plan and the proposed implementation plans.
- Identify current best practices for tenant fit-outs and develop model floor layouts for bench marking and cost estimating. Make recommendations for improving collaboration and work flow.
- Compile current office standards developed by IPDM and evaluate application for future needs based on the model layouts.
- Prepare presentation graphics to document IPDM building relocations, space opportunities and space conflicts.
- Prepare stacking diagrams and graphics to aid development of the implementation plan.



Representative Floor Plan

Energy Efficiency

Improving the energy and water usage at the McCormack building is a critical component of the Comprehensive Facilities Plan and the Certifiable Study. The majority of the work is focused on deferred maintenance projects, providing the opportunity to reduce energy costs of poor performing windows and aging and maintenance intensive equipment and replacing them with high efficiency systems to reduce the overall energy costs for the building.

Though the proposed project does not require LEED certification, it is the intent that the work in the Certifiable Study, including upgrades to windows, light fixtures, new air handling units, VAV box, pumps, fan motors, induction units and electrical systems, meet the current energy code and strive to exceed requirements by 20%. In conjunction with proposed energy efficiency improvements, the project team shall be prepared to pursue all available energy efficiency incentives through the MassSave program, including assisting with completing applications and providing necessary documentation.

An energy consultant will be included in the Prime basic services to advocate for inclusion of green features, identifying and meeting energy and water reduction goals, promoting the teamwork and collaboration necessary to evaluate the complex building interactions required in an integrated design process and providing conceptual energy modeling services.



Mechanical floors 7 and 22.

Accessibility

The Comprehensive Plan for McCormack provides an opportunity to address accessibility for people with disabilities – employees and the general public – in the planning and phasing of improvements. A comprehensive evaluation will be conducted by DCAMM’s Statewide Accessibility Initiative to include: 1) assessing compliance with the requirements of Title II of the ADA and developing an Implementation Plan that prioritizes strategies for compliant policies and procedures, effective communication, and program access where structural barriers cannot be easily removed; 2) compliance with 521CMR if a project includes elements that are required to be accessible and/or if the total cost of work that gets performed over the last three year period exceeds 30% of the CAMIS value of the building (\$275,976,155 in 2016) at the time a building permit is pulled. ADA issues that are beyond the scope of this project are the Title II obligations of each agency housed in McCormack to operate non-discriminatory programs, services and activities. Issues that have already been identified for accessibility review include signage and wayfinding, listening systems, toilets, accessibility from transit, parking, website information, and emergency evacuation procedures. The Designer is responsible for coordinating work with DCAMM’s accessibility consultant.

Security - Building, Garage and Site

The Design Team, working with DCAMM’s Security department, will identify security deficiencies and determine long term needs and incorporate findings and costs into the Comprehensive Facilities Plan and prioritized project list for the Certifiable Study.

Office of Information Technology - Internet and Telecommunications

The Design Team, working with ITD/Mass IT identify current deficiencies, determine long term needs and develop server room consolidation plan. Incorporate findings and costs into the Comprehensive Facilities Plan prioritized project list for the Certifiable Study.

McCormack Way-Finding

DCAMM is in the process of developing a wayfinding and signage package for the common public areas in the building. The Design Team will incorporate findings and costs into the Comprehensive Facilities Plan prioritized project list for the Certifiable Study.

Hazardous Materials

As part of the Comprehensive Facilities Plan the selected Designer will identify any gaps in prior hazardous material testing. DCAMM will provide and/or complete a summary of hazardous materials in McCormack. Asbestos, lead paint inspection, design and monitoring services, and indoor air quality testing and monitoring will be carried out at a sufficient level to provide a sound estimate of budget and scope for the Certifiable study. DCAMM will provide and/or complete a comprehensive hazardous materials survey of McCormack, identifying remaining locations of ACM, lead-based paint containing equipment. Final deliverables shall include: a summary of hazardous materials; requirements for abatement based upon planned renovation activities; concept alternatives based upon existing conditions as well as remediation requirements; cost estimates for remediation.

Recently Completed Infrastructure Studies

There have been many updates to the McCormack Building since its opening and there are several projects currently underway, as well as some planned for the near future and some to be identified by this study. Below is a list of major studies to be reviewed by the selected Design Team and the findings incorporated as appropriate in the Comprehensive Facilities Plan. This is not to be understood as a complete list as there are many other studies and work not identified here that will be provided to the selected Design Team. Link to the studies noted below can be found in Additional Supporting Documents section.

2012 McCormack Existing Conditions Assessment

This report assesses existing conditions in order to understand the building operations and provide a platform for future energy conservation measures. It contains a HVAC overview, description of supply air systems (perimeter induction units), interior air handling units, heating hot water systems, chilled water systems, domestic cold and hot water systems, building automation system and a utility consumption analysis.

2012 McCormack Building Energy Upgrades

Schematic Design level documentation for building energy upgrades by Kling Stubbins for the DCAMM Energy Team. The design specifications and drawings identified a range of energy and water conservation measures throughout the building required to improve energy and water efficiency. The Study recommended new high efficiency equipment with variable frequency drives and 2-way control valves to greatly reduce energy consumption as much of the mechanical equipment at the McCormack building, including pumps, fans, motors, and air handling units, which are both inefficient and beyond their ASHRAE median lifespan. The air handling units are constant volume as well. For further savings, new direct digital controls were recommended with electric actuation for the induction units. Exterior windows were proposed to be fitted with an aluminum sill sash frame and clear single pane glazing mounted on the inside of the existing window mullion. See 2012 worksheet for summary of proposed ECMs.

In addition to updating the 2012 Building Energy Study's findings and budget, the selected Designer will explore potential alternatives to these recommendations that incorporate the results of the building envelope leakage study. Working with DCAMM stakeholders confirm the preferred solution and prepare an implementation phasing plan that reflects the occupant analysis. The Design Team is also responsible for producing energy models, savings calculations for all energy conservation measures, identifying any applicable utility incentives and required to file all paperwork necessary to receive incentives. See 2012 worksheet of energy conservation measures in Additional Supporting Documents section.

2013 McCormack Facility Condition Assessment

Facility Condition Assessment completed by Jacobs Engineering with sections on; structural/architectural, mechanical, electrical, telecommunication, security and fire alarm, plumbing, and fire protection and life safety. The Design Team will be responsible for identifying any gaps in this study and/or new evaluations required since the study effort and incorporating the findings into the Comprehensive Plan and the implementation plan.

2012 McCormack Leakage Investigation

An investigation into reported leakage by Simpson Gumpertz & Heger. The report identifies water leakage through exterior walls that is causing damage to interior finishes on multiple floors and across the fenestration. Exterior walls consist of exposed-aggregate precast concrete panels and glazed curtain walls. The main roof and 22nd floor balcony roofs consist of EPDM roofing systems. A significant source of the water infiltration is open joints in the precast concrete panel system's stainless steel window washing track liners. In addition, moisture penetration is causing sills to rust which in turn causes the windows to crack. A key element of the Comprehensive Plan will be to develop a water tight envelope which will then enable the design for energy efficient mechanical systems.

2016 McCormack Garage Structural Conditions Assessment

Condition assessment of garage levels 1, 2, 3 and 4, a four-level underground reinforced concrete structure below the McCormack Building. The garage is mainly constructed of cast-in-place waffle slabs supported on concrete columns and concrete walls. In 1992, an impressed-current cathodic protection (ICCP) system was installed in the topping slab. Some of the recommendations include; repair deteriorated/delaminated concrete on the topsides and undersides of concrete slabs, remove and replace areas with debonded topping, install vehicular-traffic-bearing waterproofing and to repair and replace the ICCP system. The selected Designer develops a detailed cost estimate and incorporate findings into the Comprehensive Plan for project prioritization and implementation.

2016 Deferred Maintenance Projects in Process

- EPDM Roofing System Replacement
- Cooling Tower repair and replacement
- Boiler(s) replacement
- Public restrooms on the ground and 21st floor`-

Sampling of Interior Projects in Study or Construction:

- MassIT Server Room Renovation – consolidate data center, improve data infrastructure, new office space.
- MassIT Comprehensive Plan (fit-out) – office renovation
- Human Resources Division Consolidation (fit-out) - Consolidation and renovation for the HR Division
- Main Lobby Security and Access Project – upgrades to the building lobby to improve access
- Commonwealth Childcare Center (CCC) – interior expansion
- Cafeteria - Interior space reconfiguration to improve efficiency and capacity in the dish room and serving areas.

Recently Completed Projects:

- Garage Drainage - Replacement of the existing drainage piping in the garage and new ejector pumps.
- Roemer Plaza - renovated and improved as part of the Suffolk University project.
- 12th Floor Renovations - Renovation of Treasurer’s Office.
- 2004 Fire Alarm System
- 2010 Elevator Replacement

DETAILED SCOPE OF WORK

The Design Team must be prepared to enter into a contract and begin work immediately upon selection.

The study will be organized into two parts. Part One, a Comprehensive Facilities Plan, will evaluate the infrastructure, building systems, common areas, prepare a high level space plan and prioritize projects for implementation over ten years as funding becomes available. Part Two, a Certifiable Study, will develop the prioritized group of projects (the Consensus Solution) and prepare schematic design plans for Study certification.

Part One – Comprehensive Facilities Plan

Develop a project plan for the renewal of the McCormack Building based on prior DCAMM studies, reports and projects, space use analysis, building interviews and your own investigation. Compile findings in a clear document for future reference. Prepare an interactive budget tool to assist stakeholders in prioritizing projects. Develop an implementation and phasing plan for the entire scope of work and identify the potential types of project delivery methods; expense projects, in-house repairs, emergency repair projects, user agency projects, as well as capital funded projects.

Part Two – Certifiable Study (including Schematic Design)

The Design Team, working with DCAMM, will identify the scope of work selected from the Comprehensive Facilities Plan for a \$52,700,000 bond funded capital project. Scope of work includes an abbreviated study pulling elements from the Comprehensive Plan and then preparing detailed Owner Project Requirements (OPR), architectural and engineering systems requirements, cost estimates and project schedule for the selected scope of work.

The Prime Principal-In-Charge is required to participate throughout all phases of the Comprehensive Facilities Plan and Certifiable Study. Technical specialists, including engineering, code, specifications, security and information technology, and energy specialists are expected to be key team members that will provide sound and innovative technical analysis and design early in the programming and design process, and continue to provide engineering and design services through all phases. Throughout the study process, it is imperative that all issues potentially impacting program, scope, costs and schedule be identified and accounted for in order to provide DCAMM with the relevant information to make informed choices and decisions at every step.

The Design Team will focus on four areas of investigation in each phase of the Comprehensive Facilities Plan and Certifiable Study:

1. Space analysis to understand occupancy use, project impact on occupants and plan for implementation of the Comprehensive Facilities Plan and the Certifiable Study.
2. Building condition and building systems assessment and recommendations for phased capital projects and repair projects to resolve deferred maintenance and operational issues
3. Cost analysis, including project costs, building, energy and operational costs
4. Implementation – phasing options reflecting the program and cost options.

Recognizing that further investigations beyond the study may be required to accurately determine the impact of a particular issue, the Design Team’s obligation during the Study is to identify those issues and use their professional expertise to anticipate, estimate and document the potential impact. Additional services to augment the scope of work in the Work Plan may be authorized as needed.

Study Phases - Overview:

1. Project Start Up and Problem Definition
2. Existing Conditions Review, Information Gathering, Program/Space Analysis
3. Alternatives
 - a. Problem Restatement (if required)
Project Review Workshop
4. Consensus Solution with Schematic Design (SD for Certifiable Study only)
5. Draft and Final Reports
6. Certification for Certifiable Study only

The tasks identified below are representative for the purposes of this advertisement and by no means fully inclusive:

Part One: Comprehensive Facilities Plan

Objectives

- a. Develop a comprehensive needs assessment for the capital renewal of the McCormack Building
- b. Develop a strategy to meet the needs that incorporate solutions for deferred maintenance, infrastructure upgrades, common areas upgrades and department renovations on individual floors.
- c. Determine optimal implementation plan that considers deferred maintenance and building operations, energy efficiency, occupancy planning, costs, construction phases, and accessibility.

1. Project Start Up and Problem Definition:

- a. Attend “A” conference to review DCAMM administrative procedures
- b. Conduct “S” Workshop with stakeholders and working groups to review project goals and objectives, planning process, schedule of milestones, information and data requirements, etc. Design Team members (including sub-consultants) will be introduced to the user group, and their roles and responsibilities described.
- c. The Designer should assume bi-weekly working sessions throughout the duration of the study phase unless otherwise notified.
- d. Prepare detailed workplan for study phase with task descriptions including scope items, methodology, deliverables, schedule with milestones, fee breakdown by task and deliverable, team directory, etc. Written notice-to-proceed with the project will be based on approval of the workplan by the Director of Programming, and the approved workplan will constitute a formal amendment to the Designer’s Contract

2. Existing Conditions Review, Information-Gathering and Program/Space Analysis

a. Program and Planning

- i. While program is not a central focus of this Study, as the DCAMM’s Interior Design, Planning and Management unit (IDPM) is responsible for the planning and updating of the McCormack Building’s interior program space, close coordination will be required with IDPM, in order to create and cost an implementation plan.

- ii. See Office Planning section of this ad.
- b. Site and Building Condition**
 - i. Review all relevant and prior work, studies, reports, CAMIS database, validate findings perform visual surveys supplemented by destructive testing, if necessary, to confirm building conditions including energy and water use. Identify any additional testing or information needed to complete this Study;
 - ii. Interview Facilities staff, Project Managers, Energy Team, Security, Interior Planners and local code officials for input on condition, use and operation of the McCormack Building.
 - iii. Review operations, security and maintenance procedures with DCAMM facilities staff and identify areas for improvement and alignment with best practices;
 - iv. Identify opportunities and constraints of existing conditions
 - v. Analysis hazmat conditions including scope, methods and cost for remediation as required to do this project;
 - vi. Conduct a building code analysis including a comprehensive Chapter 34 analysis. Identify necessary permits, reviews and interactions with regulatory agencies and factor into implementation plan.
 - vii. Detail all relevant deficiencies or concerns and propose approaches for resolution to be incorporated in the alternatives solutions.
 - viii. For deferred maintenance, O&M, and Accessibility –see separate sections of this ad
- c. Cost**
 - i. Provide a current assessment of the construction cost escalation rate for similar buildings in Mass;
 - ii. Develop analytical framework for measuring construction and operating cost impacts;
 - iii. Recommend potential options to reconcile preliminary costs with phased project budgets;
 - iv. Prepare cost estimates for the Comprehensive Facilities Plan at 50% and 100% developed.
- d. Schedule and Implementation Plan**
 - i. Identify permitting and regulatory reviews required and their impact on timeline;
 - ii. Outline an approach to maintain 24/7/365 operation of the McCormack Building in light of the need to keep the building occupied and fully operational during all phases of construction with only very limited swing space;
 - iii. The designer will provide an analysis of the implementation impact on the building’s operation and occupants and the need and timing, if any, for swing space.
- e. Deliverables**
 - i. Provide annotated list of all documentation provided to the Designer by DCAMM;
 - ii. List of additional documentation identified by Designer as required to complete this Study;
 - iii. Identify additional facilities conditions assessment required.
 - iv. Prepare summary of recommendations for CAMIS update by DCAMM.
 - v. Base document set including:
 - 1. Site Plan;
 - 2. Dimensioned floor plans, elevations and sections developed to BIM Level 200. (Note: DCAMM’s Office of Facilities Management and Maintenance will make instrumental use of the BIM in the future maintenance and operation of the building);
 - 3. Photographs documenting conditions of the building and site;
 - vi. Summaries and building condition narratives at Unifomat II Level 3;
 - vii. Code analysis identifying permits, reviews and interactions with regulatory agencies required; and including a comprehensive Chapter 34 analysis;
 - viii. Summary of findings, issues and factors expected to have an impact on design alternatives and costs;
 - ix. Draft prioritized list of recommended Life Safety, access, MEP and other required building systems, site and infrastructure improvements to be considered;
 - x. Workshop materials for Cost Analysis Workshop and Project Review Workshop(s);
 - xi. Conduct workshop to present analysis and key findings to confirm project scope, budget, performance standards and schedule.
 - xii. Technical memorandum on costs, including life cycle cost analysis, possible approaches to cost control, and results of workshops.
 - xiii. Meeting Minutes.

3. Development and Evaluation of Alternatives

This phase of the study will focus on developing and analyzing a minimum of three to five meaningful alternatives for the phased renovation and capital renewal plan of the McCormack Building. These scenarios will define and prioritize the deficiencies in the building and site, to identify the best and most cost effective approach to address them and achieve the goals of this study.

a. Program

- i. Provide blocking and stacking diagrams and illustrate internal adjacencies and collaboration opportunities for each;
- ii. Indicate any site issues. Include circulation diagrams and indicate accessible paths of travel.

b. Site and Building

- i. Develop a master list of facility deficiencies and proposals to address these;
- ii. Present a matrix that illustrates a pros and cons analysis of alternatives in regards to criteria established by the team including but not limited to: accomplishing the project goals, constructability, reduction of energy and water consumption, improved overall resilience of the building, improved accessibility throughout the building and site, impact on maintenances and operations, cost avoidance, construction schedule, implementation difficulty and potential impact on day to day operation of building and any other implementation requirements and criteria identified by the team;
- iii. Identify and define priority phased projects for near and long term implementation.

c. Cost

- i. Provide cost estimate in Uniformat for all alternatives;
- ii. Prepare interactive cost matrix identifying all building features and associated cost for repair or upgrade
- iii. Conduct a cost workshop

d. Schedule

- i. Prepare 10 year phasing plan
- ii. Evaluate schedule options and issues, including swing space needs and timing.

e. Deliverables:

- i. Documentation of findings;
- ii. Prioritized list of phased projects illustrating construction and funding schedule,
- iii. Cost analysis including a cost estimate and life cycle cost analysis workshop;
- iv. Comparative matrix illustrating pros and cons in regards to project goals, costs, construction schedule, and potential implementation impact in occupied building;
- v. Technical memorandum on costs, including comparable costs and assessments, possible approaches for cost control, and results of workshops;
- vi. Meeting Minutes

Project Review Workshop

A half-to-full day workshop, led by the Design Team, to provide all project participants and stakeholders an opportunity to comment on the key issues identified by the Study for the Comprehensive Plan. To review the alternative concepts and preferred option selected from the work in Task 3. An appropriate presentation should be prepared for the project review workshop and the selected alternative refined and documented per discussion.

4. Development & Evaluation of Consensus Solution

Outline the preferred phased renovation strategy and plan for its implementation distilled from the alternatives and as directed by DCAMM. . Include comments from the Project Review Workshop(s) and Cost Workshops. Prepare the following package as part of the certification documentation:

a. Program

- a. Narrative outlining all components to be included in the building and rationale for inclusion;
- b. Revised relationship diagram depicting important adjacencies;

b. Site and Building

- a. Narrative that clearly outlines the preferred renovation strategy and phased projects as well as the rationale for their selection including a detailed approach to maintaining the 24/7/365 operation of the building;
- b. Schematic Design Package per the DCAMM Designer's Procedure's Manual; energy and water use estimates as required for EO 484 compliance; Architectural, MEP systems, and site narratives.

c. Cost

- a. Detailed cost estimate in Uniformat II Level 3.

d. Schedule

- a. List of all applicable codes, permits and reviews; implementation schedule including permitting, reviews, construction phasing and other critical logistics, enabling projects, etc.;
- b. Implementation plan addressing construction schedule, phasing, required coordination and swing space, detailed review of applicable codes, permits and compliance.

5. Draft and Final Reports

- a. Draft report
- b. Final report for the Comprehensive Plan will not be certified
 - Incorporate comments from the draft report in required digital and hard copy formats.
 - The report package should provide a sufficiently detailed information package to describe all relevant aspects of the proposed phased renovation strategy and include: the executive summary, project narrative, project justification and rationale for selection of consensus renovation plan, schematic design package, final ADA, Operations, MEP and site narratives, code analysis, energy costs, sustainable and resilient design approach, a phased construction cost estimate and narrative, an operating cost analysis, and a proposed project schedule (Gantt chart).
- c. Executive briefing power point presentation

Part Two – Certifiable Study and Schematic Design for a selected group of infrastructure projects

All interested applicants are advised that DCAMM is now required to incorporate Schematic Design for the proposed project in the Certifiable Study. The required corresponding scope of work and fee has been adjusted accordingly. The Certifiable Study refers to both the traditional DCAMM Study with a Schematic Design package.

With DCAMM, identify the scope of work selected from the Comprehensive Plan for a \$52,700,000. It is anticipated that the scope of work for the Certifiable Study will include actions to resolve the leakage problems, the design of a new window system, replacement of portions of the mechanical systems and repair to the garage structure. At every phase of the Certifiable Study, the Designer will be responsible for preparing cost estimates for the project and developing recommended actions to stay within budget.

The Certifiable Study follows the same process as the Comprehensive Facilities Plan outlined above with the addition of Schematic Design phase as noted below.

1. Project Start Up and Problem Definition
 - a. An abbreviated work plan for a group of projects identified in the Comprehensive Facilities Plan
2. Existing Conditions Review, Information Gathering, Program/Space Analysis
 - a. Document existing conditions of the selected projects in greater detail than described in the Comprehensive Facilities Plan with specific attention to impact on building occupancy, serviceability and costs.
3. Alternatives
 - a. Consider different engineering solutions, energy payback, occupancy alternatives, and products
 - b. Project Review Workshop and Project Re-statement if required
4. Consensus Solution with Schematic Design
 - a. Incorporate Agency and DCAMM input on Consensus Solution for formal approval
 - b. Document the owners project requirements (OPR) for the selected project(s), prepare architectural and engineering systems requirements and narratives, cost estimates, and phasing plan reflecting occupancy usage.
 - c. BIM implementation plan
 - d. Energy modeling and utilities incentive plan
 - e. Incorporate DCAMM's commissioning plan and participate in CM selection
 - f. The schematic design package (in accordance with the DCAMM Designer Procedures Manual) will be developed, with complete architectural and engineering drawings and specs, corresponding cost estimates, code and permitting review, BOD narratives, project manual, project schedule and phasing/implementation plan.
5. Draft and Final Reports
6. Certification

ADDITIONAL SUPPORTING DOCUMENTS:

The scope of work for this project is supported by the materials listed below, which are available for review and download on the Designer Selection Board website.

- **McCormack Existing Conditions Assessment for Energy Upgrades – Kling Stubbins**
DCAMM Project # DCP1021 ES, May 10, 2012
<http://www.mass.gov/anf/docs/dcam/dsblist/dsb161501-1-20120510-mccormack-exist-conds-rpt-final-revised.pdf>
- **McCormack Energy Upgrades (Design Report) - Kling Stubbins**
DCAM Project # DCP1021 ES1, November 16, 2012
<http://www.mass.gov/anf/docs/dcam/dsblist/dsb161501-2-20121116-mccormack-energy-upgrades.pdf>
- **McCormack Leakage Investigation - Simpson Gumpertz & Heger**
An investigation into reported leakage, December 2012
<http://www.mass.gov/anf/docs/dcam/dsblist/dsb161501-3-20121231-mccormack-leakage-investigation-report.pdf>
- **McCormack Facility Conditions Assessment – Jacobs Engineering**
DCAMM Project Number DCP1417 HS4, December 2013
<http://www.mass.gov/anf/docs/dcam/dsblist/dsb161501-4-20131231-mccormack-lindemann-hurley-facility-assessment.pdf>
- **McCormack Garage Structural Conditions Assessment , ICCP Overlay Evaluation and Testing for Acid-Soluble Chloride in Concrete - Simpson Gumpertz & Heger**
DCP1660 FS1, July, August and October 2016
<http://www.mass.gov/anf/docs/dcam/dsblist/dsb161501-5-20161004-mcc-building-garage-report.pdf>
- **List of State agencies located in the McCormack Building.**
<http://www.mass.gov/anf/docs/dcam/dsblist/dsb161501-6-list-of-state-agencies-located-in-the-mccormack-building.pdf>

GENERAL CONDITIONS OF THIS CONTRACT:

Contract for Study, Final Design, and Construction Administration Services

DCAMM uses one standard *Contract for Study, Final Design and Construction Administration Services* (June 2016) (“Study/Design Contract”). The contract will be signed when the study services are procured, but there will be a break from the Study Phase to Design Phase for study certification and finalizations of the Design and Construction Administration scope of services. Designers awarded a contract for the Study Phase *are not* guaranteed to be awarded the Design Phase.

Study Phase: Pursuant to a recent revision to M.G.L. c. 7C Section 59, the Schematic Design will be included in the certified study. DCAMM has established a goal of eight to twelve months to complete a study, including Schematic Design. If selected for study services, the applicant agrees to execute the Study/Design Contract or its successor, without revisions or modifications. DCAMM compensates the Designer during the Study Phase for approved products in accordance with the approved work plan.

Design Phase: DCAMM has established a goal of nine to twelve months to complete design (DD and CD). At the conclusion of the study, if the applicant is requested by DCAMM to perform final design services, the applicant agrees to amend the Study/Design Contract’s scope of services to include final design and construction administration services, and the certified study, and any other documents as necessary.

<http://www.mass.gov/anf/docs/dcam/dlforms/forms/study-design-combination-contract-07-7-16.pdf>

Please note that the timeframe referenced above for the completion of the Study Phase and the Design Phase is presented solely in a narrative format to provide information to Designers, and shall not serve as the sole basis for a request for additional services under the Study/Design Contract.

Veteran Owned Business Participation Benchmark - Chapter 108 of the Acts of 2012; Executive Order 565

The Commonwealth encourages the participation of Service-Disabled Veteran-Owned Business Enterprises (“SDVOBE”) and Veteran-Owned Business Enterprises (“VBE”) on its design projects. The benchmark for combined SDVOBE and VBE participation on DCAMM and other “state assisted building” projects is 3% of the contract price as set forth in the standard DCAMM Study and Design Contracts referenced above.

Financial Statement

Chapter 7C, Section 51 requires that on public design contracts where the total design fee is expected to exceed \$10,000 or for the design of a project for which the estimated construction cost is expected to exceed \$100,000 the designer shall:

- a) File its latest CPA or PA audited financial statement with the Division of Capital Asset Management and Maintenance (DCAMM), and continue to do so annually throughout the term of the contract;
- b) Submit a statement from a CPA or PA that states that they have examined management’s internal auditing controls, and expresses their opinion regarding those controls.

DCAMM Procedures

The designer will follow the procedures established in DCAMM’s Designer Procedures Manual dated August 2008 (<http://www.mass.gov/anf/docs/dcam/dlforms/designers-procedures-manual-aug08.pdf>). Applicants are urged to review and become familiar with the following supplemental material, which is available on the web at: <http://www.mass.gov/dcam>.

PMAS

Consultants will be required to use DCAMM’s electronic web-based Project Management and Accounting System (PMAS) as a repository for all project correspondence, documentation, and project budgeting, and scheduling. No special software is required.

Workshops

DCAMM and the Designer will hold periodic workshops to ensure that critical issues are not overlooked and that all team members have an opportunity to contribute their expertise, to anticipate potential obstacles, to identify potential solutions, and to expedite the decision-making process. Attendance by key design team members will be required at all workshops.

Executive Order 484

This project shall comply with all applicable requirements of Executive Order 484 (EO 484): see <http://www.mass.gov/anf/docs/dcam/dlforms/energy/energy-eo484-final.pdf>.

All building studies shall include preliminary estimates of the project’s energy use, water use, and greenhouse gas emissions using protocols established by EOEA or as determined by DCAMM. No building study shall be certified for final design unless all means, methods, and commitments required to mitigate the project’s impact on the operating agency’s plan for meeting EO 484’s goals are documented in the consensus solution, implementation plan, and estimated construction cost.

LEED Certification

This project will not be LEED certified.

Universal Design

Design solutions provided under this contract are expected to provide environments elements that meet the diverse and changing needs of users across age, ability, language, ethnicity and economic circumstance. DCAMM welcomes innovative design strategies that are usable by the widest range of people operating in the widest range of situations without special or separate design.

Accessibility

The consultant’s design must comply, *at a minimum*, with 521 CMR, The Rules and Regulations of the Architectural Access Board (<http://www.mass.gov/eopss/consumer-prot-and-bus-lic/license-type/aab/aab-rules-and-regulations.html>), as well as the 2010 ADA Standards for Accessible Design (<http://www.ada.gov/regs2010/2010ADASTandards/2010ADASTandards.htm>). When the requirements of these two laws differ the consultant shall comply with the one that provides the greater degree of accessibility. The consultant is also expected to understand and reflect in its design the civil rights obligations of the Commonwealth under Title II of the Americans with Disabilities Act (http://www.ada.gov/regs2010/titleII_2010/titleII_2010_regulations.htm) to provide equal access to programs, services and activities. DCAMM will use its Accessibility Consultants to provide technical assistance and oversight for accessibility compliance during the study, design and construction process, including accessibility audits of existing buildings.

Environmental and other supplemental services

DCAMM reserves the right to obtain supplemental services through independent consultants who will collaborate with the Principal-in-Charge (P.I.C.) and the project team. Asbestos inspection, design and monitoring, and indoor air quality testing and monitoring will be extra services under this contract.

Construction Specifications

The designer shall utilize the DCAMM Standard Specification.

Cost Estimating

Cost estimates, cost models, and estimator participation in both the study and the design phases shall meet the requirements of the current DCAMM *Cost Estimating Manual* and will be submitted in Unifomat II in the study phase and in both Unifomat II to Level 3 and CSI Masterformat in the design phase. The *Cost Estimating Manual* can be found at <http://www.mass.gov/anf/docs/dcam/dlforms/cem-feb06.pdf>, and Unifomat II can be found at <http://fire.nist.gov/bfrlpubs/build99/PDF/b99080.pdf>.

Building Information Modeling (BIM)

Building Information Modeling (BIM) will be used in the study, design, and construction phases of the project. The BIM List of Services can be found at <http://www.mass.gov/anf/docs/dcam/publdgconstr/16-2-27-bim-list-of-services.pdf>. This List of Services document is a general statement of DCAMM's current requirements regarding the use of Building Information Modeling technology in agency projects. The specific requirements regarding use of the BIM will vary depending on the nature of the project, the Levels of Development delineated in the DCAMM approved BIM Execution Plan for the project, and the diverse purposes for which DCAMM will use the BIM during the life cycle of the facility from design through facility operations. In all instances, the language of the project contract(s) will be controlling.

Building Commissioning

DCAMM will include an independent third party building commissioning as part of this project. The Commissioning Agent will develop in collaboration with DCAMM an operations and maintenance plan as a reimbursable expense during the building commissioning phase. The commissioning agent will meet with DCAMM's design team during planning, design and construction to evaluate design proposals and make recommendations to ensure the maintainability and operational efficiency of the new building.

CM at Risk

The construction of this project will be performed utilizing a construction management at-risk (CMAR, sometimes referred to as CM/GC) contract in accordance with MGL Chapter 149A. It is anticipated that the CM will be on board during the Schematic Design phase of Final Design project.

Integrated Project Delivery Approach/Lean Construction Tools

To the extent allowed under the Commonwealth public procurement laws and regulations, DCAMM may elect to use some aspects of an Integrated Project Delivery (IPD) approach, as generally described in the AIA document *Integrated Project Delivery: A Guide* (2007) – (see http://info.aia.org/SiteObjects/files/IPD_Guide_2007.pdf for informational purposes). To the extent the IPD approach and/or Lean Construction Tools conflict with DCAMM's contract terms or the laws governing DCAMM, then the contract documents and laws shall take precedence. DCAMM's preliminary approach to IPD will use Construction Manager at Risk procurement with the goal that DCAMM, Client Agency, Designer, CM, Trade Partners, and other key stakeholders will work as an integrated project delivery team within the existing statutory and contractual frameworks.

DCAMM may elect to use Lean Construction Tools as part of the IPD project delivery approach. The Lean Tools that DCAMM may use in connection with the project include Value Stream Mapping, Set Based Design, Target Value Design, A3 Decision-making, and Last Planner™ - (see http://www.leanconstruction.org/media/docs/LCI_Glossary12232015.pdf) for informational purposes).

CONDITIONS FOR APPLICATION:

Current or updated Master File Brochures must be on file with the Board. As a condition of application, each applicant, if selected for the new project, agrees to carry professional liability insurance in an amount equal to the lesser of \$5,000,000 or 10% of the Project's Fixed Limit Construction Cost, but in no event less than \$250,000 per claim in accordance with the

Study Contract and Design Contract (i.e., minimum coverage of \$250,000 up to \$5,000,000 depending on the construction cost). DCAMM may seek additional coverage for the selected designer, and if so will bear the cost of the additional coverage. Note that the requirement for professional liability insurance shall apply to both the Contract for Study Services and Contract for Final Design and Construction Administrative Services when a project is advertised for both study and design services.

APPLICATION EVALUATION – PERSONNEL

Applications will be evaluated based on the applicant and consultant’s personnel and extent of compliance with MBE/WBE participation goals. Please see Section 6 on DSB Application Form: On the organizational chart, identify the team by listing them in the same order as below. Include resumes for all personnel.

- | | |
|---------------------------------|--|
| 1. Architect (P.I.C.)* | 6. Energy Management Consultant |
| 2. Mechanical Engineer (M/P/FP) | 7. Specifications Consultant (independent consultant required) |
| 3. Electrical Engineer | 8. Cost Estimator (independent consultant required) |
| 4. Structural Engineer | 9. Building Code Consultant (independent consultant required) |
| 5. Civil Engineer | |

*Should the advertisement require the applicant to be either an Architect or an A&E firm, the P.I.C. or P.M. must be a Registered Architect in the Commonwealth of Massachusetts.

Where an “independent consultant” is required the Applicant may not provide the services “in house.” If the Applicant plans to fulfill any of the other sub-consultant roles, so indicate on the organizational chart. Project Managers for Study and Final Design should be listed separately on the organizational chart.

APPLICATION EVALUATION – PROJECT EXPERIENCE

Applications will be evaluated based upon the requirements of M.G.L. Ch. 7C §49 and the work listed on DSB Application Form Sections 8, 9 AND 10 which illustrate current qualifications in the following areas:

- | | |
|--|---|
| 1. Relevant completed project experience by the Designer as well as their consultants in strategic phased renovation planning and design for buildings similar in vintage, construction type, use type, and for an occupied building that includes evaluation and cost comparisons of multiple options for replacement, upgrades or new building infrastructure. | 4. Demonstrated Team experience in low energy strategies for existing building renovations highlighting reduced energy, weather tight envelopes integrated with efficient mechanical systems. |
| 2. Relevant experience demonstrated by the Design Team with completed projects which integrate deferred maintenance and building operations with building infrastructure upgrade solutions for adaptable and flexible building systems that can be modified over time. | 5. Design Team experience with Ch. 149A / CM at Risk processes. |
| 3. Firm depth of resources, specifically, significant experience of Designer’s project manager on similar relevant projects as well as key consultant personnel. | |

APPLICANTS PLEASE NOTE

A copy of the most current Application Form and General Instructions - **DSB Application Form (Updated July 2016)** are included with this Public Notice and available for download at www.mass.gov/dcam/dsb

Applications that are incomplete will be rejected. Applications that are submitted on a form other than **DSB Application Form (Updated July 2016)** may be rejected as non-compliant and not be considered by the Board. Applications received at the DSB Office after the advertised deadline will not be considered.

**COMMONWEALTH OF MASSACHUSETTS
DESIGNER SELECTION BOARD PROJECT CRITERIA**

DSB LIST # 16-15 **ITEM #** 2 **DSB PUBLIC NOTICE DATE:** November 16, 2016

LAST DATE FOR FILING APPLICATION IS: December 7, 2016 at 2:00 PM

The Board requests applications to be submitted by any of the following firms:

- | | |
|--|-----------------------------------|
| <input checked="" type="checkbox"/> Architect | <input type="checkbox"/> Engineer |
| <input checked="" type="checkbox"/> Architect/Engineer (A/E) | <input type="checkbox"/> Other: |

PROJECT NUMBER: **HCCS 1645**

PROJECT TITLE: **Holyoke Community Charter School Gymnasium / High School**

PROJECT LOCATION: **2200 State Highway Holyoke MA, 01040**

AWARDING AGENCY: **Holyoke Community Charter School**

APPROPRIATION SOURCE: **Private Funds & Bonds**

AVAILABLE AMOUNT: **To Be Determined**

ESTIMATED CONSTRUCTION COST: **Project Phase A - 5 MIL. And Project Phase B - 17 MIL.**

TOTAL FEE, excluding reimbursables or any authorized per diem payments, based on scope of work and services authorized if project is completed.

<input checked="" type="checkbox"/> Lump Sum Established Set Fee for Study/Concept Phase Per M.G.L. C.7C, §50	<u>\$10,000</u>	Dollars
<input checked="" type="checkbox"/> Lump Sum Established Set Fee for Phase A Final Design Phase Per M.G.L. C.7C, §50, based on the approved estimated construction cost in the study.	<u>8%</u>	Percent
<input checked="" type="checkbox"/> Lump Sum Established Set Fee for Phase B Final Design Phase Per M.G.L. C.7C, §50, based on the approved estimated construction cost in the study.	<u>6.7%</u>	Percent

The total fees above are to be negotiated with not exceed rates as indicated per phase.

IMMEDIATE SERVICES AUTHORIZED:

- BUILDING STUDY

It is intended that the following continued services will be required of the selected Designer, and approval of the Designer by the DSB for the study phase shall also constitute approval of the Designer for continued services at the Awarding Authority's discretion. If the Awarding Authority determines that the continued services will not be required of the Designer then the Awarding Authority must notify the Designer and the Board, upon making that determination.

- SCHEMATIC PLANS AND OUTLINE SPECIFICATIONS
- DESIGN DEVELOPMENT PLANS AND SPECIFICATIONS
- CONSTRUCTION PLANS AND SPECIFICATIONS
- ADMINISTRATION OF CONSTRUCTION CONTRACT
- OTHER: TECHNOLOGY AND SECURITY DESIGN AND BASIC ACOUSTIC DESIGN

MBE/WBE PARTICIPATION:

The Holyoke Community Charter School (HCCS) has not established minimum MBE/WBE participation goals for this project. Applicants from MBE/WBE firms as prime or sub consultants are encouraged.

APPROPRIATION LANGUAGE: N/A

Briefing session: A briefing session will be held at the Holyoke Community Charter School (HCCS), 2200 STATE HIGHWAY, HOLYOKE, MA. A Session is scheduled for Wednesday, November 28, 2016 at 10:00am.

GENERAL SCOPE OF WORK:

The Holyoke Community Charter School (HCCS) is a public Commonwealth Charter School that opened in September 2005. Its campus consist of one building of approximately 96,000 gross square feet located at 2200 Northampton Street, Holyoke, Massachusetts, 01040. It is a K-8 Commonwealth Charter School with enrollment of 702 students. The Board of Trustees seeks to pursue either **Project Phase A** or **Project Phase B** or **both** below.

Project Phase A: An addition of approximately 24,000 gross square feet attached to the existing structure. The construction of the 24,000 gross square foot addition is estimated to cost \$4 million to \$5 million. This project will house one gymnasium, locker rooms, administrative spaces and storage. It is anticipated that the project will be completed by March 2018.

Project Phase B: An addition of approximately 49,000 gross square feet attached to the existing structure. The construction of the 49,000 gross square foot addition is estimated to cost \$15 million to \$17 million. This project will be for the proposed Holyoke Community Charter High School. **Project Phase B includes the scope outlined in Project Phase A.** It is anticipated that the project will be completed by March 2019. The High School will have an enrollment of 400 students and encompass general classrooms, science labs, art rooms, music rooms, small group rooms, SPED rooms, as well as a health room and gymnasium.

Note: Should Phase B not be authorized immediately, it is possible that the HCCS will approve it during Phase A. In that event, the design services may be amended accordingly and will be done so at the owner's discretion.



Regardless of which Phase is authorized, applicants should have familiarity with the City of Holyoke's stormwater management regulations and policies, as this project requires specific site permitting.

Zoning and Permitting: A detailed zoning and permitting analysis has not yet been conducted and is a service the architect is expected to provide. It is expected that the project will require Holyoke Conservation Commission approval, Planning Board site plan, and stormwater approval, and, potentially, additional zoning relief from other local permitting agencies. The architect shall provide required permitting application materials and attend required meetings.

Schedule: Target for construction commencement for **Project Phase A** is Spring 2017 with occupancy for Spring 2018. Target for construction commencement for **Project Phase B** is Spring 2018 with occupancy for Spring 2019, depending on the permitting schedule.

Project Delivery: It is the Holyoke Community Charter School's intention to design, bid and construct the project according to procedures defined in M.G.L. c.149.

Project Scope of work:

The Scope of Work for this project will include the following:

- **Study / Concept:** The Designer shall review and update the study / program information provided in the additional supporting documents section. It is the school's expectation to utilize as much existing construction as possible in order to minimize construction cost.
- **Permits and Approvals:** Work with Owner, OPM and development team to identify and obtain all required permits and approvals. Provide design drawings as required for all permit submissions. *Building Code compliance is architect responsibility. Building Code consulting and any meetings with Holyoke Inspectional Services Department required to obtain building permit are included in base scope.*
- **Schematic Design:** Work with Owner and OPM to develop specifications, site layout, building plans, including floor plans, elevations, sketches to define the character and quality of interior spaces, and primary building MEP/FP and structural systems that are in line with the understandings of the design objectives, cost and schedule constraints. Present alternatives to be evaluated.
- **Design Development:** Work with Owner, OPM to determine and document specifications, final layouts, details and material and equipment selections consistent with the work product of Schematic Design to further clarify and define that stage's design decisions that are in line with the design objectives, cost and schedule constraints.
- **Construction Documents:** Prepare final construction documents that will facilitate accurate and dependable final pricing through a public bid process.
- **Bid phase:** Perform all necessary bid phase services, including bidder prequalification.
- **Construction Phase:** Perform Construction Administration and project close-out duties per the Agreement between Owner and Architect.
- Asbestos inspection, design and monitoring, and indoor air quality testing and monitoring will be extra services under this contract.

ADDITIONAL SUPPORTING DOCUMENTS:

The scope of work for this project is supported by the materials listed below, which are available for review and download on the Designer Selection Board website.

Holyoke Community Charter School Master Plan Final:

<http://www.mass.gov/anf/docs/dcam/dsblist/dsb161502-holyoke-community-charter-school-master-plan-final.pdf>

GENERAL CONDITIONS OF THIS CONTRACT:

Contract for Study, Final Design, and Construction Administration Services

HCCS will use a single contract for all phases of the work.

Financial Statement

Chapter 7C, Section 51 requires that on public design contracts where the total design fee is expected to exceed \$10,000 or for the design of a project for which the estimated construction cost is expected to exceed \$100,000 the designer shall:

- a) File its latest CPA or PA audited financial statement with the Division of Capital Asset Management and Maintenance (DCAMM), and continue to do so annually throughout the term of the contract;
- b) Submit a statement from a CPA or PA that states that they have examined management's internal auditing controls, and expresses their opinion regarding those controls.

LEED Certification

The project is not pursuing a LEED certification although would expect that the Designer utilizes appropriately energy efficient and sustainable design techniques and materials.

Universal Design

In addition to complying with 521 CMR, The Rules and Regulations of the Architectural Access Board (<http://www.mass.gov/aab>), the consultant will review ADA Title II (<http://www.usdoj.gov/crt/ada/reg2.html>), and the ADA Accessibility Guidelines (<http://www.access-board.gov/adaag/html/adaag.htm>), to ensure that the proposed design meets the civil right intent of this act. The requirements of these two laws may differ and the consultant must comply with the more stringent. Design solutions will meet the diverse and changing needs of users across age, ability, language, ethnicity and economic circumstance. HCCS welcomes innovative design strategies that are simultaneously equitable, flexible and legible for all and extend beyond minimal compliance with accessibility regulations.

Environmental and other supplemental services

HCCS reserves the right to obtain supplemental services through independent consultants who will collaborate with the Principal-in-Charge (P.I.C.) and the project team.

Construction Specifications

The designer shall be responsible for creating detailed comprehensive Specifications specifically suited to the project in Standard CSI format.

Cost Estimating

Three detailed costs estimates will be included in the Scope of Work, at end of Schematic Design, end of Design Development, and at 90% completion of Construction Documents.

Building Commissioning

HCCS may include building commissioning as part of this project. The Designer of Record will develop in collaboration with HCCS an operations and maintenance plan as part of the building commissioning phase. As part of the Scope, the Designer will meet with HCCS's building commissioning agent during design and construction to evaluate design proposals for MEP systems to ensure maintainability and operational efficiency.

CONDITIONS FOR APPLICATION:

Current or updated Master File Brochures must be on file with the Board. As a condition of application, each applicant, if selected for the new project, agrees to carry professional liability insurance in an amount equal to the greater of \$2,000,000 or 10% of the Project's Fixed Limit Construction Cost. HCCS may seek additional coverage for the selected designer, and if so will bear the cost of the additional coverage.

APPLICATION EVALUATION – PERSONNEL

Applications will be evaluated based on the applicant and consultant's personnel. Please see Section 6 on DSB Application Form: On the organizational chart, identify the team by listing them in the same order as below. Include resumes for all personnel. No changes to the proposed sub-consultants and engineers will be permitted without HCCS's approval following award.

- | | |
|---------------------------------|--|
| 1. Architect (P.I.C.)* | 7. Specifications Consultant (Independent Consultant Required) |
| 2. Mechanical Engineer (M/P/FP) | 8. Cost Estimator (Independent Consultant Required) |
| 3. Electrical Engineer | 9. MA Building Code Consultant (Independent Consultant Required) |
| 4. Structural Engineer | 10. Technology/Security Consultant |
| 5. Civil Engineer | 11. Educational Planner |
| 6. Landscape Architect | |

*Should the advertisement require the applicant to be either an Architect or an A&E firm, the P.I.C. or P.M. must be a Registered Architect in the Commonwealth of Massachusetts.

Where an "independent consultant" is required the Applicant may not provide the services "in house." If the Applicant plans to fulfill any of the other sub-consultant roles, so indicate on the organizational chart. Project Managers for Study and Final Design should be listed separately on the organizational chart.

APPLICATION EVALUATION – PROJECT EXPERIENCE

Applications will be evaluated based upon the requirements of M.G.L. Ch. 7C §49 and the work listed on DSB Application Form Sections 8, 9 AND 10 which illustrate current qualifications in the following areas:

1. Prior successful experience programming, designing and constructing educational buildings of similar type and scope including work on Massachusetts charter schools under Chapter MGL.149.
2. Significant experience designing and permitting buildings in suburban municipalities while making creative use of building structure, component systems, materials, and construction delivery methodology to minimize overall construction costs.
3. Demonstrate your firm’s ability to meet the project schedule based on current workload of the staff assigned to the project, total workload of the firm, and past record of designing on tight schedules while designing to budget and minimizing construction cost changes. Provide specific work-plan indicating assigned staff ability to meet the schedule.
4. Demonstrate your firm’s knowledge and experience with the City of Holyoke’s Stormwater Authority’s rules, regulations and ordinances.
5. Demonstrate your firm’s prior successful experience with phased construction under Chapter MGL.149.

APPLICANTS PLEASE NOTE

A copy of the most current Application Form and General Instructions - **DSB Application Form (Updated July 2016)** are included with this Public Notice and available for download at www.mass.gov/dcam/dsb . Applications that are incomplete will be rejected. Applications that are submitted on a form other than **DSB Application Form (Updated July 2016)** may be rejected as non-compliant and not be considered by the Board. Applications received at the DSB Office after the advertised deadline will not be considered.