



TOWN OF SOMERSET MEETING NOTICE

Received & Posted _____ Time: _____

Town Clerk

(PLEASE PRINT OR TYPE LEGIBLY)

Name of Board or Committee: Somerset School Committee - Somerset Middle School Building Committee

Date & Time of Meeting: Monday, January 3, 2022 at 6:00 pm

Location of Meeting: via Zoom: 929.205.6099 Meeting ID: 872 4767 6231 Passcode: 240622 OR:

<https://us02web.zoom.us/j/87247676231?pwd=U3Vsb2pSRDc2dHl2WjZVMW9TYzVwQT09>

Robin Vaccaro, Recording Secretary, December 27, 2021

Clerk/Board Member posting notice & date

Cancelled or **postponed to:**
(circle cancelled/postponed)

Clerk/Board Member cancelling/postponing meeting

AGENDA / LIST OF TOPICS

Somerset Middle School MSBA Building Committee Members: Victor Machado, Chair; Jeffrey Schoonover, Vice Chair; Richard Brown; Christopher Godet; Ronald Tarro; Elizabeth Haskell; Carlos Campos; Pauline Camara; Kathleen Byers; Cassey Monte; Dominic Raffa; Steven Medeiros; Robert Lima; Kevin Scanlon; Nicole Mello, Michael Botelho, Ira Schaefer, James Teixeira and Allen Smith
Also Present: Troy Randall (Ai3 Architects), Jonathan Quell (Ai3 Architects), Daniel Tavares (CGA Project Management), Marybeth Carney (CGA Project Management) and Shannon Khoury (CGA Project Management)

- I. Owner's Project Manager Report
- II. Architect's Presentation
- III. Formation of Contractor Prequalification Committee
- IV. Approval of Building Committee Membership Updates
- V. Approval of November 8, 2021 Minutes
- VI. Other Items
- VII. Public Input



OPM Progress Report

Somerset Middle School Building Committee

1.03.2022

➤ PROJECT UPDATES & ACTION ITEMS:

○ **MSBA Updates:**

- **Design Meeting:** The MSBA scheduled a virtual meeting on January 13th with the District and project team to review the progress of the design from schematic through design development phases as we lead into the construction document phase. Review of any variances on the budget, scope and schedule will also take place as will a general overview of Module 6. Team will report update at the February SBC meeting.
- **Commissioning Agent (Cx):** BR+A issued DD review comments, which were included in the MSBA submission. A commissioning coordination meeting with the entire team is scheduled for January 18th. Reoccurring coordination meetings will continue through the CD development phase.
- **Design Development (DD) Submission:** Project Team issued DD documents to the MSBA on November 12th as scheduled. MSBA issued their review comments on December 3rd. Project team issued response to the MSBA comments on December 17th. MSBA will notify the team of any additional information needed at this time, otherwise, further updates will be provided with the 60% CD submission.
- **Legal Counsel:** SBC should consider seeking legal advice on the Contract between the Owner and General Contractor and on other legal matters. OPM is requesting direction on how they would like to proceed. OPM can solicit firms that specialize in public construction law. The Project Budget included an estimate of \$25,000 for legal fees.
- **Contractor Prequalification:** This project requires the prequalification of General Contractors and certain subcontractors, known as "Filed Sub-Bidders" (FSB). These FSB subcontractors make up approximately half of the construction contract. There are several steps for prequalifying contractors and subcontractors starting with establishing a prequalification committee. Additional information was shared with the SBC prior to the meeting and is attached for reference. This committee will include one representative from the Architect and OPM, and two representatives from the Owner. **ACTION ITEM**
- **February SBC Meeting Dates:** SBC to determine meeting dates for the week of February 8th and February 14th. Project team is recommending February 10th to review VE items, if needed, and February 14th to approve the VE items and 60% CD submission to the MSBA.

➤ INVOICE REVIEW:

- The following attached invoices were issued since the last SBC meeting:
 - **[Ai3]** November_25B: \$417,216.50; 9E: \$18,500; and 7R: \$4,741.51. December_26B: 434,276; and 10E: \$5,625
 - **[CGA]** November_32: \$50,000; December_33: \$25,000.
 - **[Arthur Frank]** Invoice #12160: \$375

➤ **PROJECT BUDGET REPORT (reference attached Total Project Budget):**

○ **MSBA Payment Request & Reimbursement Status:**

▪ Total Project Budget:	\$ 85,020,490
▪ Maximum Total Facilities Grant:	\$ 31,799,754
▪ Number of Payment Requests Issued to Date:	11
▪ Total Amount of Payment Requests Issued to Date:	\$ 3,070,173
▪ MSBA Payments to Date:	\$ 1,291,347
▪ Current Payment Request Amount (PR-11):	\$ 910,951
▪ MSBA Eligible Grant Amount (Pending):	\$ 561,055
▪ Effective Percentage Rate (61.59%) of Reimbursement:	59.80%

➤ **ANTICIPATED PROJECT SCHEDULE (subject to change):**

- MODULE 1: ELIGIBILITY PERIOD (12/13/17 – 12/19/18)
- MODULE 2: FORMING THE PROJECT TEAM: (12/19/18 – 7/15/19)
- MODULE 3: FEASIBILITY STUDY (7/15/19 – 6/24/20)
- MODULE 4: SCHEMATIC DESIGN (6/01/20 – 4/14/21)
- MODULE 5: FUNDING THE PROJECT (4/14/21 – 5/22/2021)
- **MODULE 6: DETAILED DESIGN [DD/CD/BID] (6/01/21 – 7/31/22)**
 - 10/06/21: DD Documents issued to Cost Estimators
 - 10/22/21: DD Estimates Due
 - 10/25/21–10/29/21: Cost Estimate Reconciliation & VE review
 - 11/01/21: SBC Meeting (Review/approve VE options)
 - 11/08/21: SBC Meeting to approve VE and DD Submission to MSBA
 - 11/12/21: DD Submission to MSBA
 - 12/06/21: SBC Meeting (Kick-Off CD Phase)
 - **01/10/22: Start Contractor Prequalification**
 - **01/21/22: 60% CD Documents issued to Cost Estimators**
 - **02/04/22: 60% CD Estimates Due**
 - **02/07/22: Cost Estimate Reconciliation Meeting**
 - **02/10/22: SBC Meeting to review VE Options (if needed)**
 - **02/14/22: SBC Meeting to approve VE and 60% CD Submission to MSBA**
 - **02/16/22: Solicit Contractor/Subcontractor Qualifications (RFQ)**
 - **02/18/22: 60% CD Submission to MSBA**
 - **03/09/22: Receive Contractor/Subcontractor Qualifications (SOQ)**
 - **04/01/22: 90% CD Documents issued to Cost Estimators**
 - **04/15/22: 90% CD Estimates Due**
 - **04/19/22: Cost Estimate Reconciliation Meeting**
 - **04/25/22: SBC Meeting to review VE Options; Approve Prequalified GC/FSB**
 - **04/27/22: Issue Public Notice of Prequalified Contractors/Subcontractors**
 - **05/02/22: SBC Meeting to approve VE and 90% CD Submission to MSBA**
 - **05/06/22: 90% CD Submission to MSBA**
 - **06/08/22: 100% CD Submission to MSBA; GC/FSB Bid Documents Available**
 - **06/29/22: Filed Sub-Bid (FSB) Subcontractor Bids Due**
 - **06/30/22: SBC Meeting to review FSB Bids**
 - **07/13/22: General Contractor Bids Due**
 - **07/18/22: SBC Meeting to review GC Bids and Award Contract**



OPM Progress Report

- **MODULE 7: CONSTRUCTION (8/01/22 – 6/30/25)**
 - **08/01/22-05/03/24: New School Construction**
 - 04/01/24-04/30/24: Punch Inspections/AHJ Inspections
 - **05/01/24: Substantial Completion (Building & Associated Site Work)**
 - 06/03/24-06/28/24: FF&E and Technology Installations
 - 06/24/24-06/28/24: Owner Move from Existing Middle School
 - **07/31/24: Final Completion (Building & Associated Site Work)**
 - 08/05/24-08/30/24: Owner Move into new Middle School/Initial Training
 - **09/03/24: Anticipated First Day of School**
 - 07/01/24-10/31/24: Abatement/Demolition of Existing School
 - 09/03/24-5/30/25: Develop Athletic Fields and Landscaping
- **MODULE 8: COMPLETING THE PROJECT (6/30/25 – 6/24/26)**

➤ **NEXT SBC MEETING DATES (*subject to change*):**

- **2/10/22**
- **2/14/22**
- 3/07/22
- 4/04/22
- **4/25/22**
- **5/02/22**
- 6/06/22
- **6/30/22**
- **7/18/22**

Contractor and Subcontractor Prequalification Requirements for Building Contracts Estimated to Cost \$10 Million or More

For M.G.L. c. 149 building contracts estimated to cost \$10 million or more, general bidders and filed sub-bidders must be prequalified by your jurisdiction in accordance with the detailed prequalification procedures contained in M.G.L. c. 149. Awarding authorities may elect to institute these prequalification procedures for building contracts estimated to cost between \$100,000 and \$10 million.³⁴ On M.G.L. c. 149 contracts for which prequalification procedures are required or adopted, you will solicit bids only from prequalified general bidders and filed sub-bidders.

The following agencies are exempt from the mandatory contractor and subcontractor prequalification requirements contained in M.G.L. c. 149 but may elect to follow them: DCAMM, the Massachusetts Port Authority, the Massachusetts Water Resources Authority, the Massachusetts State College Building Authority and the University of Massachusetts Building Authority.

The detailed legal requirements for prequalifying general bidders and filed sub-bidders on these larger building construction contracts are found in M.G.L. c. 149, §§ 44D½ and 44D¾, and in DCAMM regulations, 810 CMR 9.00 and 10.00. These requirements are summarized below but the following summary is not comprehensive. Awarding authorities embarking on a prequalification process should consult the relevant provisions of M.G.L. c. 149 and the DCAMM regulations cited above.

The basic steps for prequalifying contractors and subcontractors to bid on public building contracts estimated to cost \$10 million or more are as follows:

1. Establish a prequalification committee.
2. Prepare the request for qualifications (RFQ).
3. Advertise the RFQ and receive statements of qualifications.
4. Evaluate and prequalify contractors or subcontractors.

³⁴ If you elect to use a prequalification process on a building contract estimated to cost between \$100,000 and \$10 million, you are not required to prequalify subcontractors in all subtrade categories. However, if you elect to prequalify subcontractors in a particular subtrade category, then all subcontractors submitting filed sub-bids for that subtrade category must be prequalified. 810 CMR 10.03(4).

5. Notify applicants; post and publish public notice of prequalified contractors or subcontractors.
6. Solicit bids or filed sub-bids from prequalified contractors or subcontractors.

Step 1: Establish a prequalification committee.

Before issuing the RFQ for general bidders or filed sub-bidders, you must establish a prequalification committee consisting of one representative of the project designer and three representatives of your jurisdiction, one of whom will be the owner's project manager (OPM), if an OPM is required.³⁵ The representative of the project designer must either have prepared the design documents or be the designer's designated representative for the building project. If the OPM is a consultant, the scope of services of your contract with the OPM must include the prequalification committee services and related costs. At its initial meeting, the prequalification committee must designate one of the three representatives of your jurisdiction to serve as chairperson. The chairperson will be responsible for coordinating the committee meetings and managing the evaluation process. 810 CMR 9.04. If you are prequalifying both general bidders and filed sub-bidders for a construction contract, the prequalification committee members for each prequalification process should be the same to the extent possible.

Step 2: Prepare the RFQ.

The RFQ must include an RFQ Interest Form in a form consistent with the RFQ Interest Form prescribed by DCAMM in two documents available at www.mass.gov/dcam: *Standard Forms for General Contractor Prequalification* and *Standard Forms for Subcontractor Prequalification*. You are required to maintain a list of all firms that have submitted an RFQ Interest Form with their responses to the RFQ and to provide notice of any addenda or other communications regarding the prequalification process to all firms that have submitted the RFQ Interest Form. 810 CMR 9.05, 10.05.

The RFQ must also include a standard Statement of Qualifications (SOQ) in a form consistent with the Statement of Qualifications prescribed by DCAMM in the *Standard Forms for General Contractor Prequalification* and the *Standard Forms for*

³⁵ An OPM will be required on all building projects estimated to cost \$1.5 million or more.

Subcontractor Prequalification. Your jurisdiction may customize the SOQ to include project-specific information pertaining to the evaluation criteria listed below, but the standard SOQ may not otherwise be modified or changed. You are required to make the SOQ available in both electronic and paper form to interested general contractors and subcontractors. The general contractor or subcontractor submitting the SOQ in response to the RFQ must sign the SOQ under pains and penalties of perjury.

In preparing the RFQ, you must use only the evaluation criteria, information requirements and point rating system that are specified in M.G.L. c. 149 and are listed below. Different requirements for contractors and subcontractors are noted.

1. Management experience (50 points; minimum of 25 points required for approval)

- Business owners: Name, title and years with firm of the owner(s) of the business.
- Management personnel: Names, title, education and construction experience, years with firm and list of projects completed by all management personnel who will have any direct or indirect responsibility for the building project.
- Similar project experience: Project name(s), description, original contract sum, final contract sum with explanation and date completed of similar projects. Your jurisdiction has the discretion to include in the RFQ a description of what you consider a “similar project.”
- Terminations: A list of any projects on which the firm was terminated or failed to complete the work, including an explanation for each instance listed.
- Legal proceedings (general contractors): A list of all legal or administrative proceedings currently pending against the general contractor or concluded adversely to the general contractor within the past five years that relate to the procurement or performance of any public or private construction contract.
- Legal proceedings (subcontractors): A list of all legal or administrative proceedings currently pending against the subcontractor or concluded adversely to the subcontractor within the past three years that relate to the procurement or performance of any public or private construction contract. Legal proceedings do not include any actions that primarily involve personal injury or workers’ compensation claims, or where the sole cause of action involves the subcontractor’s exercise of its rights for direct payment under M.G.L. c. 30, § 39F.
- Safety record: The three-year history of the firm’s workers’ compensation experience modifier.

- Compliance record (general contractors): Information on, and evidence of, the firm's compliance record with respect to minority business enterprise and women business enterprise inclusion goals and workforce inclusion goals, if applicable, on building projects within the past five years.

2. References (30 points; minimum of 15 points required for approval)

- Project references: A list of references from owners and architects for all "similar projects" provided in response to the third item listed under "Management Experience" (above), including project names and names of the owners and architects, with a current address, telephone and fax number, and contact person for each project.
- Credit references: A list of at least five credit references, including the telephone and fax numbers of contact persons from key suppliers, vendors and banks.
- Public project records: A list of all public building construction projects subject to M.G.L. c. 149 completed during the past three years, including the owner's name, current address, telephone number, fax number and contact person for each project.

3. Capacity to complete projects (20 points; minimum of 10 points required for approval)

- General contractors: An audited financial statement for the most recent fiscal year.³⁶
- Subcontractors: Annual revenue for the prior three fiscal years.³⁷ (Note that the RFQ for subcontractors may not require submission of financial statements.)
- Revenue under contract for the next three fiscal years.

³⁶ To preserve the confidentiality of this information and the information regarding the general contractor's revenue under contract for the next three years, interested general contractors may submit the required information in a sealed envelope that is stapled to the SOQ package, labeled with the general contractor's name, the project name, the project number and a notation stating that the envelope contains confidential financial information. 810 CMR 9.05(4).

³⁷ To preserve the confidentiality of this information and the information regarding the subcontractor's revenue under contract for the next three years, interested subcontractors may submit the required information in a sealed envelope that is stapled to the SOQ package, labeled with the subcontractor's name, the project name, the project number and a notation stating that the envelope contains confidential financial information. 810 CMR 10.05(4).

4. Mandatory requirements for which no points are assigned

- A commitment letter, issued by a surety company licensed to do business in the Commonwealth and whose name appears on United States Treasury Department Circular 570, for payment and performance bonds indicating that the contractor or subcontractor is bondable for 100 percent of the estimated contract or subcontract value.³⁸ If the commitment letter is written by another party on behalf of a surety company, the commitment letter must be accompanied by an authorized power of attorney from a surety company.
- General contractors: A Certificate of Eligibility issued by DCAMM showing single and aggregate capacity ratings sufficient for the project, and a completed Update Statement.
- Subcontractors: A Certificate of Eligibility issued by DCAMM and a completed Update Statement.

The RFQ must identify the specific point allocation for each category and subcategory of information. Within each category of information, the prequalification committee may use discretion in allocating points among the subcategories, consistent with the total points for the category.

For prequalification of both general contractors and subcontractors, the RFQ and the public notice must include the following information:

1. For general contractors, the RFQ must include a statement that the RFQ will be used to prequalify general contractors that will be invited to submit bids pursuant to M.G.L. c. 149, § 44E. For subcontractors, the RFQ must include a statement indicating that the RFQ will be used to prequalify subcontractors that will be invited to submit filed sub-bids pursuant to M.G.L. c. 149, §§ 44E-44F.
2. The location(s) where interested general contractors or subcontractors can obtain a full copy of the RFQ, including the actual and electronic addresses where copies may be obtained.
3. The time and date for receipt of responses to the RFQ, which must be at least two weeks after the date of the advertisement.
4. The mailing and physical addresses of the office to which responses are to be delivered.
5. The time frame in which the public agency will respond to the responses.

³⁸ This commitment letter constitutes a written determination by the surety that, based on the information known at the time, it would approve the issuance of payment and performance bonds for 100 percent of the estimated contract or subcontract value.

6. A general description of the building project, including a description of the physical location of the project and work to be performed.
7. The anticipated schedule for the building project from the time a notice to proceed is issued by your jurisdiction.
8. The estimated construction cost for the project and estimated construction cost for each and every subtrade for which subcontractors will be prequalified to submit filed sub-bids.
9. A listing of the project team, including the awarding authority, the designer and the awarding authority's OPM, if applicable.
10. A detailed description of the evaluation procedure and criteria for prequalification of general contractors or subcontractors, including the point rating system and specific point allocations for each evaluation category and subcategory, and the anticipated schedule for the start and completion of the evaluation process.
11. A prohibition against any unauthorized communication or contact with your jurisdiction outside of the official pre-bid meetings.
12. Any limitations desired by your jurisdiction on the size of and number of pages to be included in the response to the RFQ.

If inclusion of all of the above information in the text of the public notice is not practicable due to space and cost limitations, you must include items 1 through 9 above. You may state in the public notice that all further required information, including the prequalification evaluation criteria and selection process, is included in the RFQ. 810 CMR 9.07, 10.07.

Step 3: Advertise the RFQ and receive statements of qualifications.

At least two weeks before the deadline for submitting responses to the RFQ, you must advertise the RFQ in a newspaper of general circulation in the area in which the building project is located, in the *Central Register* and on COMMBUYS.³⁹ If you so choose, you may also post the public notice on your jurisdiction's website.

The SOQs are not opened publicly but must be opened in the presence of one or more witnesses at the time specified in the RFQ. The opening of the SOQs by the prequalification committee will satisfy this requirement.

³⁹ COMMBUYS is the Commonwealth's electronic procurement system. Any public agency in Massachusetts can post solicitations on COMMBUYS free of charge. For additional information, visit www.commbuys.com.

The prequalification committee is required to prepare a register of responders that includes the name of each general contractor or subcontractor that submitted a SOQ in response to the RFQ. The register of responders must be open for public inspection. After the SOQs have been evaluated by the prequalification committee, the SOQs must be made available to the public with the exception of the financial information they contain, which is not a public record. M.G.L. c. 149, § 44D½(g).

Step 4: Evaluate and prequalify contractors or subcontractors.

After opening the responses to the RFQ, the prequalification committee is required to review the register of responders and obtain copies of each SOQ and all supporting documentation. The prequalification committee may delegate the checking of references to individuals that are not committee members provided that the prequalification committee develops a written reference check form with uniform questions to be asked by those checking general contractor and subcontractor references. The chairperson of the prequalification committee may delegate additional administrative tasks necessary to facilitate the prequalification process. 810 CMR 9.08, 10.08.

The prequalification committee is responsible for evaluating each SOQ submitted in response to the RFQ, using only the evaluation criteria contained in the RFQ. After prequalification committee members have completed their individual reviews of the SOQs, the prequalification committee must collectively evaluate the responses to the RFQ. The prequalification committee may consult with other representatives of your jurisdiction, the designer, client or user agency (if applicable) or legal counsel as necessary to expedite the evaluation process. The prequalification committee may also contact interested general contractors and subcontractors to clarify or verify timely information submitted by an interested general contractor or subcontractor in its SOQ. After the evaluation process is completed, the chairperson must complete a Prequalification Evaluation Report in a form consistent with the Prequalification Evaluation Report prescribed by the DCAMM *Guidelines for Prequalification*. This report must reflect the consensus of the prequalification committee regarding the score received by the general contractor or subcontractor for each evaluation category and subcategory and must indicate the total points awarded. The report may be customized

by the prequalification committee only to reflect project-specific information. 810 CMR 9.08, 10.08.

Only general contractors and subcontractors receiving the minimum number of points in each of the four general evaluation categories as set forth in the RFQ, as well as a total minimum score of 70 points, may be prequalified to submit bids and filed sub-bids. All general contractors and subcontractors that fulfill these requirements must be invited to submit bids and filed sub-bids. 810 CMR 9.08, 10.08.

The prequalification committee must select at least three qualified general contractors to submit bids on the construction contract. If the prequalification committee prequalifies fewer than three general contractors for a M.G.L. c. 149 construction contract estimated to cost \$10 million or more (for which contractor prequalification is mandatory), your jurisdiction must reject all responses and issue at least one new RFQ. If that RFQ produces fewer than three prequalified general contractors, you have two options: (1) you may solicit general bids pursuant to M.G.L. c. 149, §§ 44B-44E; or (2) if at least two general bidders have been prequalified, you may invite bids from those prequalified general bidders.

If your jurisdiction chose to use the prequalification process for a M.G.L. c. 149 construction contract estimated to cost between \$100,000 and \$10 million, and if the prequalification committee prequalifies fewer than three general contractors, you have three options: (1) you may reject all responses and issue a new RFQ; (2) you may solicit general bids pursuant to M.G.L. c. 149; or (3) if at least two general contractors have been prequalified, you may invite general bids from those prequalified general contractors. If you reissue an RFQ for general bidders, your RFQ may stipulate that a general contractor that was prequalified for a particular project during the first RFQ process will remain prequalified for that project, without any further submissions by the general contractor or review by your jurisdiction. This prequalification will last for up to 120 days from the due date of responses to the first RFQ. M.G.L. c. 149, § 44D½(i).

Similarly, the prequalification committee must select at least three qualified subcontractors to submit filed sub-bids for each category of work subject to the filed sub-bidding requirements of M.G.L. c. 149. If the prequalification committee

prequalifies fewer than three subcontractors for a particular trade in connection with a M.G.L. c. 149 construction contract estimated to cost \$10 million or more (for which subcontractor prequalification is mandatory), you must reject all responses and issue at least one new RFQ. If that RFQ produces fewer than three prequalified subcontractors, you have two options: (1) you may solicit filed sub-bids pursuant to M.G.L. c. 149, §§ 44B-44E; or (2) if at least two sub-bidders have been prequalified, you may invite bids from those prequalified subcontractors.

If your jurisdiction chose to use the prequalification process for a M.G.L. c. 149 construction contract estimated to cost between \$100,000 and \$10 million, and the prequalification committee prequalifies fewer than three contractors, you have three options: (1) you may reject all responses and issue a new RFQ; (2) you may solicit filed sub-bids pursuant to M.G.L. c. 149; or (3) if at least two subcontractors have been prequalified, you may invite filed sub-bids from the two prequalified subcontractors. If you reissue an RFQ for subcontractors, your RFQ may stipulate that a subcontractor that was prequalified for a particular project during the first RFQ process will remain prequalified for that project, without any further submissions by the subcontractor or review by your jurisdiction. This prequalification will last for up to 120 days from the due date of responses to the first RFQ. M.G.L. c. 149, § 44D³/₄(i).

Step 5: Notify applicants; post and publish public notice of prequalified contractors and subcontractors.

Within 14 days of the completion of the prequalification committee's evaluation process, your jurisdiction is required to send via first class mail, postage prepaid:

- written notices to all contractors and subcontractors that were not prequalified, advising them that they did not achieve a sufficient score from the prequalification committee to be prequalified; and
- written notices to all prequalified contractors and subcontractors, advising them that they have been prequalified by the prequalification committee to submit bids or filed sub-bids on the project.

Also within 14 days of the completion of the prequalification committee's evaluation process, your jurisdiction is required to publish a public notice listing all general contractors or subcontractors that have been prequalified for the building project and

stating that only prequalified general contractors or subcontractors are eligible to submit bids or filed sub-bids. The notice must be posted in your jurisdiction's bid room or place of business where general bids are customarily received for building projects and on COMMBUYS. You may also post the public notice on your jurisdiction's website.

General contractors and subcontractors submitting SOQs in response to an RFQ may obtain their scores upon written request to your jurisdiction. M.G.L. c. 149, §§ 44D½ and 44D¾ provide that the decisions of the prequalification committee shall be final and shall not be subject to appeal except on grounds of arbitrariness, capriciousness, fraud or collusion.

Step 6: Solicit bids or filed sub-bids from prequalified contractors or subcontractors.

A copy of the public notice referenced in Step 5 must be sent via first class mail, postage prepaid, to all prequalified general contractors or subcontractors along with an invitation to bid. The invitation to bid must state where prequalified general contractors and subcontractors can obtain copies of the plans and specifications for the project and must specify the deadlines for submitting bids and filed sub-bids. The invitation to bid must be issued at least two weeks before the deadlines for submitting bids and filed sub-bids. Any other parties interested in obtaining the plans and specifications may do so by providing a deposit designated by your jurisdiction. You must refund the deposit when the documents are returned. 810 CMR 9.10, 10.10.

For contracts estimated to cost \$10 million or more, or for contracts estimated to cost between \$100,000 and \$10 million for which you have elected to prequalify the general bidders and filed sub-bidders, you will solicit bids and filed sub-bids only from general bidders and filed sub-bidders that have been prequalified by your jurisdiction using the procedures summarized above.



ARCHITECT / ENGINEER REQUEST FOR PAYMENT

Ai3 Architects LLC
526 Boston Post Road
Wayland, MA 01778

Telephone: 508-358-0790
Fax: 508-358-0791

MSBA ID:
Contract for: Somerset Middle School

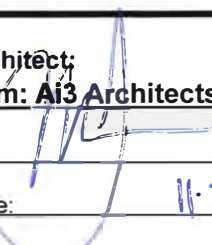
Somerset Public Schools / Somerset-Berkley Reg. HS
ATTN: Ronald D. Tarro, Director of Business and Finance
580 Whetstone Hill Road
Somerset, MA 02726

Telephone:
Fax:

Period Ending: **November 30, 2021**
BASIC SERVICES
Invoice 0025B-1901.00

Project Phase	Approved Budget	Percent of Total	Previously Approved Payments	Request This Period	Total Complete to Date	% Complete	Balance to Finish
Feasibility Study Phase	\$ 292,996.00		\$ 292,996.00	\$ -	\$ 292,996.00	100.00%	\$ -
Full Schematic Design Phase	\$ 242,379.00		\$ 242,379.00	\$ -	\$ 242,379.00	100.00%	\$ -
Design Development Phase	\$ 1,895,643.00		\$ 1,687,702.50	\$ 207,940.50	\$ 1,895,643.00	100.00%	\$ -
Construction Documents Phase	\$ 2,874,208.00		\$ -	\$ 209,276.00	\$ 209,276.00	7.28%	\$ 2,664,932.00
Early Bid Packages	N/A		\$ -	\$ -	\$ -		
Bidding Phase	\$ 159,090.00		\$ -	\$ -	\$ -		\$ 159,090.00
Construction Administration Phase	\$ 1,136,318.00		\$ -	\$ -	\$ -		\$ 1,136,318.00
Completion Phase	\$ 83,558.00		\$ -	\$ -	\$ -		\$ 83,558.00
Totals	\$ 6,684,192.00		\$ 2,223,077.50	\$ 417,216.50	\$ 2,640,294.00	39.50%	\$ 4,043,898.00

Architect:
Firm: **Ai3 Architects LLC**

By: 
Date: **11.30.21**

Reviewed: Project Manager
Firm: **CGA Project Management LLC**

By: 
Date: **11/30/21**

Approved:
LGU: **Town of Somerset**

By: _____
Date: _____

MSBA Form 3012

526 Boston Post Road Wayland, MA 01778



P 508.358.0790

F 508.358.0791

www.ai3architects.com



Ai3 Architects LLC
526 Boston Post Road
Wayland, MA 01778

Telephone: 508-358-0790
Fax: 508-358-0791

MSBA ID:
Contract for: Somerset Middle School


Somerset Public Schools / Somerset-Berkley Reg. HS
ATTN: Ronald D. Tarro, Director of Business and Finance
580 Whetstone Hill Road
Somerset, MA 02726

Telephone:
Fax:


Period Ending: **November 30, 2021**
EXTRA SERVICES
Invoice 0009E-1901.00

Project Phase	MSBA Cost Codes	Approved Budget	Percent of Total	Previously Approved Payments	Request This Period	Total Complete to Date	% Complete	Balance to Finish
Phase 1: Site Surveyor - Topographical & Boundary Survey		\$ 27,500.00		\$ 27,500.00	\$ -	\$ 27,500.00	100.00%	\$ -
Phase 1: Preliminary Geotechnical Evaluation of Proposed Site Area		\$ 16,500.00		\$ 16,500.00	\$ -	\$ 16,500.00	100.00%	\$ -
Phase 1: Hazardous Materials Inspection Services		\$ 2,200.00		\$ 2,200.00	\$ -	\$ 2,200.00	100.00%	\$ -
Phase 1: Traffic Study		\$ 11,275.00		\$ 11,275.00	\$ -	\$ 11,275.00	100.00%	\$ -
Phase 1: Environmental Site Assessment		\$ 4,400.00		\$ 4,400.00	\$ -	\$ 4,400.00	100.00%	\$ -
Phase 1: Wetland Delineations		\$ 2,750.00		\$ 2,750.00	\$ -	\$ 2,750.00	100.00%	\$ -
Phase 2: Site Surveyor		\$ 34,639.00		\$ -	\$ -	\$ -		\$ 34,639.00
Phase 2: Traffic Study		\$ 12,320.00		\$ 3,942.40	\$ -	\$ 3,942.40	32.00%	\$ 8,377.60
Phase 2: Geotechnical Evaluation		\$ 86,680.00		\$ -	\$ -	\$ -		\$ 86,680.00
Phase 2: On-Site Geotechnical Engineer During Site Excavation/Compaction (Construction Phase)		\$ 41,448.00		\$ -	\$ -	\$ -		\$ 41,448.00
Phase 2: Hazardous Materials Investigation		\$ 12,650.00		\$ -	\$ -	\$ -		\$ 12,650.00
Phase 2: Hazardous Materials Surveys, Monitoring, Testing and Inspections (Construction Phase)		\$ 121,000.00		\$ -	\$ -	\$ -		\$ 121,000.00
Phase 2: Site Permitting, Zoning, Regulatory Variances, Submittals, and Approvals Planning Board		\$ 37,840.00		\$ -	\$ -	\$ -		\$ 37,840.00
Phase 2: Hydrant Flow Testing		\$ 3,300.00		\$ -	\$ -	\$ -		\$ 3,300.00
Phase 2: Soil Characterization		\$ 41,580.00		\$ -	\$ -	\$ -		\$ 41,580.00
Phase 2: Soil Characterization Field Observation During Fill Transportation		\$ 18,920.00		\$ -	\$ -	\$ -		\$ 18,920.00
Phase 2: Installation Management of FF&E		\$ 22,000.00		\$ -	\$ -	\$ -		\$ 22,000.00
Phase 2: Environmental Permitting Conservation Commission		\$ 3,300.00		\$ -	\$ -	\$ -		\$ 3,300.00
Phase 2: Wetlands Delineation		\$ 2,112.00		\$ -	\$ -	\$ -		\$ 2,112.00
Phase 2: National Pollutant Discharge Elimination System (NPDES)		\$ 2,200.00		\$ -	\$ -	\$ -		\$ 2,200.00
Phase 2: MAAB Variance Application		\$ 4,000.00		\$ -	\$ -	\$ -		\$ 4,000.00
Phase 2: LEED / Sustainability / Existing PV Array		\$ 150,000.00		\$ 15,935.00	\$ 18,500.00	\$ 34,435.00	22.96%	\$ 115,565.00
Phase 2: Design, Specifications, and Procurement of Technology Equipment which is not part of the Building Infrastructure and/or Building Construction Contract Documents								
		By Owner		\$ -	\$ -	\$ -		
Totals		\$ 658,614.00		\$ 64,625.00	\$ 18,500.00	\$ 64,625.00	9.81%	\$ -

Architect:
Firm: **Ai3 Architects LLC**

By: 
Date: 11.30.21

Reviewed: Project Manager
Firm: **CGA Project Management LLC**

By: 
Date: 11/30/21

Approved:
LGU: **Town of Somerset**

By: _____
Date: _____

MSBA Form 3012

526 Boston Post Road Wayland, MA 01778



P 508.358.0790 F 508.358.0791 www.ai3architects.com



November 30, 2021

Mr. Ronald D. Tarro, Director of Business and Finance
Somerset Public Schools
580 Whetstone Hill Road
Somerset, MA 02726

Dear Ron,

The following is a list of services provided as part of this month's \$18,500.00 "Phase 2: LEED / Sustainability / Existing PV Array" billing for Somerset Middle School:

- Consulting services provided by Thornton Tomasetti related to LEED design development
- Design, investigation, documentation, submittals, correspondence, and collaboration services by Ai3 required to pursue LEED Silver certification
- Design, investigation, documentation, submittals, correspondence, and collaboration services by Ai3 required to move the existing 285kW PV array from the roof of the existing building to the roof of the proposed new building

This **\$18,500.00** total billing is shown in our Architect / Engineer Request For Payment 0009E-1901.00 for the period ending November 30, 2021 for EXTRA Services.

If you have any questions please feel free to contact me.

Sincerely,

A handwritten signature in black ink, appearing to read 'Kristen Baker', is written over a horizontal line.

Kristen Baker, Associate | Office Manager
Ai3 Architects LLC

Thornton Tomasetti

SEND PAYMENT & REMITTANCE ADVICE TO:

Thornton Tomasetti, Inc. | P.O. Box 781187 | Philadelphia, PA 19178 - 1187
PAYMENT TERMS: NET 20 DAYS
EIN 13-1251070

WELLS FARGO
420 MONTGOMERY STREET
SAN FRANCISCO, CA 94104

Bank Routing or ABA# 121000248
Account# 2000039485775
Account Name: Thornton Tomasetti, Inc

November 7, 2021

Invoice No: P21603.00 - 2

Tony Randall
Ai3 Architects
526 Boston Post Rd
Wayland, MA

Email: randall@ai3architects.com; baker@ai3architects.com

Somerset Middle School

For Services rendered on the above referenced project through October 29, 2021

Phase 2100 LEED - DD

<u>PHASE</u>	<u>FEE</u>	<u>% COMPLETE</u>	<u>PREVIOUSLY BILLED</u>	<u>CURRENT BILLING</u>
LEED Design Developemnt	22,500.00	75.00	3,375.00	13,500.00
Total Fee	22,500.00		3,375.00	13,500.00

TOTAL FEE

13,500.00

Total this Phase

\$13,500.00

Phase 2200 LEED - CD

<u>PHASE</u>	<u>FEE</u>	<u>% COMPLETE</u>	<u>PREVIOUSLY BILLED</u>	<u>CURRENT BILLING</u>
LEED Construction Documents	30,000.00	0.00	0.00	0.00
Total Fee	30,000.00		0.00	0.00

TOTAL FEE

0.00

Total this Phase

0.00

Phase 2300 LEED - CA

<u>PHASE</u>	<u>FEE</u>	<u>% COMPLETE</u>	<u>PREVIOUSLY BILLED</u>	<u>CURRENT BILLING</u>
LEED Construction Administration	22,500.00	0.00	0.00	0.00
Total Fee	22,500.00		0.00	0.00

Please direct all correspondence to:

14 York Street, Suite 201, Portland, ME 04101

If no errors are reported in 10 days this invoice will be considered correct.

Please do not accept any changes to TT's banking information from emails from ThorntonTomasetti.us which is a fraudulent domain. Our banking information has not changed. If our banking information were to change, it would be preceded by advance notice and will accompany your invoice or contract.



Invoice Statement

November 30, 2021

Mr. Ronald D. Tarro, Director of Business and Finance
Somerset Public Schools
580 Whetstone Hill Road
Somerset, MA 02726

Ai3 Architects Project No. 1901.00

Invoice No.

0007R-1901.00

Reimbursable Expenses –

Somerset Middle School

The following reimbursable expenses are submitted for payment as per the provisions of Article 9 of the Designer Services Contract.

For the printing and distribution of 100% Design Development and 100% Design Development Estimating drawings, specs, and reports for the Somerset Middle School.

ANDREW T. JOHNSON CO., INC.

Invoice #IVC124812 – Somerset Middle School (5 sets)	\$ 2,499.24
Invoice #IVC124897 – Somerset Middle School (1 set)	\$ 344.55
Invoice #IVC125269 – Somerset Middle School (8 sets)	\$ 7,213.90
SUBTOTAL (14 sets)	\$ 10,057.69

$\$10,057.69 / 14 \text{ sets} = \718.41 per set

- Eight (8) sets of design submittals for a project pursuant to G.L.c. 149, as per Article 9.1.2 of the Designer Services Contract

14 total sets – 8 required sets per Contract = 6 reimbursable sets

6 sets x \$718.41 per set =	\$ 4,310.46
TOTAL	\$ 4,310.46

10% administrative markup as per Designer Services Contract:	\$ 431.05
--	-----------

GRAND TOTAL THIS INVOICE **\$ 4,741.51**



HISTORICAL

ANDREW T. JOHNSON CO., INC.
15 TREMONT PLACE
BOSTON MA 02108

Bill To:

Ai3 ARCHITECTS LLC
526 BOSTON POST ROAD
WAYLAND MA 01778

Ship To:

Ai3 ARCHITECTS LLC
JONATHAN QUELL
526 BOSTON POST ROAD
WAYLAND MA 01778

Purchase Order No.		Customer ID		Ship Date	Shipping Method	Payment Terms	Date	Invoice
SOMERSET MS		000000010750		10/8/2021	COURIER	Net 30	10/8/2021	IVC124812
Ordered	Shipped	B/O	Item Number	Description			Unit Price	Ext. Price
5,100	5,100	0	4002A-100	10-7-21 / Jonathan Quell Somerset MS: 1,020 Originals For 5 Sets = 5,100 Xerox 8-1/2x11, 2-Sided (Vol. #1)			\$0.0900	\$459.00
4,040	4,040	0	4002A-100	808 Originals For 5 Sets = 4,040 Xerox 8-1/2x11, 2-Sided (Vol. #2)			\$0.0900	\$363.60
10	10	0	300A-100	Covers Front & Back			\$1.4000	\$14.00
10	10	0	100F-100	Screwpost Bind			\$2.2000	\$22.00
1,500	1,500	0	4008A-100	500 Plots onto Bond 15x21 - 1,500 Total Sqft.			\$0.3500	\$525.00
6,000	6,000	0	4009A-100	500 Originals For 4 Sets = 2,000 E/Prints 15x21 - 6,000 Total Sqft.			\$0.1500	\$900.00
10	10	0	100F-100	Screwpost Bind			\$2.2000	\$22.00
1	1	0	4005B-100	Deliver (Ai3 Architects, Wayland, MA)			\$41.6500	\$41.65
1	1	0	UPS	UPS - Ground - Amy Happ, Hingham, MA			\$41.0300	\$41.03
1	1	0	UPS	UPS - Ground - Marybeth Carney, Westport, MA			\$60.1900	\$60.19
1	1	0	UPS	UPS - Ground - Dan Tavares, Seekonk, MA			\$50.7700	\$50.77

Please provide account numbers and/or invoice numbers
when making payments. Thank you.

Subtotal	\$2,499.24
Misc	\$0.00
Tax	\$0.00
Freight	\$0.00
Trade Discount	\$0.00
Total	\$2,499.24

HISTORICAL

ANDREW T. JOHNSON CO., INC.
15 TREMONT PLACE
BOSTON MA 02108

Bill To:

AI3 ARCHITECTS LLC
526 BOSTON POST ROAD
WAYLAND MA 01778

Ship To:

NANCY LOHRER
800 NE STOKES TERRACE
JENSEN BEACH FL 34957

Purchase Order No.		Customer ID		Ship Date	Shipping Method	Payment Terms	Date	Invoice
SOMERSET MS		000000010750		10/14/2021	UPS GROUND	Net 30	10/15/2021	IVC124897
Ordered	Shipped	B/O	Item Number	Description			Unit Price	Ext. Price
1,500	1,500	0	4009A-100	10-14-21 / Jonathan Quell Somerset MS: 500 E/Prints 15x21			\$0.0000	\$300.00
2	2	0	100F-100	Screwpost Bind			\$2.2000	\$4.40
1	1	0	UPS	UPS (See Shipping Method)			\$40.1500	\$40.15

Please provide account numbers and/or invoice numbers
when making payments. Thank you.

Subtotal	\$344.55
Misc	\$0.00
Tax	\$0.00
Freight	\$0.00
Trade Discount	\$0.00
Total	\$344.55

INVOICE

ANDREW T. JOHNSON CO., INC.

15 TREMONT PLACE

BOSTON MA 02108

(617) 742-1610 - Phone

(617) 523-0719 - Fax



Bill To:

Ai3 ARCHITECTS LLC
526 BOSTON POST ROAD
WAYLAND MA 01778

Ship To:

Ai3 ARCHITECTS LLC
JONATHAN QUELL
526 BOSTON POST ROAD
WAYLAND MA 01778

Purchase Order No.		Customer ID		Ship Date	Shipping Method	Payment Terms	Date	Invoice
SOMERSET M.S.		000000010750		11/23/2021	COURIER	Net 30	11/19/2021	IVC125269
Ordered	Shipped	B/O	Item Number	Description	Discount	Unit Price	Ext. Price	
1,623	1,623	0	4008A-100	11-17-21 / Kristen Baker Somerset M.S.: 541 Plots onto Bond 15x21 - 1,623 Total Sqft.	\$0.0000	\$0.3500	\$568.05	
12,984	12,984	0	4009A-100	541 Originals For 8 Sets = 4,328 E/Prints 15x21 - 12,984 Total Sqft	\$0.0000	\$0.1200	\$1,558.08	
18	18	0	100F-100	Screwpost Bind	\$0.0000	\$2.2000	\$39.60	
6	6	0	4013A-100	6 USB Drives	\$0.0000	\$15.0000	\$90.00	
10,240	10,240	0	4002A-100	(Vol. #1): 1,280 Originals For 8 Sets = 10,240 Xerox 8-1/2x11, 2-Sided	\$0.0000	\$0.0900	\$921.60	
16	16	0	4002C-100	Xerox 11x17	\$0.0000	\$0.2700	\$4.32	
16	16	0	800F-100	Fan Fold 11x17's	\$0.0000	\$0.0750	\$1.20	
7,440	7,440	0	4002A-100	(Vol. #2): 930 Originals For 8 Sets = 7,440 Xerox 8-1/2x11, 2-Sided	\$0.0000	\$0.0900	\$669.60	
16	16	0	4002LC1-100	Color Copies 8-1/2x11 onto Front Covers	\$0.0000	\$0.7900	\$12.64	
16	16	0	300A-100	White Back Covers	\$0.0000	\$0.7000	\$11.20	
16	16	0	100F-100	Screwpost Bind	\$0.0000	\$2.2000	\$35.20	
4,214	4,214	0	4002LC1-100	(Vol. #3): 602 Originals For 7 Sets = 4,214 Color Copies 8-1/2x11	\$0.0000	\$0.4900	\$2,064.86	
1,036	1,036	0	4002LC3-100	Color Copies 11x17	\$0.0000	\$0.6900	\$714.84	
1,036	1,036	0	800F-100	Fan Fold 11x17's	\$0.0000	\$0.0750	\$77.70	
1	1	0	800A-100	3 Hole Punch	\$0.0000	\$11.0000	\$11.00	
175	175	0	600C-100	25 Originals For 7 Sets = 175 Xerox onto Tabs 9x11	\$0.0000	\$0.4500	\$78.75	
175	175	0	600C-100	Tabs 9x11 (Inserted)	\$0.0000	\$0.1000	\$17.50	
7	7	0	600E-100	Insert into A13 Supplied 3-Ring Binders	\$0.0000	\$0.5000	\$3.50	
1	1	0	4005B-100	Delivery (See Ship to)	\$0.0000	\$41.6500	\$41.65	
1	1	0	UPS	UPS (Ground) - Jeffrey Schoonover, Superintendent of Schools, Somerset School Department, Somerset, MA	\$0.0000	\$66.0500	\$66.05	
1	1	0	UPS	UPS (Ground) - Richard Brown, Town Administrator, Somerset Town Hall, Somerset, MA	\$0.0000	\$70.7500	\$70.75	
1	1	0	UPS	UPS (Ground) - Dan Tavares, CGA Project Management, Seekonk, MA	\$0.0000	\$70.7500	\$70.75	
1	1	0	UPS	UPS (Ground) - Marybeth Carney, CGA	\$0.0000	\$85.0600	\$85.06	

HISTORICAL

ANDREW T. JOHNSON CO., INC.
15 TREMONT PLACE
BOSTON MA 02108

Bill To:

Ai3 ARCHITECTS LLC
526 BOSTON POST ROAD
WAYLAND MA 01778

Ship To:

Ai3 ARCHITECTS LLC
JONATHAN QUELL
526 BOSTON POST ROAD
WAYLAND MA 01778

Purchase Order No.		Customer ID		Ship Date	Shipping Method	Payment Terms	Date	Invoice	
SOMERSET M.S.		000000010750		11/19/2021	COURIER	Net 30	11/19/2021	IVC125269	
Ordered	Shipped	B/O	Item Number	Description				Unit Price	Ext. Price
				Project Management, Westport, MA					
				<u>DD set</u>					

Please provide account numbers and/or invoice numbers
when making payments. Thank you.

Subtotal	\$7,213.90
Misc	\$0.00
Tax	\$0.00
Freight	\$0.00
Trade Discount	\$0.00
Total	\$7,213.90



ARCHITECT / ENGINEER REQUEST FOR PAYMENT

Ai3 Architects LLC
526 Boston Post Road
Wayland, MA 01778

Telephone: 508-358-0790
Fax: 508-358-0791

MSBA ID:

Contract for: Somerset Middle School

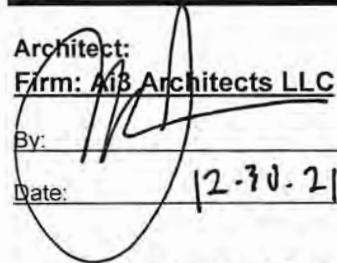
Somerset Public Schools / Somerset-Berkley Reg. HS
ATTN: Ronald D. Tarro, Director of Business and Finance
580 Whetstone Hill Road
Somerset, MA 02726

Telephone:
Fax:


Period Ending: **December 31, 2021**
BASIC SERVICES
Invoice 0026B-1901.00

Project Phase	Approved Budget	Percent of Total	Previously Approved Payments	Request This Period	Total Complete to Date	% Complete	Balance to Finish
Feasibility Study Phase	\$ 292,996.00		\$ 292,996.00	\$ -	\$ 292,996.00	100.00%	\$ -
Full Schematic Design Phase	\$ 242,379.00		\$ 242,379.00	\$ -	\$ 242,379.00	100.00%	\$ -
Design Development Phase	\$ 1,895,643.00		\$ 1,895,643.00	\$ -	\$ 1,895,643.00	100.00%	\$ -
Construction Documents Phase	\$ 2,874,208.00		\$ 209,276.00	\$ 434,276.00	\$ 643,552.00	22.39%	\$ 2,230,656.00
Early Bid Packages	N/A		\$ -	\$ -	\$ -		
Bidding Phase	\$ 159,090.00		\$ -	\$ -	\$ -		\$ 159,090.00
Construction Administration Phase	\$ 1,136,318.00		\$ -	\$ -	\$ -		\$ 1,136,318.00
Completion Phase	\$ 83,558.00		\$ -	\$ -	\$ -		\$ 83,558.00
Totals	\$ 6,684,192.00		\$ 2,640,294.00	\$ 434,276.00	\$ 3,074,570.00	46.00%	\$ 3,609,622.00

Architect:
Firm: Ai3 Architects LLC

By: 
Date: 12-31-21

Reviewed: Project Manager
Firm: CGA Project Management LLC

By: 
Date: 1/3/2022

Approved:
LGU: Town of Somerset

By: _____
Date: _____

MSBA Form 3012

526 Boston Post Road Wayland, MA 01778



P 508.358.0790 F 508.358.0791 www.ai3architects.com



Ai3 Architects LLC
526 Boston Post Road
Wayland, MA 01778

Telephone: 508-358-0790
Fax: 508-358-0791

MSBA ID:
Contract for: Somerset Middle School

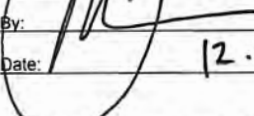
Somerset Public Schools / Somerset-Berkley Reg. HS
ATTN: Ronald D. Tarro, Director of Business and Finance
580 Whetstone Hill Road
Somerset, MA 02726

Telephone:
Fax:


Period Ending: **December 31, 2021**
EXTRA SERVICES
Invoice 0010E-1901.00

Project Phase	MSBA Cost Codes	Approved Budget	Percent of Total	Previously Approved Payments	Request This Period	Total Complete to Date	% Complete	Balance to Finish
Phase 1 Site Surveyor - Topographical & Boundary Survey		\$ 27,500.00		\$ 27,500.00	\$ -	\$ 27,500.00	100.00%	\$ -
Phase 1 Preliminary Geotechnical Evaluation of Proposed Site Area		\$ 16,500.00		\$ 16,500.00	\$ -	\$ 16,500.00	100.00%	\$ -
Phase 1 Hazardous Materials Inspection Services		\$ 2,200.00		\$ 2,200.00	\$ -	\$ 2,200.00	100.00%	\$ -
Phase 1 Traffic Study		\$ 11,275.00		\$ 11,275.00	\$ -	\$ 11,275.00	100.00%	\$ -
Phase 1 Environmental Site Assessment		\$ 4,400.00		\$ 4,400.00	\$ -	\$ 4,400.00	100.00%	\$ -
Phase 1 Wetland Delineations		\$ 2,750.00		\$ 2,750.00	\$ -	\$ 2,750.00	100.00%	\$ -
Phase 2: Site Surveyor		\$ 34,639.00		\$ -	\$ -	\$ -		\$ 34,639.00
Phase 2: Traffic Study		\$ 12,320.00		\$ 3,942.40	\$ -	\$ 3,942.40	32.00%	\$ 8,377.60
Phase 2: Geotechnical Evaluation		\$ 86,680.00		\$ -	\$ -	\$ -		\$ 86,680.00
Phase 2: On-Site Geotechnical Engineer During Site Excavation/Compaction (Construction Phase)		\$ 41,448.00		\$ -	\$ -	\$ -		\$ 41,448.00
Phase 2: Hazardous Materials Investigation		\$ 12,650.00		\$ -	\$ -	\$ -		\$ 12,650.00
Phase 2: Hazardous Materials Surveys, Monitoring, Testing and Inspections (Construction Phase)		\$ 121,000.00		\$ -	\$ -	\$ -		\$ 121,000.00
Phase 2: Site Permitting, Zoning, Regulatory Variances, Submittals, and Approvals Planning Board		\$ 37,840.00		\$ -	\$ -	\$ -		\$ 37,840.00
Phase 2: Hydrant Flow Testing		\$ 3,300.00		\$ -	\$ -	\$ -		\$ 3,300.00
Phase 2: Soil Characterization		\$ 41,580.00		\$ -	\$ -	\$ -		\$ 41,580.00
Phase 2: Soil Characterization Field Observation During Fill Transportation		\$ 18,920.00		\$ -	\$ -	\$ -		\$ 18,920.00
Phase 2: Installation Management of FF&E		\$ 22,000.00		\$ -	\$ -	\$ -		\$ 22,000.00
Phase 2: Environmental Permitting Conservation Commission		\$ 3,300.00		\$ -	\$ -	\$ -		\$ 3,300.00
Phase 2: Wetlands Delineation		\$ 2,112.00		\$ -	\$ -	\$ -		\$ 2,112.00
Phase 2: National Pollutant Discharge Elimination System (NPDES)		\$ 2,200.00		\$ -	\$ -	\$ -		\$ 2,200.00
Phase 2: MAAB Variance Application		\$ 4,000.00		\$ -	\$ -	\$ -		\$ 4,000.00
Phase 2: LEED / Sustainability / Existing PV Array		\$ 150,000.00		\$ 34,435.00	\$ 5,625.00	\$ 40,060.00	26.71%	\$ 109,940.00
Phase 2: Design, Specifications, and Procurement of Technology Equipment which is not part of the Building Infrastructure and/or Building Construction Contract Documents				\$ -	\$ -	\$ -		
		By Owner		\$ -	\$ -	\$ -		
Totals		\$ 658,614.00		\$ 64,625.00	\$ 5,625.00	\$ 64,625.00	9.81%	\$ -

Architect:
Firm: **Ai3 Architects LLC**

By: 
Date: **12.30.21**

Reviewed: Project Manager
Firm: **CGA Project Management LLC**

By: 
Date: **1/3/2022**

Approved:
LGU: Town of Somerset

By: _____
Date: _____

MSBA Form 3012

526 Boston Post Road Wayland, MA 01778



P 508.358.0790 F 508.358.0791 www.ai3architects.com

Thornton Tomasetti

SEND PAYMENT & REMITTANCE ADVICE TO:

Thornton Tomasetti, Inc. | P.O. Box 781187 | Philadelphia, PA 19178 - 1187
PAYMENT TERMS: NET 20 DAYS
EIN 13-1251070

WELLS FARGO
420 MONTGOMERY STREET
SAN FRANCISCO, CA 94104

Bank Routing or ABA# 121000248
Account# 2000039485775
Account Name: Thornton Tomasetti, Inc

December 7, 2021

Invoice No: P21603.00 - 3

Tony Randall
Ai3 Architects
526 Boston Post Rd
Wayland, MA

Email: randall@ai3architects.com; baker@ai3architects.com

Somerset Middle School

For Services rendered on the above referenced project through November 26, 2021

Phase 2100 LEED - DD

PHASE	FEE	% COMPLETE	PREVIOUSLY BILLED	CURRENT BILLING
LEED Design Developemnt	22,500.00	100.00	16,875.00	5,625.00
Total Fee	22,500.00		16,875.00	5,625.00

TOTAL FEE

Total this Phase

5,625.00

\$5,625.00

Phase 2200 LEED - CD

PHASE	FEE	% COMPLETE	PREVIOUSLY BILLED	CURRENT BILLING
LEED Construction Documents	30,000.00	0.00	0.00	0.00
Total Fee	30,000.00		0.00	0.00

TOTAL FEE

Total this Phase

0.00

0.00

Phase 2300 LEED - CA

PHASE	FEE	% COMPLETE	PREVIOUSLY BILLED	CURRENT BILLING
LEED Construction Administration	22,500.00	0.00	0.00	0.00
Total Fee	22,500.00		0.00	0.00

Please direct all correspondence to:

14 York Street, Suite 201, Portland, ME 04101

If no errors are reported in 10 days this invoice will be considered correct.

Please do not accept any changes to TT's banking information from emails from ThorntonTomasetti.us which is a fraudulent domain. Our banking information has not changed. If our banking information were to change, it would be preceded by advance notice and will accompany your invoice or contract.

**CGA Project Management, LLC**P.O. Box 3147
Fall River, MA 02722**INVOICE****Somerset Public Schools**
Ronald D. Tarro
Director of Business and Finance
580 Whetstone Hill Road
Somerset, MA 02726**SOMERSET MIDDLE SCHOOL****Invoice #:** SMS-032
Invoice Date: 11/30/2021

Original Contract Amount:	\$ 150,000.00
Contract Amendment #1:	\$ 2,080,000.00
Contract Amendment #2:	\$ -
Contract Amendment #3:	\$ -
Total Contract Amount:	\$ 2,230,000.00

BASIC SERVICES

Description	Contract Amount	Previously Billed	Current Billing	Total Earned	% Complete
Feasibility Study/Schematic Design	\$ 150,000.00	\$ 150,000.00		\$ 150,000.00	100%
Design Development	\$ 125,000.00	\$ 125,000.00		\$ 125,000.00	100%
Construction Documents	\$ 200,000.00		\$ 25,000.00	\$ 25,000.00	13%
Bidding	\$ 50,000.00			\$ -	0%
Construction	\$ 1,500,000.00			\$ -	0%
Closeout/Completion	\$ 125,000.00			\$ -	0%
Cost Estimates	\$ 75,000.00		\$ 25,000.00	\$ 25,000.00	33%
Basic Services Summary	\$ 2,225,000.00	\$ 275,000.00	\$ 50,000.00	\$ 325,000.00	15%

EXTRA SERVICES & REIMBURSABLE EXPENSES

Description	Amount	Previously Billed	Current Billing	Total Earned	% Complete
Contract Amount as Amended	\$ 5,000.00				
Davol-Taunton Printing, Inc. (10 Banners)	\$ 1,420.00	\$ 1,420.00	\$ -	\$ 1,420.00	100%
Extra Services Summary	\$ 1,420.00	\$ 1,420.00	\$ -	\$ 1,420.00	0%

Balance of Unused Expenses \$ 3,580.00

TOTAL INVOICE SUMMARY	\$ 2,226,420.00	\$ 276,420.00	\$ 50,000.00	\$ 326,420.00	15%
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TOTAL DUE: \$ 50,000.00**Please remit payment to:**CGA Project Management, LLC
P.O. Box 3147
Fall River, MA 02722*Payment Terms:* Thirty (30) days



CGA Project Management, LLC

P.O. Box 3147
Fall River, MA 02722

INVOICE

Somerset Public Schools
Ronald D. Tarro
Director of Business and Finance
580 Whetstone Hill Road
Somerset, MA 02726

SOMERSET MIDDLE SCHOOL

Invoice #: SMS-033
Invoice Date: 12/31/2021

Original Contract Amount:	\$ 150,000.00
Contract Amendment #1:	\$ 2,080,000.00
Contract Amendment #2:	\$ -
Contract Amendment #3:	\$ -
Total Contract Amount:	\$ 2,230,000.00

BASIC SERVICES

Description	Contract Amount	Previously Billed	Current Billing	Total Earned	% Complete
Feasibility Study/Schematic Design	\$ 150,000.00	\$ 150,000.00		\$ 150,000.00	100%
Design Development	\$ 125,000.00	\$ 125,000.00		\$ 125,000.00	100%
Construction Documents	\$ 200,000.00	\$ 25,000.00	\$ 25,000.00	\$ 50,000.00	25%
Bidding	\$ 50,000.00			\$ -	0%
Construction	\$ 1,500,000.00			\$ -	0%
Closeout/Completion	\$ 125,000.00			\$ -	0%
Cost Estimates	\$ 75,000.00	\$ 25,000.00	\$ -	\$ 25,000.00	33%
Basic Services Summary	\$ 2,225,000.00	\$ 325,000.00	\$ 25,000.00	\$ 350,000.00	16%

EXTRA SERVICES & REIMBURSABLE EXPENSES

Description	Amount	Previously Billed	Current Billing	Total Earned	% Complete
Contract Amount as Amended	\$ 5,000.00				
Davol-Taunton Printing, Inc. (10 Banners)	\$ 1,420.00	\$ 1,420.00	\$ -	\$ 1,420.00	100%
Extra Services Summary	\$ 1,420.00	\$ 1,420.00	\$ -	\$ 1,420.00	0%

Balance of Unused Expenses \$ 3,580.00

TOTAL INVOICE SUMMARY	\$ 2,226,420.00	\$ 326,420.00	\$ 25,000.00	\$ 351,420.00	16%
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TOTAL DUE: \$ 25,000.00

Please remit payment to:

CGA Project Management, LLC
P.O. Box 3147
Fall River, MA 02722

Payment Terms: Thirty (30) days

Vendor # 9414

ARTHUR D. FRANK, JR., ESQUIRE

Attorney at Law
209 Bedford Street, Suite 402
Fall River, MA 02720
508-678-4556

TOWN OF SOMERSET
ATTN: Richard Brown, Town
Administrator
140 Wood Street
Room #23
Somerset, MA 02726

Billing Date: 11/3/2021
Acct. No.: 23855
Invoice: 12160

Re: Review of Somerset Middle School Plans

10/1/2021 - 10/31/2021

Professional Services

10/6/2021 Receipt/review of correspondence; Review Zoning By-Laws

10/21/2021 Receipt/review of Elevation Plan Analysis

10/22/2021 Receipt/correspondence with architect regarding height requirements/ mean grade

Total Professional Services

Amount

\$375.00

BALANCE DUE

\$375.00

RB

TERMS: BALANCE DUE WITHIN 15 DAYS OF BILLING DATE
UNLESS PRIOR ARRANGEMENTS ARE MADE
PLEASE PUT ACCOUNT NUMBER ON CHECK

NOV 10 '21 12:50

Total Project Budget

**Town of Somerset
Somerset Middle School**

December 31, 2021

Total Project Budget: All costs associated with the project are subject to 963 CMR 2.16(5)	PFA Budget	Projected	Spent to Date
Feasibility Study Agreement			
<i>OPM Feasibility Study</i>	\$150,000	\$150,000	\$150,000
<i>A&E Feasibility Study</i>	\$535,375	\$535,375	\$535,369
<i>Env. & Site</i>	\$64,625	\$59,340	\$59,340
<i>Other</i>	\$50,000	\$1,723	\$1,723
Feasibility Study Agreement Subtotal	\$800,000	\$746,438	\$746,432
Administration			
Legal Fees	\$25,000		\$0
Owner's Project Manager			
<i>Design Development</i>	\$125,000	\$125,000	\$125,000
<i>Construction Contract Documents</i>	\$200,000	\$200,000	\$25,000
<i>Bidding</i>	\$50,000	\$50,000	\$0
<i>Construction Contract Administration</i>	\$1,500,000	\$1,500,000	\$0
<i>Closeout</i>	\$125,000	\$125,000	
<i>Extra Services</i>			
<i>Reimbursable & Other Services</i>	\$5,000	\$5,000	\$1,420
<i>Cost Estimates</i>	\$75,000	\$75,000	\$25,000
Advertising	\$2,000		\$0
Permitting			
Owner's Insurance	\$75,000		
Other Administrative Costs			\$0
Administration Subtotal	\$2,182,000	\$2,080,000	\$176,420
Architecture and Engineering			
Basic Services			
<i>Design Development</i>	\$1,792,090	\$1,792,090	\$1,895,646
<i>Construction Contract Documents</i>	\$2,752,141	\$2,752,141	\$209,276
<i>Bidding</i>	\$88,330	\$88,330	\$0
<i>Construction Contract Administration</i>	\$1,152,048	\$1,152,048	\$0
<i>Closeout</i>	\$80,016	\$80,016	
<i>Other Basic Services</i>			\$0
Basic Services Subtotal	\$5,864,625	\$5,864,625	\$2,104,922
Reimbursable Services			
<i>Construction testing</i>			\$0
<i>Printing (over minimum)</i>			\$0
<i>Other Reimbursable Costs</i>	\$133,000	\$133,000	\$33,171
<i>Hazardous Materials</i>	\$103,000	\$103,000	\$0
<i>Geotech & Geo-Env.</i>	\$387,000	\$387,000	\$0
<i>Site Survey</i>	\$29,500	\$29,500	\$0
<i>Wetlands</i>			\$0
<i>Traffic Studies</i>	\$13,000	\$13,000	\$3,942
Architectural/Engineering Subtotal	\$6,530,125	\$6,530,125	\$2,142,035
CM & Risk Preconstruction Services			
Pre-Construction Services			
Site Acquisition			
Land/Building Purchase			
Appraisal Fees			
Recording fees			
Site Acquisition Subtotal	\$0	\$0	\$0
Construction Costs			
Main Project	\$68,956,365		\$0

Total Project Budget

Town of Somerset
Somerset Middle School

December 31, 2021

Total Project Budget: All costs associated with the project are subject to 963 CMR 2.16(5)	PFA Budget	Projected	Spent to Date
<i>Change Orders -ESP</i>			
<i>Change Orders -Main Project</i>			
<i>Anticipated COs</i>			
Construction Budget	\$68,956,365	\$0	\$0
Alternates			
Alternates	\$1,000,000		
Alternates Subtotal	\$1,000,000		\$0
Miscellaneous Project Costs			
<i>Utility company Fees</i>	\$75,000		\$0
<i>Testing Services</i>	\$200,000		
<i>Swing Space/Modulars</i>	\$0		
<i>Other Project Costs (Mailing & Moving)</i>	\$125,000		\$0
Misc. Project Costs Subtotal	\$400,000	\$0	\$0
<i>Furnishings and Equipment</i>			
<i>Furnishings, Fixtures & Equipment</i>	\$944,000		
<i>Technology</i>	\$708,000		\$0
FF&E Subtotal	\$1,652,000	\$0	\$0
Soft Costs that exceed 20% of Const'n Cost			
Project Budget	\$81,520,490	\$9,356,563	\$3,064,887
Construction Contingency	\$2,500,000		
Owner's Contingency	\$1,000,000		
Total Potentially Eligible Contingency ²	\$3,500,000	\$0	
Total Project Budget	\$85,020,490	\$9,356,563	
Reimbursement Rate	61.59%	61.59%	
Maximum Total Grant	\$31,799,754	\$31,799,754	
Town Share	\$53,220,736	-\$22,443,191	

SOMERSET MIDDLE SCHOOL BUILDING COMMITTEE MEETING NO. 37
OPEN SESSION MINUTES – November 8, 2021
Virtual via Zoom

Mr. Machado called the meeting to order at 6:00 p.m. due notice having been posted.

Voting Members:

Mr. Victor Machado, Chair	Mr. Jeff Schoonover, Vice Chair, Superintendent of Schools
Dr. Pauline Camara, Principal at the SMS	Mr. Ira Schaefer, Vice Principal at the SMS
Ms. Cassey Monte, Teacher at SMS	Ms. Kathleen Byers, Teacher at SMS (<i>Absent</i>)
Mr. Steven Medeiros, Registered Architect	Mr. James Teixeira, Somerset Advisory & Finance Committee
Mr. Ronald Tarro, Dir. of Business /Finance for Somerset Public Schools	Ms. Elizabeth Haskell, Director of Curriculum and Assessment, Somerset Public Schools and SBRHS (<i>Entered the meeting at 6:10 p.m.</i>)
Mr. Chris Godet, School Committee Member	Mr. Carlos Campos, Supervisor of Buildings and Grounds
Mr. Robert Lima, Superintendent of Somerset Water Department, Retired	Ms. Nicole Mello, Content Coordinator for Science and Technology at the Somerset Middle School
Mr. Michael Botelho, Community Member (<i>Entered the meeting at 6:10 p.m.</i>)	Mr. Kevin Scanlon, Licensed Mass. General Contractor
Mr. Nick Raffa, Community Member	

Non-Voting Members:

Mr. Richard Brown, Town Administrator (<i>Absent</i>)	Mr. Allen Smith, Board of Selectmen Member
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Also Present:

Mr. Troy Randall, Mr. Jonathan Quell and Ms. Heather Martins [Ai3 Architects]
Mr. Dan Tavares and Ms. Marybeth Carney [CGA Project Management]
Mr. Manuel Alves, Director of Buildings and Grounds.

Note: All individuals were present and participating remotely.

I. Owner's Project Manager's Report

A. MSBA Updates

1. ProPay Reimbursement: No Updates currently.
2. The commissioning agent, BR+A, issued comments regarding the design development documents to Ai3. Ai3 is waiting for a few more documents/comments from BR+A. These comments will be included in the submission to the MSBA.
3. The design development document submission will be sent to the MSBA on November 12, 2021. The MSBA is requiring electronic submission only. (Hard copies will not be required.)

B. Three Action Items Required:

1. **Design Development Submission:** Vote to approve the 100% Design Development Documents and to authorize the Owner's Project Manager to submit the documents to the MSBA for its consideration.
2. **Value Engineering Options:** Based on the November 4, 2021, working group meeting, Ai3 will present updates on the Value Engineering (VE) options to bring the construction cost estimate within the project budget. The VE process will continue through the Construction Document Phase.
3. **Proprietary Items:** Ai3 will present the list of proprietary items to be included in the Design Development submission. The list will continue to be updated through the next phase.
 - a. Several items have been identified already. One additional item will need to be formally approved at tonight's meeting.

C. Invoice Review

1. The Invoice Review Sub-Committee continues to review invoices.
 - a. Ai3 submitted two invoices:
 - Invoice 24B for \$382,940.50 for services through October, 2021.
 - Invoice 8E for \$14,997.40 for traffic and photovoltaic array system study.
 - b. CGA submitted one invoice:
 - Invoice 31 for \$25,000.00

D. Project Budget

1. No change.

E. Anticipated Project Schedule

1. Schedule has not changed.
2. Key Milestone Dates:
 - a. November 12, 2021 - 60% Design Development submission to the MSBA.
 - b. December 6, 2021 – SMSBC meeting which will kick-off the Construction Documents (CD) Phase.
 - c. February 18, 2021 – 60% CD Submission to the MSBA
 - d. April 29, 2021 – 90% CD Submission to the MSBA
 - e. June 3, 2021 – 100% CD Submission to the MSBA
 - f. May 1, 2024 – Substantial Completion Submission to the MSBA.
 - Building and associated site work complete.

F. Questions and comments from the SMSBC:

1. None.

II. Architect's Presentation

A. Working Group Meeting Updates

1. Had a productive week in going over potential value engineering items. These items would not have an impact on student education.

2. One additional working group meeting was held on Friday morning.
3. The group was successful in bringing the project back within budget.
4. Mr. Randall showed slide presented at the November 1, 2021 meeting followed by a slide showing adjustments made to include additional VE items.
5. General Items
 1. Removing art classroom outdoor balcony. Cost savings of \$190,000.00 over several trades.
 - a. The working group felt that this was an appropriate item to remove.
 2. Reduction of the roof level at the adaptive physical education space in front of the gymnasium. Reduce the secondary lobby by 3'-0" overall.
 - a. There will be no effect on daylight or student education.
 - b. This will reduce materials overall.
 - c. This will reduce the height of the interior folding panel partition and amount of exterior glass.
 3. Reorganization of Stair 1 at the end of the Academic Wing which reduces the square footage slightly and makes it more efficient. It will reduce the number of level changes, square footage, materials and required fire-rated glass.
 4. Function and use of the outdoor performance platform.
 - a. Original design had an overhead door which has been reduced.
 - b. Windows will be removed in their entirety.
 - c. Double doors will be placed on the right and left sides of the platform.
 - d. Access door changed from a double door to an 8'-0" wide x 10'-0" high insulated overhead coiling type door which is an approximate cost savings of \$65,000.00.
 5. Exterior Enclosure
 - a. Remove vertical sunshades.
 - b. Reduce exterior windows throughout the perimeter.
 6. Interior Construction
 - a. Mr. Randall summarized several of the items discussed at the previous meeting emphasizing that there would be no impact on natural light or student education. (Refer to Ai3 presentation and the November 1, 2021 meeting minutes.)
 7. Interior Finishes
 - a. Replace student dining acoustical soffit ceiling with 4'-0" x 4'-0" acoustical ceiling tile ceiling. Visual will stay the same but will be less costly.
 - b. Proposed gypsum ceilings in the academic areas would be changed to 2'-0" x 4'-0" acoustical ceiling tiles which would continue into the adjacent toilet rooms.
 8. The exterior toilet rooms will be revised from one men's and one women's toilet room to three gender neutral toilet rooms.
 - a. More flexibility in use rather than identifying specific men's and women's toilet rooms.
 9. Electrical and Technology
 - a. Maintain security cameras at parking and eliminate cameras at the playing fields.
 - b. Try and install cameras on the building exterior and at exterior poles which will be installed as part of the overall project.
 - c. Be efficient in coverages.
 1. Ai3 will provide visual coverage and pixilation of the images in the future. This will be provided by Ai3's security consultant.
 10. Site Improvements
 - a. Mr. Randall reviewed some items discussed at the last meeting. (Refer to presentation and November 1, 2021 meeting minutes which included, but not limited to, the reduction of exterior signs, the reduction of boulders and reduction of deciduous trees.)

- b. Mr. Randall noted that both estimates have identified \$500,000.00 in costs related to the geotechnical report. He indicated that Traverse Landscape Architects, Vertex Engineering and Pare Corporation (Geotechnical Engineers) talked about possibly testing soils at the site to determine its composition. The quality of the soils will be looked at in a lab to determine whether the over excavated materials in the area identified by the geotechnical engineer and civil engineer can be used on site for topsoil. If it can remain on site this will reduce export from and import to the existing site. Soil sampling and testing will be presented to the working group and will be submitted before the 60% Construction Documents Set estimating process. The design team will share their findings with the committee.

11. Summary

Schematic Design Total Construction Cost Estimate: \$68,955,863.00

Design Development Total Construction Cost Estimate: \$72,097,649.00

Value Engineering Cost Savings: \$ 2,141,284.00

Revised Total Construction Cost Estimate: \$69,956,365.00

B. Questions and comments from the SMSBC:

1. Mr. Smith noted that he reviewed the SMS Ai3 Draft dated November 5, 2021 and asked:
 - a. If the window height to the right of the adaptive physical education space in front of the gymnasium will be reduced. Mr. Randall confirmed that this was correct.
 - b. To confirm that there will be three roof heights along that side of the building. Mr. Randall confirmed that this was correct.
 - c. If there will be significant changes to the left side of the building if it will change how that elevation looks. Mr. Randall noted that this will eliminate the window system on the left. It will maintain the architectural feature which will be the backdrop of that performance area.
2. Mr. Smith noted that all the changes to the right of the adaptive physical education space will result in a \$29,000.00 cost reduction whereas the bus loop canopy can be reduced to provide a cost savings of approximately \$150,000.00. Mr. Randall replied that this was true; however, the functionality of the canopy is more significant than the reduction of the elevation on the right-hand side of the education space. These two areas were not compared during the working group meetings. Mr. Smith understood that each change stood on its own merit and overall use. He asked if there was a benefit to reducing the bus loop canopy by 50%. Mr. Tavares added that there were other costs outside the \$29,000.00 that were not factored into the estimate such as finishes. Mr. Randall indicated that this is correct and that with the reduction of interiors there will be a greater cost savings. As for the bus loop canopy the number of students and the zone to protect from inclement weather or the sun makes the canopy area important. Mr. Smith felt that students go through this area more quickly and that it is an expensive item for only being used in the morning and the evening and would rather see the money go to the spaces used by staff and students throughout the day.
3. Mr. Smith noted that regarding the exterior enclosure the cost to replace the glass fiber reinforced polymer (GFRP) vertical face with fiber cement board (FCB) is a cost savings of \$50,000.00. He asked what the downside was that prevents the design team from recommending that change. Mr. Randall replied that by changing the detailing from GFRP with FCB it does create detail that is more finicky as compared to other areas. It is more susceptible to long term potential challenges. There are areas that the design team is highlighting architecturally, and this is one of the areas. Mr. Smith asked if this is at the back of the building. Mr. Randall noted that this is at the front of the building. Mr. Smith noted that in this one item there is a \$150,000.00 savings when there is much of the interior that is being removed from the project. It may be tricky to detail with the FCB but visually it will appear similar versus what will be removed from the interior. Mr. Randall indicated that he could see how making the compromise is logical but going through the exterior and interior the design team does not see the change to the interior as being compromises and may even be necessary and makes it more cost effective.

4. Mr. Smith noted that reviewing the cost estimates the project carries white PVC roofing which could change to white EPDM roofing and would still need to meet the same warranty whether the town goes with white PVC or White EPDM. Mr. Randall stated that he would not recommend the EPDM due to long term maintenance and durability issues (puncture rating). PVC is a much more durable product. Long term the town would not want to scale back on this item. Mr. Smith noted that PVC must have gotten a lot better over time because it has had its problems. Mr. Randall noted that in the roofing industry you have PVC and TPO at the top and then EPDM which is inferior to both. He also stated that it was Ai3's opinion that rubber roofs are not as good as PVC. Many manufacturers and contractors would tell the committee the same thing. Mr. Smith followed up by asking what the warranty was for the PVC. Mr. Randall responded that for a standard PVC roof it is between 20 and 25 years.
5. Mr. Smith noted that in the site improvement section of the estimates concrete and asphalt curbing in lieu of granite would save \$200,000.00. Mr. Randall noted that the town could do that but for the town's long term benefit granite would be the ideal scenario.
 - a. Mr. Machado noted that the concern with the curbing is that if the committee reduces this item and things change in the future once the building is being constructed, assuming that the building is being constructed and there is a shortfall, we can look at the outside items that have not been done and can change or take items out completely. The curbs are done last in the overall scope.
 - b. Mr. Randall noted that there is a potential of identifying a deduct alternate or an add alternate with granite as the base bid number and a deduct alternate to identify include concrete and asphalt bituminous concrete.
 - c. Mr. Tavares let the committee know that there will be two more rounds of estimating prior to bidding so the committee and the design team will revisit these items in the later stage. He stressed that all that is being demonstrated to the MSBA and the town is that there are ways to make up the gap between the estimate and the established budget created in the spring (2022). The decisions made in the last week were to capture as much as possible without compromise to student education. These items stand as is with the understanding that moving forward, we will need to re-evaluate these items. Any changes to the design will be easier to do now versus moving forward into the CD phase which will make it more challenging to make complete design changes. Mr. Tavares added that the design team highly recommends keeping the building envelope design as is because the town should not want to compromise the building envelope, mechanical system, or lighting systems.
6. Mr. Medeiros stated that he had the same reaction to the white EPDM roofing cost savings number as Mr. Smith but knows the benefits of moving forward with PVC. He stated that many of the roofs that had been once completed with EPDM are being re-roofed with PVC. Mr. Medeiros was on board with moving forward with the white PVC Roof. Mr. Medeiros also agreed with Mr. Randall and Mr. Tavares in keeping the granite curbing stating that the durability of the granite curbing is the reason why it should be supported. He noted that there would be a cost savings now but in the long run granite would be the best way to move forward.
 - a. Mr. Tavares asked given the future considerations all are saying that keeping the granite curbing and the PVC roofing would be the prudent thing to do. Mr. Medeiros stated that it would be.

C. Proprietary Specifications

1. Mr. Quell went over what proprietary specifications are, the advantages and disadvantages of proprietary specifications and the reason why proprietary specifications could be used.
2. Four items were approved by the committee to date:
 - a. Door Hardware – Schlage
 - b. Automatic Temperature Control – Johnson Controls, Inc. (JCI)
 - c. Boilers – Lochinvar Boilers
 - d. Access Controls – S2 Access Controls

3. Scoreboards have been identified as a potential proprietary item. The design team are requesting approval by the committee at tonight's meeting.
 - a. Mr. Randall noted that the district has had challenges with scoreboards being fixed for several months because the vendors were not local. He stated that parts and materials can be obtained by Daktronics in a timely manner.
 - b. Mr. Quell noted that there will be a couple more times when the design team and the committee will review these items which will be at the 60% and 90% construction documents prior to the finalizing and including in the 100% construction documents set.
 - c. Mr. Medeiros asked if the exterior signs will be solar powered. Mr. Quell acknowledged that they would be.
4. Mr. Quell provided a snapshot of what has been developed from schematic design to 100% design development and what will be sent to the committee and the MSBA including updates to the following:
 - a. Site circulation
 - b. Utilities
 - c. Outdoor educational areas
 - d. More detailed cost documents (500-page document)
 - e. Feedback and information from the district, committee, fire department and police department regarding safety and security.
 - f. Finishes, color palettes and interior and exterior products.
5. Questions and Comments from the Committee:
 - a. Mr. Smith asked if JCI will be responsible for the entire energy management system for the future middle school building. Mr. Randall confirmed that it would be for the entire energy management system.
 - b. Mr. Smith followed up by asking if the system needs repairs would JCI need to be called in to complete the repairs, or could another vendor be used? Mr. Randall noted that with proprietary items he was not sure if a component needs to be replaced if JCI would need to come in or if another vendor could come in and make modifications or adjustments to the system. Ai3 will reach out to their engineer to find out. Mr. Randall asked that if there was a specific question that Mr. Smith had for the engineer to forward it to him for discussion.
 - c. Mr. Smith noted that this could impact maintenance down the road if JCI were to be expensive. If the school could use another vendor, it may be less expensive. Mr. Tavares noted that in some cases it must be the vendor of the system but will ask the engineer. He added that JCI's energy management system is used throughout all the buildings which is the reason why it had been asked to be a proprietary item.
 - d. Mr. Smith asked how many other schools use JCI's system that is being proposed for the future middle school building. Mr. Randall noted that JCI's system is installed at the high school but was not 100% certain at other school in town. (See clarification by Mr. Campos later on in these minutes.) He will review with the engineer and the district regarding what is installed at other schools in town.

- e. Mr. Smith noted that going through the rest of the report it seemed like the South and Chase Elementary Schools had no energy management systems. That they are 100% pneumatics. North Elementary School has same system but is probably much older. He asked what JCI system is being proposed. Mr. Randall noted that the design team could send the specifications of what is being proposed.
 - 1. Mr. Campos indicated that the high school uses a Delta System. JCI is the better system than what is installed at the high school. With Delta or JCI you can buy the parts off the vendor and have it installed in-house or have someone else install for you. Facilities has an HVAC person in-house who deals with HVAC system including installing parts. Mr. Campos also noted that most of the valves and controls at the middle school are JCI. The middle school has the meta system which is not at the elementary schools.
 - 2. Mr. Campos was asked about his experience with the installed HVAC systems. He stated that the JCI products were a little better than Delta which is why he proposed JCI to be proprietary for this project.
- f. Mr. Machado asked if the committee is leaving the proprietary items as is for the vote and revisiting in the future. Mr. Tavares noted that this was being recommended, and that the items could be revisited again when 60% construction documents are complete.

D. SMSBC Vote:

- 1. Vote to approve the Value Engineering List

Mr. Machado entertained a motion to approve. Mr. Schoonover moved the motion. Mr. Teixeira seconded. On a roll call vote of the voting members present the Committee voted 16-0 in favor of the motion. Ayes: Mr. Schoonover, Mr. Godet, Mr. Tarro, Ms. Haskell, Mr. Campos, Dr. Camara, Ms. Monte, Mr. Raffa, Mr. Medeiros, Mr. Lima, Mr. Scanlon, Ms. Mello, Mr. Machado, Mr. Botelho, Mr. Shaefer and Mr. Teixeira.

- 2. Vote to approve Proprietary List

Mr. Machado entertained a motion to approve. Mr. Schoonover moved the motion. Dr. Camara seconded. On a roll call vote of the voting members present the Committee voted 16-0 in favor of the motion. Ayes: Mr. Schoonover, Mr. Godet, Mr. Tarro, Ms. Haskell, Mr. Campos, Dr. Camara, Ms. Monte, Mr. Raffa, Mr. Medeiros, Mr. Lima, Mr. Scanlon, Ms. Mello, Mr. Machado, Mr. Botelho, Mr. Shaefer and Mr. Teixeira.

- 3. Vote to approve 100% Design Development and to authorize the Owner's Project Manager to submit the 100% Design Development documentation and submittal to the MSBA for its consideration.

Mr. Machado entertained a motion to approve. Dr. Camara moved the motion. Mr. Medeiros seconded. On a roll call vote of the voting members present the Committee voted 16-0 in favor of the motion. Ayes: Mr. Schoonover, Mr. Godet, Mr. Tarro, Ms. Haskell, Mr. Campos, Dr. Camara, Ms. Monte, Mr. Raffa, Mr. Medeiros, Mr. Lima, Mr. Scanlon, Ms. Mello, Mr. Machado, Mr. Botelho, Mr. Shaefer and Mr. Teixeira.

III. Approval of Meeting Minutes:

Approval of September 13, 2021 and November 1, 2021 Meeting Minutes

Mr. Machado entertained a motion to approve the September 13, 2021 and November 1, 2021 meeting minutes. Mr. Lima moved the motion. Mr. Medeiros seconded. On a roll call vote of the voting members present the Committee voted 16-0 in favor of the motion. Ayes: Mr. Schoonover, Mr. Godet, Mr. Tarro, Ms. Haskell, Mr. Campos, Dr. Camara, Ms. Monte, Mr. Raffa, Mr. Medeiros, Mr. Lima, Mr. Scanlon, Ms. Mello, Mr. Machado, Mr. Botelho, Mr. Shaefer and Mr. Teixeira.

IV. Other Items: None

V. Public Input: None

Mr. Machado entertained a motion to adjourn the meeting. Mr. Teixeira moved the motion. Ms. Mello seconded. On a roll call vote of the voting members present the Committee voted 16-0 in favor of the motion. Ayes: Mr. Schoonover, Mr. Godet, Mr. Tarro, Ms. Haskell, Mr. Campos, Dr. Camara, Ms. Monte, Mr. Raffa, Mr. Medeiros, Mr. Lima, Mr. Scanlon, Ms. Mello, Mr. Machado, Mr. Botelho, Mr. Shaefer and Mr. Teixeira.

Meeting adjourned at 7:14 p.m.

Respectfully submitted,
Steven Medeiros, Recording Committee Member

Documents List: Ai3/CGA Project Management Presentation