

Massachusetts School Building Authority

Deborah B. Goldberg
Chairman, State Treasurer

Maureen G. Valente
Chief Executive Officer

John K. McCarthy
Executive Director, Deputy CEO



Joint OPM & Contractor Roundtable

October 20, 2016

Massachusetts School Building Authority

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Project Advisory 36

Changes to the Owner's Project Manager Report

Evan Levesque, MSBA



Project Advisory 36

- Project Advisory 36 addresses the new OPM Report System and is posted to our website under the Building With Us/Project Advisories tab.
- Project Advisory 36 became active on July 1, 2016, for the June 2016 OPM Reports.
- The OPM Report User Guide has been updated to reflect the changes made to the system and has a link at the bottom of Project Advisory 36. You may also find the User Guide under Policies, Forms & Guidelines/System User Guides & Access Request Forms/OPM Report User Guide.



OPM Report System

- One report submission per month opposed to the previous requirement of two reports per month.
- OPM Report will be submitted entirely online through MSBA Systems.
- The remaining report will continue to be due on the 12th of each month.
- Along with the current online report, three attachments will be required to be submitted, with a fourth optional attachment.
- The three required attachments will be a signed “Budget and Cost Report – MSBA Format”, “Projected Cash Flow vs. Actual Cash Flow”, and a “Project Schedule”
- The fourth optional attachment will be for “Proposed Change Orders”
- The signed “Budget and Cost Report – MSBA Format” is simply the online report printed, signed, scanned and uploaded.

OPM Summary - Tab

The screenshot displays the MSBA Systems PreProduction web application. The browser address bar shows the URL: `preprod/OPM_Report/Main/MSBA.aspx`. The user is logged in as "test Evan, you are in: OPM Report".

MSBA Systems PreProduction

OPM Report

OPM Summary | OPM | Designer | General Contractor | Attachments | Submit Report

Hingham
 Progress Report As of Date : 3/31/2016
 Hingham Middle School - 201001310410

Total Project Budget (ProPay)	\$58,414,481	Project Completion Percentage	55%
Encumbered (Reporting Period)		Encumbered (to Date)	
Total Project Invoices Received (to Date)		School Building Committee Rep	

OPM

Firm Name	Knight, Bagge & Anderson Inc.	Project Director	Daniel P Bradford
Designer		Principal	Scott Dunlap
Firm Name	AJ Architects LLC	General Contractor	
Firm Name	Brak Builders Corp.	Contact Name	Robert Brak

OPM Summary

This page contains the current report and all previously submitted report details. For the current report, please select the Reporting period to start the submission process.

Current Report Details

Note : These fields should be filled in before working on a new report. Fields marked with an asterisk * are required

*Progress Report As of Date: 3/31/2016

School Building Committee Rep

Total Project Budget (ProPay): \$58,414,481

Encumbered (Reporting Period): \$

Encumbered (to Date): \$

Total Value of Invoices Received (to Date): \$

*Project Completion Percentage: 55.00%

Previously Submitted OPM Reports

Report As of Date	Date Due	Date Submitted	Late?	Notes	Report Attachments
10/31/2014	11/12/2014	4/11/2015	Yes		
9/30/2014	10/12/2014	10/6/2015	Yes		
8/30/2014	9/12/2014	9/2/2015	Yes		
7/31/2014	8/12/2014	8/9/2015	Yes		
6/30/2014	7/12/2014	7/6/2015	Yes		

Attachments - Tab

The screenshot shows a web browser window displaying the MSBA Systems PreProduction application. The browser's address bar shows the URL `preprod/OPM_Report/Main/MSBA.aspx`. The user is logged in as 'test Evan' and is viewing the 'OPM Report' page. The page has a navigation menu with tabs for 'OPM Summary', 'OPM', 'Designer', 'General Contractor', 'Attachments', and 'Submit Report'. The 'Attachments' tab is active.

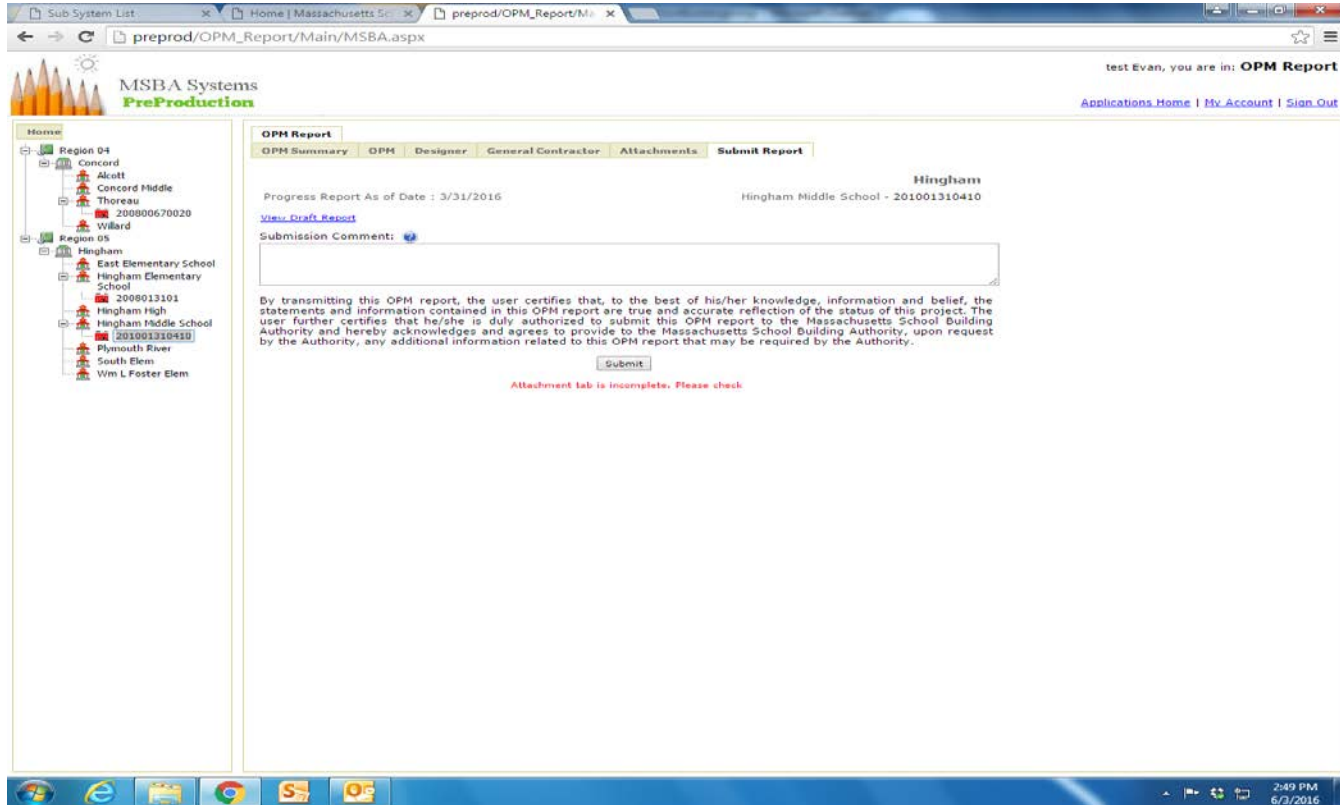
On the left side, there is a tree view showing the organizational structure. Under 'Region 04', 'Concord' is expanded, showing 'Alcott', 'Concord Middle Thoreau', and 'Willard'. Under 'Region 05', 'Hingham' is expanded, showing 'East Elementary School', 'Hingham Elementary School', 'Hingham High', 'Hingham Middle School', 'Plymouth River', 'South Elem', and 'Wm L Foster Elem'. The 'Hingham Middle School' entry is highlighted with a red box and the ID '201001310410'.

The main content area displays the following information:

- OPM Report** (Hingham)
- Progress Report As of Date : 3/31/2016
- Hingham Middle School - 201001310410
- Attachments**
- Please find below the list of attachments that are required for an OPM Submission. Read the instructions for each attachment and upload the necessary documents.
- Attachment 1 - Budget and Cost Report (MSBA Format)**
- Note: To upload this report, please download the 'pre-submission' OPM Report by clicking on the 'Download report to sign' link below. Please sign on the 'downloaded' report; scan it and re-upload it as 'Attachment 1'. Please make sure that the format of the file is 'PDF' and the file size doesn't exceed 2 MB.
- [Download report to sign](#)
- Budget Cost: No file chosen [Attach](#)
- Attachment 2 - Projected Cash Flow vs. Actual Cash flow**
- Note: This report's layout is at the discretion of the OPM but please make sure that the format of the file is 'PDF' and the file size doesn't exceed 2 MB.
- Cash Flow: No file chosen [Attach](#)
- Attachment 3 - Project Schedule**
- Note: This report's layout is at the discretion of the OPM but please make sure that the format of the file is 'PDF' and the file size doesn't exceed 2 MB.
- Project Schedule: No file chosen [Attach](#)
- Attachment 4 - Proposed Change Orders (Optional)**
- Note: This report's layout is at the discretion of the OPM but please make sure that the format of the file is 'PDF' and the file size doesn't exceed 2 MB.
- Proposed Change Order: No file chosen [Attach](#)

The Windows taskbar at the bottom shows the system tray with the time 2:48 PM and date 6/3/2016.

Submit Report - Tab



The screenshot shows a web browser window with the URL `preprod/OPM_Report/Main/MSBA.aspx`. The page header includes the MSBA Systems logo and the text "PreProduction". A user notification in the top right corner reads "test Evan, you are in: OPM Report". Below the header, there are navigation links: "Applications Home | My Account | Sign Out".

The main content area is titled "OPM Report" and features a tabbed interface with the following tabs: "OPM Summary", "OPM", "Designer", "General Contractor", "Attachments", and "Submit Report". The "Submit Report" tab is currently active.

On the left side, there is a tree view under the heading "Home". It shows a hierarchy of regions and schools:

- Region 04
 - Concord
 - Alcott
 - Concord Middle
 - Thoreau
 - 200900670020
 - Willard
 - Region 05
 - Hingham
 - East Elementary School
 - Hingham Elementary School
 - 2009013101
 - Hingham High
 - Hingham Middle School
 - 201001310410
 - Plymouth River
 - South Elem
 - Wm L Foster Elem

The main content area displays the following information:

- Progress Report As of Date : 3/31/2016
- Hingham Middle School - 201001310410
- [View Draft Report](#)
- Submission Comment:
- A text block containing a disclaimer: "By transmitting this OPM report, the user certifies that, to the best of his/her knowledge, information and belief, the statements and information contained in this OPM report are true and accurate reflection of the status of this project. The user further certifies that he/she is duly authorized to submit this OPM report to the Massachusetts School Building Authority and hereby acknowledges and agrees to provide to the Massachusetts School Building Authority, upon request by the Authority, any additional information related to this OPM report that may be required by the Authority."
- A "Submit" button.
- A red error message: "Attachment tab is incomplete. Please check."

The Windows taskbar at the bottom shows the system tray with the time 2:49 PM and date 6/2/2016.



OPM Report System

Questions?

Massachusetts School Building Authority

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Project Advisory 38

Board of Directors Meeting Schedule

Katie Loeffler, MSBA



MSBA Due Date for District Submittals for Board Presentations	Facilities Assessment Subcommittee Meetings		MSBA Board of Directors Meetings
2017			
By 5:00 PM	9:30 AM – 11:30 AM		10:00 AM – 12:00 PM
Wednesday, January 4, 2017	Wednesday, January 18, 2017	Wednesday, February 1, 2017	Wednesday, February 15, 2017
Thursday, March 23, 2017	Wednesday, March 29, 2017	Wednesday, April 12, 2017	Wednesday, May 10, 2017
Thursday, May 18, 2017	Wednesday, May 24, 2017	Wednesday, June 7, 2017	Wednesday, June 28, 2017
Thursday, June 29, 2017	Wednesday, July 19, 2017	Wednesday, August 9, 2017	Wednesday, August 23, 2017
Thursday, September 14, 2017	Wednesday, September 20, 2017	Wednesday, October 4, 2017	Wednesday, October 25, 2017
Thursday, November 9, 2017	Wednesday, November 15, 2017	Wednesday, November 29, 2017	Wednesday, December 13, 2017

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Update on the Required Content and Format of OPM Responses to an RFS

Brian Kelley, MSBA



OPM Response

- Please include page numbers in the Response.
- “The total length of the Response (including Attachment C only but excluding Attachments A, B and D) **may not exceed twenty (20) single-sided numbered pages** with a minimum acceptable font size of “12 pt” for all text.”
 - The cover letter and evaluation criteria are included in the page limit.
 - Additional information to #9 in Attachment C is subject to the 20 page limit, if necessary, up to three (3) additional double-sided pages are acceptable to supplement Attachment C.
 - The MCPPO certification, balance sheet and income statement are **excluded** from the page limit.



OPM Response

- Ensure that MCPPO certifications are current. If they are expiring or about to expire, please include a notice of application to recertify.
- Please differentiate between ARP projects and Core projects when providing details of past performance on MSBA projects.
- If an individual left a firm to join a new firm, please identify which firm he/she was employed by when detailing his/her past performance.
- If a firm offers both OPM/Designer services, the past performance on projects, listed in the response, must clearly identify which services were performed by the firm.



OPM Response

- **Organizational Chart for Key Personnel**
 - Must have all the key personnel referenced in the chart. If an individual, such as a Project Representative, has not yet been identified, the position should still be included on the chart and listed as TBD. Firms may list multiple names but they must be properly labeled.
 - **Project Director** and **Project Representative** are defined in the contract, therefore, these roles **MUST** be identified on the chart as such.
 - Identification of the Project Representative not C.O.W (Clerk of the Works) or Site Representative.
 - "Available" is not specific within the resume. Percentages and start dates preferable (ex. 50%, beginning on or about 10/12/16).

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Collaborative Purchasing for Furniture, Fixtures & Equipment

Supporting School Districts

Barbara Hansberry, MSBA



Supporting School Districts

- FF&E expense always high
- Volume discounts are available
- Combining purchases may make sense, especially for smaller districts



Supporting School Districts

- MSBA is learning about opportunities that may exist to stretch the MSBA budget for FF&E (\$1,200 per student)
- Simple concept: School districts combine their FF&E purchases, create greater volume and potentially lower the unit cost of items (May work for technology too)



Supporting School Districts

- MSBA held a training in August for school districts. Presenters included: OSD, MHEC, MA OIG and Peabody's Purchasing Agent
- MSBA will be looking at districts with projects soon to be reaching substantial completion for their interest in piloting a collaborative purchase



Supporting School Districts

- MSBA would like to tap OPM expertise in this area

- Contact Barbara Hansberry if interested to continue this conversation

Barbara.Hansberry@Massschoolbuildings.org

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Schedule of Values

Michael McGurl, MSBA

Massachusetts School Building Authority

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Construction Delivery Methodologies

Summary Level Information and Comparative Data Part II

Michael McGurl, MSBA



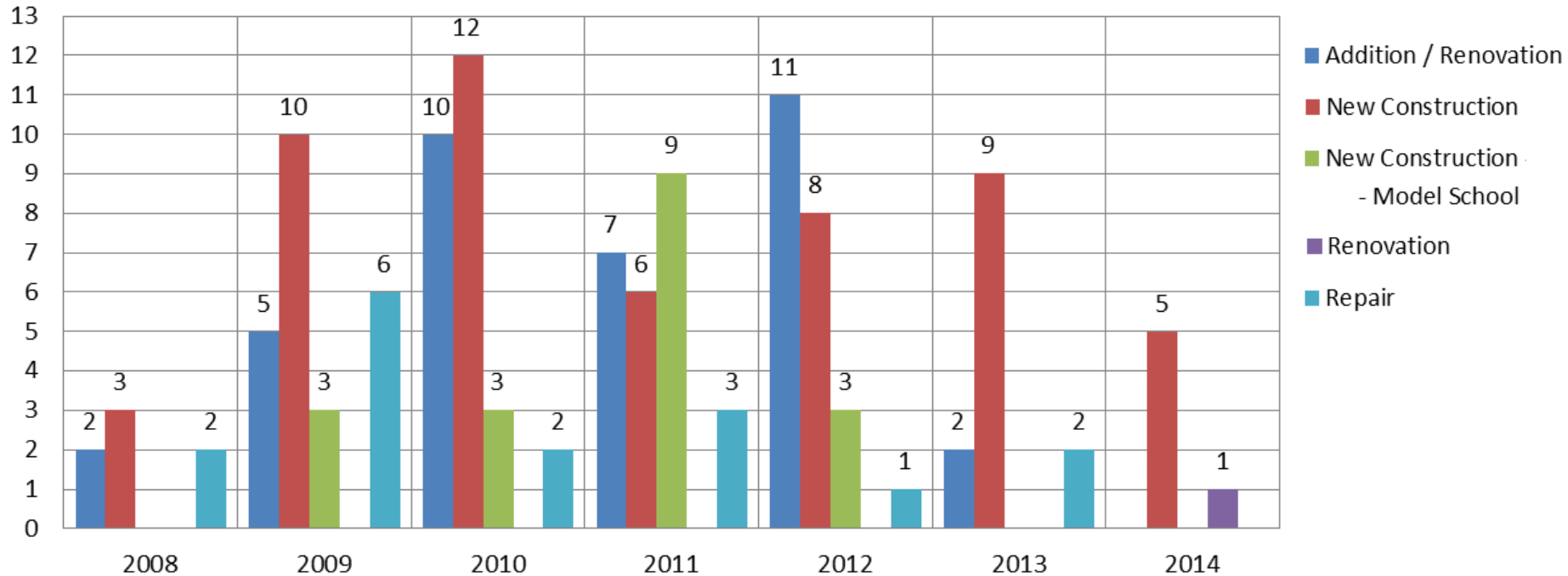
CMR / DBB Presentation

Summary Construction Cost and Change
Order Data for Core Program Projects



Construction Methodology Summary Data

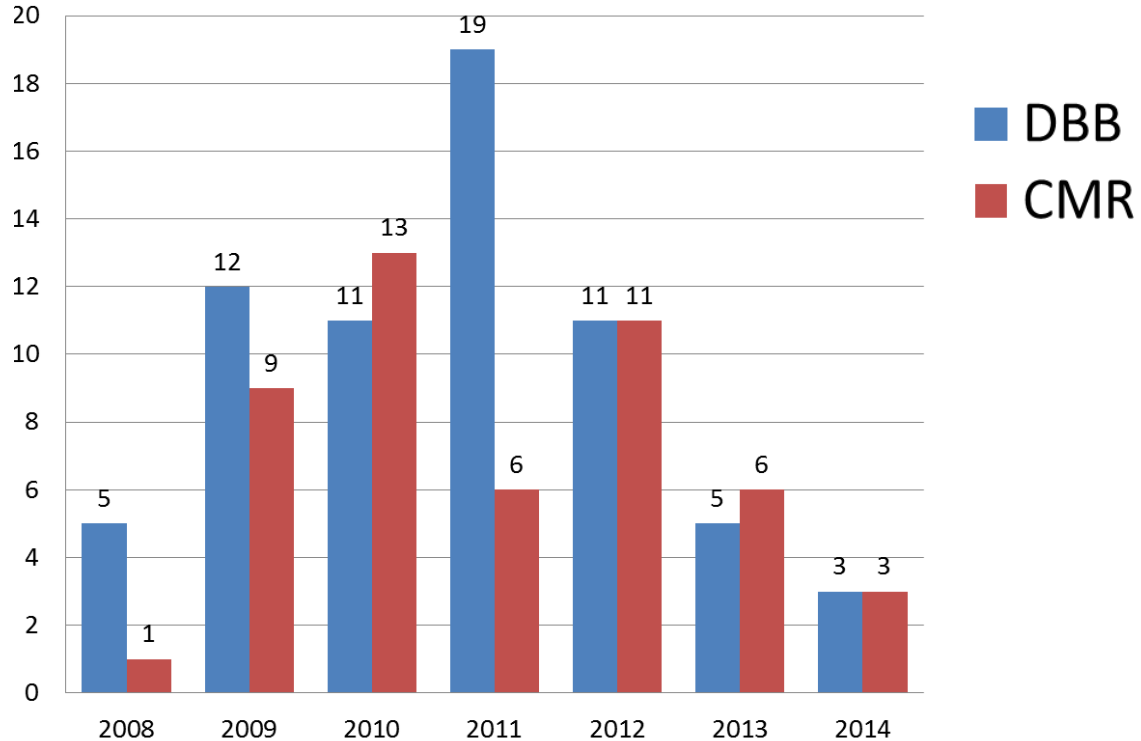
125 projects authorized for PFAs by year between April 2008 and July 2014





Construction Methodology Summary Data

115 of the 125 projects are eligible for Construction Manager at Risk

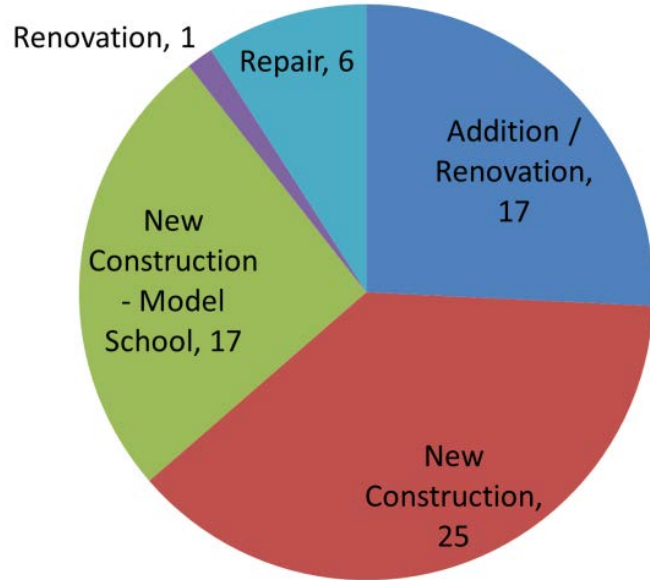




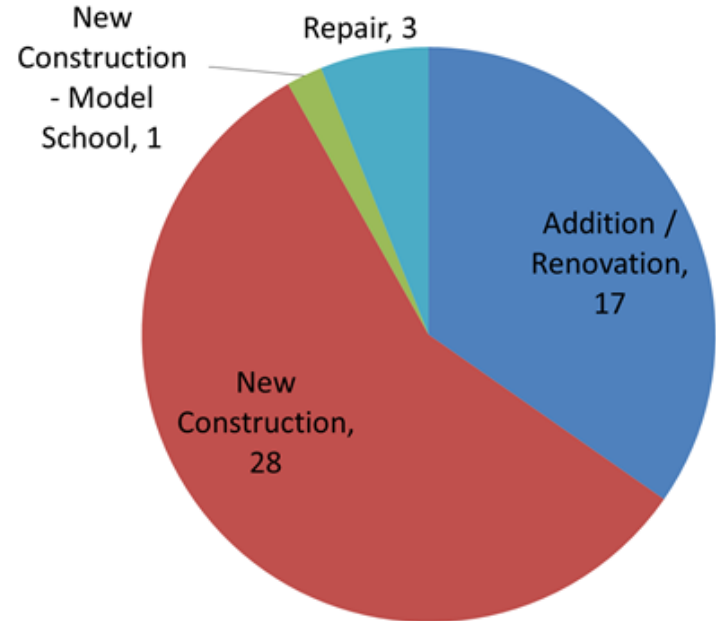
Construction Methodology Summary Data

71 of 115 projects are New Construction or New Construction - Model School

66 DBB



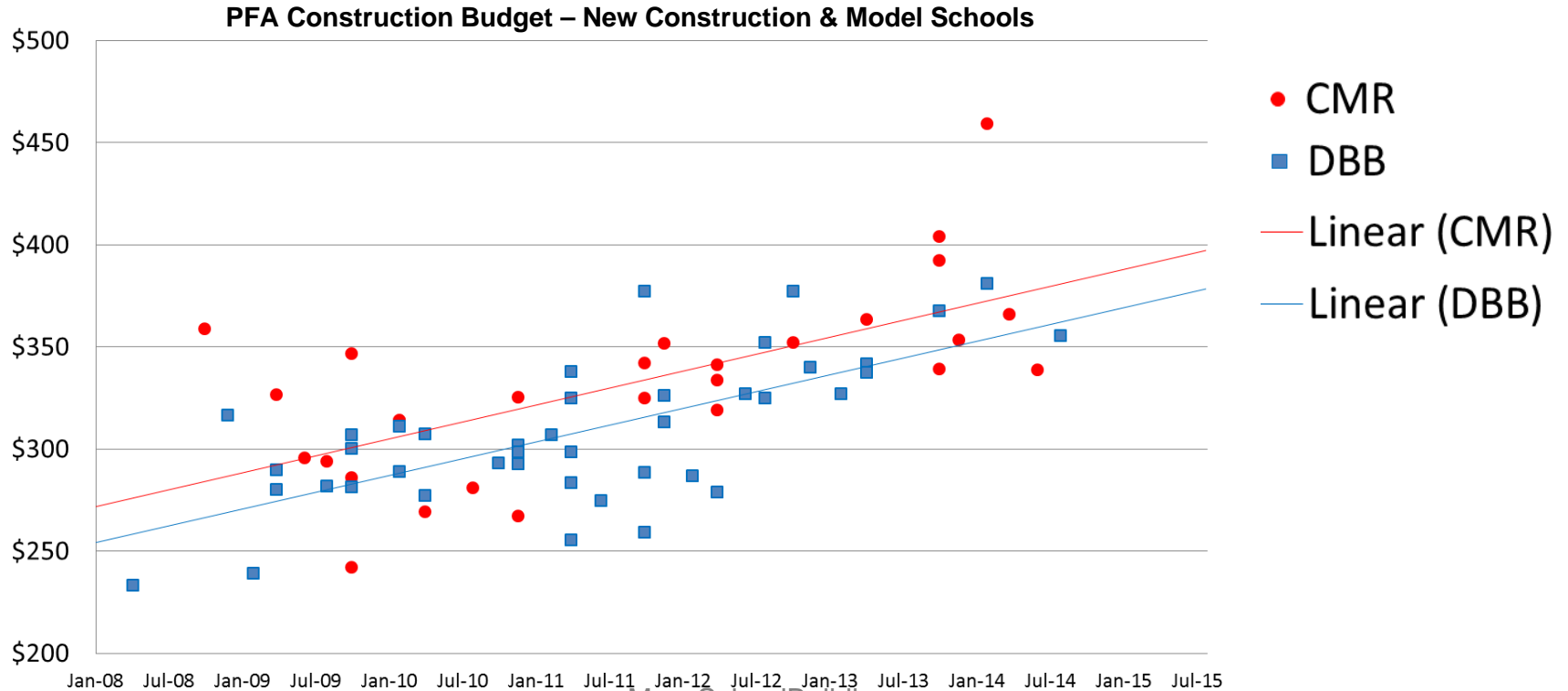
49 CMR





Construction Methodology Cost Data

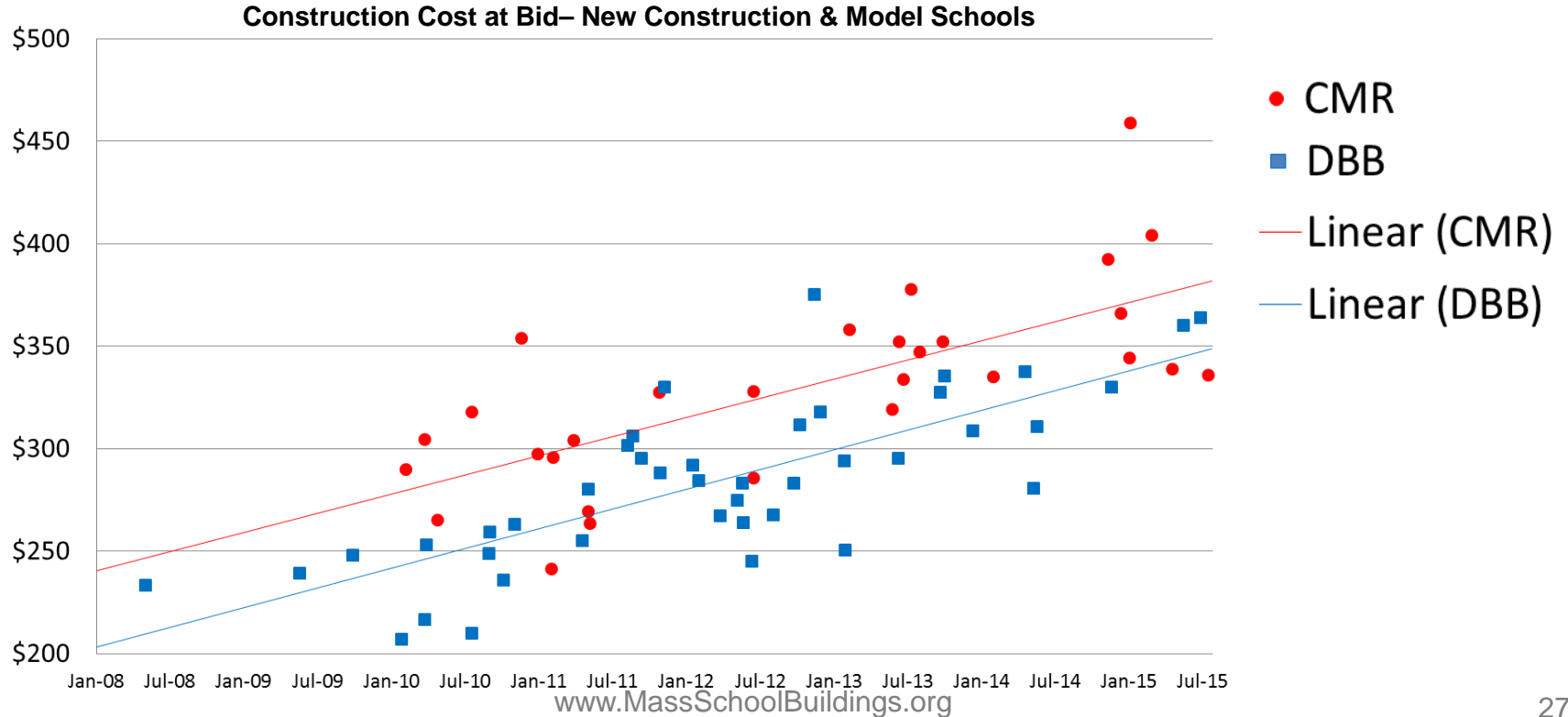
71 projects authorized for PFAs between April 2008 and July 2014





Construction Methodology Cost Data

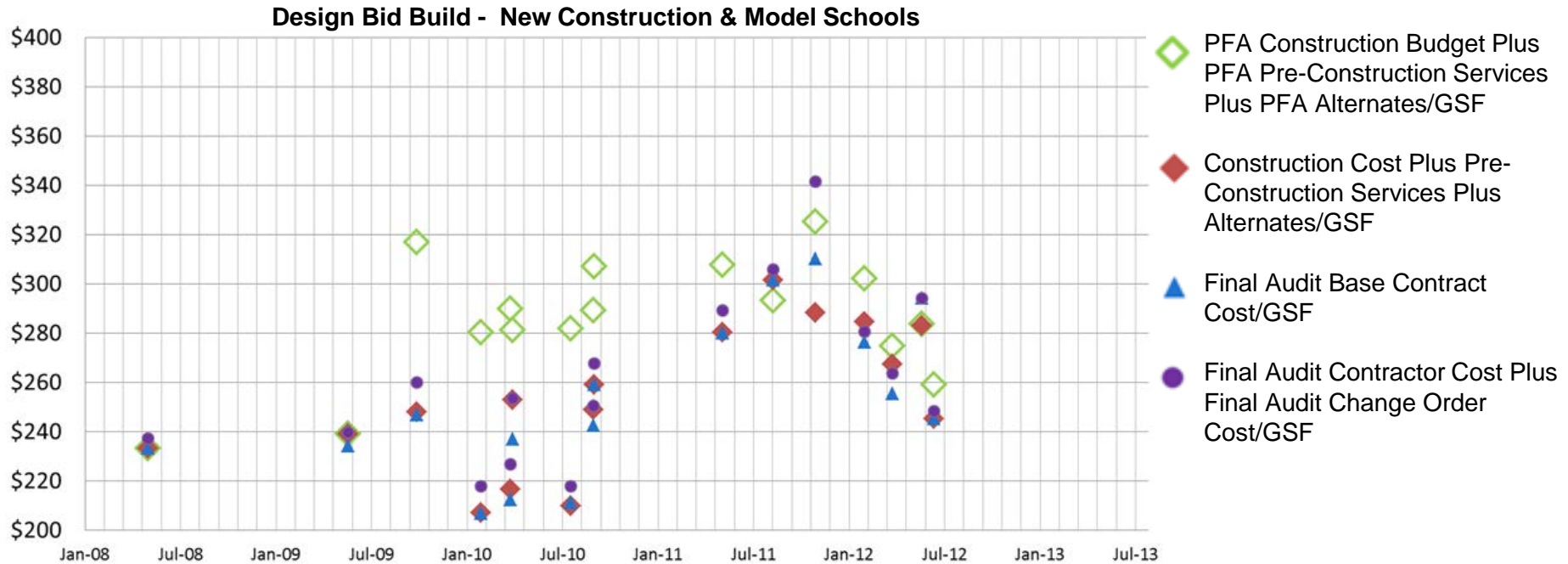
71 projects authorized for PFAs between April 2008 and July 2014





Construction Methodology Cost Data

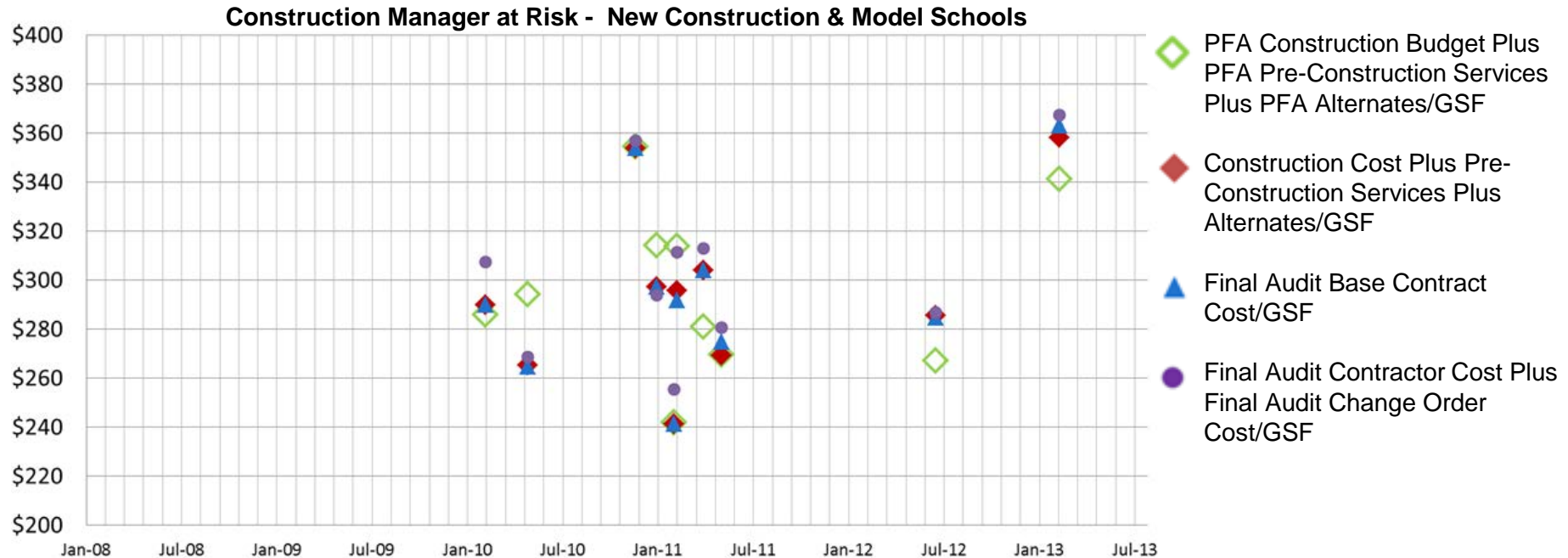
16 Design Bid Build projects authorized for Final Audit





Construction Methodology Cost Data

10 Construction Manager at Risk projects authorized for Final Audit

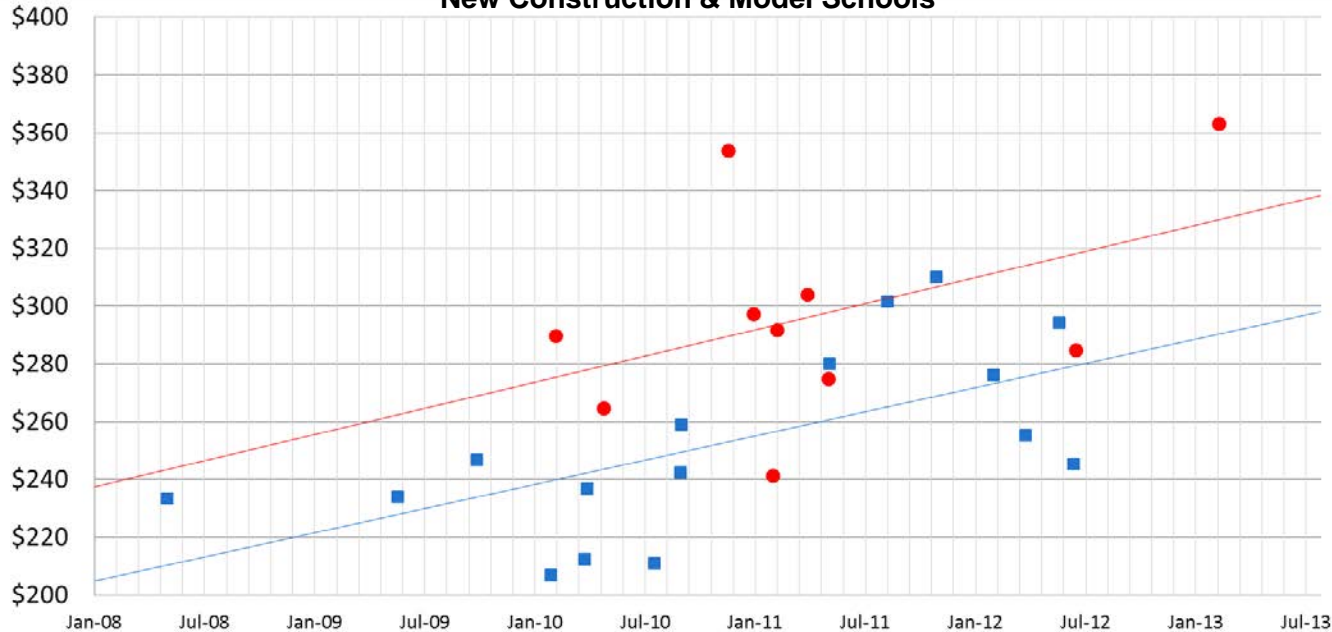




Construction Methodology Cost Data

26 total projects authorized for Final Audit

Construction Cost without Change Orders at Final Audit
New Construction & Model Schools



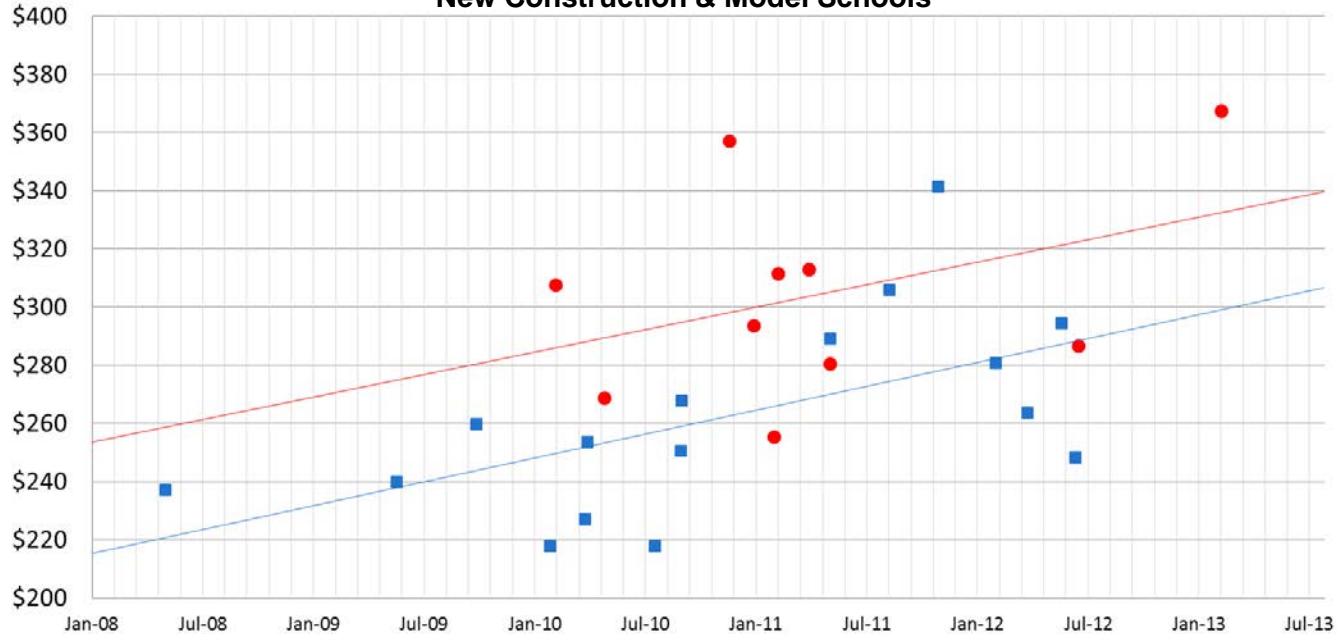
- CMR
- DBB
- Linear (CMR)
- Linear (DBB)



Construction Methodology Cost Data

26 total projects authorized for Final Audit

Construction Cost including Change Orders at Final Audit
New Construction & Model Schools



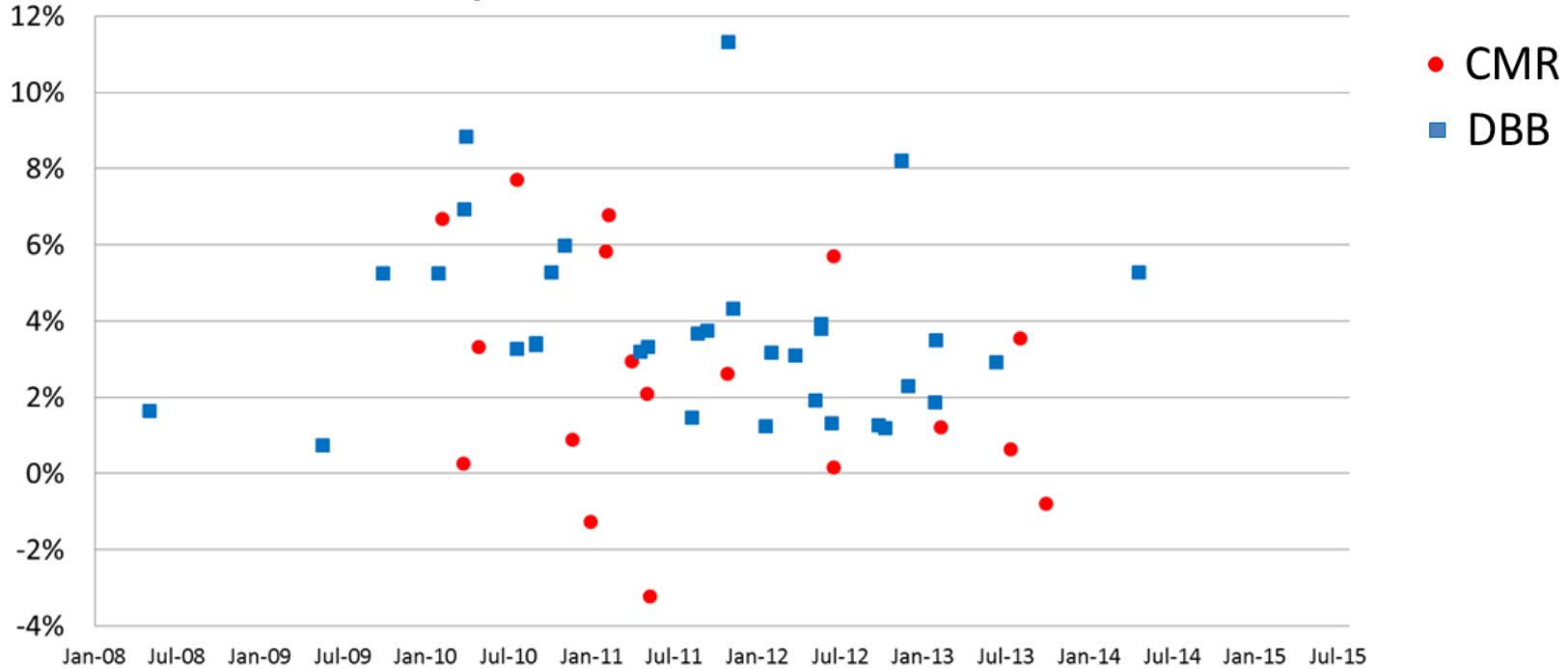
- CMR
- DBB
- Linear (CMR)
- Linear (DBB)



Construction Methodology Change Order Data

51 new construction projects having exceeded 90% physical progress

Total Change Orders – New Construction & Model Schools

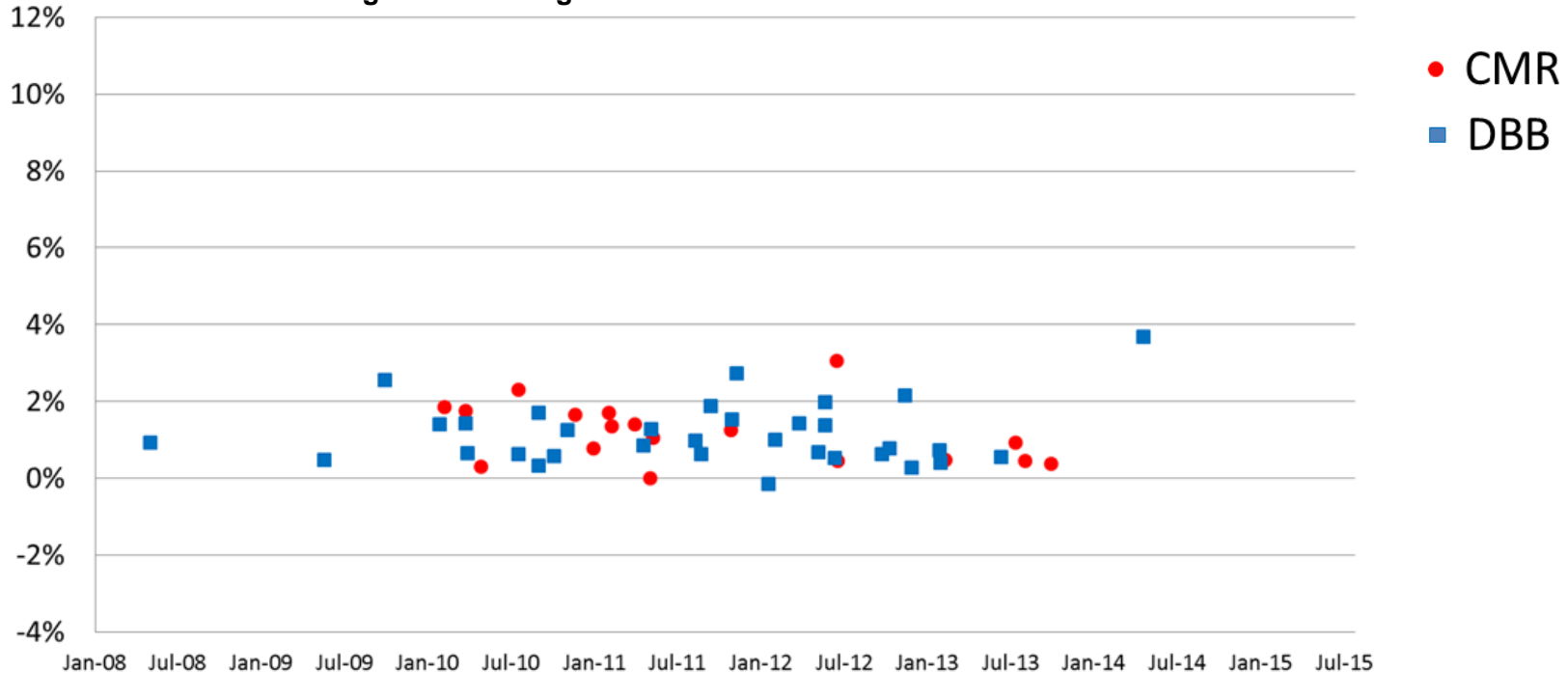




Construction Methodology Change Order Data

51 new construction projects having exceeded 90% physical progress

Design Issue Change Orders – New Construction & Model Schools

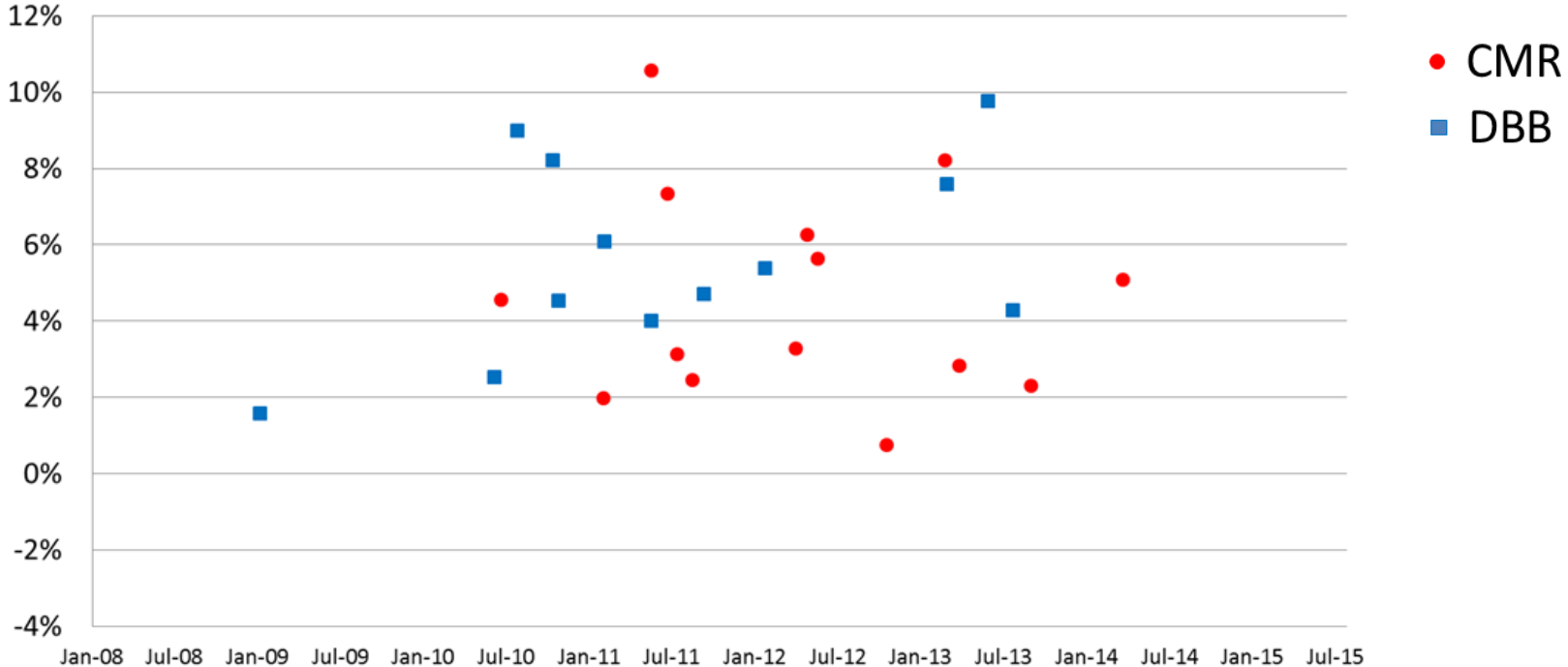




Construction Methodology Change Order Data

51 new construction projects having exceeded 90% physical progress

Total Change Orders – Addition/Renovation

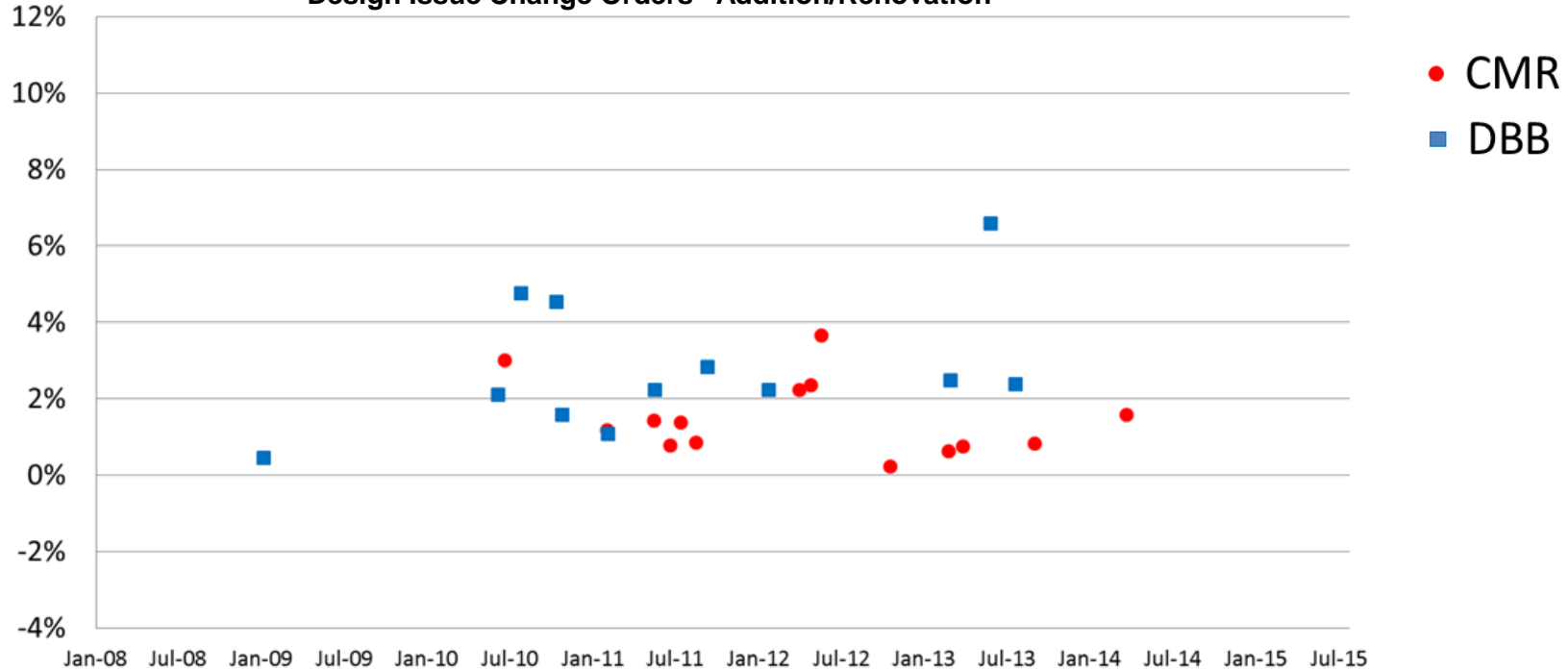




Construction Methodology Change Order Data

51 new construction projects having exceeded 90% physical progress

Design Issue Change Orders– Addition/Renovation





Construction Methodology Summary Data

Construction Costs per Project Phase

- Schematic Design Estimate: Linear trend lines for estimated construction costs of both Design Bid Build and Construction Manager at Risk projects reflect an approximate \$23 per square foot difference between Design Bid Build and Construction Manager at Risk projects.
- Bid Result: When evaluating construction cost as established in the Project Funding Agreement Amendment based on bid price or executed Guaranteed Maximum Price, the linear trend line begins in January 2008 at an approximate \$38 per square foot difference and ends in July 2015 at an approximate \$35 per square foot difference.



Construction Methodology Summary Data

Construction Costs per Project Phase

- Final Audit: Evaluating the 26 projects which have reached the Final Audit phase, including change order cost, the final cost of twelve of the 16 Design Bid Build projects (75%) and three of the ten Construction Manager at Risk projects (30%) was less than the estimated cost. If change order cost is not considered, 14 Design Bid Build projects (88%) and five Construction Manager at Risk projects (50%) remain within their estimated cost.



Construction Methodology Summary Data

Change Orders per Construction Methodology and Project Type

- Comparing new construction projects by design issue change orders as a percentage of the bid cost or executed Guaranteed Maximum Price, the percentages for projects do not differentiate between the construction methods and are commonly between 0% and 2%.
- Like new construction, a comparison of design issue change orders for Addition/Renovation projects reveal little difference between the construction methods.

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Upcoming Roundtable Topics



Exploration Topics for Future Roundtables

- Cost Analysis and Cost Comparison
- Design effect on cost
- Manpower, trade participation, competition
- Opportunities to increase competition in public construction

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