**ATTACHMENT A**

**Documentation required for Massachusetts School Building Authority (the “MSBA”) approval process**

Attachment A consists of two parts:

* **Part 1: Template Narrative of the Procurement and Selection Process for the Owner to Complete**

The information contained in the narrative should be detailed and clearly explain the procurement process and the selection process. The information provided should be supported by the documentation detailed in the Confirmation of Required Information list, which is referenced below as Part 2 of Attachment A. **Please note: This is a standard MSBA form that should only be changed for formatting purposes.**

The narrative must be signed by the Procurement Administrator and Chief Executive Officer (the “CEO”), on behalf of the Owner. The Procurement Administrator and the CEO must certify that a qualifications-based selection process was used, state that the Owner recommends the selected respondent as the Owner’s Project Manager (“OPM”), and state that the Owner is seeking the MSBA’s approval of the OPM. A copy of the MSBA standard Contract for Project Management Services signed **only** by the selected respondent shall be included in the Owner’s narrative. **The District should not sign this contract until the MSBA OPM Review Panel has approved the Owner’s selection.**

* **Part 2: List of Required Information for the Owner to Complete**

The Owner should provide the information requested in the first column of the confirmation list either in the text of the narrative or as an Exhibit, as specified in the chart. The individual designated as a Massachusetts Certified Public Purchasing Official for **Design and Construction Contracting** in the Massachusetts Certified Public Purchasing Official Program as administered by the Inspector General of the Commonwealth of Massachusetts should initial the second column of the confirmation list to confirm that the required information is being submitted and submit the OPM Procurement Certification (Exhibit F).

**\*\*\*All of the information described in Attachment A, including the Exhibits, must be submitted to the MSBA no later than the due date provided by the MSBA to provide the OPM Review Panel with sufficient time to review the materials. Attachment A and other submission requirements can be found on the MSBA’s website:** [**http://www.massschoolbuildings.org/building/team/opm**](http://www.massschoolbuildings.org/building/team/opm)**.**

**ATTACHMENT A - Part 1**

*\*Please note: All bracketed information in the narrative should be filled in or deleted*

**Narrative of the Selection Process**

**Formation of the Selection Committee:**

A Selection Committee was formed by the [District Name] School Building Committee to prepare a Request for Services (“RFS”) for an OPM. The RFS is attached as Exhibit A.

The Selection Committee included the following members:

[In the chart below, list names, titles and a brief description of related experience. Also identify the full-time employee of the Owner who is designated as the procurement administrator and that individual’s Massachusetts Certified Public Purchasing Official (“MCPPO”) certification date.]

|  |  |  |
| --- | --- | --- |
| Name | Title | Description of related experience |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Procurement administrator: [Provide Name, Title, and MCPPO Training Certification Date\*].The procurement administrator was a [voting /non-voting] member of the Selection Committee.

*\*A copy of the current MCPPO certification must be attached if the procurement administrator is different than the “SBC member who is MCPPO certified” in the MSBA-approved School Building Committee form that was provided by the District during the Eligibility Period. If the MCPPO certification is expired, please provide proof of registration in an upcoming MCPPO class.*

**Issuing the Request for Services:**

On [DATE], the Selection Committee presented the RFS to the School Building Committee [or such other body that is authorized under state and local law to approve the RFS and the advertisement of the RFS]. The [INSERT: School Building Committee OR name of other authorized body] approved the RFS and authorized the Selection Committee to advertise the RFS for an OPM. The **certified** vote approving the RFS and authorizing the Selection Committee to issue the RFS is attached as Exhibit B [*the vote should be certified by the appropriate local official and placed on district letterhead]*.

On [DATE], the [District Name] advertised an RFS for an OPM for a school construction project in the Central Register and local newspaper(s), as required by law. [Please list publications]. Copies of the Advertisement (with the name of the publisher visible) are attached as Exhibit C. An informational meeting and site inspection was held on [Date] and [Indicate number] interested parties attended. Questions [were/were not] received from the interested parties [and addressed in published answers and resulted in addenda to the RFS].

**Review of Responses Received:**

[Indicate number] potential respondents requested the RFS including:

[List the names of the respondents in the chart below in alphabetical order.]

|  |
| --- |
| Firm Name |
| 1. |
| 2. |
| 3. |
| 4. |

[Indicate number of respondents] respondents submitted responses by the due date of [Date] as follows:

(Please note if the submission date was extended.)

[List the names of the respondents in the chart below in alphabetical order.]

|  |
| --- |
| Firm Name |
| 1. |
| 2. |
| 3. |
| 4. |

The Selection Committee members each received copies of the responses that were received. The Selection Committee determined which responses comply with the minimum requirements set forth in M.G.L. c.149 §44A½ for an “owner’s project manager” and 963 CMR 2.00 *et seq*.

The Selection Committee then ranked the group of respondents that met the minimum requirements. They ranked this group based on the selection criteria listed in the RFS as described below.

[Insert the Owner’s evaluation criteria from the RFS.]

The Selection Committee ranked the respondents as follows:

[Provide a list of the respondents and the scores for each in the chart below, listed from highest to lowest score.]

|  |  |
| --- | --- |
| Firm Name | Cumulative Average Score  (highest to lowest) |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

The Selection Committee short-listed the following respondents:

[Provide a list of the short-listed respondents in the chart below, listed from highest to lowest score.]

|  |  |
| --- | --- |
| Firm Name | Cumulative Average Score (highest to lowest) |
|  |  |
|  |  |
|  |  |

The Selection Committee [did/did not] conduct interviews of the short-listed respondents.

**Interviews:** *If interviews were conducted, continue with the following narrative.*

[Indicate number] respondents were interviewed and the following questions were asked.

[Provide a list of the interview questions.]

The Selection Committee used the following scoring system in assessing the interviewees, which was in accordance with the process outlined in the Owner’s OPM RFS.

[Provide a detailed description of the scoring system.]

The Selection Committee [did/did not] factor in the respondent’s original scores with the interview scores, which was in accordance with the process outlined in the Owner’s OPM RFS.

[Provide an explanation of how the original rankings and scoring of the respondents were incorporated with the interview scoring to determine a final ranking of the short listed firms as applicable.]

Below are narratives of each interview that the Selection Committee conducted.

[Provide a narrative paragraph for each interviewed respondent including: (1) the responses provided to each interview question, (2) specific information about the strengths and weaknesses realized through the interview questions, and (3) how this information impacted the scoring and/or ranking.]

Narrative about the interview of Respondent A:

Narrative about the interview of Respondent B:

Narrative about the interview of Respondent C:

Narrative about the interview of Respondent D:

Narrative about the interview of Respondent E:

After the interviews, the Selection Committee ranked the three short-listed respondents as follows:

[Provide a list of the ranked, short-listed respondents in the chart below, add to chart if more than three respondents were short-listed.]

|  |  |
| --- | --- |
| Firm Name | Cumulative Average Score  (highest to lowest) |
| 1. |  |
| 2. |  |
| 3. |  |

**Reference Checks:**

The Selection Committee conducted [write in number] reference checks for each short-listed candidate in accordance with the process outlined in the Owner’s OPM RFS, and as summarized in the OPM Reference Checks Matrix (attached as Exhibit E).

**Final Ranking of all Interviewees:**

The Selection Committee ranked [Name of first-ranked Respondent] first based on: [Provide a list of specific supporting reasons].

The Selection Committee ranked [Name of second-ranked Respondent] second based on: [Provide a list of specific supporting reasons].

The Selection Committee ranked [Name of third-ranked Respondent] third based on: [Provide a list of specific supporting reasons].

**Conclusion Statement:**

[Name of selected Respondent] and [Name of City/Town/Regional School District] have completed negotiations and [Name of selected Respondent] has signed the MSBA standard Contract for Project Management Services for a Design/Bid/Build or Construction Manager at Risk project, without modifications to its terms and conditions. The contract as signed only by [Name of selected Respondent] is attached as Exhibit G.

Pursuant to section 3.2 of the Contract between the OPM and [Name of City/Town/Regional School District], the Eligible Applicant for [Name of City/Town/Regional School District] has designated [Name and title of District’s Contact Designee] as the individual who shall have the authority to act on behalf of the Owner under this Contract and who shall be responsible for the day-to-day communication between the Owner and the OPM.

Based on the information as stated above, the undersigned hereby certify that: (1) all required local approvals in connection with the RFS have been obtained, (2) the Owner utilized a qualifications-based selection process, (3) the Owner followed the procurement process that was set forth in the RFS that was issued by the Owner, including the process for scoring and reference checks, (4) the final ranking of respondents accurately reflects the scores received by the respondents, and (5) the scoring sheets used in the selection process are true, complete and accurate. The Owner recommends the selection of [Name of selected Respondent] as the most qualified respondent to provide OPM Services for the proposed [School Name] project. The Owner requests that the MSBA approve its selection as required by 963 CMR 2.11(2).

\**Please print the name of the Chief Executive Officer and Procurement Administrator below his/her signature.*

**Chief Executive Officer** Dated

**Procurement Administrator (MCPPO Certified)** Dated

**Exhibits**

A. RFS including any addenda and questions and answers.

B. School Building Committee (or other authorized body) authorization of membership of the Selection Committee, approval of the RFS, and authorization for the Selection Committee to advertise the RFS.

C. Copy of advertisement in the Central Register and additional publications, including name and date of publication.

D. Copy of the selected respondent’s proposal, including organizational chart.

E. OPM Reference Checks Matrix.

F. OPM Procurement Certification.

G. Original copy of the MSBA standard Contract for Project Management Services signed only by the selected respondent. The Owner should not sign this contract until the MSBA OPM Review Panel has approved the Owner’s selection.

**ATTACHMENT A - Part 2**

**Confirmation of Required Information**

The Procurement Administrator should use this list to ensure that the Owner has included all of the required information in its Narrative and procurement package that it is providing to the MSBA. The Procurement Administrator should review the requirements listed in column one and should confirm that the requirements have been included in the District’s submission by initialing in column three. Please note that all information is required.

|  |  |
| --- | --- |
| District: |  |
| School: |  |
| Procurement Administrator: |  |
| Date RFS issued: |  |
| Respondent Selected: |  |

|  |  |  |
| --- | --- | --- |
| Documentation/Information | Provide in the Narrative or as an Attachment/ Exhibit | Included  (Please Handwrite Initials  Here) |
| A completed Narrative providing all of the required detail specified in the template narrative. | *In Narrative* |  |
| A list of Selection Committee members, including their titles and background. | *In Narrative* |  |
| The name and title of the full-time employee of the Owner designated to be the Procurement Administrator, including the MCPPO Certification date. | *In Narrative* |  |
| MCPPO Certification where required.  \**A copy of the certification is required if the Procurement Administrator is different than the “SBC member who is MCPPO certified” in the MSBA-approved School Building Committee form that was provided by the District during the Eligibility Period. If the MCPPO certification is expired, please provide proof of registration in an upcoming MCPPO class.* | *Attachment* |  |
| Copy of Procurement Documents including the RFS, any addenda, and any questions and answers. | *Exhibit A* |  |
| School Building Committee (or other authorized body) authorization of Selection Committee membership, approval of RFS, and authorization to advertise the RFS. | *Exhibit B* |  |
| Copy of advertisement in the Central Register and public notice including name and date of publication. | *Exhibit C* |  |
| Informational Meeting and Site Inspection held. *(Body of Narrative)* | *In Narrative* |  |
| How many qualification statements were received and from whom. *(Body of Narrative)* | *In Narrative* |  |
| Copy of the proposal submitted by the selected Owner’s Project Manager, including the respondent’s organizational chart. | *Exhibit D* |  |
| Interview questions, explanation of how information was recorded during the interviews, the results of the interviews, and how the interviews result were factored into the selection process. *Only required if interviews were conducted.* | *In Narrative* |  |
| OPM Reference Checks Matrix | *Exhibit E* |  |
| OPM Procurement Certification (Form signed by MCPPO individual certifying that the district followed the appropriate procurement procedures) | *Exhibit F* |  |
| MSBA standard Contract for Project Management Services signed only by selected OPM. | *Exhibit G* |  |
| Additional information: *Please list any additional information that is being provided.* | *Attachment* |  |

**ATTACHMENT B**

**Suggested format for Scoring Sheets**

**(For reference purposes only)**

Scoring sheet by Selection Committee member

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Respondent | Criteria | SCM#1 | SCM#2 | SCM#3 | SCM#4 |
| Respondent 1 | 1 |  |  |  |  |
|  | 2 |  |  |  |  |
|  | 3 |  |  |  |  |
|  | 4 |  |  |  |  |
| Respondent 2 | 1 |  |  |  |  |
|  | 2 |  |  |  |  |
|  | 3 |  |  |  |  |
|  | 4 |  |  |  |  |
| Respondent 3 | 1 |  |  |  |  |
|  | 2 |  |  |  |  |
|  | 3 |  |  |  |  |
|  | 4 |  |  |  |  |
|  |  |  |  |  |  |

Suggested format for Summary scoring sheet for ranking or interview

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Respondent | SCM#1 | SCM#2 | SCM#3 | SCM#4 |
|  |  |  |  |  |
| Respondent 1 | (Total Score) | (Total Score) | (Total Score) | (Total Score) |
| Respondent 2 | (Total Score) | (Total Score) | (Total Score) | (Total Score) |
| Respondent 3 | (Total Score) | (Total Score) | (Total Score) | (Total Score) |