

Amendment 1
to
Owner-OPM Agreement for The Advanced Math & Science Academy Charter School

This Amendment to the Independent Contractor Agreement is made as of this 1st day of September 2022, by and between **The Advanced Math and Science Academy Charter School** (hereinafter "Owner") with its principal place of business at 201 Forest Street, Marlborough, MA 01752 and **Anser Advisory Management LLC** (hereinafter "Consultant") of 18 Tremont Street, Suite 401, Boston, MA 02108.

WHEREAS, Owner has acquired and is prepared to make improvements to their campus at 201 Forest Street (the "Project") and

WHEREAS, Consultant has experience acting as Owners Representative providing services to Owners during all phases of the project; and

WHEREAS, Owner and Consultant (collectively "the Parties") agree that Consultant shall perform such services on the Project under such terms and conditions as provided for herein;

NOW THEREFORE, in consideration of the mutual covenants and agreements herein contained, the parties do agree as follows:

1. Term of Agreement

This original Agreement having commenced as of 28 June 2021 this amendment extends the term from the original construction date of 3 May 2023 through 30 June 2024, unless terminated as otherwise provided in this Agreement.

2. Scope of Services

A matrix outlining the responsibilities of the parties (Owner, OPM, Architect and Construction Manager) is provided as attachment to this amendment.

3. Fee Proposal & Compensation

Compensation will be increased by \$100,000 to a not-to-exceed total of \$390,000 to reflect the extended duration of the contract:

Original Contract	\$290,000
This Amendment	\$100,000
<hr/> Total	<hr/> \$390,000

At any time, AMSA may elect to convert this agreement to a fixed monthly fee by dividing the unpaid balance by the remaining months in the contract.

The rates remain as noted in the original contract:

Managing Director	Tom O'Neil	\$ 210
Project Director	Margaret Wood	\$ 175
Senior Project Manager	Kseniya Slavsky	\$ 155
Project Manager	If utilized	\$ 135
Assistant Project Manager	Josh Luttrell	\$ 120

Reimbursibles for travel shall remain as noted in the original contract.

4. Authority

Executive Director Ellen Linzey represents that s/he has the authority to enter into this Agreement on behalf of Owner.

Ellen Linzey, Executive Director
The Advanced Math & Science Academy Charter School

RHB

Date:



9/19/2022

Tom O'Neil, Managing Director
Anser Advisory

Date:

Attachments: Matrix of Responsibilities
Basis of Fee Proposal

AMSA Matrix of Responsibilities	Anser	FAA Team	WT Rich	QPD/AMSA
I. Permitting and Public Process				
Attend permitting meetings				√
Coordinate Permitting approvals	√			
Coordinate preparation of applications	√			
Assist and advise with the permitting process				√
II. Project set up				
Set up communication and reporting protocols	√			
Develop and manage Master Schedule			√	
Manage Designer Selection Process	√		√	
III. Financing and Acquisition				
Monthly packaging of invoices	√			
Associated reporting and coordination	√			
Audit support.			√	√
IV. Design				
Attend biweekly meetings	√		√	√
Manage value engineering	√	√	√	√
Review final construction and bid documents			√	
Coordinate preparation of front end	√			
Coordinate local utility rebates		√	√	
Review/negotiate design additional services requests.				√
V. Bidding				
Manage MGL Chapter 149a CMaR selection process	√			
Coordinate advertising of filed sub-bids	√			
Trade prequalification (led by WT Rich)	√	√	√	√
Sub-bid review and summary	√	√	√	
Negotiate the GMP	√			√
Obtain required documents (bonds, COI, SOV)	√			
VI. Construction Administration				
Attend weekly job meetings	√	√	√	√
Site observations		√		
Manage Change Order Process	√	√		√
Review/negotiate changes for scope, cause, labor/material loading.		√		
Review/negotiate changes for technical pricing accuracy & verify application of contingency, allowances, holds.	√	√		
Review and comment on requisitions	√	√		√
Review/negotiate subcontractor progress billings		√	√	
Review design invoices for accuracy	√			√
Track and record required documents			√	
Track Certified Payroll			√	√
Manage abutter and interested party relations				√
Establish and manage "open book" processes	√			
Utility invoice management.			√	√
Prepare forms required to draw down funds from funding sources (bond, grants, etc).				√
Monitor schedule	√			√
Review of punch list		√		√
VII. Project Closeout				
Close out and move in schedule				√
Secure receipt of final lien waivers and as-builts			√	√
Secure Occupancy Permits			√	√
Oversee project turnover, including warranties			√	√
Secure O&M manuals			√	√
Oversee owner staff training on building systems			√	√
Provide final DCAMM evaluation of Contractor	√			√

√ Team lead

