

Request for Qualifications

Concord-Carlisle Regional School District

Amenities Building Assessment and Design

Concord-Carlisle High School

500 Walden Street, Concord, MA

July 17 2024

LEGAL NOTICE:

REQUEST FOR QUALIFICATIONS (RFQ)

CONCORD-CARLISLE REGIONAL SCHOOL DISTRICT
AMENITIES BUILDING ASSESSMENT AND DESIGN

The Concord-Carlisle Regional School District (hereinafter “CCRSD”) is accepting proposals from qualified consultants for a for a “**Amenities Building Assessment and Design**” In order for your submission to be considered responsive, this original document must be delivered prior to the time and at the place indicated herein. Sealed proposals for “Amenities Building Assessment and Design - CCRSD” will be received until August 7, 2024, at 2:00 PM at the Business Office, 120 Meriam Road, Concord, MA 01742. Proposals received after such time will not be accepted. Sealed envelopes containing proposals must be clearly marked in accordance with the Submission Instructions.

The work shall consist of written proposals from qualified Contractors to provide a Amenities Building Assessment and Design at Concord-Carlisle High School, adjacent to the football field. All proposals for this project are subject to applicable bidding laws of Massachusetts. To the extent applicable, the following sections of Massachusetts General Laws are incorporated herein by reference: M.G.L c.7C, Sections 44-58

In the event of any inconsistency between the Request for Qualifications, Advertisement, Conditions or any other applicable statutes, by-laws or regulations existing on the date on which the proposal is submitted, then the statute, by-laws or regulations shall govern. Such inconsistency shall not be grounds for invalidating the proposals. The proposer agrees that this proposal shall be good and may not be withdrawn for a period of 60 days, Saturdays, Sundays and legal holidays excluded after the opening of proposals.

Request for Qualifications (RFQ) documents will be available at 10:00 AM on July 17th, 2024. Documents may be requested via e-mail to the District’s Assistant Business Manager at Rmathieu@concordps.org. Include “Amenities Building RFQ – CCRSD” in the subject field. The Owner reserves the right to waive any informalities or to reject any or all proposals.

Project Name: Amenities Building Assessment and Design

Project Location(s): Concord-Carlisle Regional High School
500 Walden St, Concord, MA 01742

Awarding Authority: Concord-Carlisle Regional School District
120 Meriam Rd, Concord, MA 01742

Advertisement: Posted

RFQ Available: July 17, 2024, at 10:00 AM
Email request to Rmathieu@concordps.org with subject line “Amenities Building Assessment and Design”

Questions Due: August 1, 2024, at 12:00 PM

Email Questions to: Rmathieu@concordps.org

Proposals Due: August 7, 2024, at 2:00 PM
120 Meriam Rd, Concord, MA 01742

Est. Award Date: August 20, 2024
Est. Work Start Date: September 1, 2024
Interim Report Due: October 1, 2024
Final Design Due: November 1, 2024

Background Information

In accordance with Massachusetts General Law, the Concord-Carlisle Regional School District is seeking the services of a qualified “Designer” within the meaning of G.L. Ch.,7C, Sections 44-58 to provide professional design services to conduct a comprehensive and detailed study of alternatives for an amenities building, and/or smaller facilities with solely bathrooms. The District seeks candidates with experience in designing facilities for school districts, assessing conditions, cost estimating and knowledge of building code requirements.

Briefing Session

A non-mandatory briefing session **may be held** for interested parties, at the discretion of the district. All interest parties will be notified of meeting venue and date/time if this meeting is to occur.

Scope of Services

The service requested in the RFQ for the Amenities Building Assessment and Design shall be completed by a qualified Assessment Team (AT) to be comprised of architectural and engineering professionals with the extensive experience designing building structures and systems.

The selected Contractor shall develop a report showing the considerations, recommendations and alternative options for a stand-alone amenities building at the Concord-Carlisle Regional High School. This report should help the District understand its options for functionality based on the needs expressed during the discovery phase of the project.

The District will make available districtwide and building-based staff for discussions of the goals and desired outcomes of this project.

The successful firm shall create an Interim Report outlining the various options available to the District, and a Final Report which shall include design documents appropriate to use for procurement for construction. Additional detail on the requirements for the interim and final report are in the following section.

Upon receipt of the Interim Report, the District will have internal discussions so that a decision can be made with respect to the agreed upon option to be incorporated into the final report and accompanying design specifications.

The successful firm shall agree to meet at least once, and not more than twice, with the School Committee in a public meeting to review options identified in the “Interim Report”. These meetings will occur on a weekday evening, anticipated to be Tuesday.

Separate and Additional Scopes:

- An additional scope may be added at the discretion of the district. at a negotiated cost, to assist in preparing an application for variances to the plumbing code.
- Should the design be accepted and funds be authorized by the School Committee and regional district towns, the selected firm will also provide bidding services, and construction management

services as follow on scopes of service, at a negotiated fee. Services include: participation in an on-site pre-bid meeting; provide necessary clarifications during the bid process; prepare and issue addenda as necessary; attend the bid opening and review the low bidder's qualifications and bid amounts; and provide a written recommendation for award to the lowest responsible and eligible bidder.

These additional scopes will be negotiated with the selected firm at the same time as the core scope of services, so that the district has a comprehensive view of total project costs.

A. Assessment Report - Interim

The Amenities Building Assessment and Design Interim Report will outline at least three options available to the District, and provide cost estimates for each option.

- One of the options should be based on the schematic design developed during the feasibility study of the CCHS campus that was performed a few years ago. A copy of that design is attached as an Appendix within this RFQ. This option only requires an updated cost estimate for this schematic design.
- At least one of the other two options should be a lower cost alternative, that the selected firm feels will offer as much functionality as can be achieved relative to the schematic design noted above, at a lower cost. It need not be based off the same design, (design may be modified or scaled back or re-created entirely) but rather seek to achieve functionality apparent within that schematic design. Handicap accessible bathrooms are a priority in this option, other functionality may be sacrificed to achieve a lower cost.
- At least one low cost alternatives should be proposed, with attention specifically to providing handicap accessible bathrooms. Non-permanent structures can be provided as options.
- Each of the options presented should evaluate the feasibility of toilet and bathroom facilities having composting capabilities. The impact on design and project cost of incorporating this option should be included in the Interim Report for this option.

B. Final Report and Design Specifications

For the selected option, prepare 100% complete construction documents for bid in accordance with public procurement procedures, including bid form, front end and contractual documents, technical specifications, and detailed drawings. Provide updated construction cost estimates, and an estimate of project milestones/schedule. Attend meetings with district staff to review the final design documents submission. A presentation of the final design to School Committee is required, and may be waived by the District, in its own discretion, if it determines that it is not necessary.

C. The Assessment Team (AT)

The AT will be comprised of the following:

The Assessment team will have detailed knowledge and experience in the field of engineering, and design development for construction projects.

Members of the Assessment team will possess the necessary certifications to perform this work.

The Assessment team will have a clearly defined Project Lead / Manager, with experience leading teams of company staff and in working with subcontractors on similar sized or larger projects.

Minimum Requirements

1. Must be a qualified Designer within the meaning of M.G.L Chapter 7c.
2. Thorough knowledge of Massachusetts State Building Code and applicable plumbing codes.
3. Proposers must have been regularly engaged for at least five (5) years prior to the date of this RFQ in the business of providing facility feasible studies, and development of design specifications for construction projects.
4. Proposers must be able to provide all of the services described in the Scope of Services.
5. Proposers must have the credentialed staff as described in Assessment Team section.
6. Proposers must have performed and can demonstrate similar (or larger scale) assessments for school districts in the past.

Proposal Components

All interested parties must include the following information in their proposal.

1. **Experience:** List and describe the firm's past five (5) years of experience developing school facility assessment reports and design engineering services with a similar project scope. Include the name and telephone number of the reference for all projects on the list.
2. **Team:** Describe and list by name and function of all in-house staff, and sub-Contractors including engineers, and related specialists that will be used on this project. This shall include resumes and a list of their licenses and certifications where applicable. A project manager must be identified.
3. **Approach to Project & Proposed Schedule:** Describe in detail the firm's approach to conducting this work. Submit a proposed schedule for all work required with timeframes for completion showing the ability to meet target dates as outlined in the timeline section.
4. **Report:** Submit one (1) sample feasibility assessment and design report for a construction project from a prior study of a similar nature that most closely depicts our requirements specified herein.

General Conditions

- 1) Each firm must demonstrate that it meets minimum qualifications.
- 2) Contractor shall submit a complete list of all contracts performed in the past five (5) years that are similar in scope to this project with contact names and telephone numbers.
- 3) Contractor shall submit a minimum of three (3) references of contracts performed that are similar in scope to this project with contact names and telephone numbers.
- 4) The district reserves the right to randomly select (3) other projects to contact and obtain feedback from.

- 5) Contractor includes a project manager who has a minimum of five (5) years' experience in performing the work described in this RFQ and is a registered professional engineer or architect.
- 6) The Contractor shall assure that all personnel, equipment and materials necessary to the performance of this award are available and make provision for contingencies in the scheduling of personnel and equipment necessary for performance of in a timely manner.
- 7) The Contractor agrees at all times to furnish competent and experienced employees. The District expressly reserves the right to disapprove any employee and to require the Contractor to furnish another satisfactory to the District. Liability for the Contractor's personnel while in the performance of duty under this contract shall be the sole responsibility of the Contractor.
- 8) The Contractor will indemnify, defend, and hold the District harmless from any and all claims, loss, cost, expense, or damage of any kind resulting from or arising out of performance of the contract by the Contractor, its officers, agents, or employees.
- 9) The Contractor shall keep in force at all times during the term of this contract, a policy or policies of insurance as specified in the General Laws of Massachusetts. The Contractor shall carry public liability insurance covering at least \$1,000,000 limits and property damage coverage of not less than \$100,000 or more at the discretion of the Contractor in order to protect their interest.
- 10) The Contractor shall provide Worker's Compensation insurance for the payment of compensation and the furnishing of other benefits under M.G.L. Chapter 152 to all persons to be employed under this contract and shall continue such insurance in full force and effect during the term of this contract.
- 11) The Contractor agrees to comply with M.G.L. c.6, 172G and provide information on each employee by conducting thorough background checks including criminal background (CORI), sex offender (SORI), and fingerprinting. If required, Contractor will have employees complete drug and alcohol testing.
- 12) This contract is subject to the laws of the Commonwealth of Massachusetts. Any clause, which does not conform to such laws, shall be void, and such laws shall be operative in lieu of said clause. All disputes shall be settled within the Commonwealth of Massachusetts.
- 13) The contract represents the entire and integrated agreement between the parties and supersedes all prior negotiations, representations or agreements, either written or oral. No changes or modifications to the contract shall be made thereto other than by means of a writing signed by the District.
- 14) The District reserves the right to terminate the contract if the Contractor violates the terms of the contract or when service is poor. In addition to penalties assessed, and all other rights of the District under the contract, the Contractor will be notified in writing of service that is poor or unsatisfactory and will correct such deficiency to the District's satisfaction. The District reserves the right to cancel any resulting contract at any time with 30-days written notice.
- 15) No part of any contract and/or financial interest therein resulting from the response to the Request for Proposal may be assigned to any third party in whole or in part.

- 16) The District acknowledges the existence of the Americans with Disabilities Act (ADA) of 1990 and Section 504 of the Rehabilitation Act of 1973. The rights guaranteed within these Acts shall apply to this contract.
- 17) After the receipt deadline, a proposer may not change any provision of the proposal. Minor informalities will be waived or the proposed will be allowed to correct them. If there is a mistake and the intent is clearly evident on the face of the document the mistake will be correct to reflect the intended correct proposal, and the proposer will be notified in writing the proposed may not withdraw the proposal. A proposer may withdraw a proposal if a mistake is clearly evident on the face of the document, but the intended correct proposal is not similarly evident.

Submission Requirements

Describe in narrative form, in one page or less, the Contractor 's approach and technical plan for accomplishing the work listed above. The Contractor's report shall summarize of how the Project will be accomplished in accordance with the RFQ, including describing the overall approach to performing the work.

Provide names and complete résumés for all professional members of the project team. Each member's educational background and professional experience shall be provided. Special skills should be summarized. Identify the person(s) who will be the Project Manager(s) with ultimate responsibility for the work. Team members must be available throughout the duration of the project to actively participate.

The proposal shall provide details of experience and past performance of the Project Manager and members of the team on comparable work for government entities. This section should cover, as a minimum, the substantive nature of comparable engagements, the experience of members of the team in working successfully in matters of similar complexity and the record of the members of the project team for timely performance. Contractors are requested to give sufficient information of their experience to permit the District to understand and verify the exact nature of contribution to other projects and entities.

Identify the specific schedule you propose to follow in completing the tasks and benchmarks for evaluating progress.

Contractor shall discuss the means by which adequate and timely attention to this engagement will be assured.

The fee for this project shall be negotiated and not to exceed \$175,000, for the core scope of services. Alternate scope of services items, should they be needed, will be negotiated separately. The budget amount does not include bidding services or construction administration.

The Contractor shall complete and submit required forms in Appendix A.

Comparative Evaluation Criteria

All proposals meeting the minimum criteria/qualifications will then be evaluated based upon the specific comparative evaluation criteria. The following point schedule will be utilized:

- Highly advantageous - 5 points - Response excels on the specific criterion.
- Advantageous - 3 points - Response meets evaluation standard for the criterion.
- Acceptable - 1 point - Response does not fully meet the criterion or leaves a question or issue not fully addressed.
- Does Not Meet - 0 point - Does not address the criterion, proposal is automatically eliminated from further consideration if “0 points” is received in any category.

Note: Contractors must indicate where evidence of each comparative evaluation criteria may be found within their proposal.

1. Breadth of Company Experience/References (25%):

Highly

Advantageous:

Description and list of ten (10) or more school studies of a similar *scope* with references which have been successfully completed within the last five (5) years. Positive reference feedback.

Advantageous:

Description and list of five (5) or more school studies of a similar *scope* with references which have been successfully completed within the last five (5) years. Positive reference feedback.

Less Advantageous:

Description and list of less than five (5) or more school studies of a similar *scope* with references which have been successfully completed within the last five (5) years. Mostly positive reference feedback.

Unacceptable:

Description and list of less than five (5) or more school studies of a similar *scope* with references which have been successfully completed within the last five (5) years. Significant negative feedback from references, or inability to obtain feedback from references.

2. Team Composition: (35%)

Highly

Advantageous:

Project Manager has more than 10 years experience in facility design and construction work, and holds professional certifications (e.g. AIA's, ED's, Professional Engineering, Registered Architect, LEED, etc). Team members are listed and each member's experience is clearly demonstrated by way of resume and listed qualifications.

Advantageous:

Project Manager has 5-10 years experience in facility design and construction work, and holds professional certifications (e.g. AIA's, ED's, Professional Engineering, Registered Architect, LEED, etc). Team

members are listed and each member's experience is clearly demonstrated by way of resume and listed qualifications.

Less Advantageous: Project Manager has less than 5 years experience in facility design and construction work, and holds professional certifications (e.g. AIA's, ED's, Professional Engineering, Registered Architect, LEED, etc). Team members are listed and each member's experience is clearly demonstrated by way of resume and listed qualifications.

Unacceptable: Project Manager has less than 2 years experience in facility design and construction work, and holds professional certifications (e.g. AIA's, ED's, Professional Engineering, Registered Architect, LEED, etc.). Team members are not listed and each member's experience is NOT clearly demonstrated, with no resume or listed qualifications.

3. Project Approach (25%):

Highly Advantageous: A well-articulated, start-to-finish project approach with details on how the assessment will be accomplished and a proposed schedule that meets our timeline for completion. Schedule shows scope of services, including milestones and meetings.

Advantageous: A well-articulated project approach and schedule but one that does not as clearly delineate the process - may not show what will happen, and when in a clear concise way.

Less Advantageous: A project approach with a schedule but may not be clearly laid out in terms of major milestones and meetings and may not illustrate specifically what will happen or when.

Unacceptable: A project approach without a clear schedule and terms of major milestones and meetings; may not illustrate specifically what will happen or when.

4. Quality of Sample Report (15%):

Submission of one (1) sample Facility Needs Assessment and Design set of reports (from initial to final report) of a project within the last 10 years for review that would best exemplify the work you are capable of:

Highly

<i>Advantageous:</i>	<p>This report sample would include many elements: A table of contents, continuous page numbering so report can be referenced easily, data designed using a pyramid approach (summary information followed by more detailed levels of information). Each section is clearly titled for ease of use.</p> <p>There would be an executive summary that provides a clear snapshot of the plan. This section will be supported with graphs, tables, and charts to aid non-technical people in understanding the findings.</p> <p>This report would provide a detailed analysis of expressed needs and potential costs. The detailed schedules that support the executive summary are provided in an orderly, clear, and consistent layout pattern. The detailed sections align to the areas delineated in the scope of work. These sections summarize the findings for each category (electrical, plumbing, non-building infrastructure, etc.). These sections will also provide a schedule for the components that comprise the associated systems in the category that identify the current condition, estimated useful life moving forward, and any comments and cost estimates for repairs and replacement values.</p> <p>The sample report would include building layouts, pictures and other graphics used to assist in communicating relevant information. This report would be provided in electronic (PDF) format and hardbound version.</p>
<i>Advantageous:</i>	<p>The sample report addresses only the most key components and contains an executive summary, elements of the scope of work, summarizes findings for each category, provides a repair/replacement schedule for all areas, assesses current conditions, and projects useful life moving forward. It also incorporates photos and graphics to assist in communicating relevant information.</p>
<i>Less Advantageous:</i>	<p>The sample report addresses just some of the key components but misses some of the desired elements listed above.</p>
<i>Unacceptable:</i>	<p>The sample report addresses very few of the key components of the desired elements above, or is not provided.</p>

Note: Contractors must indicate where evidence of each comparative evaluation criteria may be found within their proposal.

Submission Instructions

The proposal shall consist of the following items and shall be submitted by each firm desiring consideration:

1. Interested firms shall submit one sealed envelope or container containing three printed and one electronic version on USB of the submission clearly marked on the outside of the envelope “Amenities Building Assessment and Design – Concord-Carlisle Regional School District”.
2. All proposals shall be delivered to 120 Meriam Rd, Concord, MA 01742
3. Submissions must contain the required Proposal Components and supporting data to be evaluated under the Comparative Evaluation Criteria, as well as the required forms in Appendix A
4. Deadline for the submission of proposals is August 7, 2024 at 2:00PM. It is the sole responsibility of the proposer to ensure that the submission arrives on time and at the designated place. In the event the central office is closed due to inclement weather or other reasons on the date proposals are due, the deadline will be extended until the next business day, and if closed again, until such day as the central office is open again.

Rule of Award

Three finalists, provided they meet the minimum criteria, will be selected based on the ratings the district assigns to firms relative to the comparative criteria.

The District will interview the three finalists via ZOOM, or in person, and seek additional information to assess the qualifications of the finalists.

A contract will be awarded to the firm that is in the district’s judgment, the most highly qualified to perform this project, provided that fee is agreed upon during negotiations between the selected firm and the district. The district has budgeted \$175,000 for this project. If fee negotiations are unsuccessful and a contract price cannot be agreed upon, the district will commence negotiations with the second ranked firm on its list. The district reserves its right to contact proposer references and conduct interviews as part of the qualitative rating.

Attachment A – Evaluation Criteria

Comparative Evaluation Criteria Self-Rating Sheet			
Number	Description	Self-Rating	Page of Evidence Location
1	Breadth of Experience/References (25%):		
2	Team Composition: (25%)		
3	Project Approach: (25%)		
4	Quality of Sample Report (25%)		

Appendix A – REQUIRED FORMS

TECHNICAL PROPOSAL - SUBMISSION FORMS

A. CERTIFICATE OF NON-COLLUSION: REQUIRED FORM

Pursuant to M.G.L. Ch. 30b, s10, the undersigned hereby certifies, under penalties of perjury, that this bid or proposal has been made and submitted in good faith and without fraud or collusion with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Certificate of Non-Collusion

The undersigned certifies under the penalties of perjury that this bid or bid has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business partnership, corporation, union, committee, club or other organization, entity or group of individuals.

Signature of person submitting contract/bid

Date

Name of Business

B. CERTIFICATE OF TAX COMPLIANCE

Pursuant to M.G.L. Ch.62c, s49A, I hereby certify, under penalties of perjury that to my best knowledge and belief that the undersigned bidder has filed all state tax returns and paid all state taxes required by law.

Certificate of Tax Compliance

Pursuant to M.G.L. c. 62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

*Social Security Number or
Federal Identification Number*

Signature of Individual or Corporate Name

Corporate Officer (if applicable)

C. CERTIFICATE OF GOOD STANDING

The vendor needs to look themselves up, and then click the button that says “Request Certificate”. You should select “Good Standing” as the certificate choice.

<https://corp.sec.state.ma.us/CorpWeb/Certificates/CertificateOrderForm.aspx>

D. PRICE PROPOSAL – SUBMISSION FORM

CONCORD-CARLISLE REGIONAL SCHOOL DISTRICT CONCORD, MASSACHUSETTS

Price Proposal: The price proposal should be in a separate sealed envelope marked with the consultant's *NAME AND ADDRESS followed by "Concord Public Schools RFP - Amenities Building Assessment and Design"*

The price proposal is for the completion and execution of the scope of work as indicated in the RFP. All project awards are subject to the availability of funds.

TOTAL – Assessment and Design: \$ _____

PRICE PROPOSAL INFORMATION:

Company Name _____

Contact Name _____

Address _____

Phone _____

Signature _____

Add-on Services

TOTAL – Code Variance: \$ _____

TOTAL – Bidding Services: \$ _____

NOTICE:

Proposal should be signed in ink by a person having proper legal authority, and the person's title should be given such as "owner" in the case of individual; "partner" in the case of a general partnership; "president", "treasurer" or other authorized office in the case of a corporation.

E. CERTIFICATE OF AUTHORITY CORPORATE- MEETING OF BOARD OF DIRECTORS

At a meeting of the Board of Directors of _____ duly called
(Corporation)
and held at _____ on the _____ day of __,
(Location)
20_____, at which a quorum was present and acting, it
was voted that _____
(Name)
the _____ of this corporation; and that he/she is
hereby (Title/Position)
authorized to execute contracts in the name and on behalf of said company, and affix it's corporate seal
thereto; and such execution of any contract or obligation in this company's name on its behalf by such,
under seal of this company shall be valid and binding upon this company.

*I hereby certify that the above is a true and correct copy of the record, that said vote has not been amended
or repealed and is in full force and effect as of this date, and that*

_____ is duly elected _____ of this Corporation.

Clerk or Secretary of the Corporation

Date

F. CERTIFICATE OF CORPORATE BIDDER

I, _____, certify that I am the _____ of the Corporation named as Bidder in the attached Bid Form; that _____, who signed said Bid Form on behalf of the Bidder was then _____ of said Corporation; that I know his/her signature hereto is genuine and that said Bid Form was duly signed, sealed and executed for and on behalf of its governing body.

(Corporate Seal)

Name of Bidder

Address of Bidder

Telephone Number

By:

(Signature)

Printed Name

Printed Title

Date

This Certificate shall be completed where Bidder is a Corporation and shall be so completed by its Clerk. In the event that the Clerk is the person signing as the Bidder on behalf of the Corporation, this certificate shall be completed by another officer of the Corporation.

G. CERTIFICATE OF AUTHORITY
SOLE PROPRIETOR

I, _____ as a Sole Owner of my Business, _____
(Name) (Business)

certify that I am authorized to enter into a contract with the Concord Public Schools on behalf of myself.

I have set my hand as the Sole Owner of the Business this

_____ day of _____, 20_____.
Day Month Year

Sole Owner Signature

H. CERTIFICATE OF AUTHORITY - PARTNERSHIP

I, _____, a Principal of _____, do hereby certify that:
(Name) (Partnership)

- (1) I am a Principal of _____, a partnership (the "Partnership");
(Partnership)
- (2) I maintain and have custody of a copy of the Partnership Agreement of the Partnership and a list of the General Partners and Principals of the Partnership assigned;
- (3) I am duly authorized to issue certificates with respect to such Partnership Agreements and such General Partners and Principals;
- (4) I have attached hereto as Certificate Exhibit A, a true, accurate and complete excerpt of the relevant provision of the Partnership Agreement of the Partnership setting forth the authority of a Principal of the Partnership to enter into and sign agreements in the name of and on behalf of the Partnership;
- (5) _____, is on the date hereof, and since or before _____, 20____ has been
(Name) Month Year
a Principal of the Partnership as referred to in Certificate Exhibit A attached hereto;
- (6) As a Principal of the Partnership she/he is fully authorized on behalf of and in the name of the Partnership to enter into and to take any and all actions to execute, acknowledge and deliver the contract with the Concord Public Schools and the Concord Public Schools, providing for the performance by the Partnership of certain management consulting services, and any and all documents, agreements and other instruments (and any amendments, revisions, or modifications thereto) as she/he may deem necessary, desirable or appropriate to accomplish the same;
- (7) The signature of _____, as Principal of the Partnership affixed to any instrument or
(Name)
document described in or contemplated by the preceding paragraph shall be exclusive evidence of the authority of said Principal to bind the Partnership thereby;
- (8) The excerpt of the Partnership Agreement of the Partnership attached as Certificate Exhibit A has not been revoked, annulled, or amended in any manner whatsoever and remains in full force and effect as of the date hereof;
- (9) The following persons, whose signatures appear below, have been duly appointed or assigned to and now occupy the positions indicated below in the Partnership:

Signature of Partnership Representative Partnership Representative Name & Title

Signature of Partnership Representative Partnership Representative Name & Title

I. CONFLICT OF INTEREST

The Bidder hereby certifies:

I hereby certify that the Bidder understands that the Massachusetts Conflict of Interest Law, Chapter 268A of the Massachusetts General Laws, applies to the Bidder with respect to the transaction outlined in the Invitation for Bids. I also certify that the Bidder understands that the Bidder, his/her/its officers, employees, agents, subcontractors, and affiliated entities, shall not participate in any activity which constitutes a violation of the Massachusetts Conflict of Interest Law or which creates an appearance of a violation of the Massachusetts Conflict of Interest Law.

Name of Bidder

Address of Bidder

Telephone Number

By: _____ (Signature)

Printed Name

Printed Title

Date

J. STANDARD DESIGNER APPLICATION FORM

Commonwealth of Massachusetts Standard Designer Application Form for Municipalities and Public Agencies not within DSB Jurisdiction (Updated July 2016)	1. Project Name/Location For Which Firm Is Filing:		2. Project #								
			This space for use by Awarding Authority only.								
3a. Firm (Or Joint-Venture) - Name and Address Of Primary Office To Perform The Work:		3. Name Of Proposed Project Manager: For Study: (if applicable) For Design: (if applicable)									
3b. Date Present and Predecessor Firms Were Established:		3f. Name and Address Of Other Participating Offices Of The Prime Applicant, If Different From Item 3a Above:									
3c. Federal ID #:		3g. Name and Address Of Parent Company, If Any:									
3d. Name and Title Of Principal-In-Charge Of The Project (MA Registration Required): <div style="display: flex; justify-content: space-between;"> Email Address: </div> <div style="display: flex; justify-content: space-between;"> Telephone No: Fax No.: </div>		3. Check Below If Your Firm Is Either: <div style="display: flex; justify-content: space-between; margin-top: 5px;"> (1) SDO Certified Minority Business Enterprise (MBE) <input type="checkbox"/> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> (2) SDO Certified Woman Business Enterprise (WBE) <input type="checkbox"/> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> (3) SDO Certified Minority Woman Business Enterprise (M/WBE) <input type="checkbox"/> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> (4) SDO Certified Service Disabled Veteran Owned Business Enterprise (SDVOBE) <input type="checkbox"/> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> (5) SDO Certified Veteran Owned Business Enterprise (VBE) <input type="checkbox"/> </div>									
4. Personnel From Prime Firm Included In Question #3a Above By Discipline (List Each Person Only Once, By Primary Function -- Average Number Employed Throughout The Preceding 6 Month Period. Indicate Both The Total Number In Each Discipline And, Within Brackets, The Total Number Holding Massachusetts Registrations):											
Admin. Personnel	_____	(_____)	Ecologists	_____	(_____)	Licensed Site Profs.	_____	(_____)	Other	_____	(_____)
Architects	_____	(_____)	Electrical Engrs.	_____	(_____)	Mechanical Engrs.	_____	(_____)		_____	(_____)
Acoustical Engrs.	_____	(_____)	Environmental	_____	(_____)	Planners: Urban./Reg.	_____	(_____)		_____	(_____)
Civil Engrs.	_____	(_____)	Fire Protection	_____	(_____)	Specification Writers	_____	(_____)		_____	(_____)
Code Specialists	_____	(_____)	Geotech. Engrs.	_____	(_____)	Structural Engrs.	_____	(_____)		_____	(_____)
Construction Inspectors	_____	(_____)	Industrial	_____	(_____)	Surveyors	_____	(_____)		_____	(_____)
Cost Estimators	_____	(_____)	Interior Designers	_____	(_____)		_____	(_____)		_____	(_____)
Drafters	_____	(_____)	Landscape	_____	(_____)		_____	(_____)	Total	_____	(_____)
5. Has this Joint-Venture previously worked together? <div style="display: inline-block; margin-left: 20px;"> <input type="checkbox"/> Yes </div> <div style="display: inline-block; margin-left: 20px;"> <input type="checkbox"/> No </div>											

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

CITY / TOWN / AGENCY

Prime Consultant
Principal-In-Charge

Project Manager for Study

Project Manager for Design

Discipline
(from advertisement)

Name Of Firm
Person In Charge Of Discipline
Mass. Registr. #
MBE/WBE Certified (If
Applicable)

Discipline
(from advertisement)

Name Of Firm
Person In Charge Of Discipline
Mass. Registr. #
MBE/WBE Certified (If
Applicable)

Discipline
(from advertisement)

Name Of Firm
Person In Charge Of Discipline
Mass. Registr. #
MBE/WBE Certified (If
Applicable)

Discipline
(from advertisement)

Name Of Firm
Person In Charge Of Discipline
Mass. Registr. #
MBE/WBE Certified (If
Applicable)

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

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

8b. List Current and Relevant Work By Sub-Consultants Which Best Illustrates Current Qualifications In The Areas Listed In The Advertisement (Up To But Not More Than 5 Projects For Each Sub-Consultant). Use Additional Sheets Only As Required For The Number Of Sub-Consultants Requested In The Advertisement.					
Sub-Consultant Name:					
a. Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Relevant Experience	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
				Construction Costs (Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was/Is Responsible
(1)					
(2)					
(3)					
(4)					
(5)					

9. List All Projects Within The Past 5 Years For Which Prime Applicant Has Performed, Or Has Entered Into A Contract To Perform, Any Design Services For All Public Agencies Within The Commonwealth.					
# of Total Projects:		# of Active Projects:	Total Construction Cost (In Thousands) of Active Projects (excluding studies):		
Role P, C, JV *	Phases St., Sch., D.D., C.D., A.C.*	Project Name, Location and Principal-In-Charge	Awarding Authority (Include Contact Name and Phone Number)	Construction Costs (In Thousands) (Actual, Or Estimated If Not	Completion Date (Actual or Estimated) (R)Renovation or (N)New
		1.			
		2.			
		3.			
		4.			
		5.			
		6.			
		7.			
		8.			
		9.			
		10.			
		11.			
		12.			

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

10.	Use This Space To Provide Any Additional Information Or Description Of Resources Supporting The Qualifications Of Your Firm And That Of Your Sub-Consultants For The Proposed Project. If Needed, Up To Three, Double-Sided 8 ½" X 11" Supplementary Sheets Will Be Accepted. <u>APPLICANTS ARE ENCOURAGED TO RESPOND SPECIFICALLY IN THIS SECTION TO THE AREAS OF EXPERIENCE REQUESTED IN THE ADVERTISEMENT.</u>																																
Be Specific – No Boiler Plate																																	
11.	Professional Liability Insurance: <table style="width: 100%; border: none;"> <tr> <td style="width: 30%;">Name of Company</td> <td style="width: 30%;">Aggregate Amount</td> <td style="width: 30%;">Policy Number</td> <td style="width: 10%;">Expiration Date</td> </tr> </table>	Name of Company	Aggregate Amount	Policy Number	Expiration Date																												
Name of Company	Aggregate Amount	Policy Number	Expiration Date																														
12.	Have monies been paid by you, or on your behalf, as a result of Professional Liability Claims (in any jurisdiction) occurring within the last 5 years and in excess of \$50,000 per incident? Answer YES or NO . If YES, please include the name(s) of the Project(s) and Client(s), and an explanation (attach separate sheet if necessary).																																
13.	Name Of Sole Proprietor Or Names Of All Firm Partners and Officers: <table style="width: 100%; border: none;"> <tr> <td style="width: 20%;">Name</td> <td style="width: 15%;">Title</td> <td style="width: 15%;">MA Reg #</td> <td style="width: 15%;">Status/Discipline</td> <td style="width: 20%;">Name</td> <td style="width: 15%;">Title</td> <td style="width: 15%;">MA Reg #</td> <td style="width: 15%;">Status/Discipline</td> </tr> <tr> <td>a.</td> <td></td> <td></td> <td></td> <td>d.</td> <td></td> <td></td> <td></td> </tr> <tr> <td>b.</td> <td></td> <td></td> <td></td> <td>e.</td> <td></td> <td></td> <td></td> </tr> <tr> <td>c.</td> <td></td> <td></td> <td></td> <td>f.</td> <td></td> <td></td> <td></td> </tr> </table>	Name	Title	MA Reg #	Status/Discipline	Name	Title	MA Reg #	Status/Discipline	a.				d.				b.				e.				c.				f.			
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b.				e.																													
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14.	If Corporation, Provide Names Of All Members Of The Board Of Directors: <table style="width: 100%; border: none;"> <tr> <td style="width: 20%;">Name</td> <td style="width: 15%;">Title</td> <td style="width: 15%;">MA Reg #</td> <td style="width: 15%;">Status/Discipline</td> <td style="width: 20%;">Name</td> <td style="width: 15%;">Title</td> <td style="width: 15%;">MA Reg #</td> <td style="width: 15%;">Status/Discipline</td> </tr> <tr> <td>a.</td> <td></td> <td></td> <td></td> <td>d.</td> <td></td> <td></td> <td></td> </tr> <tr> <td>b.</td> <td></td> <td></td> <td></td> <td>e.</td> <td></td> <td></td> <td></td> </tr> <tr> <td>c.</td> <td></td> <td></td> <td></td> <td>f.</td> <td></td> <td></td> <td></td> </tr> </table>	Name	Title	MA Reg #	Status/Discipline	Name	Title	MA Reg #	Status/Discipline	a.				d.				b.				e.				c.				f.			
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15.	Names Of All Owners (Stocks Or Other Ownership): <table style="width: 100%; border: none;"> <tr> <td style="width: 20%;">Name And Title</td> <td style="width: 15%;">% Ownership</td> <td style="width: 15%;">MA. Reg.#</td> <td style="width: 15%;">Status/Discipline</td> <td style="width: 20%;">Name And Title</td> <td style="width: 15%;">% Ownership</td> <td style="width: 15%;">MA. Reg.#</td> <td style="width: 15%;">Status/Discipline</td> </tr> <tr> <td>a.</td> <td></td> <td></td> <td></td> <td>d.</td> <td></td> <td></td> <td></td> </tr> <tr> <td>b.</td> <td></td> <td></td> <td></td> <td>e.</td> <td></td> <td></td> <td></td> </tr> <tr> <td>c.</td> <td></td> <td></td> <td></td> <td>f.</td> <td></td> <td></td> <td></td> </tr> </table>	Name And Title	% Ownership	MA. Reg.#	Status/Discipline	Name And Title	% Ownership	MA. Reg.#	Status/Discipline	a.				d.				b.				e.				c.				f.			
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b.				e.																													
c.				f.																													
16.	I hereby certify that the undersigned is an Authorized Signatory of Firm and is a Principal or Officer of Firm. I further certify that this firm is a "Designer", as that term is defined in Chapter 7C, Section 44 of the General Laws, or that the services required are limited to construction management or the preparation of master plans, studies, surveys, soil tests, cost estimates or programs. The information contained in this application is true, accurate and sworn to by the undersigned under the pains and penalties of perjury. <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">Submitted by (Signature) _____</td> <td style="width: 50%;">Printed Name and Title _____ Date _____</td> </tr> </table>	Submitted by (Signature) _____	Printed Name and Title _____ Date _____																														
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