

Town of East Bridgewater
East Bridgewater, Massachusetts

COMMUNICATION AND PROJECT CONTROL PROCEDURES

Project Procedures for Design,
Bid, Award, and Construction Phases

for the

EAST BRIDGEWATER NEW JUNIOR / SENIOR HIGH SCHOOL PROJECT

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I. PREFACE

In order to achieve full coordination and cooperation among the disciplines in the carrying out of their respective services for the Town of East Bridgewater, it is necessary to establish an understanding of the procedures and responsibilities for the tasks to be performed in accomplishing the Town's goals. This report has been prepared to clarify areas of responsibilities and lines of communication between the various parties, and to establish procedures that will be utilized for all aspects of the project as it relates to activities between the Designer, the Town, Owner's Project Manager, and Contractor.

This report is intended to supplement the contract documents and not to modify them. In the event of any conflict between the contract documents and this report, contract documents will govern.

II. PROJECT OVERVIEW

The Town of East Bridgewater, through its East Bridgewater High School Building Committee (EBHSBC), proposes to replace the existing Proposed New Grade 7-12 School with a facility to accommodate the best practices and technologies in the education of Grades 7 through 12.

The Town submitted the project to the Massachusetts School Building Authority (MSBA) under the Statement of Interest (SOI) process in June 2006. At the September 2009 Board of Directors meeting, the MSBA voted to issue an invitation to the Owner to participate in a study of the identified issues at the high school for this Statement of Interest to identify and study possible solutions and, through a collaborative process with the MSBA, reach a mutually-agreed upon solution. In July 2010, the Town was invited by the MSBA to the Model School program. The Town voted an appropriation to hire an Owners Project Manager and Architect through the Schematic Design Phase and Project Scope and Budget offered by the MSBA.

On July 14, 2010, the Town issued a Request for Services for an Owner Project Manager (OPM) which is required for all public construction projects with an estimated value above \$1.5 million. The EBSBC selected *RFWalsh collaborative partners* (RFWCP) as the OPM. The MSBA issued an approval of the OPM selection process and released the Town to move forward with the feasibility study process.

On August 25, 2010 the EBHSBC designer selection subcommittee met to discuss and review the selection process and scoring criteria and proceeded to interview all three firms. Ai3 Architects, LLC was as the highest ranked design firm. The Town of East Bridgewater negotiated a contract with Ai3.

Once the designer was under contract, a desired schematic plan was devised and agreed upon by the Town and the MSBA. The project submitted the Schematic Design to the MSBA for a Project Scope and Budget Agreement in December 2010. The Scope and Budget Agreement sets the total project budget and total reimbursement of eligible costs from the MSBA. The Town secured local approval authorizing the project funds in an

election on February 12, 2011. It is estimated to typically take about 8 months to move from schematic to start of construction and less than 3 years for construction.

III. ADMINISTRATIVE RELATIONSHIP

Introduction

The Town of East Bridgewater, through the East Bridgewater High School Building Committee (EBHSBC), will serve as Owners with the responsibility to perform oversight of the Project in the best interests of the Town.

The Town of East Bridgewater, pursuant to MGL c.149 §44A1/2, has employed the services of *RFWalsh collaborative partners* (RFWCP) to act as the Owner's Project Manager (OPM) for this project. The Town has employed the services of Ai3 Architects LLC to act as the designer. The Town expects that the services of the Project Manager and the Designer will be provided through a team effort in achieving the project budget and schedule goals.

This manual documents the roles, procedures and responsibilities between the Designer, OPM, the Town and the Contractor, in achieving the Town's objectives for this Project.

Definitions

Town

The Town as defined herein and in all contract documents is the Town of East Bridgewater, MA: by and through the Chair of the Selectmen, currently Ms. Theresa McNulty. Authorization and approval of all contracts and expenditures are to be through the East Bridgewater High School Building Committee, currently co-chaired by Mr. Ryan Pratt and David Floeck.

User Agency

The User Agency is the East Bridgewater Public Schools.

Owner's Project Manager (OPM)

The firm employed by the Town to provide Program Management services on the Project, *RFWalsh collaborative partners* (RFWCP).

Designer

The firm employed by the Town to provide Designer services on the Project, Ai3 Architects, LLC.

Contractor

The company or companies who may be awarded a Contract for the construction work on the Project.

Project Management Team

The Project Management Team will consist of designated representatives of the Town, High School Building Committee, User Agency, Designer, and Owner's Project Manager.

Role of the Project Manager

The primary function of *RFWalsh collaborative partners* is to provide professional services in the management of the Project. The objective of these services is to promote efficient coordinated planning, design and construction of the project within an established timetable and budget. In accomplishing this objective, the Project Manager will have the role of leadership of the project team in matters concerned with schedule, budget, procedures, and administering construction contracts for the Owner. In conjunction with carrying out the various management activities, the OPM may make suggestions and recommendations concerning the design and construction documents to the Town. However, final design decisions shall be established in the Owner-Designer Agreement.

The scope of responsibility of the OPM is defined in the Standard MSBA OPM Agreement, and is generally as follows:

- Oversee designer and consultants
- Provide an overall project strategy (phasing)
- Develop a management and communications plan
- Develop and maintain an overall project schedule
- Facilitate communication and activities between the Town and MSBA
- Develop and monitor the project budget and process
 - Impact of design decisions on time and cost
 - Value Analysis
 - Construction packaging and phasing
 - Identification of long-lead items and plan of acquisition or action
 - Provisions for time and cost control in the specifications
 - Provide detailed cost estimates and revisions thereto at each design phase.
- Manage and lead contractor pre-qualification process
- Review and analyze bids and recommend award.
- Provide daily on-site observation of construction activity
- Manage schedule and cost controls
- Manage Change Orders
- Manage for Town the project close out process

Role of Designer

The primary function of the Designer on the project is to carry out those professional activities of project design, documentation and construction observation. The objective of the services performed by the Designer is to produce a design for the facility to meet the Town's needs and requirements and to ensure the implementation of that design in construction. In accomplishing this objective, the Designer will have the role of leadership of the project team in matters related to design of the project, selection of materials, systems, equipment, and construction contract compliance related to workmanship and design.

In general, the scope of responsibilities of the Designer in carrying out the design and inspection activities is outlined as follows:

- Developing a design as necessary to ensure project budget compliance

- Furnishing logical contract packaging and construction documents
- Furnishing schedule information and project milestone data related to the design process, sequence, and progress
- Develop furniture and equipment packages and hazardous waste remediation packages
- Preparing addenda and providing input to change orders through established procedures
- Observation of construction process to ensure technical sufficiency of construction
- Periodic reporting of construction activities and progress as required by the Town
- Reviewing shop drawings, submittals, progress payments in accordance with established procedures and time spans
- Providing a timely response to Requests for Information (RFI)

Design Work Plan

The Designer submitted a proposed Design Work Plan pursuant to this Contract, including anticipated tasks and submittals. The Designer also submitted to the Owner and OPM a proposed work plan schedule consistent with the project schedule included in the RFS. The Design Work Plan contains dates for submittals, deliverables, actions, milestones, design workshops, meetings, and the critical path through all design service activities. It includes allowances of time for the Owner's and the Authority's review and approval of submittals and for necessary submissions for permits in connection with the Project. The work plan also includes a work plan schedule of values consistent with Attachment A to the RFS, which shall be the basis for which payments of the Fee for Basic Services within each Phase shall be made. The work plan schedule of values identifies deliverables within each Phase and percentages of the phase fee payable upon completion of such deliverable.

Communications

The Owner, User Agency, Owner's Project Manager, Designer, Consultants and Contractors shall designate an individual within their respective organizations to serve as their prime contact for communication on this project. All communications will be routed to or through those individuals.

All communications with the public or media will be referred to the Owner's primary contact, Mr. Ryon Pratt, Chairman of the High School Building Committee and the secondary contact will be Ms. Theresa McNulty, Chair of Selectmen of Town of East Bridgewater and the third contact will be Ms. Susan Cote, Superintendent of Schools, for East Bridgewater Public Schools.

The Project Management Team will not discuss the project with the press unless so authorized by the Owner. RFWCP's Corporate Public Relations staff can be made available, if necessary, to assist in dealings with the media.

All communications associated with the Project between Town of East Bridgewater, East Bridgewater Public Schools, East Bridgewater High School Building Committee, other Town agencies, OPM, Designer, Designer's consultants and Contractor, shall be copied

to the OPM. Communications to mean reports, letters, forms, memoranda, submittals, contracts, proposals, invoices, purchase orders, emails, phone conversation records, and transmittals.

Each party may place their own project number on such communications; however, all Project communication shall always be identified as the "East Bridgewater Proposed New Grade 7-12 School Project".

RFWalsh collaborative partners shall maintain all communications in a Project master file. The Project master file will utilize RFWCP's filing codes. All original bids, contracts, purchase orders and invoices are to be kept and filed at Town offices or as required by the Town's Purchasing Officer, only copies will be kept in the project master file maintained by RFWCP.

During Construction, RFWCP shall maintain an onsite master file which shall contain all communication during the construction, fit out and close out phases. This master file shall contain contractor's submittals, architects' supplemental instructions and sketches, change proposals, change orders, all logs and payroll records. This site master file will be combined with the Master File maintained at RFWCP's offices and turned over to the Town as the Project Record at the close out phase of the Project.

Project Meetings

During the course of the Project, meetings between the Owner, User Agency, OPM, Designer, Contractor(s) and other project stakeholders, will be scheduled to facilitate the progress of the Work. Project meetings shall encompass all programs, design and user agency meetings, as well as all construction meetings. It will be the responsibility of the OPM to schedule and manage project meetings, as well as record and distribute the official minutes of all project meetings. Public meetings held by Town officials or committees shall not be categorized as project meetings.

Issue Resolution

During the course of the Project, issues may arise that will require policy decisions by the Owner. The Program Management Team will make initial recommendations. These recommendations will be made to the EBHSBC for review and approval.

IV. DESIGN PHASE PROCEDURES

Feasibility Study

The Feasibility Study is the beginning phase of the design process. It is in the Feasibility Study Phase that the full scope of the project is to be determined and the options available to East Bridgewater will be examined. The ultimate goal of the Feasibility Study is to come to an agreement with the MSBA on a preferred schematic upon which the project can move forward. The Owner is required to ascertain the Authority's input and approval throughout the study process; therefore, the Design Team shall develop and prepare the documentation required to assist the Owner in securing the Authority's

concurrence and/or approval at the following milestones, before proceeding to the next milestone.

Note: Some of the approvals to move to the next milestone require a vote of the MSBA's Board of Directors.

- (a) MSBA approved enrollment projections generated through the MSBA's on-line enrollment projection system
- (b) Scope, cost and schedule for the Feasibility Study
- (c) Preliminary design program
- (d) Budget Statement for Educational Objectives, as defined by 963 CMR 2.02
- (e) Development of alternatives to be studied
- (f) Preliminary evaluation of alternatives
- (g) Final Evaluation of Alternatives
- (h) Recommendation to the MSBA's Board of Directors of the preferred alternative that will be advanced to schematic design

Alternatives to Consider

The Design Team shall define and develop a few reasonable, educationally sound, cost effective and practical solutions to evaluate, that shall satisfy the East Bridgewater Public Schools educational program requirements. The alternatives considered shall address the following as a minimum:

- (a) Analysis of school district student school assignment practices and available space in other schools in the district
- (b) Tuition agreements with adjacent school districts (per MGL c.70B §8)
- (c) Rental or acquisition of existing buildings that could be made available for school use. (per MGL c.70B §8)
- (d) Renovation and/or addition to existing building(s) and related facilities or fields, if appropriate to the Project
- (e) No-build or status quo option, to be used as a benchmark for comparative analysis of all other alternatives
- (f) In some cases, it may also be appropriate to consider construction of new building and the evaluation of potential locations

The Feasibility Report

The Feasibility Study will review the problems identified in the Statement of Interest at the East Bridgewater Public Schools. It will review the feasibility of a model school. The Design Team shall explore each option for conformance to the Education Program, phasing or schedule impacts and overall cost. The EBHSBC, along with DPS, at the conclusion of the Feasibility Study phase, will select a preferred scheme that fulfills the educational mission of the School Department now and in the future and is the most economical alternative in terms of permanent value, low maintenance and low initial cost.

The Feasibility Report shall document the evaluation of the options explored during the Feasibility Study phase, leading to the Recommended Preferred Solution as approved by the EBHSBC and the Town. The report shall document that the Design Team reviewed all available drawings, reports, maintenance reports and other existing data pertaining to the Project, and conducted a thorough on-site review of conditions relating to the Project. The report shall demonstrate that the "Recommended Preferred Solution" complies with all applicable Codes and Regulations, including any special design standards supplied by the Authority.

The Feasibility Report shall include or address the following:

- (a) Potential Alternative to Construction or Renovation
- (b) No Build or Status Quo Option
- (c) School assignment Practices and Available Space
- (d) Underutilized or Vacant Space
- (e) Lease, Rental or Acquisition of Existing Buildings for School Use
- (f) Regional or Tuition Possibilities with Adjacent School Districts
- (g) Cost Estimate for Each Alternative
- (h) Environmental and Cost Impacts of Construction Phasing
- (i) Evaluation of Existing Conditions
- (j) Geotechnical Evaluation and Soils Exploration
- (k) Initial Site Investigation by an LSP
- (l) Analysis of Budget Statement for Educational Objectives
- (m) Analysis of District's Operating and Capital Budget
- (n) Ability of District to Support Operating and Capital Costs and District Funding of All Costs.
- (o) Detailed Scope of Proposed Project
- (p) Architectural & Site Program Drawings
- (q) Description of Major Building Construction Systems
- (r) Budget Cost Estimate
- (s) Projected Cash Flow
- (t) Permitting Requirements
- (u) Design and Construction Schedule
- (v) Sustainable Design goals

Schematic Design

Upon receipt of an Approval to Proceed to Schematic Design Phase, the Designer shall meet with the Owner and OPM to arrive at a mutual understanding of the requirements of the Final Design Program approved in writing by the Owner and the Authority. The

Designer shall develop the Recommended Preferred Solution to a full schematic design level. Schematic design level documentation shall be based on the Final Design Program, shall incorporate Owner and Authority comments and shall include each of the following, to the extent applicable to the Recommended Preferred Solution:

(a) Site analysis, including content, traffic and access, topographic and utilities recognition.

(b) Site Development Plan – Site plan shall be at a minimum scale of 1 inch equals 40 feet and include property lines with bearings and distances, building setbacks, site acreage, wetlands information, proposed and existing topography, proposed and existing buildings and site features, floor and roof elevations for all buildings, proposed and existing utilities and utility connections, emergency equipment access.

(c) Traffic Analysis – Analysis of the impact of anticipated vehicular and pedestrian traffic, including impacts to existing infrastructure, to determine efficient and safe site access.

(d) Environmental Assessment – Provide additional site and building assessments as may be required by the Authority to quantify presence of unsuitable materials and scope of possible remediation efforts.

(e) Geotechnical and Geoenvironmental Analysis – Provide additional geotechnical analysis as may be required by the Owner or the Authority to describe soil conditions, remediation requirements and appropriate foundation.

(f) Program Analysis - A space measurement analysis for the design, which shall verify that the sum of all program floor areas plus all other floor areas equal the gross floor area of the Final Design Program

(g) Code Analysis – Determination of the impact of all federal, state, regional and local codes, regulations and ordinances having jurisdiction, including a listing of permitting and other regulatory filing requirements.

(h) Utility Analysis – Determination of the availability and capacity of all required building utilities. Provide soils analysis and preliminary design for on-site septic/sewage treatment facilities, if required.

(i) Massing Study – An analysis of the building's integration into its surroundings and neighborhood with drawings, models, or photographs.

(j) Schematic Building Floor Plans of all floors and roof at a minimum scale of 1/16" =1'-0" showing all elements of the building, including overall dimensions, gross square footage of each floor and net square footage of each space, response to functional requirements of program, major and minor access, and circulation.

(k) Schematic Exterior Building Elevations for all sides and orientations, indicating all exterior finishes and fenestration.

(l) Building Systems Descriptions – Description in narrative and on schematic plans basic information relative to:

1. Building Structure - a written narrative of the design approach to the structural systems including discussion of the feasible options for foundations and superstructure as well as treatment of special situations such as unusual soils conditions or long spans.

2. Plumbing and HVAC - written narratives of the basic systems and proposed fuel source(s) and a preliminary life cycle cost analysis pursuant to the criteria of M.G.L. c. 149 § 44(m). Provide schematic plans indicating basic distribution concepts and the location of major equipment items such as boilers, water heaters, cooling towers, chillers, air handling units, heat recovery units, exhaust stacks, and special systems (e.g. fume exhausts).

3. Fire Protection - written narratives of the basic systems and design criteria. Provide schematic plans indicating basic distribution concepts and the location of major equipment items such as fire pumps, standpipes, and fire department connections.

4. Electrical (including power, lighting, communications, fire alarm, video/CATV, security/surveillance) - written narratives of the proposed electrical and communications systems resources, needs, and proposed scope. Provide schematic plans indicating basic distribution concepts and the location of major equipment items such as switchgear, standby generator, and control centers/panels.

5. Information Technology - written narratives of the proposed information technology system resources, needs, and proposed scope. Provide schematic plans indicating basic distribution concepts, location of major equipment items such as switches and hubs.

(m) MA-CHPS Scorecard – Pursuant to the MSBA Green School Guidelines, complete a MA-CHPS Scorecard and describe sustainable design features and each high performance green school prerequisite and credit included in the proposed design and a plan for implementation or inclusion of any appropriate public utility energy conservation design programs.

(n) Outline specifications in accordance with Uniformat and M.G.L. c.149 § 44F filed sub-bid format that clearly define the scope of construction, identify the sub-trades pursuant to M.G.L. c. 149 § 44F, establish the quality of materials, finishes, products, equipment and workmanship, and the special or unique conditions of construction.

(o) Accessibility - an analysis of the design's compliance with the Americans with Disabilities Act (ADA) and the Massachusetts Architectural Access Board requirements (MAAB).

(p) Project Schedule - Provide a reasonable level of design-related input to the OPM such that the OPM can prepare a draft schedule for the proposed project for the Owner in the form of a graphic representation (Gantt Chart) of the duration of all tasks,

activities and phases of the design and construction processes against the progression of time, up to a proposed occupancy date.

Dependencies between activities and tasks will be delineated. Individual tasks and activities will be rolled up to the major project milestones. Provide input to the OPM regarding priority actions and activities that may have a major impact on the schedule. The OPM, not the Designer, is responsible for preparing and maintaining the draft and updated project schedule document, except as it pertains to the project design schedule developed under the work plan by the Architect.

(q) Construction cost estimate - in Unifomat II Level 2 format with aggregated unit rates and quantities supporting each item. If independent cost estimates are prepared for the Owner by the OPM in this or subsequent phases, then the Designer shall work with the OPM to resolve such any differences in a cost reconciliation process and shall involve any relevant parties in such process.

Feasibility and Schematic Phase Meetings

The OPM shall lead bi-weekly design coordination meetings between the Designer with appropriate consultants, and the Owner and, as required, the Authority, to provide for review and discussion of design/engineering related issues. The OPM shall provide technical assistance to the Owner and shall take and distribute minutes of these meetings to the Owner. These meetings will be conducted at the Town of East Bridgewater's facility, except when an alternate location is appropriate and all parties are in agreement. Additional participants will attend the meetings when their input is required.

Cost and Schedule Control

The OPM shall monitor the activities and responsibilities of the Designer during this phase and assist the Owner in the review of the proposed scope, schedule and budget, developed by the Designer, including the review of the Designer's preliminary drawings. The OPM shall:

- a. Prepare independent construction cost estimates for comparison with the Designer's cost estimates.
- b. Work with the Owner and Designer to prepare the Project Schedule.

The OPM shall monitor the status of the Designer contract including monitoring the schedule of the Designer, provide review and comment of Designer's work product and make recommendations to the Owner when, in the opinion of the Owner's Project Manager, requirements of the Designer's contract with the Owner are not being fulfilled. The OPM shall meet with the Owner, Designer and other project participants as necessary.

Value Engineering

The OPM shall review the schematic design to recommend Value Engineering Changes (VEC) to the Owner. The Value Engineering Change shall include an analysis of the

constructability, cost, quality and schedule impact. The Designer will be responsible for a thorough review and recommendation on the technical merit of the VEC.

Site Evaluation and Testing

The Designer and OPM shall assist in the implementation of additional site evaluation and testing as required by the Designer, including, but not necessarily limited to, site surveys, wetlands evaluation, environmental evaluations, hazardous materials evaluation, subsurface testing (percolation tests, test pits, borings, etc.), destructive testing and other investigative work in the case of renovation projects.

Green School and Grant Writing

The Designer and OPM shall assist the Owner with the completion of grant applications for funding for the study of green design strategies and assist by identifying green strategies, as appropriate, for study during this phase. The OPM shall assist the Owner and Designer, as needed, in the preparation of the certification required for Green Schools in accordance with MA CHPS or LEED Gold pursuant to the most current MSBA requirement.

MSBA Approval and Project Funding Agreement

At the conclusion of the Schematic Design Phase, the Design Team shall prepare a submission to the MSBA for a Board of Directors approval of the project and the issuance of the Project Funding Agreement (PFA). This submission shall include all the Schematic Design phase drawings, specifications, construction cost estimates and other submittals required by the MSBA. The Schematic Design submission is required to be submitted to the MSBA at least 6 weeks prior to the MSBA Board meeting, to allow for staff review and final recommendation to the Board. It is during this period that the Town, along with the OPM and Designer, shall meet with the MSBA to determine the final scope and budget of the project. These meetings with the MSBA will focus on a detailed review of the space summaries, cost estimates and project schedule. The final scope and budget agreement issued by the MSBA will determine the total amount of reimbursable project costs and the reimbursement rate, along with the total amount of project costs that will not be eligible for reimbursement. It is this agreement that will be presented to the MSBA Board for approval and, once approved will be the basis for the PFA. It is from this MSBA Board vote that the Town has 120 calendar days to obtain total funding approval through debt exclusion and bond authorization votes at Town Meeting and Election. Upon full project funding from the Town, the MSBA will execute the PFA and set the project up in the MSBA's ProPay system for monthly reimbursement of all approved costs.

Design Development

As a model school project, there is no Design Development submittal. Most, if not all, of the tasks and studies will be part of the 50% Construction Document submittal. The final design process is broken into two distinct phases, the Design Development and the Construction Document Phases. The Design Development Phase is where the schematic or preliminary plans that were the basis for MSBA and Town approval are finalized. Meetings with school officials and teachers will be held to confirm the educational

program. Meetings with the EBHSBC with the advice of selected school administration and faculty shall determine the final design of the site layout, floor plans and room layouts, building elevations, building materials, furniture and equipment to be installed will be decided during this phase. The building and site design issues that need to be reviewed and agreed upon in the Design Development Phase include:

- Site Design
 - Traffic patterns and parking
 - Pedestrian flow
 - Material drop off and trash pick up locations
 - Student drop off and pick up locations
 - Athletic Fields
 - Landscaping

- Building Design
 - Final plan layout
 - Interior circulation
 - Classroom layouts
 - Library, Cafeteria, auditorium, Gym, Lobby and Administration design
 - Emergency shelter
 - Community use and activities
 - Building security issues
 - Exterior materials
 - Window types and arrangement
 - Interior materials
 - HVAC system selection
 - Furniture fixture and equipment scope and layout

Progress Meetings – Design Development Phase

The Designer with appropriate consultants, Project Manager, and the EBHSBC Design Sub-Committee, shall attend progress meetings at a minimum of twice monthly for the duration of the Design Development Phase. These meetings will be conducted at the Town of East Bridgewater's facility, except when an alternate location is appropriate and all parties are in agreement. Additional participants will attend the meetings when their input is required. The role of the EBHSBC and the Design Sub-Committee is review, comment and make final approval of the design issues as they are presented.

The Design Phase Progress Meetings shall provide the following:

- Discussion of current issues.
- Receipt of information from the Town.
- Decisions concerning revisions to the Design and Program.
- Progress report from the Designer.
- Review of specific cost reports or studies.
- Review of schedule status.
- General communication between the Designer, Project Manager, the Town, the User Agency.

Construction Documents

The Construction Document Phase is where the building and site design is completed and all the technical information is incorporated into documents that will be issued to pre-qualified bidders. Meetings with the EBHSBC and the Design Sub-Committee shall determine the final details of the site design, building details, selection of colors, furniture, building systems. The building and site design issues that need to be reviewed and agreed upon in the Construction Document Phase are:

- Site Design
 - Plantings
 - Type of exterior light fixtures
 - Athletic facilities outdoor
 - Any site amenities

- Building Design
 - Final material selection
 - Final interior materials and colors
 - Casework design
 - Building security system
 - HVAC system selection
 - Furniture fixture and equipment selection

Progress Meetings – Construction Document Phase

The Designer with appropriate consultants, Project Manager, and the EBHSBC Design Sub-Committee shall attend progress meetings on a bi-monthly basis for the duration of this Phase. These meetings will track the ongoing design process to assure that issues are reviewed and decision made in a timely manner. The form and agenda of these meetings will be similar to that of the design meeting during the previous phase.

Contractor Pre-qualification

During the Construction Document Phase all General Contractors and Filed Sub-contractors will be pre-qualified by a Pre-qualification Committee established for the Project pursuant to MGL c.149 §44D ½ and MGL c.149 §44D3/4. This Committee shall comprise of the OPM, Designer and two members selected by the Owner. The Committee shall be chaired by the OPM. The purpose of the Pre-qualification Committee is to review each contractor responding to a Request for Qualifications issued by the Town. Only General Contractors and Filed Sub-Contractors who are pre-qualified will be eligible to submit bids for the project. The RFQ will contain information on the types and size of the project the contractor has experience in, references on all the projects listed and data on the company's financial health. All this information will be reviewed and the Committee must score each contractor based on the criteria established in the RFQ. Any contractor who fails to score above 70 points will be ineligible to offer a bid on the project. On average about 60 to 80 contractors will submit a pre-qualification package for review.

Project Budget

The Project Budget shall encompass all soft cost (design, management, legal, and miscellaneous Project costs), all hard costs (construction, site and furniture and equipment costs) and a project contingency. It will be the OPM's responsibility to manage the budget process and monitor all costs. A budget summary will be updated and submitted as part of the Project Manager's Monthly Report.

Cost Control

The overall goal of cost control is to monitor the costs during the Design Phase to assist in keeping the project within the original budget allocation. During the Design Development and Construction Document phases, two cost estimates are required by the MSBA in each phase. As the design becomes more complete, the estimates will include construction not included in earlier estimates, thus increasing the total estimated costs. The design contingency will become less to offset the increase in estimated costs. Cost control is achieved by monitoring the design versus the program and the anticipated construction cost throughout the Design Phase by preparing phased estimates and cost reduction adjustments, as necessary.

Estimates and Design Review

The Designer will receive from the OPM the budgets for all phases of the project including contingency. It shall be the Designer's responsibility to manage the design of the Project to ensure the Project Construction costs are within the designated construction budget.

The Owner's Project Manger and the Designer will both provide the phased estimates and value analysis studies as required. Estimates will be prepared at the Schematic Design, Design Development, 60% Construction Document, and 100% Construction Document Phases. The line item components in the estimate will be compared to the previous estimate components to identify major variances. All estimate information will be strictly confidential.

Should there be a significant variance from the budget amount to the estimate, the Designer and OPM will jointly prepare a listing of areas of potential cost reduction for the Town's review. The Designer will be required to furnish the technical data for these cost estimates.

Design Phase Adjustment / Professional Supplemental Service

If after review of the Project design and phased cost estimates, should the Town elect to proceed with a significant scope change; a Design Adjustment will be issued in order to document the program, schedule and budget revisions. A Design Phase Adjustment is to be prepared by the OPM and issued by the Town to authorize the Designer to make significant modifications to the Project. All Design Phase Adjustments shall receive approval by the EBHSBC.

If the Design Phase Adjustment significantly affects the Designer's scope of services, the Designer shall provide a Professional Supplemental Service (PSS) proposal detailing all cost and schedule impacts. All PSSs shall be reviewed and accepted by the OPM. If

accepted, the OPM will present to the EBHSBC for approval and execution adjusting the Designers Contract price and or time.

Designer Submittal Requirements

The Designer will provide submittals at each Design Phase as outlined in the Designer Scope of Services. Prior to beginning design review and estimating, the OPM will check the documents to determine if the contractual submittal requirements have been satisfied. For design review and estimating purposes, a number of duplicate copies will be required.

Schedule Responsibility

It shall be the responsibility of the OPM to prepare a Master Schedule and Critical Date Schedule. The Critical Date Schedule shall set specific dates during the Design Phase to achieve the Project Schedule. It must be recognized by all participants of the schedule, that to the greater degree, the Critical Date Schedule is precipitated by the final completion dates established by the Owner. The Critical Date Schedule shall include the Designer, Town and OPM activities necessary to implement the Project Management Plan as it relates to the design, packaging the documents, early orders, approvals, estimates, bid/award, and Construction Phase interface dates.

It shall be the responsibility of the Owner, OPM and the Designer to achieve their respective activities on schedule.

At any time, if an unforeseen constraint becomes apparent to the Owner, OPM or Designer, which affects his ability to achieve his respective activities on schedule, he shall work with the other Management Team Members to adjust the schedule to minimize the delay and/or recover the lost time.

V. CONSTRUCTION PHASE PROCEDURES

Project Bid Phase

Upon completion of the Contract Documents by the Designer and final review by the OPM, the Project will be advertised to receive bids. The advertisement will be written by the OPM and issued by the Town. The distribution of Contract Documents and receipt of bid deposits will be pursuant to Town procedures. The OPM and Designer will assist the Town in this process. The typical bid period is three (3) weeks for Filed sub-bids with General bids to be received two (2) weeks after the filed sub-bids. A pre-bid conference will be held to allow the potential bidders to examine the site and ask questions of the Designer and OPM. The OPM will manage and record the Pre-bid conference.

All bids will be received at the time and place designated in the advertisement and shall be officiated by a Town officer in accordance with Town procedures and the OPM. Upon review and analysis of bids received, beginning with the lowest apparent bidder first, the Town/OPM shall review required supplemental bid information such as, and not limited to the Minority and Women Business Enterprise contract awards per contract requirements. Once the supplemental bid information is reviewed the OPM shall recommend award of a

contract to the lowest eligible bidder. This recommendation shall be to the Town for their approval and award the contract. Upon Town approval, the OPM will draft a Notice of Intent to Award, to be issued by the Town. The Town will initiate the process to execute a contract with the awarded General Contractor pursuant to Town procedures.

Pre-Construction Conference

Once the Notice to Proceed has been issued, the OPM will organize a pre-construction conference. This meeting will serve as the first project construction meeting with the agenda to orient the Contractor(s) to the various reporting procedures and site rules prior to the commencement of actual construction. The conference attendees will include the Town, OPM, a representative of the Designer, and personnel from the Contractor's organization including, at a minimum, their jobsite superintendent and Project Manager. The EBHSBC, Architect and OPM may elect to require the Contractor to bring representatives of selected major contractors to this meeting.

Construction Observation

The OPM will have a significant presence during the construction phase to observe the progress of the Work and advise the Town and the Designer of any deviations and deficiencies observed in the Work. The OPM's observation duties shall include reasonable diligence to discover work that is not in compliance with the Contract Documents and monitoring the Contractor's compliance to their Contractor Quality Control Program.

Should the Contractor be in non-compliance with their Quality Control Program, a written notification will be transmitted to the Contractor. If the Contractor fails to correct, non-compliance may result in withholding payments.

The Designer will provide periodic visits during construction to determine whether the work is in conformance with the contract documents. These visits will be made in conjunction with weekly jobsite meetings and a monthly visit dedicated to composing a monthly construction observation report. Neither the Designer nor the OPM will be responsible for construction means, methods, sequence or procedures, safety precautions, and programs in connection with the work.

Progress Meeting - Construction Phase

A progress meeting will be held weekly at the jobsite. The day and time for the meetings will be determined at the Pre-Construction Conference for the particular contract.

The regular attendees at the site meetings will include representatives of the Contractor, the Designer, the Town and the OPM. Representatives of the Town, School Department and Educational Facility Planning & Building Committee members may be present to address specific issues. Depending on activities currently underway, the applicable Designer consultants shall attend along with certain sub-contractor trades as deemed appropriate. If non-regular attendees are requested, a 48-hour advance notice will be provided. The OPM will facilitate, record, and chair all construction meetings. The minutes from the previous weeks meeting will serve as the agenda for the next meeting.

At each of the regularly scheduled progress meetings, the Contractor and the Designer shall bring their respective Shop Drawing Logs, RFI Logs and Change Order Logs in order to provide a joint review of the status of the work. The Contractor shall provide all Proposed Change Orders and a two week look ahead schedule noting all activities expected for the coming weeks.

Schedule

It is the responsibility of the Contractor to develop their schedule for the project in accordance with the Contract Documents:

- Within twenty 20 days after Notice to Proceed (NTP), the Contractor shall develop their Critical Path Method Schedule and submit it to the OPM and Designer for review.
- Within seven (7) days of completion of the Schedule, the Contractor will provide the Schedule of Values for review.
- Within fourteen (14) days upon the receipt of the Schedule of Values, the Designer and OPM shall provide comments or approve the Schedule and Schedule of Values for resubmission within seven (7) days.
- Within fourteen (14) days Contractor shall provide a cash flow schedule.

Submittals

The Contractor shall, within fifteen (15) days of NTP or contract execution, submit to the OPM and Designer a schedule of submittals. Submittals shall be comprised of shop drawings, samples or any other information that documents what materials and/ or procedures the Contractor is to provide during the course of the Project to ensure that all construction is in compliance with the contract documents. The Contractor shall assure that all submittals are submitted to the Designer through their office and not directly by the subcontractor. All submittals shall bear the Contractor's signature certifying that the submittal has been checked for conformance to the Contract Documents. The Designer shall, within twenty-one (21) calendar days of receipt of the shop drawings, samples or other submittals, complete their review and return the submittals to the Contractor. The Designer shall include a transmittal form with a complete description of the item(s). Should the submittal be so extensive that additional review time is required; the Designer must advise the OPM immediately.

Shop Drawings which are not in accordance with the requirements stated; for example, submittal of a drawing which does not contain the Contractor's certification that he has checked the same, shall immediately be returned to the Contractor by the Designer with the reason for returning.

The OPM shall be provided with one (1) set of the final approved shop drawing and one (1) sample for the Project master file and other submittals.

Periodic Payments Applications

As is required by the Contract Documents, the Contractor shall submit their estimated value for each activity which must correspond with the activities of the construction schedule and sub-divided as appropriate. The approved cost values (Schedule of Values) will be the basis for processing the future payment requests from the Contractor.

Monthly, prior to a weekly progress meeting, the Contractor shall issue a "pencil" or draft payment noting the requested payment for Work performed the prior month. The Contractor should be prepared to substantiate the actual work completed. If the Contractor's payment request includes payment for stored materials, the appropriate documentation is to be provided. At the progress review meeting, the Owner, the Designer and the OPM, will review the pencil payment request along with an update of the Construction Schedule to verify the Contractor's percentage complete for each item.

The payment application will include the total amount of the contract, total amount earned to date, total amount previously paid, total retention withheld, change orders and amount left unearned. The format of the application shall be the standardize payment application as approved by the MSBA. The Designer and OPM will review and comment on the payment application. The contractor shall make adjustments noted by the Owner's Team and submit a final payment request. The Designer will sign and forward to the OPM who will provide a payment recommendation to the EBHSBC. The EBHSBC will vote their final approval and the payment application will be processed by Town administration. By law, periodic payment applications must be paid to the contractor within 15 days from receipt of the "designer approved" Application from the Contractor.

Construction Change Orders

Construction Change Orders are any changes to the Construction Contract involving Project cost or Project time. The Change Order procedures below represent a suggested set of guidelines to follow for the project. The exact procedures to be utilized will be determined jointly by representatives from the Owner, Designer and the OPM and will be compatible with administrative procedures, Town procurement regulations and the General Conditions.

Change Orders can only be authorized for five reasons.

- Request by the Owner.
- Errors in the Contract Documents.
- Omissions in the Contract Documents.
- The discovery of an existing condition that was unforeseen and not shown in the Contract Documents.
- Change of Law, Regulation or Jurisdiction.

All Owner requests shall be issued by the Designer in the form of a Request for Proposal (RFP). The RFP should contain all information and documentation necessary for the Contractor to determine the additional cost and time required to incorporate the change into the contract. The Contractor shall submit a detailed break down of all costs and additional time required in the form of a Proposed Change Order (PCO) to the OPM.

The Contractor shall notify the OPM of potential changes due to errors or omissions in the contract or discovery of unforeseen conditions. The notification is to be in the form of a Request for Information (RFI) where the Contractor requests clarification of the Contract Documents from the Designer. The Designer shall be the interpreter of the Contract Documents and respond to the RFI within five (5) working days. The OPM shall maintain a log of all RFIs and Designer responses.

If it is determined that a potential change to the contract exists, the Contractor shall assemble and submit a PCO within seven (7) days from receipt of the Designer response to the RFI. The PCO must include substantiation of all the costs and impacts to the project schedule required to incorporate the change to the Project. The PCO must be in the format approved by the Town and detail all costs in materials, labor and equipment. All over head and profit costs must conform to the percentages dictated in the contract.

The OPM will maintain a log of all RFI, PCO and CCD and they are to be reviewed at the weekly project meetings by the Owner, OPM and Designer. Resolving PCOs is a critical element in keeping the project on schedule and will be a major element in the weekly project meetings. The OPM will lead the Owner's team in negotiating all PCOs with the contractor.

When the Contractor and OPM reach agreement on the final cost and time, a final PCO incorporating all negotiated changes will be submitted. The Designer shall assemble all approved PCOs into a Change Order and submit to the OPM. There could be numerous PCOs contained in a Change Order. The OPM will review and approve the Change Order and submit to the EBHSBC for their approval to execute an amendment to the Contract by the Town.

If a negotiated agreement with the Contractor cannot be achieved in a timely manner and the change is of a critical nature, the OPM may determine that a Construction Change Directive (CCD) is required to keep the project on schedule. The CCD requires the Contractor to proceed with the change while the issues of cost and time are being negotiated. The Designer shall issue the CCD with all documentation required to define the scope of Work involved. The CCD is to be executed once signed by the Town and the Contractor. Because time is a critical issue, it is of paramount importance that the Town designates a representative who will have authority to sign the CCD.

Project Time

The Contract stipulates the amount of time allowed for the Contractor to complete the Project. An extension of Contract time can only be granted if the Contractor can demonstrate that the project has been delayed through no fault of the Contractors.

All requests for extension of Contract time will be in the form of a Proposed Change Order. The PCO must contain a detailed analysis of the construction schedule showing the impact and cause of the delay. The Owner, OPM and Designer will review the time extension PCO in relationship to the approved schedule activities and analysis provided by the Contractor. If the time extension is justifiable due to changes in the Work, the OPM

will recommend adjustment in both time and cost. If the time extension is justifiable due to acts of nature, the OPM will recommend an extension of time only with no additional monies approved. A Change Order extending Contract time will be executed in the same process as noted above.

Contractor Claims

A claim is a demand or assertion of rights under the Contract. Contractor claims normally arise from a decision by the Town or an interpretation by the Designer that the Contractor takes issue. All claims must be in writing and must be submitted within 21 days of the written notification of a decision by the Town or interpretation by the Designer. The OPM will receive a copy of all notices of claims by the Contractor against the Owner. The OPM will perform a preliminary evaluation of the contents of the claim; obtain information concerning the claim, and make recommendations to the Town on the claim's substance. The burden to substantiate a claim is with the Contractor; however, it is in the Town's interest that claims are resolved quickly and equitably. It is the OPM's responsibility to document claim's issues and assist the Town in reaching a resolution.

Non-Conforming Work

During the observation or inspection of the work, non-conforming work may be uncovered. The OPM will, in conjunction with the Designer, make recommendations to the Contractor for corrective action on observed non-conforming work. The OPM will also advise when the Contractor is in non-compliance with their Quality Control Program. If there is a disagreement with the conformity of the Work, the Designer shall be the final arbiter of the issue. If the Contractor refuses to correct non-conforming Work, the Town can have the Work corrected by other forces and back charge the Contractor for all costs associated with this action, or negotiate with the Contractor on the appropriate loss of value credit. The OPM, along with the Designer, shall document all non-conforming Work and assist the Town in making a final resolution of the issue.

Project Commissioning

Prior to the project reaching Substantial Completion, the Contractor must complete the Project Commissioning Program. This includes the verification that all systems are properly installed per the documents and written certification that the specified systems have been completed and tested in accordance with the plans and specifications and performance of the systems demonstrated.

Substantial Completion

In conjunction with the OPM, the Designer will make the determination that the Project has achieved Substantial Completion. Substantial Completion is to mean that the work is ready to be used for its intended purposes, can obtain a Certificate of Occupancy and the remaining value of uncompleted work is less than 1% of the contract value. The OPM and Designer will systematically review all the finished work and notify the Contractor of any deficiencies through an itemized punch list. After the Architect completes a follow-up review (back-punch) of the deficiencies, the remaining incomplete punch list items will be

monetized by the Designer to reflect the cost to complete the work by other forces if the Contractor fails to complete the work. The release of project retainage will be based on the value of the monetized punch list. The OPM and Designer will advise the Town of acceptability of project completeness and recommend issuance of the Certificate of Substantial Completion.

Final Completion

The Contractor has 60 calendar days under the Contract to complete the punch list and submit all close out documents. The close out document includes as built drawings, all warranties and all operation and maintenance manuals for all equipment incorporated into the Project. Close out also includes all training of User Group personnel on all equipment. The OPM and Designer will, at the conclusion of all corrective action of all punch list items, make a final comprehensive review of the project, make a report to the Town which will indicate whether the work performed is in compliance with the Contract Documents, and make recommendations as to final payment to the Contractor. The Contractor must submit evidence of release of all sub-contractor liens and resolution of all claims before final payment.

East Bridgewater New Junior/Senior High School



Communication Matrix	Prepared By	Processed By	Approved By	Copies to
Project Management - Project Controls (all phases)				
Contracts	EBHSBC/MSBA	RFWCP	EBHSBC/ MSBA	EBHSBC, MSBA, RFWCP, Ai3, Vendor/ Contractor
EBHSBC Meeting Notes	RFWCP	RFWCP	EBHSBC	EBHSBC, MSBA, RFWCP, Ai3
Project Meeting Notes	RFWCP	RFWCP		EBHSBC, MSBA, RFWCP, Ai3
Project Budget	RFWCP	RFWCP	EBHSBC/ MSBA	EBHSBC, MSBA, RFWCP, Ai3
Invoices	Vendor	RFWCP	EBHSBC	EBHSBC, MSBA, RFWCP, Ai3
Encumbrances	Vendor	RFWCP/EBHSBC	EBHSBC	EBHSBC, MSBA, RFWCP, Ai3
Schedule	RFWCP		EBHSBC	EBHSBC, MSBA, RFWCP, Ai3
Monthly Progress reports	RFWCP	RFWCP		EBHSBC, MSBA, RFWCP, Ai3
Change Order/Claims Admin	RFWCP/ Ai3	RFWCP	EBHSBC	EBHSBC, MSBA, RFWCP, Ai3
Project Records and reports	RFWCP/ Ai3 /Consultants	RFWCP/ EBHSBC		EBHSBC, MSBA, RFWCP, Ai3
Design Phase				
Existing Conditions Survey and Report	Ai3	RFWCP	EBHSBC/ MSBA	EBHSBC, MSBA, RFWCP, Ai3
Feasibility Study/Project Scope	Ai3	RFWCP/ EBPS	EBHSBC/ MSBA	EBHSBC, MSBA, RFWCP, Ai3
Preliminary Project Budget	RFWCP	RFWCP	EBHSBC/ MSBA	EBHSBC, MSBA, RFWCP, Ai3
Designer Selection	RFWCP/ MSBA	EBHSBC	EBHSBC/ MSBA	EBHSBC, MSBA, RFWCP, Ai3
Project Design	Ai3	Ai3/ RFWCP/ EBPS	EBHSBC/ MSBA	EBHSBC, MSBA, RFWCP, Ai3
Design Coordination	Ai3	RFWCP/ Ai3		
Cost Estimating	RFWCP/ Ai3	RFWCP/ Ai3	EBHSBC/MSBA	EBHSBC, MSBA, RFWCP, Ai3
Constructability Review	RFWCP/ Ai3	RFWCP/ Ai3	EBHSBC/MSBA	EBHSBC, MSBA, RFWCP, Ai3
Value Engineering	RFWCP/ Ai3	RFWCP/ Ai3	EBHSBC/ MSBA	EBHSBC, MSBA, RFWCP, Ai3
Commissioning Coordination	MSBA	RFWCP/ MSBA	MSBA	
Contractor Pre-qualification	RFWCP	RFWCP/ Ai3/ EBHSBC	RFWCP/ Ai3/ EBHSBC	EBHSBC, MSBA, RFWCP, Ai3
Bid Review	RFWCP	RFWCP/ Ai3	EBHSBC	EBHSBC, MSBA, RFWCP, Ai3
Award Recommendation	RFWCP	RFWCP	EBHSBC	EBHSBC, MSBA, RFWCP, Ai3
Construction Phase				
Construction Project Meetings	RFWCP	RFWCP/ Ai3/ GC/ EBHSBC		EBHSBC, EBPS, MSBA, RFWCP, Ai3, GC
Monthly payment applications	General Contractor	RFWCP/ Ai3	EBHSBC	EBHSBC, EBPS, MSBA, RFWCP, Ai3, GC
Construction Submittals	General Contractor	Ai3	Ai3	RFWCP, Ai3, GC
Daily Manpower log	General Contractor	RFWCP	RFWCP	RFWCP, Ai3, GC
Construction Inspection	RFWCP/ Ai3	RFWCP	RFWCP	RFWCP, Ai3, GC
T&M/Unit Price Work Oversight	RFWCP/ Contractor	RFWCP	EBHSBC/ RFWCP	RFWCP, Ai3, GC
Construction Change Orders Requests/ Proposals	General Contractor	RFWCP/Ai3	EBHSBC	EBPS, RFWCP, Ai3, GC
Prevailing Wage Oversight	RFWCP/ GC	RFWCP	EBHSBC	EBPS, RFWCP, Ai3, GC
As Built Documentation	GC	RFWCP/ Ai3	Ai3	EBPS
SOV Review	RFWCP/ Ai3	RFWCP	RFWCP	EBHSBC, EBPS, MSBA, RFWCP, Ai3, GC
Schedule Review	RFWCP/ Ai3	RFWCP	EBHSBC	EBHSBC, EBPS, MSBA, RFWCP, Ai3, GC
Commissioning Coordination	RFWCP/ Ai3	RFWCP		EBPS, RFWCP, Ai3, GC
FF&E/ Technology Contracts Payment	Vendor	RFWCP/ Ai3	EBHSBC	EBHSBC, EBPS, MSBA, RFWCP, Ai3
FF&E Coordination	Ai3	RFWCP/ EBHSBC	EBPS	EBPS, RFWCP, Ai3
Completion Phase				
Punch list/Substantial Completion Verification	GC	RFWCP/ Ai3	EBHSBC	EBHSBC, EBPS, MSBA, RFWCP, Ai3
Close-out Documentation & Coordination	GC	RFWCP/ Ai3	RFWCP/ Ai3	EBHSBC, EBPS, MSBA, RFWCP, Ai3
Commissioning Coordination	ComX/ RFWCP/ GC			EBHSBC, EBPS, MSBA, RFWCP, Ai3
Final Completion Documents/Audit	GC/ Ai3/ RFWCP	RFWCP	EBPS/ MSBA	EBHSBC, EBPS, MSBA, RFWCP, Ai3

EBPS - East Bridgewater Public Schools
 EBHSBC - East Bridgewater High School Building Committee
 RFWCP - *RFWalsh* collaborative partners

Ai3 - Architectural Involution
 ComX - Commissioning Agent
 GC - General Contractor



Responsibility Matrix	Feasibility Study	Schematic Design	50% Construction Documents	100% Construction Documents	Bidding Phase	Construction Phase
Project Management (all phases)						
Communication & Document Control Plan			RFWCP	RFWCP	RFWCP	RFWCP
Attend/support Proj Related Mtgs		EBPS/ RFWCP/ Ai3	EBPS/ RFWCP/ Ai3	EBHSBC/ RFWCP/ Ai3	EBHSBC/ RFWCP/ Ai3	GC/Ai3/EBHSBC/ RFWCP
Review/approve/ process payments	RFWCP/ EBHSBC/ EBPS	RFWCP/ CS / EBHSBC	RFWCP/ CS/ EBHSBC	RFWCP/ CS/ EBHSBC	RFWCP/ CS/ EBHSBC	RFWCP/CS/EBHSBC
Project Controls (all phases)						
Budget		RFWCP	RFWCP	RFWCP	RFWCP	RFWCP
Cost Estimating		RFWCP/Ai3	RFWCP/ Ai3	RFWCP/ Ai3		
Schedule		RFWCP	RFWCP/ Ai3	RFWCP/ Ai3		RFWCP/GC
Monthly Progress reports		RFWCP	RFWCP	RFWCP	RFWCP	RFWCP
Change Order/Add Services/ Claims Admin		RFWCP	RFWCP	RFWCP		RFWCP/Ai3
Project Records and reports		RFWCP	RFWCP/Ai3	RFWCP/Ai3	RFWCP	RFWCP/Ai3
Design Phase						
Designer Selection						
Feasibility Study/Project Design		RFWCP/ Ai3	RFWCP/ Ai3	RFWCP/ Ai3		
Value Engineering		RFWCP/ Ai3	RFWCP/ Ai3	RFWCP/ Ai3	RFWCP/ Ai3	
Design Coordination		Ai3	Ai3	RFWCP/ Ai3	Ai3	
Cost Estimating		RFWCP/ Ai3	RFWCP/ Ai3	RFWCP/ Ai3		
Design Coordination		Ai3	Ai3	Ai3		
Constructability Review			RFWCP	RFWCP		
Commissioning Coordination			RFWCP	RFWCP/ Ai3		
Contractor Pre-qualification				RFWCP/ Ai3/ EBHSBC		
Bid Review					RFWCP/ Ai3	
Award Recommendation					RFWCP	
Construction Phase						
Design Coordination						Ai3
Full-time Construction Oversight						RFWCP
Daily log						RFWCP/ GC
Inspection						RFWCP/ Ai3
T&M/Unit Price Work Oversight						RFWCP/ GC
Prevailing Wage Oversight						RFWCP/ GC
Project Documentation						RFWCP/ GC
SOV Review						RFWCP/ Ai3
Schedule Review						RFWCP/ Ai3
Commissioning Coordination						RFWCP/ Ai3
Contractor Payment Review						RFWCP/ Ai3
FF&E Coordination						RFWCP/ Ai3
Completion Phase						
Punchlist/Substantial Completion Verification						RFWCP/ Ai3
Close-out/Commissionsing Coordination						RFWCP/ Ai3
Final Completion Documents/Audit						RFWCP/ EBHSBC

EBHSBC - East Bridgewater High School Building Committee

EBPS - East Bridgewater Public Schools

CS - Chair, SelecCSen

RFWCP - *RFWalsh* collaborative partners

Ai3 - Architectural Involution

GC - General Contractor

East Bridgewater New Junior/Senior High School

Project Directory

03/14/11



Name	Title	Phone	Fax	Cell Phone	E-mail
<u>Owner</u>					
<u>East Bridgewater High School</u>					
11 Plymouth Street East Bridgewater, MA 02333					
Paul Vieira	Principal	508-378-8214			pvieria@ebps.net
<u>East Bridgewater Public Schools</u>					
11 Plymouth Street East Bridgewater, MA 02333					
Susan T. Cote	Superintendent of Schools	508-378-5956			scote@ebps.net
Patricia Coppola-Lugo	School Business Administrator	508-378-5952			plugo@ebps.net
<u>East Bridgewater High School Building Committee</u>					
David Floeck	Co-Chair	508-269-2766			dfloeck@comcast.net; david.floeck@whrsd.k12.ma.us
164 Chestnut Street, East Bridgewater, MA 02333					
Ryon Pratt	Co-Chair	508-378-1325		508-922-8623	rpratt@ebfire.org
268 Bedford Street, East Bridgewater, MA 02333					
Susan T. Cote	Secretary	508-378-5951			scote@ebps.net
11 Plymouth Street, East Bridgewater, MA 02333					
Domenic DeAngelo	Member	508-378-9602			domdean@aol.com
5 Michael Road, East Bridgewater, MA 02333					
John Haines	Member	508-378-1620		508-922-6433	jhaines@ebmass.com
32 Strong Avenue, East Bridgewater, MA 02333					
Thomas Hamilton	Member	508-378-2001			thomasbhamilton@hotmail.com
930 Bridge Street, East Bridgewater, MA 02333					
Elizabeth Hayes	Member	508-378-2246			commlink@comcast.net; beth.hayes@MAsenate.gov
125 Sachem Rock Avenue, East Bridgewater, MA 02333					
George McCabe	Member	508-584-5408			gmac8@aol.com
139 Summer Street, East Bridgewater, MA 02333					
Theresa McNulty	Member	508-350-9811		508-510-2705	theresamcnulty@hotmail.com
100 Lorraine Drive, East Bridgewater, MA 02333					
Cheryl Pooler	Member	508-378-1609			cpooler@ebmass.com
53 Summit Drive, East Bridgewater, MA 02333					
Patricia Coppola-Lugo	Member - non voting	508-378-5952			plugo@ebps.net
11 Plymouth Street, East Bridgewater, MA 02333					
Paul Vieira	Member - non voting	508-378-8214			pvieria@ebps.net
11 Plymouth Street, East Bridgewater, MA 02333					
George Samia	Member - non voting	508-378-1600			gsamia@ebmass.com
175 Central Street, East Bridgewater, MA 02333					
<u>East Bridgewater School Committee</u>					
		508-378-8200			schoolcommittee@ebps.com
Elizabeth Hayes	Chairperson				
Thomas B. Hamilton	Vice Chair				
Michael Power	Secretary				
Kathy Gerard					
George C. McCabe, Jr.					
Timothy Fowler					
<u>Town of East Bridgewater Departments</u>					
<u>Town of East Bridgewater</u>		508-378-1600	508-378-1636		
East Bridgewater Town Hall 175 Central Street East Bridgewater, MA 02333					
Marcia Weidenfeller	Town Clerk	508-378-1606			
Paula S. Keefe	Assistant Town Clerk	508-378-1606			
George Samia	Town Administrator	508-378-1600			

East Bridgewater New Junior/Senior High School

Project Directory

03/14/11



Name	Title	Phone	Fax	Cell Phone	E-mail
Phyllis Tirrell	Town Accountant	508-378-1605			
Edward Gardner	Building Commissioner/Zoning Enforcement Officer	508-378-1607			
Frederick Canducci	Plumbing Inspector				

Board of Selectmen

East Bridgewater Town Hall
175 Central Street
East Bridgewater, MA 02333

Theresa McNulty	Chair, Selectmen	508-350-9811			
Joseph Miksch	Clerk, Selectmen	508-378-7679			
Robert Condon	Selectmen	508-690-1177			
George Samia	Town Administrator	508-378-1601			

Assessors

Cheryl Pooler	Director	508-378-1609			
Paula Wolfe	Chair				
David Phillips	Member				
Curtis Gluck	Member				

East Bridgewater Fire Department

268 Bedford Street
East Bridgewater, MA 02333

Ryon Pratt	Fire Chief	508-378-1627	508-378-1627		
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East Bridgewater Police Department

153 Central Street, PO Box 475
East Bridgewater, MA 02333

John Cowan	Chief of Police	508-378-2223	508-378-7223		
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East Bridgewater Public Works Department

100 Willow Avenue
East Bridgewater, MA 02333

John B. Haines	Director of Public Works	508-378-1620			
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East Bridgewater Health Department

Robert Philbrick	Health Agent	508-378-1612			
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East Bridgewater Conservation Commission

Claire Yocum	Chairperson	508-378-1561			
John Delano	Commission Consultant	508-824-6609			

East Bridgewater Planning Board

Roy E. Gardner	Vice Chairman	508-378-2848			
David A. Johnson					
William Nolan	Clerk	508-378-2074			

State Agency

Massachusetts School Building Authority

40 Broad Street, Suite 500
Boston, MA 02109

Katherine Craven	Executive Director				Katherine.Craven@MassSchoolBuildings.org
Mary Pichetti	Director of Project Management				Mary.Pichetti@MassSchoolBuildings.org
Kevin Sullivan	Project Manager				Kevin.sullivan@MassSchoolBuildings.org
Christopher Alles	Project Manager	617-720-4466	617-720-5260	617-960-3077	Chris.Alles@MassSchoolBuildings.org

East Bridgewater New Junior/Senior High School

Project Directory

03/14/11



Name	Title	Phone	Fax	Cell Phone	E-mail
Katie Timmins	Senior Field Coordinator				Kathleen.Timmins@MassSchoolBuildings.org
Carolyn Walsh	Field Coordinator				Carolyn.Walsh@MassSchoolBuildings.org
Owner's Project Manager					
RF/Walsh collaborative partners		617-778-0900	617-778-0999		
330 Congress Street, 6th Floor Boston, MA 02210					
Joseph A. Naughton	Principal in Charge	617-778-0921		617-519-9547	jnaughton@rfwcp.com
Paul G. Kalous	Project Director	617-778-0951		617-590-3952	pkalous@rfwcp.com
Simon Tempest	Construction Site Manager		617-721-4614		stempest@rfwcp.com
Inger Hamre-Foley	Assistant Project Manager	617-778-0915		617-981-3571	ihamrefoley@rfwcp.com
Allyson Toner	Assistant Project Manager	617-778-0911		617-921-7172	atoner@rfwcp.com
Architect					
Ai3 Architects, LLC		508-358-0790	508-358-0791		
286 Boston Post Road Wayland, MA 01778					
Kristen Baker	Office Manager				
Scott Dunlap	Principal	508-358-0795		508-498-6744	dunlap@ai-3.com
Daren Sawyer	Principal				sawyer@ai-3.com
Jim Jordan	Principal				jordan@ai-3.com
Troy Randall	Principal				randall@ai-3.com
Architect's Consultants					
Civil Engineer					
PARE Corporation					
10 Lincoln Road, Suite 103 Foxboro, MA 02035					
Andrew Chagnon	Managing Engineer	508-543-1755	508-543-1881	774-280-0163	achagnon@parecorp.com
Landscape Architect					
Gates, Leighton & Associates, Inc.		401-438-2071			
865A Waterman Avenue East Providence, RI 02914					
Arthur Eddy					aeddy@glala.com
Kris Bradner					kbradner@glala.com
Fire Protection, Plumbing, HVAC, Electrical and Lighting					
Griffith & Vary, Inc.					
Wareham Industrial Park 12 Kendrick Road Wareham, MA 02571					
Gerry Vary		508-295-0050	508-295-0003		gvary@griffithandvary.com
James Ziobro		508-295-0050	508-295-0003		jziobro@griffithandvary.com
Wayne Mattson		508-295-0050	508-295-0003		wmattson@griffithandvary.com
Hazardous Materials					
Universal Environmental Consultants					
12 Brewster Road Framingham, MA 01702					
Ammar Dieb		508-628-5486	508-628-5488	617-984-9772	adiieb@uec-env.com

East Bridgewater New Junior/Senior High School

Project Directory

03/14/11



Name	Title	Phone	Fax	Cell Phone	E-mail
Cost Estimating					
PM&C (Architect's Cost Estimator)		781-740-8007			
59 South Street Hingham, MA 02043					
Peter Bradley					
AM Fogarty (OPM's Cost Estimator)		781-749-7272	781-740-2652		
175 Derby Street, Suite 5 Hingham, MA 02043					
Peter Timothy	President				ptim@amfogrty.com
Kitchen/Food Service Consultant					
Crabtree McGrath Associates					
161 West Main Street Georgetown, MA 01833					
John Sousa		978-352-8500	978-352-8588		jsousa@crabtree-mcgrath.com
Acoustical Consultant					
Acentech					
33 Moulton Street Cambridge, MA 02138					
Douglas Sturz		617-499-8000	617-499-8074		dstruz@acentech.com
Specifications Consultant					
Wil-Spec					
Lynnfield Medical Office Building 15 Post Office Square South Lynnfield, MA 01940					
Rob Wilkinson					
Theatrical Consultant					
Barbizon Lighting Company		781-935-3920			
3 Draper Street Woburn, MA 01801					
Scott Stipetic					
Sustainable/Green Design/Renewable Energy Consultant					
Andelman & Lelek Engineering, Inc.		781-769-8773			
1408 Providence Highway Norwood, MA 02062					
Magda Lelek					
Code Consultant					
Cosentini		617-494-9090			
Building 200, 2nd Floor One Kendall Square, Suite B2204 Cambridge, MA 02139					
Rockwood Edwards					
Accessibility Consultant					
Kessler McGuinness		617-641-2802			

East Bridgewater New Junior/Senior High School

Project Directory

03/14/11



Name	Title	Phone	Fax	Cell Phone	E-mail
1121 Washington Street Newton, MA 02465					
Katherine McGuiness					
Furniture, Fixtures and Equipment Consultant					
Integrated Contract Design		978-499-8970	978-499-8972		
191 Middle Rd Byfield, MA 01922-2707					
Nancy Lohrer	President	978-499-8970			nlohrer@icdinc.com
Security Consultant					
Ingersoll Rand Security Technologies					
20 Westford Street, Unit 1 Quincy, MA 02169					
Mark Bruno					
Wastewater Treatment Engineer					
Martinage Engineering		781-944-4808			
131 Main Street, Suite 3 Reading, MA 01867					
Don Martinage					
Web Designer					
Culp Design		508-378-2854	508-378-3663		
15 East Central Street East Bridgewater, MA 02333					
Stephen Culp	Principal/Creative Director				info@culpdesign.com

East Bridgewater New Junior / Senior High School

A ADMINISTRATION

A1 CHARTER

A2 CORRESPONDENCE by

- A2-01 by RF Walsh Collaborative Partners
- A2-02 by Owner
- A2-03 by Others (MSBA, HUD)

A3 DIRECTORY

- A3-01 File Plan
- A3-02 Directory
- A3-03 Org Chart/Communication Plan

A4 RF WALSH COLLABORATIVE PARTNERS

- A4-01 Contract
- A4-02 Job Notice/Billing Instructions/Negotiations
- A4-03 RFWCP Invoices
- A4-04 Revenue/Cost Reports & Forecasts
- A4-05 Insurance
- A4-06 RFWCP Negotiations & Draft Contracts
- A4-07 RFWCP Consultants

A5 MASTER SCHEDULE/PROCESS MAP

A6 FINANCIAL/ACCOUNTING

- A6-01 Project Budget
- A6-02 Cost Reports
- A6-03 Consultant Invoices/Pay Requests
- A6-04 A/E Pay Requests (PM)
- A6-05 Cashflow

A7 OWNER/RFW MEETINGS & AGENDAS

- A7-01 Client
 - A7-01.1 Building Committee
- A7-02 Commonwealth
- A7-03 Other (MSBA, HUD)

A8 PUBLIC OUTREACH/REGULATORY/ PERMITTING

- A8-01 Permitting Schedule
- A8-02 Public Outreach Plan
- A8-03 Federal Agencies
 - A8-03.1 FAA
 - A8-03.2 EPA
 - A8-03.3 CORPS
- A8-04 State
 - A8-04.1 DEP
 - A8-04.2 MEPA
 - A8-04.3 MSBA
 - A8-04.4 CZM
 - A8-04.5 Mass Historical
 - A8-04.6 Mass Highway
 - A8-04.7 DCR

A8-05 Local

- A8-05.1 Town of East Bridgewater
- A8-05.2 Planning

- A8-05.3 Zoning
- A8-05.4 Conservation Commission
- A8-05.5 Water and Sewer
- A8-05.6 Transportation
- A8-05.7 DPW
- A8-05.8 Building Department
- A8-05.9 Historical
- A8-05.10 Board of Health
- A8-05.11 Public Safety
- A8-05.12 Boston Fire Department
- A8-05.13 Dept of Public Health
- A8-05.14 Parks & Recreation

A9 PROCEDURES

- A9-01 Design Phase
- A9-02 Construction Phase
- A9-03 MICS
- A9-04 MSBA

A10 REPORTS

- A10-01 RFWCP Monthly Reports
- A10-02 Milestone Report
- A10-03 MSBA Submittal

A11 PRESS RELEASES/CLIPPINGS

- A11-01 Website

A12 PURCHASING

B PREDEVELOPMENT

B1 HISTORICAL DATA

B2 FEASIBILITY

- B2-01 Working Group Meetings

B3 PROGRAMMING

- B3-01 Faculty Meetings

B4 PROFORMA

B5 FUNDING

C DESIGN

C1 DESIGN PROGRAM/DATA

- C1-01 Photographs
- C1-02 Design Meetings
- C1-03 Schematic Design
- C1-04 Design Development
- C1-05 Prefinal Construction Docs (50% CDs)
- C1-06 Bid Documents (100% CDs)
- C1-07 Addenda
- C1-08 Program Management
- C1-09 Construction Management

C2 CONSULTANTS

- C2-01 Architect
 - C2-01.1 RFP
 - C2-01.2 Proposals
 - C2-01.3 Contracts
 - C2-01.4 Invoices

32 C2-01.5 Correspondence Page

C2-01.6 Reports
C2-01.7 Meetings
C2-01.8 Studies
C2-02 Civil
C2-03 Geotech
C2-04 Traffic
C2-05 Legal
C2-06 MEP
C2-07 Site
C2-08 Landscape
C2-09 Tel/Comm
C2-10 Security
C2-11 Lighting
C2-12 Interiors
C2-13 Signage
C2-14 Structural
C2-15 Elevator
C2-16 Environmental
C2-17 Cost Estimator
C2-18 Structural Peer Review

C3 COMMISSIONING

C4 AGENCY REVIEW & APPROVAL

D CONSTRUCTION ESTIMATES & SCHEDULES

D1 COST ESTIMATES

D1-01 Cost Model/Pre-design Estimate
D1-02 Schematic Design Phase Estimate
D1-03 Design Development Phase Estimate
D1-04 Contract Documents Phase Estimate
D1-05 Cost/Trade Off Studies
D1-06 Value Engineering Studies

D2 SCHEDULES

D2-01 Critical Date Schedule
D2-02 Management Plan
D2-03 Master Schedule
D2-04 Design Activity Schedules
D2-05 Provisional Preliminary Schedule
D2-06 Construction Schedule
D2-07 Recovery Schedule

E BID/AWARD

E1 CONTRACTOR PREQUALIFICATION

E1-01 Advertising/RFQ
E1-02 Procedures
E1-03 SOQ's
E1-04 SOQ Evaluation
E1-05 Prequal Report
E1-06 Correspondence

E2 FIELD TRADE SUB-BIDS

E2-01 Invitation to Bid Advertising
E2-02 Bid Tabulations
E2-03 Analysis
E2-04 Protests
E2-05 Award

F CONSTRUCTION & CLOSEOUT

F1 CONSTRUCTION CONTRACT

F1-01 Contract
F1-02 Bonds
F1-03 Certificates of Insurance
F1-04 Notice to Proceed

F2 LABOR

F2-01 Certified Payrolls

F3 CONSTRUCTION MANAGEMENT PLANS

F3-01 CM Plan
F3-02 SOV
F3-03 Baseline Schedule
F3-04 Schedule Updates
F3-05 Building Permit

F4 MEETINGS

F4-01 Preconstruction Meetings
F4-02 Weekly Progress Meetings
F4-03 Other

F5 REPORTS & PROJECT DATA

F5-01 Contractor Field Reports
F5-02 A/E Field Reports
F5-03 CM Field Reports
F5-04 Owner Field Reports
F5-05 Special/Status Reports
F5-06 Climatological Reports
F5-07 Progress Photos
F5-08 Owner Testing/Inspection
F5-08.1 Foundation/Soils
F5-08.2 Concrete
F5-08.3 Steel
F5-08.4 Fireproofing
F5-08.5 Roofing/Waterproofing
F5-08.6 Curtainwall/Windows

F6 CONTRACTOR PAYMENT REQUESTS

F6-01 Schedule of Values
F6-02 Contractors Requisition
F6-03 Change Orders

F7 MODIFICATIONS & LOGS

F7-01 Contractor's Requests for Info (RFI)
F7-02 Arch. Supplemental Instructions (ASI)
F7-03 Contractor's Change Order Requests
F7-04 Architect's Request for Proposal (RFP)
F7-05 Architect's Construction Change Directive
F7-06 PCO Log
F7-07 PCO's (by number)

F8 PM

F8-01 PM Daily

F9 SAFETY DATA & REPORTS

F9-01 Safety Manual & Data
F9-02 Safety Incident Reports

F10 DEFICIENCY

	F10-01 Architect/Engineer Reports	
33	F10-02 Deficiency Reports	Page
	F10-03 Commissioning	

F11 CLAIMS

F12 SUBMITTALS

- F12-01 Submittal Logs
- F12-02 Shop Drawings/Submittals by Division
- F12-03 Substitution Requests
- F12-04 Coordination Drawings

F13 PHOTOGRAPHS

F14 FINAL CLOSE-OUT

- F14-01 Notification of Substantial Completion
- F14-02 Punch Lists
- F14-03 Release of Liens
- F14-04 Operations/Maintenance Manuals
- F14-05 Guarantees/Warrantees
- F14-06 Completion of Certificates
- F14-07 As-built Drawings

F15 MOVING

G FF&E

- G1 FFE Design Phase
- G2 FFE Pricing
- G3 Procurement and Bids

H COMPUTER & TECHNOLOGY

- H1 Design Phase
- H2 Pricing
- H3 Procurement and Bids

I DCAM CONTRACTOR REVIEWS

J MSBA

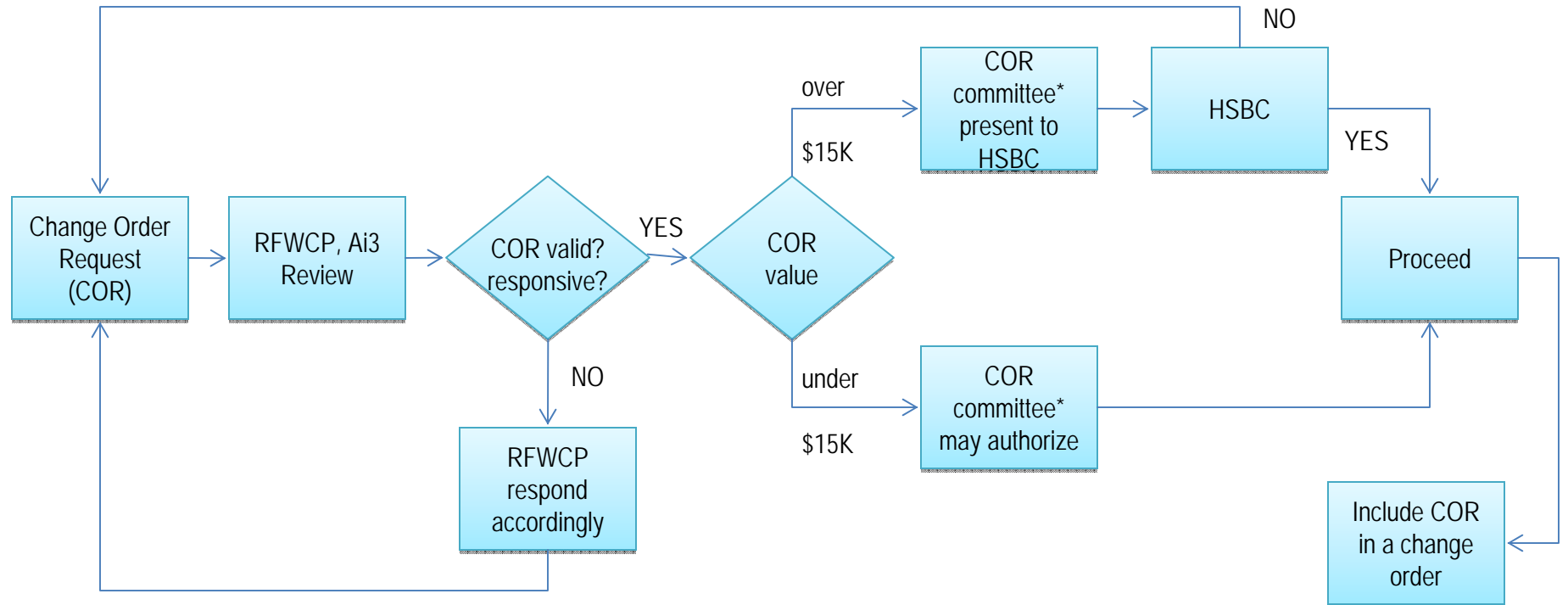
- J1 MSBA FORMS AND BOILERPLATES
 - J1-01 Maintenance Plan

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Construction Change Order Process



* COR Committee includes a member from RFWCP, Ai3 and HSBC