

ATTACHMENT A
Documentation required for MSBA approval process

Attachment A consists of two parts: 1) a narrative of the procurement and selection process and 2) a completed checklist. All of Attachment A, including all Exhibits required therein, must be submitted to the MSBA.

Part 1: Narrative of the Selection Process.

The information contained in the narrative should be detailed and clearly explain the procurement process and the selection process. The information provided should be supported by the documentation shown in the checklist. The narrative must be signed by the Chief Executive Officer, on behalf of the Owner. The Chief Executive Officer must certify that a qualifications-based selection process was used, state that the Owner recommends the selected respondent as the Owner's Project Manager, and state that the Owner is seeking the MSBA's approval of the Owner's Project Manager.

Part 2: The Checklist.

The Owner should provide the information requested in the first column of the checklist either in the text of the narrative or as an Exhibit, as designated in Attachment A. (e.g., a copy of RFS and a copy of the response from the selected respondent). In the second column of the checklist, the District should note that the required information has been submitted. The third column is for MSBA use.

Part 1: Sample Format for the Narrative of the Selection Process

A Selection Committee was formed by the (District) School Building Committee to prepare the Request for Services (Exhibit A) for an Owner’s Project Manager. The Selection Committee included the following members: (List names, titles and a brief description of related experience. Also identify the full-time employee of the Owner who was designated as the procurement administrator and include the date of completion of the individual’s MCPPO certification.)

Name	Title	Description of related experience

Procurement administrator: [Name], [Title], [Completion date of MCPPO training]

On XXXX, xx, 200X, the Selection Committee presented the Request for Services to the (District) School Committee which authorized the (District) School Building Committee to advertise the Request for Services for an Owner’s Project Manager. (Exhibit B)

On XXXX, xx, 200X, the (District) advertised a Request for Services for an Owner’s Project Manager for a school construction project in the Central Register as well as (list additional publications), Exhibit C. A (mandatory/voluntary) informational meeting and site visit was scheduled for xxxx, 200X and yyy respondents attended. Questions were received from respondents and addressed in published questions and answers and/or resulted in addenda to the Request for Services, Exhibit D.

X respondents requested the Request for Services including (list the names of the respondents).

	Firm Name

Y respondents submitted responses by the original due date of XXXX xx, 200X (Please note if the submission date was extended) as follows: (Provide the list of respondents).

	Firm Name

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

The Selection Committee ranked the respondents based on the selection criteria listed in the Request for Services (Provide a list of the respondents with the scoring by the Selection Committee. Include a detailed explanation of the scoring system the committee utilized, i.e., the meaning behind the numerical values. Please submit the committee members’ scoring sheets, Exhibit E. (See Attachment B of this document for a sample scoring sheet.))

	Firm Name	Cumulative Average Score

The committee short listed the following respondents:

	Firm Name	Cumulative Average Score

The Selection Committee did/did not decide to conduct interviews of the short-listed respondents. (If interviews were conducted, continue with the following narrative). X respondents were interviewed and the following questions were asked:

(Provide, in the narrative, a list of the interview questions the committee used.)
 (Explain the scoring system that was used in assessing the interviewees and include how respondent’s original rankings were incorporated.)

(Provide a narrative paragraph for each interviewed respondent including the responses provided and specific information about the strengths and weaknesses realized through the interview questions and how this information impacted the scoring and/or ranking.)

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

	Firm Name	Cumulative Average Score (if applicable)

Provide a narrative paragraph for each interviewed respondent including specific information about the strengths and weaknesses realized through the interview questions and how this information impacted the scoring and/or ranking.)

The Selection Committee conducted X reference checks as summarized below: (Please list how many reference checks were conducted, what ratings and feedback were given by the references and if any “independent” [not provided by the respondent] references were obtained.)

The Selection Committee ranked Respondent X first based on (list specific supporting reasons).

Conclusion Statement:

(Name of Selected Respondent) and (City/Town/Regional School District) have completed negotiations and (Name of Selected Respondent) has signed the MSBA standard Contract for Project Management Services for a Design/Bid/Build project, without modifications to its terms and conditions.

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

Based on the information as stated above, the Owner hereby certifies that the Owner utilized a qualifications-based procurement process and recommends the selection of (Name of Selected Respondent) as the most qualified respondent to provide Owner’s Project Manager services for the (School Name). The Owner requests that the MSBA approve its selection as required by 963 CMR 2.11(2).

Chief Executive Officer
(City/Town/District)

Dated

Exhibits

- A. Request for Services (RFS) including any questions and answers and/or Addenda.
- B. School Committee authorization of members of selection committee, approval of RFS and authorization to advertise
- C. Copy of advertisement in the Central Register and any additional publications.
- D. Copy of the selected respondent's proposal.
- E. Committee members' scoring sheets.
- F. Original copy of the MSBA standard Contract for Project Management Services signed by the selected respondent.

Part 2: Checklist

District:	
School:	
Date RFS issued:	
Respondent Selected:	

Documentation/Information	Included	MSBA Review
Completed Narrative providing all requested detail of the selection process.		
Selection Committee members, titles and background. Identify full-time employee of the Owner designated to be the procurement administrator. <i>(Body of Narrative)</i> .		
Copy of Procurement documents – RFS, any addenda and questions and answers. Exhibit A.		
School Committee authorization of members of selection committee, approval of RFS and authorization to advertise. Exhibit B.		
Copy of public notice and where it was posted. Exhibit C.		
Briefing session held. <i>(Body of Narrative)</i> .		
How many qualification statements were received and from whom. <i>(Body of Narrative)</i> .		
Copy of proposal submitted by the Owner’s Project Manager the District selected. Exhibit D.		
Name of Project Director and certification. Exhibit D.		
Scoring Sheets of Committee Members. Exhibit E.		
If interviews were conducted, what questions were asked, how information was recorded and what were results. <i>(Body of Narrative)</i> .		
Summary of reference checks conducted <i>(Body of Narrative)</i> .		
MSBA standard Contract for Project Management Services signed by selected OPM. Exhibit F.		

Additional information		
------------------------	--	--

ATTACHMENT B

Sample scoring sheets – suggested format

Scoring sheet by Selection Committee member

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

Summary scoring sheet for ranking or interview

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