

# RFQ

## Owner's Project Manager Nonprofit Social Service Facility and Affordable Housing

For the Project Site of 71 Cherry Street, Cambridge, MA

Proposals will be received by the Cambridge Redevelopment Authority, via email attachment or emailed link, to [ESchwarz@CambridgeRedevelopment.org](mailto:ESchwarz@CambridgeRedevelopment.org) by **5:00 p.m. on Friday October 29th, 2021** for furnishing the following to the Cambridge Redevelopment Authority (CRA):

**The Cambridge Redevelopment Authority is seeking proposals from qualified construction owner's project management (OPM) firms to provide project management oversight and construction administration for a project that includes the preservation and improvement of an 1807 historic house and the development of an addition to the historic structure, both for the provision and administration of social service programs, and the development of affordable ownership housing.**

Copies of the Request for Qualifications may be downloaded from the CRA website at:  
[www.CambridgeRedevelopment.org/jobs-contracting](http://www.CambridgeRedevelopment.org/jobs-contracting) on and after **Wednesday, October 13<sup>th</sup>, 2021**

The successful respondent must be an Equal Opportunity Employer. The CRA seeks to advance racial and social equity through its work and maintains a commitment to contracting and sub-contracting with Minority and Women Owned Business. The CRA reserves the right to reject any or all proposals, waive any minor informality in the proposal process, and accept the proposal deemed to be in the best interest of the CRA.

**Price will not be considered when initially evaluating a proposal. After the finalists have been ranked, the CRA will enter in price negotiations with the highest ranked respondent.**

**THERE MUST BE NO MENTION OF THE APPLICANT'S FEE IN THE PROPOSAL. ANY MENTION OF THE FEE WILL SUBJECT THE PROPOSAL TO REJECTION.**

An electronic version of the proposal marked "[Your Firm Name] OPM Services, Margaret Fuller" must be received by Erica Schwarz, Project Director at the Cambridge Redevelopment Authority, via email: [ESchwarz@CambridgeRedevelopment.org](mailto:ESchwarz@CambridgeRedevelopment.org) **prior to 5:00 p.m. on Friday, October 29, 2021.**

Any proposals received after such time will not be accepted, unless the required submission date and time has been changed by addendum. Delivery to any other office or email address does not constitute compliance with this paragraph, unless the proposals are received by the CRA by the established deadline. It is the responsibility of the applicant to assure proper and timely delivery.

## PROJECT OVERVIEW

The CRA and Margaret Fuller Neighborhood House (MFNH) are in a partnership to redevelop the property that MFNH owns at 71 Cherry Street. MFNH is a nonprofit organization that has been providing a range of social services to the residents of Cambridge's Port neighborhood and beyond since 1902. Today MFNH runs a food pantry that serves over 7,000 households a year, an afterschool program serving nearly 100 children per year (48 on site, 50 at another site), and a community advancement program for adults that includes job related training and search assistance, mental health support, financial assistance, and other services to ensure stability. Learn more at: [www.MargaretFullerHouse.org](http://www.MargaretFullerHouse.org).

MFNH's programs are currently provided among two connected buildings on their site: a 4,800 square foot historic house built in 1807, which was the childhood home of feminist, journalist, and transcendentalist Margaret Fuller, and is listed on the National Register of Historic Places; and a basement level addition to the house constructed in 1924. The last significant work on the site occurred in the 1980's after a fire in the historic house. Smaller projects since that times have included window repairs, bathroom upgrades, a new roof, updated build out of a basement level food pantry in the historic house, and repairs to the basement addition.

The Project will include renovation of the historic house, development of a new addition of approximately 6,500 square feet, and development of 10,000 – 15,000 square feet of affordable ownership housing on the rear of the lot, which is currently surface parking. The Project will also include a play area for children and parking for MFNH staff and the residential units.

The CRA will hold the contract for this Project, and will be working closely with representatives from MFNH to define and advance project goals. The CRA and MFNH are now operating under a Memorandum of Understanding. The CRA and MFNH will enter into a detailed development agreement after completion of the Schematic Design and related cost estimate.

### **Project Goals**

- Subdivide the lot and develop between 10,000 and 15,000 square feet of new construction housing on the rear portion, to be sold to income qualified first time home buyers.
- Bring the historic Margaret Fuller House up to code and improve accessibility while preserving its historic characteristics. The current program goal is to create spaces suitable, accessible spaces for social services on the main floor and renovate administrative offices on the upper floors.
- Develop a 6,500 square foot addition adjacent to the historic home to house the food pantry and afterschool program.
- Ensure all development on the site enhances and honors the site's history and current location in the Port neighborhood.
- Build for energy efficiency and environmental resilience.
- Maintain good community relationships within this dense urban neighborhood throughout the Project.

## OPM RESPONSIBILITIES

The OPM shall provide project management services to inform the design phase, facilitate procurement procedures, supervise construction and carry out other related activities. The OPM shall facilitate, coordinate and manage the Project with respect to timely performance and monitoring of the quality of design services and contractor work. The OPM shall recommend courses of action to the Owner when respective contractual requirements are not being fulfilled. OPM services shall continue through substantial completion and occupancy by the Margaret Fuller Neighborhood House programs, the residential housing owners, and final Project closeout. The OPM will work on a project team that includes a nonprofit real estate development consultant who has been supporting the project to date.

The CRA seeks the following specific project management services:

- Assist in development of the contract with the selected Designer.
- Advise on the development concepts considered to date, which are based on a review of the condition of the historic house and the goals of the project partners.
- Advise on the value and possibility of conducting the Project construction bidding under Chapter 149a using a Construction Manager at Risk.
- Assist in the review of Schematic Design documents through Construction Drawings for the Project.
- Assist in the development of a project budget.
- Develop a plan with the design team for constructing improvements in appropriate phases that will balance cost with the need for MFNH to limit the time required to relocate its services.
- Provide oversight of the design team during the schematic design, design development, construction document, and construction phase of the project, including supporting the planning and execution of the Chapter 149 (or Chapter 149a) procurement process.
- Ensure the preparation of time schedules to monitor performance of the building design and construction phases.
- Organize weekly meetings during the construction phase and facilitating communication amongst all parties working on the project.
- Provide construction administration services including review of contractor submittals, project schedules, monitor of contractor quality of work, report any observed health or safety risks, and review of applications for payment and change order proposals.
- Provide written evaluation of the performance of the design professionals, consultants, contractors and sub-contractors.

The successful respondent shall have demonstrated experience in:

- Successfully advancing and supporting public construction and procurement procedures,
- Developing appropriate phasing for projects with multiple buildings and uses,
- Facilitating improvements to historic buildings, as well as new construction, and
- Helping to develop and sustain positive relationships with abutters during the construction phase.

## RFQ RESPONSE CONTENT

Each response should contain only pertinent information and requested documentation, demonstrating how the applicant meets the minimum qualifications set forth in the Request for Qualifications. The submission should outline the previous relevant experience of the applicant and have a table of contents or easily discernible, labeled sections.

Each response must include the following four (4) items:

**1. An introduction of the lead firm or individual, and an overview of the qualifications and professional experience of the team that will be working on the Project described in this RFQ.**

- Include resumes and a description of responsibilities of all staff expected to work on the project.
- Identify if your firm or any subconsultants included in your proposal are MBE or WBE firms (Minority Business Enterprises or Women Business Enterprises).

**2. A description of your project management approach for public clients, based on the Project overview in this RFQ and other materials regarding the Project available on the CRA website.**

- Include information about how your team will communicate and work with the CRA staff and the rest of our project team, which will include MFNH staff, the designer, and our real estate development consultant.
- Describe how you manage project budgets while meeting program goals beginning with the design phase of the project, and your system for evaluating change orders.

**3. A list of at least three (3) references for which you and/or your firm has conducted similar project management scopes.**

- Include at least two (2) projects conducted for the public sector.
- Include at least one project that included the development of multi-family housing.
- Include at least one project that included significant improvements to a historic building.

Please include the name and telephone number of the contact person for each project, the year of the contract, and the nature of the project. These contacts shall serve as references. These references should be knowledgeable of the past work of key members assigned to the project. Please ensure the accuracy of your references' contact information. If a reference is not responsive, your firm will be determined not to have the required number of references.

**4. Signed Anti Collusion / Non-Discrimination and Tax Compliance Forms (Appendix B)**

A response which does not provide the information and documentation outlined above may be deemed nonresponsive and therefore rejected. Failure to answer any question, to complete any form, or to provide the documentation required will be deemed non-responsive and result in an automatic rejection of the response unless the CRA determines that such failure constitutes a minor informality.

## GENERAL INSTRUCTIONS TO APPLICANTS

**Information Sessions:** An optional site visit, including a tour of current buildings and the surface parking lot will take place on **Wednesday, October 20th at 9:30 am**. Participants will meet in front of 71 Cherry Street, Cambridge, MA. Participants will be asked to wear face masks while inside buildings.

An optional virtual information session will be held on **Friday, October 22<sup>nd</sup> at 11 am**. Email Erica Schwarz to receive the Zoom link: [ESchwarz@CambridgeRedevelopment.org](mailto:ESchwarz@CambridgeRedevelopment.org).

**Questions and Clarifications:** Any questions or requests for clarification must be submitted in writing and emailed to [eschwarz@cambridgeredevelopment.org](mailto:eschwarz@cambridgeredevelopment.org) by 5:00 pm on Friday, October 22, 2021. At the sole discretion of the CRA, an addendum will be issued with clarifications or answers to the questions.

**Correction, Modification, or Withdraw of Proposal:** Prior to the deadline for receipt of proposals, an applicant may correct, modify, or withdraw its proposal by making the request in writing. All corrections, modifications, or withdrawals must be delivered to the CRA in a sealed envelope with a notation on the envelope indicating the title of the project, the deadline for the receipt of the proposals and a notation that the envelope contains a correction, modification, or withdrawal of the original proposal submitted for the particular project.

**Additional Information:** Additional information with regard to the project can be found referenced on the project webpage located at: [www.cambridgeredevelopment.org/mfnh](http://www.cambridgeredevelopment.org/mfnh)

**Duration of Responses:** A response will remain in effect for a period of ninety (90) calendar days from the deadline for submission of responses, until it is formally withdrawn according to the procedures set forth herein, a contract is executed, or this RFQ is cancelled, whichever occurs first. The CRA reserves the right to reject any and all responses, or portions thereof.

**Addenda:** Potential Responders are encouraged to register their interest in the Design RFQ to the CRA via email ([eschwarz@cambridgeredevelopment.org](mailto:eschwarz@cambridgeredevelopment.org)). Any addenda will be emailed to the contact on file and will also be posted on the CRA website. It is the responsibility of the Responders to ensure that they obtain all information pertaining to this RFQ and ensuring that they receive all addenda.

## RFQ SELECTION PROCESS

**Review Procedures:** All responses will be reviewed by a selection committee including representatives from the CRA and Margaret Fuller Neighborhood House and the Project's real estate finance consultant. The selection committee may select up to five (5) applicants to be interviewed. The CRA will notify all applicants of the names of the applicants selected for interviews.

CRA staff will make final plans regarding the interview format, including if interviews will be conducted in person or virtually during the first week of November. All interviews will be conducted using the same format for parity.

After the conclusion of all interviews, the selection committee will rank up to the top three selections. Within a reasonable period of time after the last interview, the CRA staff will forward to the CRA Board its recommendation of the project management individual or team to be designated as the OPM. The CRA Board may accept or reject the recommendation. The CRA may request that a representative from the OPM team attend a CRA Board meeting.

The selected applicant will then submit a specific scope proposal along with a fee to the CRA. Negotiations will commence thereafter, until an acceptable fee has been reached. In the event negotiations are unsuccessful, the CRA will request the second ranked finalist, then if necessary the third ranked finalist, to submit a proposal in the same manner as for the first ranked finalist. In the unlikely event negotiations are unsuccessful with the three top

finalists, the CRA may re-advertise the RFQ or may select additional finalists from the original pool of applicants.

Once successful negotiations have concluded or if the fee has been set, the CRA will prepare the contract and submit them to the successful applicant for signature. Upon receipt of the executed contract and all other required documents, the CRA will have the contract signed by the CRA Board Chair.

## EVALUATION CRITERIA

The purpose of information requested in this section is to assist the CRA in evaluating the respondent's overall qualifications, including its methodologies and technical abilities, and previous experience.

1. **Complete Submission.** The RFQ response must include all items outlined in the Instructions to Applicants section.
2. **Relevance of Response and Proposed Project Management Approach to the Project Needs.** The CRA will evaluate the extent to which the project approach aligns with the stated project needs and goals in this RFQ, including:
  - How the Respondent manages and completes construction projects
  - How the Respondent will work with the CRA to incorporate input from its project partner, MFNH
  - How the Respondent balances budget, design goals and program needs
  - How the Respondent develops phasing plans for projects with multiple components
  - How the Respondent manages design phase due diligence in historic projects to limit construction phase change orders
3. **Similar Prior Experience.** The CRA will review experience and qualifications of the respondent's employees who will be working on this project in the management of projects that included historic structures and residential multi-family buildings and that were conducted on behalf of public agencies. The respondent should be able to communicate why it is uniquely qualified for this project.
4. **Quality of Prior Work/Quality of References.** Quality of prior work will be determined by references provided from other projects on which the Respondent has worked. The CRA will place strong consideration on how the Respondent managed the coordination of the public bidding process. The CRA will also seek to understand how the respondent approached prior projects with regard to managing cost and adherence to budget during the construction phase.
5. **Professional Registrations.** The firm or individual has the required experience and registered professional licenses required to execute this Project, as outlined under MGL c 149.
6. **Diversity of Respondent and Consultant Team.** The CRA will note if the responding firm and any subcontractors included in its submission are MBE or WBE firm and consider the entire team's alignment with the CRA's commitment to diversity and equity in contracting.
8. **Capacity to Perform.** The respondent's capacity to undertake this project in a timely manner to meet the CRA's schedule. The availability of each key team member – both direct employees and consultants or other vendors – must be adequate to support project coordination and the design schedule. This evaluation will be based on the size of the firm gauged against the number and size of current projects.

## ANTICIPATED SCHEDULE

Initial Posting:	<b>Wednesday, October 13, 2021</b>
Information Sessions:	<b>Wednesday, October 20, 2021, 9:30 am at 71 Cherry Street, Cambridge Friday, October 22, 2021, 11:00 am via Zoom</b>
Questions Due:	<b>Friday October 22, 2021 by 5:00 pm</b>
RFQ due:	<b>Friday, October 29, 2021 by 5:00 pm</b>
Interviews of shortlisted firms:	<b>Expected the week of November 8th, 2021</b>
Expected Decision & Contract:	<b>Mid/Late November 2021</b>
Start of Design Process:	<b>December 2021</b>
Start of Construction:	<b>Estimated: January 2023</b>
Completion of Construction:	<b>Estimated: September 2024</b>

## GENERAL TERMS AND CONDITIONS

**Contract:** The contract for this project will be between the CRA and the OPM. The CRA will have the option to cancel the contract provided that written notice is given 30 days prior to the effective termination date.

**MBE/WBE Participation.** The CRA seeks to advance racial and social equity through all aspects of its work and maintains a commitment to contracting and sub-contracting with Minority and Women Owned Business. The CRA strongly encourages the use of MBE/WBE subcontractors to the extent subcontractors are necessary.

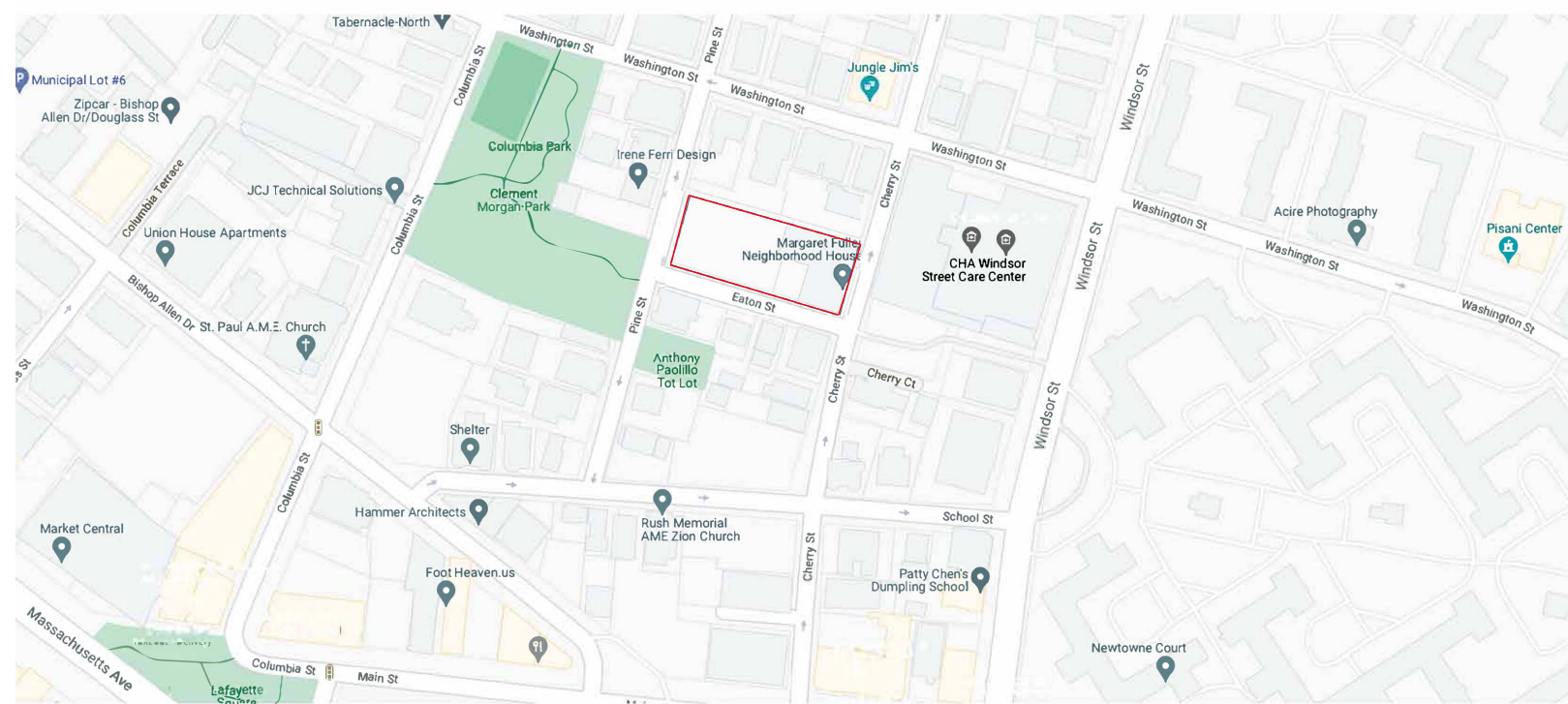
**Living Wage Requirements:** The City of Cambridge has a Living Wage Requirement that establishes minimum hourly rates for all Personnel that work on any City contract. The CRA requires its design contractors to comply with the City policy. The City of Cambridge's Living Wage as of March 1, 2021 is \$16.65 per hour, and is anticipated to increase in 2022. An overview of the Living Wage Requirements is attached.



## APPENDICES:

- A: Map and photos of 71 Cherry Street, Cambridge
- B: Non-Collusion, Non-Discrimination, and Tax/Employment Statements
- C: City of Cambridge Living Wage Requirement

**APPENDIX A: MAP AND PHOTOS OF SITE AT 71 CHERRY STREET, CAMBRIDGE**



*Margaret Fuller House, c 1900 with original addition*



*Margaret Fuller House, 1971*



Margaret Fuller House, 2020 and 2021



*Upper left:* exterior of historic house and edge of roof of 1924 basement addition  
*Upper & lower right:* main entryway staircase; and view of main entry door  
*Lower left:* after school program in basement addition





*Upper: view from Pine Street of rear parking lot from*

*Lower left: play area used by after school program*

*Lower right: Headhouse (pink siding) providing access basement level afterschool program*

**APPENDIX B: NON-COLLUSION, NON-DISCRIMINATION, and TAX/EMPLOYMENT STATEMENTS**

***NON-COLLUSION STATEMENT***

The undersigned bidder or agent, being duly sworn on oath, says that he/she has not, nor has any other member, representative, or agent of the firm, company, corporation or partnership represented by him/her, entered into any combination, collusion or agreement with any person relative to the RFQ response, to prevent any person from responding nor to include anyone to refrain from responding, and that this response is made without reference to any other response and without any agreement, understanding or combination with any other person in reference to such response.

I HEREBY AFFIRM UNDER THE PENALTIES FOR PERJURY THAT THE FACTS AND INFORMATION CONTAINED IN THE FOREGOING RFQ FOR THE CRA ARE TRUE AND CORRECT.

Dated this \_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_

\_\_\_\_\_  
Name of Organization,

\_\_\_\_\_  
Title of Person Signing

\_\_\_\_\_  
Signature

**NONDISCRIMINATION STATEMENT**

The Consultant agrees:

1. The Consultant shall not, in connection with the services under this Contract, discriminate by segregation or otherwise against any employee or applicant for employment on the basis of race, color, national or ethnic origin, age, religion, disability, sex, sexual orientation, gender identity and expression, veteran status or any other characteristic protected under applicable federal or state law.
2. The Consultant shall provide information and reports requested by the Cambridge Redevelopment Authority pertaining to its obligations hereunder, and will permit access to its facilities and any books, records, accounts or other sources of information which may be determined by the Cambridge Redevelopment Authority to affect the Consultant's obligations.
3. The Consultant shall comply with all federal and state laws pertaining to civil rights and equal opportunity including executive orders and rules and regulations of appropriate federal and state agencies unless otherwise exempt therein.
4. The Consultant's non-compliance with the provisions hereof shall constitute a material breach of this Contract, for which the Cambridge Redevelopment Authority may, in its discretion, upon failure to cure said breach within thirty (30) days of written notice thereof, terminate this Contract.
5. The Consultant shall indemnify and save harmless the Cambridge Redevelopment Authority from any claims and demands of third persons resulting from the Consultant's non-compliance with any provisions hereof, and shall provide the Cambridge Redevelopment Authority with proof of applicable insurance.

Signed (type name): \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

**CERTIFICATE OF TAX, EMPLOYMENT SECURITY, AND CHILD CARE COMPLIANCE**

Pursuant to Massachusetts General Laws Chapter 62C, §49A and Chapter 151A, §19A(b) and Chapter 521 of the Massachusetts Acts of 1990, as amended by Chapter 329 of the Massachusetts Acts of 1991,

I \_\_\_\_\_ (Name) whose principal place of business is located at \_\_\_\_\_ (Address), do hereby certify that:

- A. The above-named Respondent has made all required filings of state taxes, has paid all state taxes required under law, and has no outstanding obligation to the Commonwealth's Department of Revenue.
- B. The above-named Respondent/Employer has complied with all laws of the Commonwealth relating to unemployment compensation contributions and payments in lieu of contributions.
- C. The undersigned hereby certifies that the Respondent/Employer (please check applicable item):
  - 1. \_\_\_\_\_ employs fewer than fifty (50) full-time employees; or
  - 2. \_\_\_\_\_ offers either a dependent care assistance program or a cafeteria plan whose benefits include a dependent care assistance program; or
  - 3. \_\_\_\_\_ offers child care tuition assistance, or on-site or near-site subsidized child care placements.

Signed under the penalties of perjury this \_\_\_\_\_ day of \_\_\_\_\_, 201\_\_.

Federal Identification Number: \_\_\_\_\_

Signed (type name): \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

## APPENDIX C: CITY OF CAMBRIDGE LIVING WAGE ORDINANCE

### CITY OF CAMBRIDGE LIVING WAGE ORDINANCE FACT SHEET CHAPTER 2.121 OF THE CAMBRIDGE MUNICIPAL CODE

*Note: This fact sheet is a summary of several provisions of the Cambridge Living Wage Ordinance, intended to provide an introduction to the matters regulated by the ordinance. All determinations regarding the application of the ordinance to particular individuals or circumstances should be made by reference to the ordinance itself.*

Effective date: The Cambridge City Council enacted the Living Wage Ordinance effective July 2, 1999.

Purpose: The purpose of the ordinance is to assure that employees of the City and employees of contractors, subcontractors, and beneficiaries of assistance from the City earn an hourly wage needed to support a family.

Application: The ordinance applies to (a) City employees, (b) employees of contractors and subcontractors who have Service Contracts with the City in amounts over \$10,000, (a Service Contract does not include contracts for the purchase of goods, products, equipment, supplies, or other property, and does not apply to services which are incidental to the delivery of such products, equipment or commodities), and (c) employees of Beneficiaries of Assistance in the form of grants, loans, tax incentives, bond financing, subsidies, or other forms of assistance over \$10,000, received by or through the authority or approval of the City, including but not limited to, c. 121A tax abatements, industrial development bonds, Community Development Block Grant (CDBG) loans or grants, Enterprise Zone designations awarded after the effective date of the ordinance, and the lease of City owned land or buildings below market value.

Covered Employers: The ordinance applies to the City, any contractor or subcontractor on a Service Contract with the City over \$10,000, and any Beneficiary of Assistance over \$10,000.

Covered Employees: The ordinance applies to any person employed by a Covered Employer, and to any person employed by an independent contractor doing business with a Covered Employer, who would directly expend any of his or her time on the activities funded by the service contract or the activities for which the Beneficiary received Assistance.

Living Wage: Effective March 1, 2021 the Living Wage is \$16.65 per hour, subject to annual CPI adjustments each March 1st. Cuts in non-wage benefits prohibited: No Covered Employer may fund any wage increase required by the ordinance by reducing health, insurance, pension, vacation, or other non-wage benefits of any of its employees.

Waivers: The City Manager may grant waivers to the requirements of the ordinance. There are three types of waivers: (a) General Waiver: if the City Solicitor finds that application of the ordinance would violate a specific federal or state statute or regulation; (b) Hardship Waiver: a non-profit employer may apply to the City Manager for a waiver if payment of the Living Wage would cause a substantial hardship; and (c) Chapter 30B Waiver: prior to issuing an invitation to bid for a services contract a



department may ask the City Manager for a Living Wage waiver if it would make the contract inordinately expensive or would result in a significant loss of services.

Exceptions: Certain positions are excepted from the ordinance upon certification in an affidavit signed by the principal officer of a Covered Employer that the positions are as follows: (1) youth hired pursuant to a City, state, or federally funded program during the summer or as part of a school to work program or other related seasonal or part-time work; (2) work-study or cooperative educational programs; (3) trainees who are given a stipend or wage as part of a job training program; (4) persons working in recognized supported employment programs that provide workers with additional services such as room and board, case management, counseling, or job coaching; (5) positions where housing is provided by the employer; (6) employees who are exempt from federal or state minimum wage requirements; and (7) individuals employed by the City where such employment is intended primarily to provide a benefit or subsidy to such individuals, although they are paid for work performed.

Notification Requirements: All persons who have signed a service contract with the City or a contract for Assistance are required to forward this Fact Sheet to any person submitting a bid for a subcontract on the contract. All Covered Employers must provide this Fact Sheet to each Covered Employee and must post this Fact Sheet in a conspicuous location visible to all employees.



## **CAMBRIDGE REDEVELOPMENT AUTHORITY**

Owner's Project Manager (OPM) Services for  
Historic Margaret Fuller Neighborhood House  
Preservation & Improvements

*Cambridge, Massachusetts*

### **SUBMITTED BY:**

*CBI Consulting, LLC – A SOCOTEC Company*



250 Dorchester Avenue  
Boston, Massachusetts 02127  
T: 617.268.8977  
F: 617.464.2971

[www.socotec.us](http://www.socotec.us)

October 29, 2021

Ms. Erica Schwarz, Project Director  
Cambridge Redevelopment Authority  
255 Main Street, 8<sup>th</sup> Floor  
Cambridge, MA 02142

*Re: OPM Services for Historic Margaret Fuller Neighborhood House, 71 Cherry Street, Cambridge*

Dear Ms. Schwarz & Members of the Selection Committee:

CBI Consulting, LLC (CBI), a SOCOTEC Company, is pleased to present our qualifications to provide Owner's Project Manager (OPM) oversight and construction administration for a project that includes the preservation and improvement of an 1807 historic house and the development of an addition to the historic structure, all for the provision of social service programs and development of affordable ownership housing at 71 Cherry Street in Cambridge, Massachusetts.

CBI has been providing Owner's Project Manager services long before the term was coined. **We have over 37 years of experience** operating as an advocate for municipal entities and their nonprofit partners, bringing their projects to successful completion. It is our role as the OPM to support you, help guide you, and act in your best interest with your goals and objectives as the priority. **With over 75% of our work falling within the public sector** (MGL c. 149, 149A, 30-39M and 30b), we are very familiar with the public procurement process and the requirements of various municipal agencies and stakeholder groups required to complete projects of this size, scope, and complexity. CBI's roster of construction managers, designers, architects, and engineers gives our OPM team a deep bench of talent and technical expertise and unique representation for this vital and important project.

## WHAT SETS US APART

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- ***Experience Coordinating Projects with Multiple Stakeholders and Components***

Our team understand the complexities of this project, including managing the expectations of the various stakeholders in addition to coordinating different project elements. For instance, the OPM team is currently managing the final construction phases for the restoration of the historic 18<sup>th</sup> century Josiah Smith Tavern in Weston, Massachusetts. The conditions of the Tavern required a complete envelope overhaul, fully renovated interior, new MEP systems, HVAC, and landscaping. The stakeholders for this project were the Town of Weston, Friends of the Josiah Smith Tavern, and Historic New England which held a Preservation Deed, not to mention its listing on the Massachusetts Historical Commission's Inventory of Archeological Assets, and the National and State Registers of Historic Places. **The project team presented for the Margaret Fuller Neighborhood House renovations and additions is the same project team that is working on this project.**

- ***Experience with Historic Structures***

CBI has built our historic restoration portfolio from real-life experiences and practice and have won many awards for our work across Massachusetts. We have a unique understanding of material compatibility, application and construction techniques, as well as working with and receiving approval from Massachusetts and local Historical Commissions. We have worked on an extensive list of projects listed on the National Register of Historic Places, listed in a National Register District, and meeting the historic requirements of the Secretary of the Interior's Treatment of Historic Places. Steven Watchorn, AIA, has renovated some of the most historically significant structures in Massachusetts and has a passion for restoration. We believe he will be a great resource during the design review phase for the restoration and preservation portions of this project.

- **Structural Experts Currently Working with the Cambridge Redevelopment Authority**

Project Director Wayne Lawson, PE is a highly skilled structural engineer with over 20 years of experience that has been applied to dozens of public restoration projects. One such project is the preservation and improvement of the CRA owned historic building at 93-99 Bishop Allen Drive in the Central Square area of Cambridge. CBI is serving as the structural and envelope subconsultant for the building, which was constructed in 1855 and, much like the Margaret Fuller House, provides vital social services to the surrounding community.

## OPM TEAM

CBI employs a highly qualified team of professionals with OPM experience at historic buildings throughout Massachusetts. **We have the ability and capacity to commit the resources** necessary for the project and we propose the following OPM team:

Project Director:	Wayne Lawson, PE, SECB, MCPPO
Project Manager:	Jennifer dos Santos, CDT, MCPPO, Assoc. A.I.A.
Architectural/Historic Preservation Design Support:	Steven Watchorn, AIA, LEED AP BD+C
Energy & Sustainability Support:	Adrian Tuluca, RA, BEMP, LEED AP BD+C
Assistant Project Manager:	Riana Burton

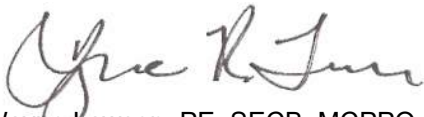
## SAMPLE OF PUBLIC OPM EXPERIENCE:

- OPM – Renovation and Adaptive Reuse of **Historic** Josiah Smith Tavern, Weston, MA
- OPM – **Historic** Tewksbury Town Hall Renovation & Additions, Tewksbury, MA
- OPM – **Historic** Tyngsborough Town Hall, Tyngsborough, MA
- OPM – Demolition of Thurgood Marshal Middle School, Lynn, MA
- OPM – Atrium Skylight Replacement at Boston Bridge Charter School, Roxbury, MA
- OPM – New Point of Pines Fire Station, Revere, MA
- OPM – New Emergency Call Center Addition, Holbrook, MA
- OPM – Mill Hill Fire Station Renovations and Addition, Chelsea, MA
- OPM – Elementary Schools Capital Maintenance, Wellesley, MA
  - Fiske Elementary School
  - Hardy Elementary School
  - Hunnewell Elementary School
  - Schofield Elementary School
  - Upham Elementary School
- OPM – Various Town-Wide Capital Projects, Wellesley, MA
  - Sprague Elementary School & Hunnewell Elementary School Roofs
  - Wellesley Middle School Plaza
  - Warren Building
  - Central Fire Station
  - Police Headquarters
- OPM – Lynn Classical High School Renovation, Lynn, MA
- OPM – Stacy Middle School Envelope Repairs, Milford, MA

**CBI certifies that we meet the Minimum Qualifications as set forth in the RFP and acknowledges Addendum #1 dated October 25, 2021.**

CBI has a proven track record of successfully completing projects and coordinating work and protecting the interests of our clients and look forward to the opportunity to do the same for the Cambridge Redevelopment Authority. Our experience has given us a depth of knowledge necessary to meet your needs and we look forward to putting our experience to work in the weeks and months ahead for the CRA, MFNH, and the community both organizations serve.

### CBI Consulting, LLC



Wayne Lawson, PE, SECB, MCPPO – *Principal*  
 250 Dorchester Avenue | Boston, MA 02127  
 M: 617.823.2553 | wayne.lawson@socotec.us



# CAMBRIDGE REDEVELOPMENT AUTHORITY

## Owner's Project Manager (OPM) Services for Historic Margaret Fuller Neighborhood House Preservation & Improvements

*Cambridge, Massachusetts*

Cover Letter  
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# SECTION 1





# Organizational Chart



CAMBRIDGE  
**REDEVELOPMENT**  
AUTHORITY



**OPM Project Director**  
Wayne Lawson, PE, SECB, MCPPO  
MA Reg #35102



**OPM Project Manager**  
Jennifer dos Santos, CDT, MCPPO, Assoc. AIA  
MA Reg #N/A



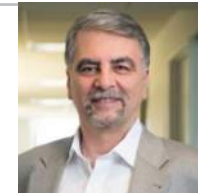
**Assistant Project Manager**  
Riana Burton  
MA Reg #N/A



**Architectural/Historic Preservation Design Support**  
Steven Watchorn, AIA, LEED AP BD+C  
MA Reg #51095



**Energy & Sustainability Support**  
Adrian Tuluca, RA, BEMP, LEED AP BD+C  
MA Reg #32291



# FIRM PROFILE

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## The CBI Advantage

CBI Consulting, LLC has over 37 years acting as an advocate on behalf of Owners across many sectors, specifically Massachusetts State and Municipal Awarding Authorities, helping bring construction projects to successful completion.

We have been providing “Owner’s Project Manager Services” long before the term was coined and we take a proactive and comprehensive approach to our OPM projects. We have extensive experience working as an advocate for municipal and State awarding authorities, helping to bring their projects to successful completion.



# OUR SERVICES

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**OPM**



**ARCHITECTURE**



**STRUCTURAL  
ENGINEERING**



**BUILDING  
ENVELOPE**



**HISTORIC  
RESTORATION**



**COMMISSIONING**



**CODE ADVISORY**



**CONSTRUCTION  
ADVISORY**



**SPECIALTY  
ENGINEERING**



**ENERGY**

# OPM SERVICES

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CBI’s OPM team has the ability to make a greater impact on the technical components of a project. As designers ourselves, we have the appropriate knowledge to ask the proper questions regarding the designer’s documents and design decisions, such as potential cost implications or long-term maintenance impacts associated with the materials specified or the installation details proposed. We believe this offers our clients an additional advantage over some other OPM firms.

CBI prepares preliminary project schedules based on submission deadlines put in place by the Owner and preliminary project budgets to track associated costs, including the Designer and OPM fees, testing and reimbursable costs, and any other consulting costs that may be necessary. Additionally, we are your trusted advisor for the various other items that may be necessary for an individual project:

- Designer Selection Laws & Procedures
- Design Peer Reviews
- Value Engineering Assistance
- Dispute Resolution
- Financial and Budget/Cost Controls
- Scheduling Assistance





## WAYNE LAWSON, PE, SECB, MCPPO OPM PROJECT DIRECTOR

Wayne R. Lawson is a licensed structural engineer and has been acting as both design engineer and project manager on municipal construction projects for over 37 years; projects have spanned the full project life cycle from pre-design and planning, design, construction to commissioning and closeout phases. His extensive engineering experience which includes studying, evaluating, and designing intricate structural systems has given him the ability to view a project comprehensively, considering all of the factors. With the increasing complexities of the design and construction landscape, Mr. Lawson brings a practicality to his Project Management approach that balances multiple priorities including budget, schedule, code requirements, sustainability objectives and asset endurance.

Mr. Lawson's project experience includes public-sector, institutional, educational, industrial, commercial, and residential projects. As a registered Professional Engineer, his first priority is always public safety, but his goal is to provide the most cost-effective solutions for clients while responding to their needs.

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### EDUCATION:

Master of Science, Civil Engineering, 1999  
University of Massachusetts

Bachelor of Science, Civil Engineering, 1983  
Worcester Polytechnic Institute

### REGISTRATION:

Professional Engineer in:

- MA #35102
- CT #26372
- FL #76639
- KS #24529
- ME #11577
- NH #12396
- NY #085753-1
- PA #PE075187
- RI #8929
- VT #018-0009122
- MCPPO Certified School Project Designer and Owner's Project Manager

### PROFESSIONAL ACTIVITIES:

- American Concrete Institute
- American Society of Civil Engineers
- Chi Epsilon National Engineering Honor Society
- National Trust for Historic Preservation
- National Fire Protection Association
- Tau Beta Pi National Engineering Honor Society
- Boston Association of Structural Engineers
- Structural Engineering Association of Massachusetts
- Certificate Holder National Council of Examiners for Engineering and Surveying
- US Green Building Council

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### REPRESENTATIVE PROJECTS:

- OPM for Renovation to Historic Josiah Smith Tavern, Weston, MA
- OPM for New Emergency Communication Center, Tewksbury, MA
- OPM for New Emergency Communication Center, Holbrook, MA
- OPM for Various Town-Wide Capital Projects, Wellesley, MA
- OPM for 5 Wellesley Elementary Schools, Wellesley, MA
- OPM for New Point of Pines Fire Station, Revere, MA
- OPM for Mill Hill Fire Station, Chelsea, MA
- OPM for Old Town Hall, Tyngsborough, MA
- OPM for Tewksbury Town Hall, Tewksbury, MA
- OPM for Lynn Classical High School Slab Demolition, Lynn, MA
- OPM for Demolition of Thurgood Marshall Middle School, Lynn, MA
- OPM for Stacey Middle School, Milford, MA
- On-Call Project Management & A/E Projects, City of Lynn
- On-Call Project Management & A/E Projects, Town of Tewksbury
- 93-99 Bishop Allen Drive Structural & Envelope, Cambridge, MA
- First Parish Meeting Housing Interior & Exterior Renovations, Tyngsborough, MA
- Woodrow Wilson Court, Cambridge Housing Authority
- Clement Street Development, Malden Housing Authority
- Wallace Tower Masonry, Fitchburg Housing Authority
- River Court Condominiums, Cambridge, MA
- Barnstable Town Hall, Hyannis, MA
- Lawrence City Hall, Lawrence, MA
- New Dover DPW, Dover, MA
- New Maintenance Facility, East Boston, MA
- South Lawrence Fire Station, Lawrence, MA
- School Administration Building Various Repairs, Hyannis, MA





## JENNIFER DOS SANTOS CDT, MCPPO, ASSOC. AIA OPM PROJECT MANAGER

Jennifer L. dos Santos is an experienced Construction Manager specializing in Massachusetts public bidding and procurement regulations, contract administration, scheduling, budget management and cost controls.

Ms. dos Santos is able to combine her experience in public design and construction with her ability to maintain a holistic and comprehensive view to bring projects to successful completion. This allows her to proactively identify and mitigate potential risk while managing budgets and schedules and lead a team through the project life cycle.

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### EDUCATION:

Bachelor of Science in Building Construction Management  
Wentworth Institute of Technology

### EXPERIENCE:

2008 - Present  
CBI, now a SOCOTEC Company

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### REPRESENTATIVE PROJECTS:

- OPM for Renovations to Historic Josiah Smith Tavern, Weston, MA
- OPM for New Point of Pines Fire Station, Revere, MA
- OPM for the Renovations of the Mill Hill Fire Station, Chelsea, MA
- OPM for New Emergency Communication Center, Tewksbury, MA
- OPM for the New Emergency Communications Center, Holbrook, MA
- OPM for Various Town-Wide Capital Projects, Wellesley, MA
- OPM for Renovation of Historic Tewksbury Town Hall, Tewksbury, MA
- OPM for Historic Old Town Hall Renovation, Tyngsborough, MA
- OPM for Bridge Boston Charter School Envelope, Roxbury, MA
- OPM for Demolition of Thurgood Marshall Middle School, Lynn, MA
- Fire Stations #1 Roof Repairs, Brookline, MA
- Tewksbury Police Station Roof Repairs, Tewksbury, MA
- On-Call Project Management & A/E Projects, City of Lawrence
- Rowley Town Hall Annex, Rowley, MA
- North Common Education Complex, Lawrence, MA
- Lawrence City Hall, Lawrence, MA
- Veteran's Memorial Stadium, Lawrence, MA
- Historic Webster Town Hall, Webster, MA
- Parker Elementary School Windows & Doors, New Bedford, MA
- First Parish Meeting House Restoration, Tyngsborough, MA
- Hull Public Library Envelope, Hull, MA
- Russells Mills Library Cupola Repairs, Dartmouth, MA
- Salem Common Fence Historic Restoration, Salem, MA
- Everett Memorial Stadium Honor Plaza, Everett, MA
- Ashland Middle School Roof Replacement, Ashland, MA
- Hood Elementary School Accessibility Upgrades, Lynn, MA
- Clement Street Development, Malden Housing Authority
- Mystic River Development Roof Replacement, Somerville Housing Authority
- Wallace Towers, Fitchburg Housing Authority
- Cherry Street Window Replacement, Everett Housing Authority
- 23-25 Bowdoin St Building Envelope, Boston Housing Authority
- Woodrow Wilson Court, Cambridge Housing Authority
- Orient Heights Roof Repairs, Boston Housing Authority
- Mary Ellen McCormack Roof Repairs, Boston Housing Authority
- 91-95 Washington Street Elevator Modernization, Boston Housing Authority, Brighton, MA
- Malden Housing Authority ADA Upgrades, Malden, MA





## RIANA BURTON

### ASSISTANT PROJECT MANAGER

Riana Burton is an experienced Assistant Project Manager who has worked on public-sector projects including renovations, additions, historic restoration and new construction. Ms. Burton is responsible for assisting with creating and maintaining the project portfolio, including the budget, schedule and issues logs. She is well versed in Massachusetts procurement procedures and provides process and compliance support to the team. In addition, she also supports the site representative with tracking on site activities and maintaining project reports.

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#### EDUCATION:

Bachelor of Arts in Global Studies,  
Minor in Business Administration  
University of Vermont, 2013

#### EXPERIENCE:

2018 - Present  
CBI Consulting, LLC, now a SOCOTEC  
Company

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#### REPRESENTATIVE PROJECTS:

- OPM for Adaptive Re-Use of Historic Josiah Smith Tavern, Weston, MA
- OPM for New Point of Pines Fire Station, Revere, MA
- OPM for New Regional Emergency Communications Center, Tewksbury, MA
- OPM for New Regional Emergency Communications Center Addition, Holbrook, MA
- OPM for Bridge Boston Charter School Envelope, Roxbury, MA
- OPM for Demolition of Thurgood Marshall Middle School, Lynn, MA
- Lawrence, City Hall, Lawrence, MA
- Holden Town Hall, Holden, MA
- Swansea Town Hall Roof, Swansea, MA
- First Parish Meeting House, Tyngsborough, MA
- Town Hall Assessment, Webster, MA
- Barnstable Carriage House, Hyannis, MA
- Rowley Town Hall Annex, Rowley, MA
- Central Fire Station Roof Replacement, Lawrence, MA
- Briggs Corner and Fire Headquarters Roofs, Attleboro, MA
- South Lawrence Fire Station Apparatus Bay, Lawrence, MA
- Dover Police & Fire Station Roofs, Dover, MA
- Gerrior Square Condominiums, Somerville, MA
- North Common Education Complex, Lawrence, MA
- Lowell Community Charter, Lowell, MA
- MA State Building at the Big E, West Springfield, MA
- Police Department Locker Room Renovations, Lowell, MA
- High School Softball Field Lighting, Acton, MA
- Pleasant Tower Apartments Elevator Modernization, Worcester Housing Authority
- Webster Square Apartments Elevator Modernization, Worcester Housing Authority
- Forestdale Apartments Modernization, Malden Housing Authority
- Newland Street & Coleman Street Developments Roof Replacement, Malden Housing Authority
- Clement Street Development Full Gut Renovation, Malden Housing Authority
- 557 Pleasant Street EIFS Repairs, Malden Housing Authority
- 23-25 Bowdoin Street Building Envelope, Boston Housing Authority





## STEVEN WATCHORN AIA, LEED AP BD+C ARCHITECTURAL / HISTORIC PRESERVATION DESIGN SUPPORT

Steven Watchorn is experienced and trained in the fields of Architecture, Planning and Urban Design. His unique background makes him a valuable asset to our team in site planning, building analysis, design and project management.

He is accomplished in all aspects of architectural practice, from schematic design through the production of working drawings and construction administration for multi-million-dollar facilities. Early in his career, Steven worked for both private architecture firms as well as public and non-profit planning organizations. While his attention has always been on detail, his planning background helped set a foundation on the importance of keeping focus on the big picture. He has worked on award-winning historic renovations projects, such as the US Customs House in Barnstable, Massachusetts.

### EDUCATION:

Master of Architecture, Urban Design -  
University at Buffalo, 2003  
Master of Urban Planning, Urban Design -  
University at Buffalo, 2003  
Bachelor of Science, Architecture &  
Environmental Design - University at Buffalo,  
2000  
Aarhus School of Architecture - Denmark  
Studies Program, 2000

### EXPERIENCE:

2011 - Present  
CBI, now a SOCOTEC Company  
Principal

### REGISTRATIONS:

- Massachusetts Registered Architect #51095
- LEED Accredited Professional

### PROFESSIONAL ACTIVITIES:

- Past Chairperson of the Town of Rockland Historical Commission
- American Institute of Architects
- Boston Society of Architects
- American Planning Association

### ACHIEVEMENTS & AWARDS:

- 2018 Chatham Preservation Award - Eldredge Public Library Windows
- 2017 MA Historical Commission Preservation Award - US Customs House Restoration, Barnstable, MA
- 2009 Congress for the New Urbanism (CNU) Charter Award for Excellence:
- Comprehensive Plan, Buffalo, NY
- 2005 APA Outstanding Planning Award for a Plan: "The Queen City Hub" Strategic Downtown Plan, Buffalo, NY
- Executive Board Member, Upstate NY Chapter of APA

### REPRESENTATIVE PROJECTS:

- OPM for Renos to Historic Josiah Smith Tavern, Weston, MA
- OPM Services for Adaptive Re-Use of Historic Josiah Smith Tavern, Weston, MA
- Gerrior Square Condominiums, Somerville, MA
- New Police Station, Avon, MA
- Historic Town Hall Restoration, Stow, MA
- DPW Building Assessments, Wellesley, MA
- Historic Rowley Town Hall Annex Accessibility, Rowley, MA
- Community Television Building Waterproofing Study, Dartmouth, MA
- Historic Restoration of Former Union School, Braintree, MA
- Town Hall & Physical Education Building Elevator Upgrades, Brookline, MA
- Central Fire Station Feasibility Study, North Attleboro, MA
- Historic Symphony Hall Window Restoration, Springfield, MA
- Historic Forest Park Library Accessibility Renovations, Springfield, MA
- Historic Springfield Police Headquarters Renovations, Springfield, MA
- Historic City Hall Council Chambers Desk, Springfield, MA
- Barnstable High School 21st Century Media Center & Curtainwall Replacement, Hyannis, MA
- High School Environmental Classroom Renovations, Hyannis, MA
- Sumner Whittier School Interior Renovations, Everett, MA
- North Quincy High School Roof, Quincy, MA
- Hood Elementary ADA/MAAB Upgrades, Lynn, MA
- Loker Elementary School Window/Doors, Wayland, MA
- Parker Elementary School Window/Door & Accessibility, New Bedford, MA
- Daniel Brunton Elementary School Window/Door & Accessibility, Springfield, MA
- Mary Walsh Elementary School Window/Door & Accessibility, Springfield, MA
- Public Day High School Window/Door & Accessibility, Springfield, MA







## ADRIAN TULUCA RA, BEMP, LEED AP BD+C ENERGY & SUSTAINABILITY SUPPORT

Adrian Tuluca advises Vidaris' clients on:

- Energy Code compliance (MA, New York State, New York City, CT)
- LEED, Passive House, BREEAM, Enterprise Green Communities
- State and Federal incentives and tax rebates
- In general, energy use and energy cost

Adrian and his team has been providing technical advice in regards to the Energy Code and to NYS on the NYS Green Construction Code.

Where appropriate, he and his team combine energy efficiency with moisture condensation and thermal comfort analyses (THERM, WUFI and CFD modeling). He has analyzed hundreds of millions of sf of facilities, achieving energy savings from 20% to over 50% to net zero, using a whole-building approach. The buildings obtained LEED ratings from Certified to Platinum.

### EDUCATION:

Master of Science in Architectural  
Technology  
Columbia University, New York

Master of Architecture  
Institute of Architecture, Bucharest

### EXPERIENCE:

2006 - Present  
CBI/Vidaris, now a SOCOTEC Company

1982 - 2006  
Steven Winter Associates, Inc.  
Principal

### REGISTRATION:

Registered Architect in:

- Connecticut
- Massachusetts
- New York

### CERTIFICATIONS:

- Building Energy Modeling Professional, ASHRAE
- LEED AP Building Design and Construction

### MEMBERSHIPS:

- ASHRAE
- USGBC

### REPRESENTATIVE PROJECTS:

#### Small Scale:

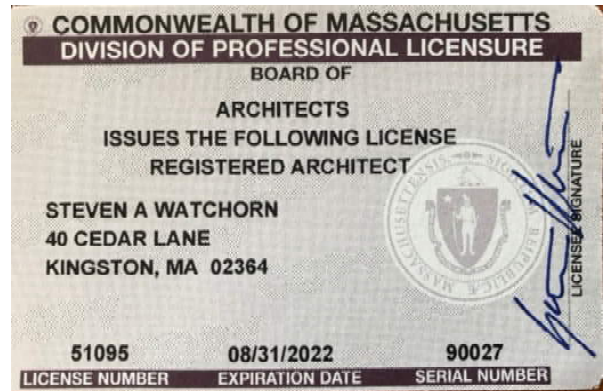
- Dudley Square Neighborhood Police Station, Dudley, MA
- George Robert White Nature Center, Boston, MA (environmental, geothermal)
- Pease Federal Office Building, Portsmouth, NH, Net Zero
- Selkirk Fire Station, Selkirk, NY - low carbon/low energy
- Aurora Hills Fire Station No. 5, Arlington, VA, LEED Silver
- 121st Police Precinct Station House, Staten Island, NY
- Staten Island Courthouse, Staten Island, NY
- Oberlin College - Adam Joseph Lewis Center, Oberlin, OH, Net Zero
- Walmart Supermarkets, Net Zero Study
- 74 Trinity Building, Assembly Podium and Office Tower, NYC, Passive House for 170,000 SF podium with classrooms, gym, auditorium and meeting rooms
- Holmes Residential Tower, New York, NY, Passive House
- 561 Greenwich St, NYC - very low carbon/very low energy office building, all-electric, highly insulated envelope
- Office HQ, NYC, very low carbon/very low energy office building, all-electric, triple-pane glass, electric chiller/heaters, high outside air ratio with modulation
- Queens Botanical Garden Administration Building, Queens, NY, LEED Platinum
- North Hempstead Community Center, Westbury, NY, LEED Platinum
- Brooklyn Botanical Garden Visitor Center, Brooklyn, NY, LEED Gold
- Bronx Zoo Lion House, Zebra House, Quarantine Building and TAB for Treatment and Isolation, Bronx, NY, LEED Gold
- Scenic Hudson Park at Long Dock - River Center & Kayak Pavilion, Beacon, NY, LEED Gold
- Idlewild Nature Center, Queens, NY, LEED Silver



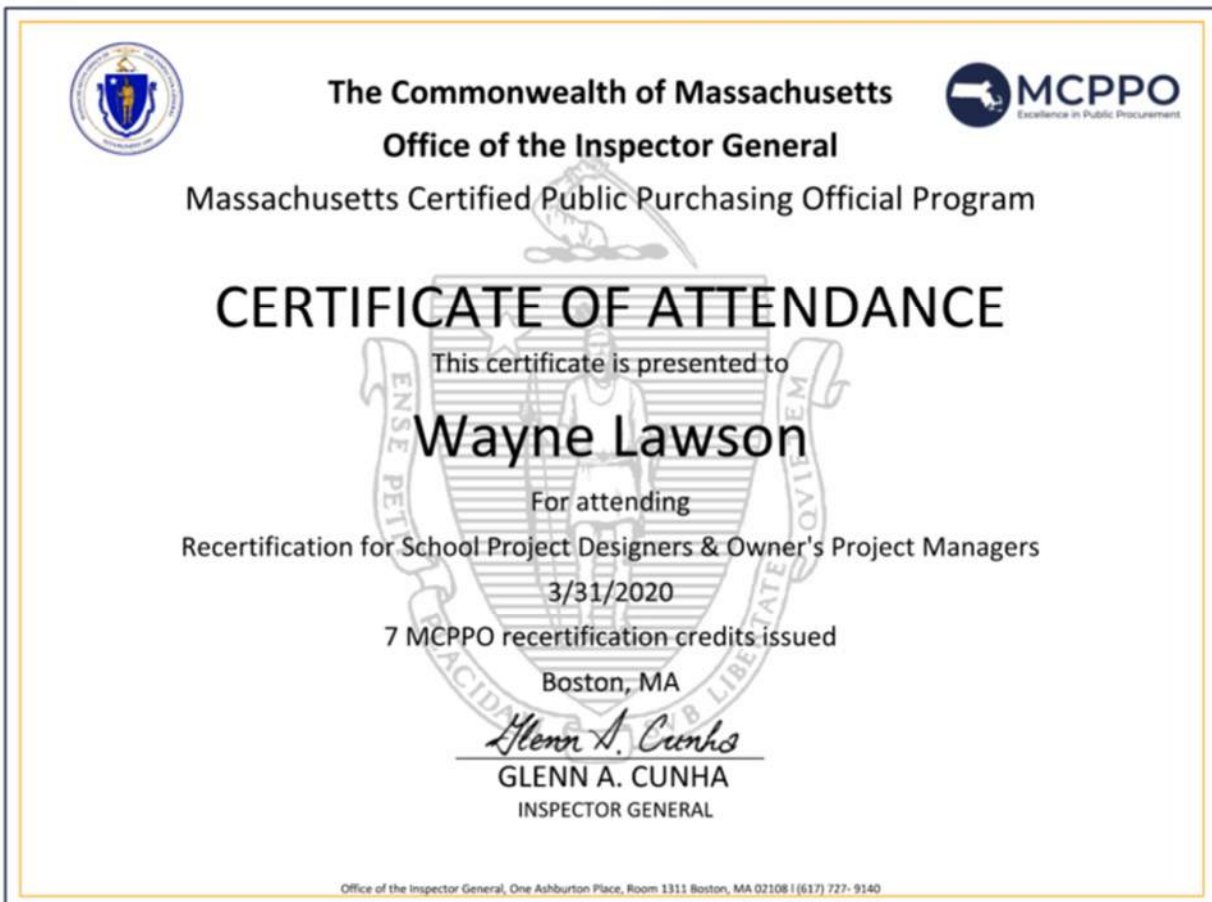
# LICENSES & REGISTRATIONS



**Wayne Lawson, PE, SECB, MCPPO**  
Structural Engineering



**Steven Watchorn, AIA, LEED AP BD+C**  
Architecture





# SECTION 2





## MANAGEMENT APPROACH

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CBI understands that all projects and all clients are unique, as are their needs and priorities. The hallmark of our success is understanding the individual needs, expectations, and priorities of each client. Although most owners are under budgetary constraints, that is rarely the only priority. Oftentimes, there are completion requirements, site concerns, special interest community groups or third-party funding sources to add to decision making matrices. It is our job to help navigate these factors to define a project that best accomplishes defined collective goals.



It is our responsibility as the OPM to support, guide, and act in the best interest of the Cambridge Redevelopment Authority (CRA) and the Margaret Fuller Neighborhood House (MFNH). CBI believes that the success of a project begins with **effective and timely communication** and our **holistic approach**. We believe that these are the foundations of our OPM success.

CBI will start by meeting with you and the stakeholders to understand your project goals and expectations and we will develop the Project Plan which will become the roadmap for the restoration, renovation, addition, and new construction housing at the historic Margaret Fuller Neighborhood House. The Project Plan becomes a vital part of the project as it communicates the overall schedule of milestones, budget, procurement matrix including Owner-furnished equipment, systems or services, and communication matrix to the entire team. This will be especially important because of the various project components as well as all the different groups involved including the CRA, MFNH, Real Estate Development Consultant, OPM, and Design Team.

## Initial Project Comments:

After reviewing the RFQ and listening to you at the in-person and virtual briefing sessions, we have an understanding of the project and the significance this building and its programs bring to the Cambridge community. We offer some initial thoughts:

- The historic Margaret Fuller House is in need of improvements and renovations to meet the current and future needs of the different programs housed in it. When renovating an existing structure, we have found that a thorough investigation including various test cuts into walls, floors, roof, etc. helps eliminate future costs due to uncovering the underlying conditions at the beginning. This will be especially important because it is a historic structure. It will be important to have realistic discussions about the owner's contingency. In any existing building, latent conditions are likely to be encountered and it is important to be properly prepared for these instances to maintain the progress of the project. We will discuss the risks and, as a team, together with the Architect, we will build in an appropriate contingency to the budget.
- There will likely be structural implications with the renovations to the existing historic Margaret Fuller House. Your OPM Project Director, Wayne Lawson, PE, is a registered Structural Engineer and will be able to provide valuable insight as well as constructability reviews during the design phases.
- The Project schedule and budget are always the priority for all of our projects. Budget management and the project schedule, as it specifically correlates to budget implications, are tracked and managed daily.
- Proper scheduling and sequencing will be important with such a multifaceted project, incorporating restoration, renovation, addition, and entirely new construction in one project.
- Understanding the role that the MFNH plays in its Community and how the Project will impact its ability to better provide critical services.

## Budget Considerations:

We will assist the CRA and MFNH with establishing the total project budget including soft costs and contingencies. During the preliminary phases, this will be based on estimated costs from past projects and, as the project progresses and actual costs added, the reconciled budget will become available in real time. On larger scale construction projects things can move quickly, and it is important to be sure that the OPM has systems in place to track to changes.

This project will most likely require more than one budget to be sure that the funds for the Margaret Fuller Neighborhood House are tracked separately from the funds for the housing development. We will work with MFNH and CRA to properly allocate line items that may be shared, or partially shared, such as design fees, site related costs, utilities and any other potential costs.

We understand that Owner have a responsibility to the Community to make responsible spending decisions. Part of this responsibility is considering all of the associated costs. Upfront costs are not the only costs to be considered; this building should be able to serve the Community for many years to come, which means that maintenance costs, replacement costs, sustainability and future use are all part of the decision-making matrix.

CBI has the ability to both generate cost estimates and perform a review of the designer's cost estimate. Oftentimes, before a Designer has been engaged, our clients will want an "order of magnitude" cost estimate for preliminary decision-making purposes but we understand that Studio G has been previously engaged for the Feasibility Study of this project, and may continue to be involved in the project going forward.

Depending on the level of information available at the time and the level of understanding of the desired scope, CBI is often able to provide estimated costs based on current market trends, other similar projects we are currently working on, or have recently worked on. We also have a number of construction company partners who we can reach out to for comparison pricing or for orders of magnitude.

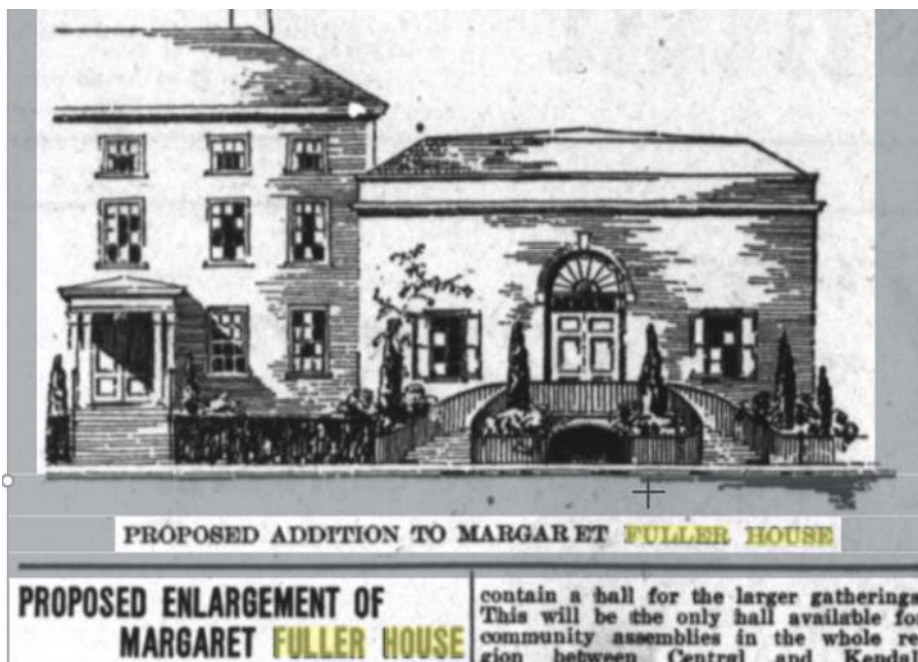
From Designer Selection through Construction and Closeout, CBI will track any changes to project costs, including the review of unforeseen conditions and change orders. In this way, we are able to monitor the impact of each design and repair element for early identification and procurement of additional time or funding. We also track all pending potential additional costs to provide you with the most accurate picture of the contingency and to, again, minimize potential risk and exposure to the CRA and MFNH.

## Value Engineering:

In conjunction with the Design Team, CBI will assist with value engineering efforts, offering our clients alternative solutions and comparing the initial installation costs with longer term replacement and maintenance costs to be sure that our clients have the whole picture. Our belief is that “two heads are better than one” and that, by working together with the Design Team (as necessary), we each may be able to consider more options.

We also evaluate materials and construction measures with respect to construction and replacement or maintenance costs. The selection of a particular design solution may also present impacts to building finishes, fixtures, and utilities that must be considered by the Design Team and this will be part of our peer review efforts and our value engineering assistance.

During the design phase of the project, CBI's team will perform peer reviews of the design documents and will issue comments related to code compliance, coordination of documents, pricing or budgetary concerns and adherence to the priorities of the CRA and other stakeholders. These comments will be made available to the design team for consideration. We find that this approach works very well for most of our clients and also for the design team as it can sometimes be very easy, and unintentional, to stray from the original objectives.



orders have on the overall schedule.

As a result of the COVID-19 pandemic, the industry is experiencing material, delivery and labor shortages. In an effort to mitigate these impacts, we are working closely with the Contractors to stay ahead of the materials needed for the projects and expedite procurements and buy outs to prevent delays.

We work with the Architect to include requirements in the specifications regarding buyout schedules and submittal schedules to keep the team informed of the status so that changes can be identified early and alternatives can be reviewed and discussed to keep the project on track.

CBI is currently providing OPM services for the renovation and adaptive reuse of the Historic Josiah Smith Tavern for the Town of Weston which is 90% complete. The project was showing some signs of falling behind schedule so CBI notified the Contractor that a recovery scheduled is required. It is important to be proactive when reviewing the monthly schedules and the look ahead schedules to be able to provide the Owner with real information to avoid delays later.

## Communication and Working Relationships:

We have built our reputation on the fact that delivery and efficient communication is key. A well-informed project team reduces surprises along the way that can cost time and money. We believe in keeping the lines of communication open and keeping all parties apprised of the status of the project.

## Schedule:

CBI's objective is always to bring your project to successful completion, while meeting or exceeding your budget and schedule expectations. To keep projects on track, we regularly compare the look ahead schedules to the baseline schedule for early recognition of any potential schedule impacts so we can adjust accordingly.

If a schedule impact does occur or is encountered, we require a recovery schedule from the Contractor. Having this information provided regularly puts us in a better position to evaluate time extension requests or impacts that change



From our experience working on all types of construction projects with a variety of Client types, we have a true understanding of the differing perspectives of different parties. From the thousands of successful projects we have completed over the years, we have formed and sustained lasting relationships with our clients, evidenced by our long list of repeat clients. We attribute this to our ability to understand and adapt to the styles and expectations of each project team. Project Teams are comprised of people who are all different; it is important that our clients and project team members trust us. As your OPM, we will start on Day One to develop strong, trusting working relationships with CRA and the MFNH.

In order to build that trust, we will endeavor to understand the perspectives of all stakeholders in the project, maintaining open lines of communication. Depending on the needs of the CRA, CBI will implement a communication/tracking system that suits the specific project needs.

The communication extends to all members including the occupants, the Community, and neighbors of the Margaret Fuller Neighborhood House. During the investigation phase of the existing building renovation, the Design Team will likely need to enter some, or all, the spaces to document existing conditions. Planning and communication are key so that the occupants are aware of what is going on to reduce any possible frustrations.

CBI can also help with community outreach, participation in community meetings or events, and providing up-to-date information for the website so that there is a clear understanding of changes that will occur with realistic timelines. We find that a well informed community benefits everyone and the different outlets where information is presented provide opportunities for the Community to get involved and ask questions.

### Choosing A Delivery Method:

CBI will advise and work with you on choosing the most appropriate delivery method for this Project whether that is Design/Bid/Build or the value and possibility of conducting the Project with a Construction Manager at Risk Delivery method. We will review the pros and cons of each with you and to be sure that we help you select the approach that works with the priorities of this project.

If the CM-at-Risk delivery method is chosen, CBI can help prepare the CM and Trade Subcontractor procurement and evaluation procedures and the approval request for submission to the Office of the Inspector General (OIG). Upon receipt of approval from the OIG, we will prepare the RFQ and the advertisement highlighting the importance of similar experience including, but not limited to, experience with Fire Station and public safety projects, and will manage the procurement of the CM. CBI will participate in the selection and interview process. We will also oversee and manage the procurement of the Trade Contractors.

We will also work with the Town and CM to negotiate and establish the Guaranteed Maximum Price (GMP). CBI will oversee the buy-outs of all filed and non-filed subcontractors and maintain the budget including buy out savings and shortfalls. During the execution of the work, CBI will review and make recommendations to the Town on the validity, timeliness and reasonableness of pricing of any change order requests from the CM.

### Maximizing Efficiency & Value for You:

It is our goal to maximize the value that our Clients receive. The following are some of the ways in which we will maximize efficiency and value for you:

- We will work closely with you at the onset to be sure that we are on the same page in terms of your expectations and goals. This will allow us to craft a scope of work that meets your needs without including extraneous tasks that may not be desired. We can work with you to negotiate a scope and fee that will work within the parameters of your budget and expectations.
- At the beginning of the project, we will work with you to establish the project requirements and make sure that they are documented and communicated to the design team. At each design submission, CBI (and the applicable team members) will perform a limited peer review where we will review for constructability, coordination items and compliance with the Owner's Project Requirements. We will then provide the feedback to the design team.

- It is also important to be sure that there is transparency into the design process and design decisions. We may ask the design team to explain a certain design decision if it exceeds the code requirements or the Owner's Project Requirements, especially if a budget is particularly constrained. We have had occasions where a Design Team, with very good intentions of delivering a superior product to the client, has specified an assembly or a product that exceeds code or Project Requirements. We believe that it is our responsibility to make sure that you have that information and are able to make an informed decision. You may decide that the longevity or environmental benefit is worth the additional cost or you may decide that it is not in the budget at this time; but, either way, it is your decision to make.
- In addition to the technical review, we will also review the cost estimate prepared by the Design Team's Cost Estimator. If the estimate exceeds the budget, we will participate with the Town and Design Team in value engineering decisions and establishing alternate bid strategies to help maximize the available funds. Some strategies that we find can be very effective are the addition of bid alternates which will allow you to decide, upon receiving bids, if you would like to proceed with certain scopes of work, or unit prices for reasonably anticipated conditions so that you know up front what unit price costs will be.
- During the construction phase we will work with the Design Team to enforce the requirements of the General Contractor. This is particularly important to enforce schedule submission requirements such as monthly updates of the Critical Path Schedule and weekly look ahead schedules. By enforcing the submission of both, we are able to compare them and track whether or not the work is on schedule. Construction projects move quickly and early identification is critical to success. If we believe that a project is tracking behind schedule, we will work with the General Contractor to establish a recovery schedule and determine what kind of recovery efforts are available, such as whether or not night work or weekend work is an option or if the work force can be increased reasonably within the space.
- We will work closely with the Design Team to review Change Order Proposals or Change Order Requests and be sure that they comply with the contractual requirements for mark ups, additional time requests, wage rates and supporting documentation requirements. We will also do a validity review to verify that the work requested is not already owned under the contract or is not actually Contractor's means and methods. If it is determined to be valid, we will review the necessity and make a recommendation to the Town.
- We will also maintain a master PCO log and track contingency usage. As part of the PCO log, we typically classify all PCO's based on the cause (unforeseen conditions, omissions, inspector requirements or owner-requested addition). This will give you additional information for decision making as well.



# SECTION 3



## REFERENCES

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### **Town of Weston**

Case House  
89 Wellesley Street  
Weston, MA 02493

#### **Contact**

Gary Jarobski, Director of Facilities  
781.786.5270

[jarobskig@weston.org](mailto:jarobskig@weston.org)

#### **Project**

OPM for Historic Josiah Smith Tavern  
Restoration & Adaptive Reuse



### **Town of Tewksbury**

Tewksbury Town Hall  
1009 Main Street  
Tewksbury, MA 02150

#### **Contact**

Mr. Richard Montuori, Town Manager  
978.649.2314

[rmontuori@tewbury-ma.gov](mailto:rmontuori@tewbury-ma.gov)

#### **Project**

OPM for Historic Tewksbury Town Hall  
Restoration & Addition and New Regional  
Emergency Call Center



### **Town of Tyngsborough**

25 Bryants Lane  
Tyngsborough, MA 01879

#### **Contact**

Matt Hanson, Town Administrator  
978.649.2300 x109

[mhanson@tyngsboroughma.gov](mailto:mhanson@tyngsboroughma.gov)

#### **Project**

OPM for Adaptive Reuse of Old Town Hall  
Restoration





**Bridge Boston Charter School**

435 Warren Street  
Roxbury, MA 02119

**Contact**

John Wallace, Former Director of Finance  
617.784.4878

**Project**

OPM for Bridge Boston Charter School Envelope Repairs



**Town of Holbrook**

Town Hall, 50 North Franklin Street  
Holbrook, MA 02343

**Contact**

Stephen Hooke, Communications Director  
781.767.6461

[shooke@ncrecc.com](mailto:shooke@ncrecc.com)

**Project**

OPM for New Regional Emergency Call Center Addition



**City of Lynn**

Lynn City Hall, 3 City Hall Square  
Lynn, MA 01905

**Contact**

Mike Donovan, P.E., Director of Inspectional Services  
781.598.4000

[mdonovan@lynnma.gov](mailto:mdonovan@lynnma.gov)

**Project**

OPM for Lynn Classical High School Interior Renovations  
OPM for Demolition of Thurgood Marshall Middle School







Wayne Lawson

SOCOTEC

250 Dorchester ave,

Boston, MA 02127

Dear Wayne,

I wanted to express to you how happy we are with the Owner's Project Manager service that we received from SOCOTEC. We had used a different OPM on our last construction job and were dissatisfied with their customer service. The decision to switch to SOCOTEC turned out to be a great one.

Our project manager, Jennifer Dos Santos, was professional and capable, but what set her apart was her enthusiasm for our job and her calming presence during any bumps in the road. There was never any doubt in our minds that SOCOTEC was on our side and was protecting the interests of the school. Thanks in part to Jenne and SOCOTEC, our project finished on schedule and on budget. Having now experienced two OPM firms, I would choose SOCOTEC again in a second.

Keep up the good work.

Regards,

A handwritten signature in black ink, appearing to read "John Wallace", with a long horizontal flourish extending to the right.

John Wallace  
Director of Finance



**OFFICE OF THE TOWN MANAGER**  
**TOWN OF TEWKSBURY**  
TOWN HALL  
1009 MAIN ST  
TEWKSBURY, MASSACHUSETTS 01876

RICHARD A. MONTUORI  
TOWN MANAGER

(978) 640-4300  
FAX (978) 640-4302

November 16, 2020

To whom it may concern:

I would like to take this opportunity and provide this letter of reference for CBI Consulting as an Owners Project Manager. CBI has worked as OPM for the Town of Tewksbury on two projects, one being the historic renovation of our Town Hall and the other a newly Constructed Regional Communications Center. On both projects CBI performed extremely well, always ensuring the Town's interests were top priority. Their attention and understanding of design detail, procurement and contract/construction management is excellent which allowed both our projects to be successful. Building projects are the most complicated projects in the public sector and an area of construction where communities are always exposed to cost overruns, poor performing contractors and potential litigation. I have always felt confident in CBI's abilities to minimize, if not completely avoid, these issues and deliver a quality project for the Town.

As a sign of further confidence that the Town has in CBI they have been contracted to undertake other design and consulting services for a variety of Town and School projects and is under agreement for "On-Call Architectural/Engineering Services" which they have performed for the Town since 2014.

I would not only recommend CBI but I would not hesitate to hire CBI them as an OPM for the Town in future.

Sincerely,

Richard A. Montuori  
Town Manager



## Holbrook Regional Emergency Communications Center

Director Stephan A. Hooke  
300 South Franklin Street  
Holbrook, MA 02343  
Business: 781-767-6461  
Fax: 781-767-6888



October 19<sup>th</sup> 2020

CBI Consulting, LLC | Vidaris, Inc.  
250 Dorchester Avenue  
Boston, MA 02127

Re: Holbrook Regional Emergency Communications Center, Holbrook, MA

Dear Mr. Lawson,

I am writing you today to express my absolute thanks and gratitude toward you and your team, especially Rick Almeida and Jennifer Dos Santos for your professional OPM services. In September of 2019, our agency broke ground on a new state of the art regional emergency communications facility which we anticipate moving operations into in November. As you are aware, this has been a multi-million-dollar project that has entailed the design and new construction of a 5,967 sq. ft. mission critical facility adjacent to our existing public safety building.

Throughout every phase of the project, you and your team have been extremely dedicated and responsive, have provided comprehensive (and relatable) status updates and went above and beyond to keep the many trades and vendors on schedule. All this throughout a pandemic which lasted throughout the duration of the project.

Rick Almeida was an asset during pre-construction meetings and the Design Development and Construction Documents phases. Rick's Architectural background was highly beneficial as he was able to truly explain the process and shed light on various components of the project from an Architectural viewpoint. Jennifer Dos Santos can largely be credited with keeping the project on track throughout the construction phase. This was the first project for the Architect assigned to our project and Jenne was able to assist in guiding him when necessary and stepped in also when necessary. Jenne was very responsive, taking calls at all hours and even stepped in as Clerk of the Works when needed. I can't say enough about Rick and Jenne and thank them for their professionalism. Of course, it takes a village and we would like to thank the entire team at CBI Consulting for the successful completion of this project.

Wayne, I cannot say enough about you and your team and greatly attribute the successful outcome of this project on your team's hard work, dedication and professionalism. I would absolutely recommend your firm to future project Owners. We would without a doubt work with CBI Consulting in the future and can attest that you are well-suited to handle even the most complex projects.

Please do not hesitate to reach out to me should you have any questions.

Sincerely,

*Stephan A. Hooke*

Stephan A. Hooke  
Director of Communications



# OPM SERVICES

## RENOVATION & ADAPTIVE REUSE OF JOSIAH SMITH TAVERN

Weston, Massachusetts, U.S.A.



### TYPE OF PROJECT:

Renovation, New Construction & Landscaping

### BUILDING TYPE:

Mixed-Use (Town Offices & Restaurant)

### CLIENT:

Town of Weston

### ARCHITECT:

Baker-Wohl Architecture

### START DATE:

2020

### ESTIMATED COMPLETION DATE:

2021

### ESTIMATED CONSTRUCTION COST:

\$9.3 Million

### DELIVERY METHOD:

Ch.149

### SERVICES:

Owner's Project Manager

### REFERENCES:

Town of Weston  
Gary Jarobski, Director of Facilities  
781.786.5270  
jarobskig@weston.org

CBI is providing Owner's Project Manager Services for the restoration, adaptive reuse, and renovation of the Historic Josiah Smith Tavern. This project also involved heavy community involvement and coordination with the various stakeholders throughout the project.





# OPM SERVICES

## ADDITION & RENOVATION OF TEWKSBURY TOWN HALL

Tewksbury, Massachusetts, U.S.A.



**TYPE OF PROJECT:** Renovation & Addition  
**BUILDING TYPE:** Municipal  
**CLIENT:** Town of Tewksbury  
**ARCHITECT:** Kang Associates  
**START DATE:** 2014  
**ESTIMATED COMPLETION DATE:** 2016  
**ACTUAL COMPLETION DATE:** 2016  
**ESTIMATED CONSTRUCTION COST:** \$6.2 Million  
**ACTUAL CONSTRUCTION COST:** \$6.5 Million  
**DELIVERY METHOD:** Ch.149  
**SERVICES:** Owner's Project Manager

**REFERENCE:**  
Town of Tewksbury  
Richard Montuori, Town Manager  
978.649.2314  
rmonduori@tewksbury-ma.gov

CBI provided Owner's Project Management services for the Town of Tewksbury's Town Hall. The scope of the work for the project included a complete renovation and rehabilitation of the existing Town Hall, built in 1917, along with two new additions that add additional meeting and office space and provide handicap accessibility to all three levels of the building. In addition, the complete building envelope was restored including windows, roofing, and brick masonry.



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# RENOVATION & ADAPTIVE REUSE OF OLD TOWN HALL

Tyngsborough, Massachusetts, U.S.A.

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**TYPE OF PROJECT:**

Existing Building

**BUILDING TYPE:**

Municipal

**CLIENT:**

Town of Tyngsborough

**ARCHITECT:**

Court Street Architects

**START DATE:**

2013

**ESTIMATED COMPLETION DATE:**

2014

**ACTUAL COMPLETION DATE:**

2014

**ESTIMATED CONSTRUCTION COST:**

\$2.5 Million

**ACTUAL CONSTRUCTION COST:**

\$2.1 Million

**SERVICES:**

Project Management Services

**REFERENCES:**

Matt Hanson  
Town Administrator  
Town of Tyngsborough  
25 Bryants Lane  
Tyngsborough, MA 01879  
978.649.2300

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We provided Owner's Project Manager (OPM) services for the renovation and restoration of this wood-framed historic Town Hall.

We provided Owner's Project Management services for the Town of Tyngsborough's Old Town Hall renovation and rehabilitation project. The scope of work for the project included the full rehabilitation of the Old Town Hall building into a community space. The building was abandoned for a number of years and a full "gut" renovation of the interior was necessary. This involved the restoration of the existing wood windows, restoration of existing clapboard siding and trim, installation of new MEP systems, construction of a new addition for lavatories and making the entire building handicap accessible. The original slate roofing was removed and select slates were reinstalled on one half of the roof after new plywood sheathing had been installed. New slates were installed on the remaining half. The entire building; walls and roof were insulated with spray foam to immensely improve the overall energy efficiency of the building.

# OPM SERVICES

## ADDITION FOR NEW EMERGENCY COMMUNICATIONS CENTER

Holbrook, Massachusetts, U.S.A.



<b>TYPE OF PROJECT:</b>	New Construction
<b>BUILDING TYPE:</b>	Municipal: Public Safety
<b>CLIENT:</b>	Town of Holbrook
<b>ARCHITECT:</b>	Jacunski Humes Architects, LLC
<b>START DATE:</b>	2018
<b>ESTIMATED COMPLETION DATE:</b>	2020
<b>ACTUAL COMPLETION DATE:</b>	2020
<b>ESTIMATED CONSTRUCTION COST:</b>	\$4.2 Million
<b>ACTUAL CONSTRUCTION COST:</b>	\$3.9 Million
<b>DELIVERY METHOD:</b>	Ch.149
<b>SERVICES:</b>	Owner's Project Manager

**REFERENCE:**  
Stephan Hooke  
Communications Director  
Town of Holbrook  
50 North Franklin Street  
Holbrook, MA 02343  
781.767.6461

CBI was engaged to provide OPM services for the Town of Holbrook, acting on behalf of the Towns of Abington, Avon, Canton, Holbrook, Randolph, Rockland, Sharon and Whitman, as the charter members of the Norfolk County – Regional Emergency Communications Center (NC-RECC), for the development of a 5,260 square foot addition to the Holbrook Public Safety Building.

The scope of work includes:

- Advise and assist the Town with evaluating designers and negotiating the design contract during the selection process.
- Provide advice on General Contractor bid process.
- Provide advice during subcontractor bid process.
- Review the designer's contract and subsequent amendments.
- Monitor the designer's progress and work with the designer to resolve any problems hindering the project's completion.
- Consult with users and other groups affected by project.
- Provide advice and comment on design options presented by the designer.
- Review and approve invoices for payment submitted by the designer.
- Conduct weekly inspections on project throughout construction phase and provide the Town with inspection reports outlining progress, potential problems and suggested solution.





# OPM SERVICES

## NEW ALDEN A. MILLS, POINT OF PINES FIRE STATION

Revere, Massachusetts, U.S.A.



<b>TYPE OF PROJECT:</b>	Demolition & New Construction
<b>BUILDING TYPE:</b>	Public Safety
<b>CLIENT:</b>	City of Revere
<b>START DATE:</b>	2020
<b>ESTIMATED COMPLETION DATE:</b>	2022
<b>ESTIMATED CONSTRUCTION COST:</b>	\$9.2 Million
<b>SERVICES:</b>	Owner's Project Manager

**REFERENCE:**  
Paul Cheever  
Deputy Chief  
City of Revere/Revere Fire  
Department  
281 Broadway  
781.286.8362

CBI is currently providing Owner's Project Manager Services for the construction of a new Alden A. Mills, Point of Pines Fire Station for the City of Revere. The City decided to demolish the existing facility and build a new facility on the same site. An adjacent parcel is planned to be purchased from the Department of Conservation and Recreation (DCR).

There is another project that is planned for development simultaneously with this one that will likely result in reconfiguration of an MBTA bus turnaround and rerouting of an on ramp and off ramp to Route 1 which will have to be very carefully coordinated to prevent cost and schedule impacts.

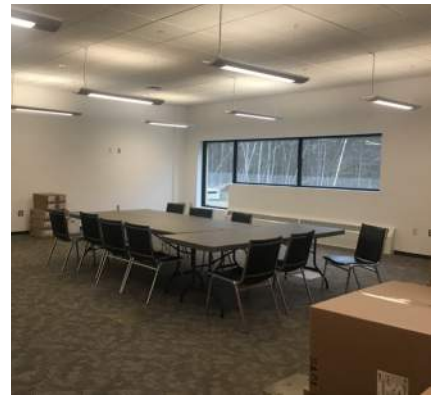




# OPM SERVICES

## NEW REGIONAL EMERGENCY COMMUNICATIONS CENTER

Tewksbury, Massachusetts, U.S.A.



<b>TYPE OF PROJECT:</b>	New Construction
<b>BUILDING TYPE:</b>	Municipal: Public Safety
<b>CLIENT:</b>	Town of Tewksbury
<b>ARCHITECT:</b>	The Galante Architecture Studio
<b>START DATE:</b>	2016
<b>ESTIMATED COMPLETION DATE:</b>	2020
<b>ACTUAL COMPLETION DATE:</b>	2020
<b>ESTIMATED CONSTRUCTION COST:</b>	\$4.2 Million
<b>ACTUAL CONSTRUCTION COST:</b>	\$3.6 Million
<b>DELIVERY METHOD:</b>	Ch.149
<b>SERVICES:</b>	Owner's Project Manager

### REFERENCE:

Town of Tewksbury  
Richard Montuori, Town Manager  
978.649.2314  
rmonduori@tewksbury-ma.gov

CBI provided OPM services for the construction of the new Northern Middlesex Regional Emergency Communications Center (NMRECC), a 7,000 square foot building which includes a dispatch area and administration, training space, conference space, parking with a 30-vehicle capacity, and is handicap accessible.

As the OPM, CBI supported the Town and managed the overall project budget, project schedule, and coordinated installation of new utilities services with utility providers and the general contractor in order to facilitate equipment start up and commissioning.

CBI managed the coordination of multiple Owner furnished equipment and services, assisted with grant applications, reimbursement requests, and quarterly reports, as well as provided a full-time on-site Clerk-of-the-Works to observe the progress of the work and provide the Owner with Daily Status Reports.

During design, CBI provided review of cost estimates and value engineering items for the Owner to consider for cost savings. Originally the Architect designed a butterfly roof (or "V" roof) which is an inversion of a standard roof form. However, CBI recommended simplifying it to a flat roof because the "V" roof would create ponding issues, complications for the rooftop mechanical units, and would need a secondary drainage system to meet code requirements.

The Architect also originally designed the structure with exposed glulams. While visually pleasing, CBI recommended this design feature may not be necessary for this type of building.

**At the completion of the project there were less than 1½% in Change Orders which included Owner requested changes/upgrades and the project was completed on time.**



# OPM SERVICES

## VARIOUS CAPITAL IMPROVEMENT PROJECTS

Wellesley, Massachusetts, U.S.A.



<b>TYPE OF PROJECT:</b>	Renovation
<b>BUILDING TYPE:</b>	Various
<b>CLIENT:</b>	Town of Wellesley
<b>START DATE:</b>	2014
<b>ESTIMATED COMPLETION DATE:</b>	2014
<b>ACTUAL COMPLETION DATE:</b>	2014
<b>ESTIMATED CONSTRUCTION COST:</b>	\$3.8m
<b>ACTUAL CONSTRUCTION COST:</b>	\$3.5m
<b>DELIVERY METHOD:</b>	Ch.149
<b>SERVICES:</b>	Owner's Project Manager (OPM)

**REFERENCE:**  
Town of Wellesley  
Joseph McDonough, PE, Facilities  
Director  
781.431.1019  
jmcdonough@wellesleyma.gov

CBI provided Owner's Project Manager services for various Town-Wide Capital projects including two school roofs, two school exterior building and entrance repairs, HVAC repairs/replacement at Police and Fire Station, Fire Station floor replacement, and miscellaneous repairs at the Warren Building. CBI's responsibility included monitoring and overseeing two (2) designers with multiple projects each. With two (2) designers and three (3) bid packages, three separate budgets to be monitored and various projects that needed to be coordinated with the tenants and the end users, there was a lot of organization and communication involved.

CBI was involved from the very beginning of the project including designer selection for the Architectural firm and for the Engineering firm. After the designers were contracted, CBI worked closely with the Town and Designers to develop the scope, acted as the liaison between the Facilities Department and the Designers to coordinate site visits for investigations and attended some of the investigations to offer insight and to ensure that the scopes of work for each project were adhered to. During the design phase, CBI performed periodic reviews of the Designer's submissions including the cost estimates and schedules, offering suggestions and answering questions. We also worked very closely with the designers to ensure that the correct products were specified. In addition, CBI attended regular Permanent Building Committee (PBC) meetings in order to provide project updates, including the adherence to overall schedules and budgets that had been established, and to observe the Designers' presentations regarding the status' of the projects.

CBI worked closely with the Town and Fire Department to make sure operations at these building has the least amount of impact during the work.

CBI also assisted with the dispute resolution and mediation (and post-mediation) that occurred.





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# OPM SERVICES

## 5 ELEMENTARY SCHOOLS

Wellesley, Massachusetts, U.S.A.

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CBI was engaged to provide Owner's Project Manager (OPM) services for various repairs and renovations to five elementary schools. CBI provided value engineering services while working closely with the Town of Wellesley to develop the construction scope for contractor bidding, the construction schedule, project phasing, and construction oversight.

The scope of work at the Fiske Elementary, Hardy Elementary, Hunnewell Elementary, Schofield Elementary and Upham Elementary schools included roof replacement, HVAC upgrades, bathroom renovations, as well as boiler replacement and repairs to the ceiling, roof, windows, doors, and flooring replacement.

<b>TYPE OF PROJECT:</b>	Renovation
<b>BUILDING TYPE:</b>	Educational - District School
<b>CLIENT:</b>	Town of Wellesley
<b>COMPLETION DATE:</b>	2013
<b>CONSTRUCTION COST:</b>	\$8m
<b>DELIVERY METHOD:</b>	Ch.149
<b>SERVICES:</b>	Owner's Project Manager Services



**REFERENCE:**  
Town of Wellesley  
Joseph McDonough, PE, Facilities Director  
781.431.1019  
jmcdonough@wellesleyma.gov

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## OPM SERVICES

### LYNN CLASSICAL HIGH SCHOOL INTERIOR RENOVATIONS

Lynn, Massachusetts, U.S.A.

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**TYPE OF PROJECT:**

Renovation

**BUILDING TYPE:**

Educational - District School

**CLIENT:**

City of Lynn

**ARCHITECT:**

Simpson, Gumpertz & Heger, Inc.

**START DATE:**

2008

**ESTIMATED COMPLETION DATE:**

2010

**ACTUAL COMPLETION DATE:**

2010

**ESTIMATED CONSTRUCTION COST:**

\$12 Million

**ACTUAL CONSTRUCTION COST:**

\$10.5 Million

**DELIVERY METHOD:**

Ch.149

**SERVICES:**

Owner's Project Manager Services

**REFERENCE:**

Mike Donovan, PE

Director of Inspectional Services

City of Lynn

Lynn City Hall, 3 City Hall Square

Lynn, MA 01905

781.598.4000

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As Owner's Project Manager (OPM), we provided value engineering services while working closely with the City of Lynn to develop the construction scope for contractor bidding. We worked with the Owner, designer and contractor to develop a construction schedule, and was present during construction. We supervised the bidding process, reviewed plans and specifications and assisted the City of Lynn in the interviewing and decision-making process.

The scope of work included managing the finances of the project and providing public relations services. We provided cost estimates during the preliminary design stage and design development stage and provided cost estimates during the development of contract documents as well as the review of incoming change orders. To keep the lines of communications between parties open, We provided the City of Lynn with regular updates throughout the project and attended meetings with necessary municipal and community groups to provide information and respond to their questions and concerns.



# OPM SERVICES

## BRIDGE BOSTON CHARTER SCHOOL

Roxbury, Massachusetts, U.S.A.



<b>TYPE OF PROJECT:</b>	Renovation
<b>BUILDING TYPE:</b>	Educational - Charter School
<b>CLIENT:</b>	Bridge Boston Charter School
<b>ARCHITECT:</b>	Gale Associates, Inc.
<b>START DATE:</b>	2020
<b>ESTIMATED COMPLETION DATE:</b>	August 2021
<b>ACTUAL COMPLETION DATE:</b>	August 2021
<b>ESTIMATED CONSTRUCTION COST:</b>	\$561,000
<b>ACTUAL CONSTRUCTION COST:</b>	\$561,000
<b>DELIVERY METHOD:</b>	Ch.149
<b>SERVICES:</b>	Owner's Project Manager Services



CBI provided OPM services for the atrium skylight repair and replacement project at Bridge Boston Charter School in Roxbury, Massachusetts. The skylight connection appeared to be detached and there were several occurrences of multiple panels lifting up and banging back into place during strong wind events.

The Owner's Representative did not have capacity to run and manage a major construction project. Even though the project did not trigger the threshold needed for an OPM, they recognized the need for us to assist with planning and designer selection, bidding and construction administration. CBI initially provided a high-level technical assessment and determined the criteria for the designer who was able to quickly put together design documents so we could bid the project.

### REFERENCE:

Bridge Boston Charter School  
Mr. John Wallace, Former Director of Finance  
617.784.4878



# OPM SERVICES

## DEMOLITION OF THURGOOD MARSHALL MIDDLE SCHOOL

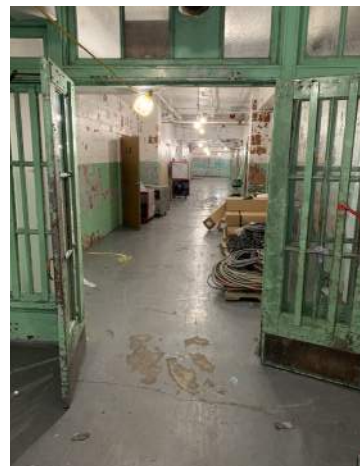
Lynn, Massachusetts, U.S.A.



<b>TYPE OF PROJECT:</b>	Demolition
<b>BUILDING TYPE:</b>	Educational
<b>CLIENT:</b>	City of Lynn
<b>ARCHITECT:</b>	Raymond Design Associates
<b>START DATE:</b>	January 2021
<b>ESTIMATED COMPLETION DATE:</b>	June 2021
<b>ACTUAL COMPLETION DATE:</b>	June 2021
<b>ESTIMATED CONSTRUCTION COST:</b>	\$2.75m
<b>ACTUAL CONSTRUCTION COST:</b>	\$2.6m
<b>SERVICES:</b>	Owner's Project Manager Services

**REFERENCE:**  
City of Lynn  
Mr. Michael Donovan, PE, Director  
of Inspectional Services  
781.598.4000  
mdonovan@lynnma.gov

CBI provided OPM services during the Construction Phase of the demolition of Thurgood Marshall Middle School. CBI supported the City and the project team with the management of the various participants, activities, and deliverables. We are also assisting with keeping the Community apprised of the progress by maintaining a webpage that is linked to the City website where residents or interested members of the community can go to access current information about the project including schedule status and photographs.





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## OPM SERVICES

### STACY MIDDLE SCHOOL ENVELOPE REPAIRS

Milford, Massachusetts, U.S.A.

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<b>TYPE OF PROJECT:</b>	Renovation
<b>BUILDING TYPE:</b>	Educational - District School
<b>CLIENT:</b>	Town of Milford / Milford Public Schools
<b>CONSTRUCTION COST:</b>	\$2.8m
<b>DELIVERY METHOD:</b>	Ch.149
<b>SERVICES:</b>	Owner's Project Manager

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CBI provided Owner's Project Manager services associated with the envelope repairs/restoration to the Stacy Middle School.

Work included replacement of existing EPDM roofing, replacement of over 300 windows and full cut and re-pointing of mortar joints for exterior granite walls. As Owner's Project Manager (OPM), CBI provided value engineering services while working closely with the Milford School Building Committee to develop the construction scope for contractor bidding. CBI worked with the Milford School Building Committee, designer and contractor to develop a construction schedule, reviewed field reports, and observed construction. CBI supervised the bidding process, reviewed plans and specifications and assisted the Milford School Building Committee in the interviewing and decision-making process.

The scope of work also included managing the finances of the project and providing public relations services. To keep the lines of communications between parties open, CBI provided the Milford School Building Committee with regular updates throughout the project and attended meetings with necessary municipal and community groups to provide information and respond to their questions and concerns.

#### REFERENCE:

Milford School Building Committee  
Dr. Robert Tremblay, Former Superintendent  
of Schools, currently works for Framingham  
Public Schools  
508.626.9118  
rtremblay@framingham.k12.ma.us



# FULL GUT RENOVATION

## CLEMENT STREET DEVELOPMENT

Malden, Massachusetts, U.S.A.



CBI designed the full gut rehab of the Clement Street Development, a special needs residential housing development, for the Malden Housing Authority. The existing Victorian style building was likely built around 1900 and in very poor condition. Bathrooms, windows, siding, elevator and mechanical systems are at the end of their useful life. The building is used by the Massachusetts Department of Mental Health who was interested in renovating the building to convert it from a group home arrangement into twelve individual one-bedroom dwelling units. Given the age of the building and new programming needs, Malden Housing opted to upgrade the entire facility to provide an improved living environment for the residents that is more in line with DMH's model for supportive independent living.

At the beginning of the project, CBI met with Malden Housing Authority (MHA) and the Massachusetts Department of Mental Health (DMH) to discuss design programming and functional needs of the residents and staff who will occupy the renovated building. The goal of this project was to convert the building into twelve (12) 1-bedroom units with special attention given to egress improvements, handicap accessibility, specialized programming needs, and building envelope energy compliance.

A limited use/limited access elevator (LU/LA) was installed within a new elevator shaft at the rear of the building where an existing building entrance will provide elevator access from grade up to the first floor and down to the basement level. In order to accommodate the LU/LA location, new stair shaft and egress corridors, we found that aligning the floor plan with the Victorian style symmetry of the existing structure yielded the most efficient space.

Functional common areas are very important for maintaining the supportive, semi-independent living environment intended for the Clement Street Development. The new egress core and utility rooms will consume most of the basement floor area that is not dedicated to dwelling units. Other than laundry, common areas will be exclusive to the first floor. A common lounge area with a television and sitting area are positioned adjacent to staff work stations to promote interaction between the staff and residents. The first floor also includes a community kitchen and dining area.

### REFERENCE:

Malden Housing Authority  
Stephen Finn, Executive Director  
781.322.3150  
sfinn@maldenhousing.org





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# WOODROW WILSON COURT MODERNIZATION

## CAMBRIDGE HOUSING AUTHORITY

Cambridge, Massachusetts, U.S.A.

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CBI provided architectural and engineering design services for the modernization of this family development.

A thorough investigation and evaluation was first completed including building exteriors, building structure, unit interiors, building systems, doors and windows, hazardous materials and code compliance to identify and prioritize the work to be done.

The original trash collection involved a chute system where tenants would throw their trash directly into the chute from floors above. The trash would go down to the basement to a compactor. The compactor rooms smelled foul and emanated odors throughout the apartments. The rooms were also infested with rodents. The compactors were also difficult to maintain. CBI designed a small addition to one of the buildings to work as a communal trash room for the entire complex. The design of the room is compatible with the architectural design of the overall complex. The room functions so tenants can drop material into chutes via exterior access from the ground level. The new trash room will have a trash compactor and recycle collection bins with proper ventilation and drainage for cleaning to help with maintenance.

Other major renovations included masonry repair and patching, construction of a new accessible entrance to each building, fire alarm system replacement, heating and water heater boiler replacement, replacement of faucets and aerators, and resupport of bathroom lavs.

**CONSTRUCTION:** \$3m



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# BUILDING ENVELOPE REPAIRS

## GERRIOR SQUARE CONDOMINIUMS

Somerville, Massachusetts, U.S.A.

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Gerrior Square is a 4-story, 41-unit, mixed-use condominium building constructed in 1898. Various components of the building envelope were deteriorated and in need of replacement and repairs. CBI first performed an existing conditions assessment including destructive testing into areas of concern. Based on our findings, we made a series of recommendations in order to improve the envelope systems and overall energy efficiency of the building.

Design services for restoration included cladding replacement, custom trim replacement, window replacement, EPDM roof replacement, and masonry repointing at this historic Condominium building.

CBI also worked with the Somerville Historical Commission who had to approve all exterior work on the building in advance.



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# FORESTDALE DEVELOPMENT MODERNIZATION

## MALDEN HOUSING AUTHORITY

Malden, Massachusetts, U.S.A.

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### CHALLENGE

Design the interior and exterior modernization of the Forestdale Development to improve the quality of life for the residents.

### CBI'S SOLUTION

The Forestdale Development consists of 103 one-bedroom apartments located in 3 two-story brick veneer buildings with sloped asphalt shingles roofs, front and rear exterior concrete balconies. There have been minimal improvements done since the development was constructed, so many of the systems need to be upgraded. Renovations include:

- Addition for limited use/limited access (LULA) elevator
- Common area interior upgrades including toilet and laundry room upgrades
- Handicap accessibility upgrades including unit conversions
- MEP upgrades
- Site upgrades

The Architectural Access Board granted our variance to allow the design all of the accessible units to be located in one building that includes the community & common spaces instead of spreading the units out in each of the three buildings, which ultimately saved MHA money.

**ESTIMATED CONSTRUCTION:** \$5.4m





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# STRUCTURAL & ENVELOPE SERVICES

## 93-99 BISHOP ALLEN DRIVE

Cambridge, Massachusetts, U.S.A.

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The Cambridge Redevelopment Authority purchased the property at 93-99 Bishop Allen Drive to preserve a building long called “nonprofit row” as an affordable nonprofit office and program space. The building was in need of various improvements including building envelope repairs, accessibility upgrades, and interior renovations for a more efficient layout for the tenants.

CBI is working with Architect, Silverman Trykowski Associates (STA) and providing structural engineering and building envelope consulting services for the preservation and renovation of this historic building.

CBI’s services include structural upgrades that were needed in order to create a more open floor plan and to turn the attic into a mechanical space with access. CBI also provided design services for masonry repairs and handicap ramp installation on the exterior.

The project is currently under construction.





# SECTION 4



**APPENDIX B: NON-COLLUSION, NON-DISCRIMINATION, and TAX/EMPLOYMENT STATEMENTS**

**NON-COLLUSION STATEMENT**

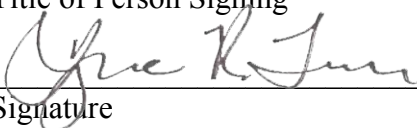
The undersigned bidder or agent, being duly sworn on oath, says that he/she has not, nor has any other member, representative, or agent of the firm, company, corporation or partnership represented by him/her, entered into any combination, collusion or agreement with any person relative to the RFQ response, to prevent any person from responding nor to include anyone to refrain from responding, and that this response is made without reference to any other response and without any agreement, understanding or combination with any other person in reference to such response.

I HEREBY AFFIRM UNDER THE PENALTIES FOR PERJURY THAT THE FACTS AND INFORMATION CONTAINED IN THE FOREGOING RFQ FOR THE CRA ARE TRUE AND CORRECT.

Dated this 28th day of October, 2021

**CBI Consulting, LLC**  
Name of Organization,


**Wayne R. Lawson, PE, SECB, MCPPO**  
Title of Person Signing

  
Signature **Signing for the LLC**

**NONDISCRIMINATION STATEMENT**

The Consultant agrees:

1. The Consultant shall not, in connection with the services under this Contract, discriminate by segregation or otherwise against any employee or applicant for employment on the basis of race, color, national or ethnic origin, age, religion, disability, sex, sexual orientation, gender identity and expression, veteran status or any other characteristic protected under applicable federal or state law.
2. The Consultant shall provide information and reports requested by the Cambridge Redevelopment Authority pertaining to its obligations hereunder, and will permit access to its facilities and any books, records, accounts or other sources of information which may be determined by the Cambridge Redevelopment Authority to affect the Consultant's obligations.
3. The Consultant shall comply with all federal and state laws pertaining to civil rights and equal opportunity including executive orders and rules and regulations of appropriate federal and state agencies unless otherwise exempt therein.
4. The Consultant's non-compliance with the provisions hereof shall constitute a material breach of this Contract, for which the Cambridge Redevelopment Authority may, in its discretion, upon failure to cure said breach within thirty (30) days of written notice thereof, terminate this Contract.
5. The Consultant shall indemnify and save harmless the Cambridge Redevelopment Authority from any claims and demands of third persons resulting from the Consultant's non-compliance with any provisions hereof, and shall provide the Cambridge Redevelopment Authority with proof of applicable insurance.

Signed (type name):  **Signing for the LLC**  
Title: **Wayne R. Lawson, PE, SECB, MCPPO**  
**Principal**  
Date: **October 28, 2021**

**CERTIFICATE OF TAX, EMPLOYMENT SECURITY, AND CHILD CARE COMPLIANCE**

Pursuant to Massachusetts General Laws Chapter 62C, §49A and Chapter 151A, §19A(b) and Chapter 521 of the Massachusetts Acts of 1990, as amended by Chapter 329 of the Massachusetts Acts of 1991,

I Wayne R. Lawson, PE, SECB, MCPPO (Name) whose principal place of business is located at 250 Dorchester Avenue, Boston, MA 02127 (Address), do hereby certify that:

- A. The above-named Respondent has made all required filings of state taxes, has paid all state taxes required under law, and has no outstanding obligation to the Commonwealth's Department of Revenue.
- B. The above-named Respondent/Employer has complied with all laws of the Commonwealth relating to unemployment compensation contributions and payments in lieu of contributions.
- C. The undersigned hereby certifies that the Respondent/Employer (please check applicable item):
  - 1.  employs fewer than fifty (50) full-time employees; or
  - 2.  offers either a dependent care assistance program or a cafeteria plan whose benefits include a dependent care assistance program; or
  - 3.  offers child care tuition assistance, or on-site or near-site subsidized child care placements.

Signed under the penalties of perjury this 28th day of October, 2021.

Federal Identification Number: 04-3108573

Signed (type name):  **Signing for the LLC**

Title: Principal

Date: October 28, 2021