

REQUEST FOR OWNER'S PROJECT MANAGEMENT SERVICES ("OPM RFS")

1. Introduction

The *Town of Natick, for Natick School Department* ("Owner") is seeking the services of a qualified OPM "Owner's Project Manager" as defined in Massachusetts General Laws Chapter 149, Section 44A½ and as further defined by the provisions of this RFS, to provide Project Management Services for the design, construction, addition to and /or renovation of the **Memorial Elementary School** in **Natick**, Massachusetts ("Project").

The Owner is requesting the services of an OPM to represent the Owner during the feasibility study and schematic design phases of the project initially, and should a construction project be approved the Natick voters, the Natick Public Schools (NPS) is seeking services through completion and close out of construction and all project MSBA reporting requirements. Subject to the approval of the Project by the Massachusetts School Building Authority (the "MSBA") and further subject to continued funding authorized by the **Town of Natick**, the contract between the Owner and the Owner's Project Manager may be amended to include continued Project Management Services through design development, construction documents, bid and award, construction and final closeout of the potential Project. A potential approved Project may include a renovation of the existing School, a renovation and addition of the existing School and/or new construction. The estimated total project costs of an approved potential Project may range from **\$100 million to \$150 Million** depending upon the solution that is agreed upon by the Owner and the MSBA and that is ultimately approved by a vote of the MSBA Board of Directors.

To ensure goals are set properly, Municipalities should contact SDO.Construction@mass.gov or 617-872-4064 as soon as possible for assistance from the Supplier Diversity Office ("SDO") in goal setting.

Please note that the Owner's Project Manager will be expected to utilize the SDO's online reporting system, presently known as "The Hub," and will be expected to adhere to all requirements set forth in M.G.L. c. 7, § 61, as well as any associated guidance from the SDO. The Owner's Project Manager will also be expected to provide, in the forms and formats required by the Owner and the SDO, regular reports of information pertaining to the businesses engaged in work set forth in the Contract for Project Management Services with the Owner, as amended.

2. Background

The Town of Natick is a suburban community of approximately 37,000 residents located about 10 miles west of Boston. The Natick Public Schools serves approximately 5,225 students PK-12. Student achievement, as measured by MCAS and AP exams, and average household income are all above the respective state average. Nine of the ten PK classrooms do not fit in the existing elementary schools. The Memorial School is antiquated, built well before the ADA and Special Education laws and still has many original systems and equipment. The severe existing overcrowding in the Natick Public Schools, the need to renovate or replace the existing Memorial, and twelve modular elementary classrooms all contributed to MSBA approving studying options for a new/renovated Memorial with 570 student

elementary school with neighborhood PK classrooms. There is strong community support, with an approved \$2.6 Million vote that includes funding to explore feasibility for geothermal, for this MSBA partner study and schematic design phase as the Town meeting vote was 111 in favor (94.8%) and 6 (5.2%) opposed, with 0 abstentions.

The Memorial School Building Committee has the typical required positions, 5 community members knowledgeable about the design and construction industry, 1 Select Board member, 1 School Committee member, 2 ad-hoc members and the SBC Chair has chaired the SBC for the Kennedy and NHS projects. See attachment for the SBC April 2025 submission to MSBA.

The chart below shows current building configuration and basic inventory information.

School Building	Address	Grades	10/1/2025 Enrollment	Approximate Square Footage	Original Construction	Last Renovation	Last Renovation Type
Natick High School	15 West Street, Natick, MA	PK, 9-12	1625	260,000	2012	N/A	New Construction
Kennedy Middle School	165 Mill Street, Natick, MA	Gr 5-8	867	183,000	2021	N/A	New Construction
Wilson Middle School	22 Rutledge Road, Natick, MA	Gr 5-8	723	140,000	2003	N/A	New Construction
Ben-Hem Elementary	22 East Evergreen Road, Natick, MA	PK, K-4	497	84,400	2001	N/A	New Construction
Brown Elementary*	1 Jean Burke Drive, Natick, MA	K-4	490	61,000	1951	1997	Full Renovation
Lilja Elementary*	41 Bacon Street, Natick, MA	K-4	461	61,000	1955	1997	Full Renovation
Memorial Elementary	107 Eliot Street, Natick, MA	K-4	433	60,000	1960	N/A	N/A
Natick Pre-School**	90 East Street, Natick, MA	PK	129	24,800	1950	TBA	Partial/Some
* School has 6 modular classrooms about 50% through expected useful life							
** Temporary Space as PK classrooms do not fit in existing Elementary Schools, Bldg belongs Town not School Committee							

The Natick community has expressed strong interest in a new building that supports high-quality teaching and learning. The design should enhance instructional practices and student experiences while also incorporating environmentally sound design principles, sustainable materials, and efficient systems that provide long-term value and minimize energy consumption and operational costs for decades after opening. Natick also understands that the evaluation of new construction, renovation, and renovation/addition options will be performed in accordance with the MSBA Feasibility Study Agreement.

Natick is a [Climate Leader Community](#), as designated by the Massachusetts Department of Energy Resources, and recently adopted a [Municipal Decarbonization Roadmap](#) which prioritizes the decarbonization of school and municipal buildings over time. The Specialized Stretch Energy Code is in effect in Natick, and, overall, energy efficiency and sustainability are a basic goal of all town-wide building projects, requiring proper design and follow up commissioning.

Please see the following attachments for expanded information.

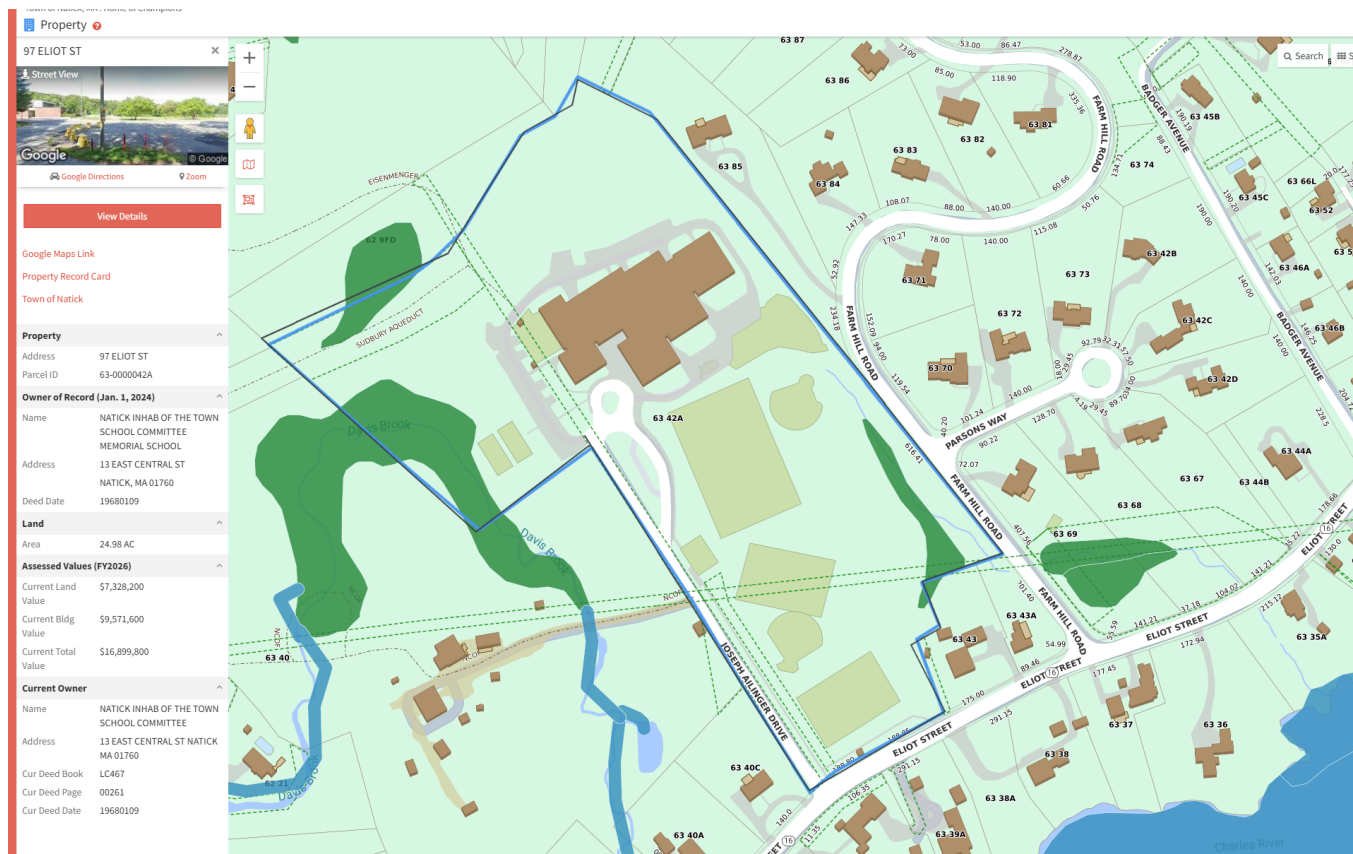
- See SOI – Attachment A
- See enrollment letter from MSBA – Attachment D
- See enrollment snapshot for enrollment by building and grade – Attachment E
- See required submittals of prior OPM reports and life cycle cost analysis – Attachment H

Below is list of parcels of land under the jurisdiction of the School Committee. Some of the larger acre sites already have schools on them. The Assessor's may screenshot of the current site and two parcels that could possibly hold a new Memorial School follow the list.

PARID	ADRNO	ADRADD	ADRSTR	CLASS	ACRES	ZONING	OWN2
12-00000200	22		EAST EVERGREEN RD	C	10.23	RSA	SCHOOL COMMITTEE
19-00000019	840		WORCESTER ST	C	1.25	RSA	SCHOOL COMMITTEE
19-00000020	831		WORCESTER ST	C	1.25	RSA	SCHOOL COMMITTEE
19-0000018B	865		WORCESTER ST	C	1	RSA	SCHOOL COMMITTEE
19-0000021B	817		WORCESTER ST	C	1.69	RSA	SCHOOL COMMITTEE
19-0000022C	0		RUTLEDGE RD END	R	0.16	RSA	SCHOOL COMMITTEE
19-0000022E	22		RUTLEDGE RD	C	6.86	RSA	SCHOOL COMMITTEE
27-0000151A	153		NORTH MAIN ST	R	0.74	RG	SCHOOL COMMITTEE
27-0000151B	155		NORTH MAIN ST	R	0.58	RG	SCHOOL COMMITTEE
27-0000151C	157		NORTH MAIN ST	R	2.23	RG	SCHOOL COMMITTEE
29-00000271	41		BACON ST	C	5.19	RSC	SCHOOL COMMITTEE
31-00000259	81		BODEN LN	C	9.8	RSA	SCHOOL COMMITTEE
31-0000258A	144		HARTFORD ST	R	0.04	RSA	SCHOOL COMMITTEE
31-0000258B	144	1/2	HARTFORD ST	R	0.02	RSA	SCHOOL COMMITTEE
32-00000013	0		TREVOR LN	C	11.7	RSA	SCHOOL COMMITTEE
32-00000046	1		JEAN BURKE DR	C	6.88	RSA	SCHOOL COMMITTEE
32-00000048	104		HARTFORD ST	C	10.8323	RSA	SCHOOL COMMITTEE
32-00000185	1		TEXAS LANE	R	0.05	RSA	SCHOOL COMMITTEE
32-0000047A	96		HARTFORD ST	C	0.5077	RSA	SCHOOL COMMITTEE
32-0000048B	112		HARTFORD ST	R	0.489	RSA	SCHOOL COMMITTEE
32-0000185A	49	1/2	PILGRIM RD	R	0.04	RSA	SCHOOL COMMITTEE
44-00000139	0		EAST CENTRAL ST	C	0.51	DM	SCHOOL COMMITTEE
50-00000018	124		POND ST	C	46.9	RSA	SCHOOL COMMITTEE
50-0000018B	0		WEST ST	C	43.0521	RSA	SCHOOL COMMITTEE

50-0000018C	0		WEST ST	C	0.5191	RSA	SCHOOL COMMITTEE
51-0000284A	105		SOUTH MAIN ST	C	1.94	RG	SCHOOL COMMITTEE
59-00000008	0	END	DURANT RD	R	8.6	RSA	SCHOOL COMMITTEE
59-00000009	0		WEST ST	C	15.7	RSA	SCHOOL COMMITTEE
59-00000052	0		WEST ST	C	2.2047	RSA	SCHOOL COMMITTEE
59-0000010A	53		WEST ST	C	19.48	RSA	SCHOOL COMMITTEE
63-0000042A	97		ELIOT ST	C	24.976	RSB	SCHOOL COMMITTEE

The existing Memorial site, parcel # 63-000000042A, is about 24.98 acres, and the wetlands are delineated with dark green.



The following is assessor map shows two parcels of land, located across the street from the Memorial Stadium field, with parcel ID # 59-0000009 land area inside the blue lines, being about 15.70 acres with

a retaining pond and ball field. The land in orange lines with parcel ID # 59-0000008, is approximately 8.6 acres.



[Link to Natick GIS for these maps](#)

3. Project Description, Objectives and Scope of Services

On or about *April 11, 2024*, the Owner submitted a Statement of Interest (Attachment A) to the MSBA for *Memorial Elementary School*. The MSBA is an independent public authority that administers and

funds a program for grants to eligible cities, towns, and regional school districts for school construction and renovation projects. The MSBA's grant program is discretionary, and no city, town, or regional school district has any entitlement to any funds from the MSBA. At the December 12, 2025 Board of Directors meeting, the MSBA voted to issue an invitation to the Owner to conduct a feasibility study for this Statement of Interest to identify and study possible solutions and, through a collaborative process with the MSBA, reach a mutually-agreed upon solution. The MSBA has not approved a Project and the results of this feasibility study may or may not result in an approved Project.

It is anticipated that the feasibility study will review the problems identified in the Statement of Interest at the Memorial Elementary School, most PREK classrooms not fitting in the existing elementary schools, # of PK classrooms to be designed in the new Memorial, possible review of alternative site locations, review of educational programs to design spaces, what flexibility and capacity should be included in the options for a new Memorial, and an upgrade of building systems that have reached the end of their expected useful life. The early estimated square footage of a potential Memorial project could be in the range of 90 to 100,000 SF.

Project Objectives under consideration by the Owner include:

- *Identification of community concerns that may impact study options;*
- *Identification of specific milestone requirements and/or constraints of the District – e.g. Town votes, swing space, occupancy issues;*
- *Identification of alternative sites;*
- *Life cycle costs of operating the School as it relates to future operational budgets;*
- *Green Building Council's LEED for Schools (LEED-S) Rating System*
- *CM-at-Risk Delivery Method*
- *Achievement of highest possible MSBA reimbursement with the most cost effective building to meet educational programmatic and community needs*

The required scope of services is set forth in Article 8 of the standard contract for Owner's Project Management Services for a Design/Bid/Build project that is attached hereto as Attachment B and incorporated by reference herein. If the Owner determines to use a CM-at-Risk delivery method, this contract shall need to be amended and/or substituted. The work is divided into the Project Phases as listed in Attachment A of this contract. The durations of the Phases shown below are estimates only, based on the Owner's experience. Actual durations may vary depending upon the Project agreed upon by the Owner and the MSBA. The total duration of the Contract is estimated as follows:

- | | | |
|----|--|----------------------|
| 1. | Feasibility Study/Schematic Design Phase; | 18-24 months* |
| 2. | Design Development/Construction Documents/Bidding Phase; and | 10-12 months* |
| 3. | Construction Phase. | 24-36 months* |

(*These ranges for scheduling timeframes are provided as guidelines only and are based upon schedules established by other Owners.)

4. Minimum Requirements and Evaluation Criteria:

Minimum Requirements:

In order to be eligible for selection, each Respondent must certify that it meets the following minimum requirements. Any Response that fails to include such certification in its response, demonstrating that these criteria have been met, may be rejected without further consideration.

Each Respondent must designate an individual who will serve as the Project Director. The Project Director shall be certified in the Massachusetts Certified Public Purchasing Officer Program (the “MCPPO”) as administered by the Inspector General of the Commonwealth of Massachusetts and must also meet the following minimum requirements:

- The Project Director shall be a person who is registered by the Commonwealth of Massachusetts as an architect or professional engineer and who has at least five years’ experience in the construction and supervision of construction and design of public buildings;
- or,**
- if not registered as an architect or professional engineer, the Project Director must be a person who has at least seven years’ experience in the construction and supervision of construction and design of public buildings.

Evaluation Criteria

In addition to the minimum requirements set forth above, all Respondents must demonstrate that they have significant experience, knowledge and abilities with respect to public construction projects, particularly involving the construction and renovation of K-12 schools in Massachusetts. The Owner will evaluate Responses based on criteria that shall include, but not be limited to, the following:

- 1) **(25 Points)** Past performance of the Respondent, if any, with regard to public, private, Department Of Education funded and MSBA-funded school projects across the Commonwealth, as evidenced by:
 - a) (12.5 Points) Documented performance on previous projects, both model school and non-model school plan projects as set forth in Attachment C, including the number of projects managed, project dollar value, number and **percentage completed under budget without an additional appropriation, number and percentage completed on time**, number and dollar value of change orders, average number of projects per project manager per year, number of accidents and safety violations, dollar value of any safety fines, and number and outcome of any legal actions;
 - b) (12.5 Points) Satisfactory working relationship with the Owner, designers, contractors, local officials, and the MSBA.
- 2) **(5 Points)** Thorough knowledge of the Massachusetts State Building Code, regulations related to the Americans with Disabilities Act, and all other pertinent codes and regulations related to successful completion of the project.
- 3) **(5 Points)** Thorough knowledge of Commonwealth construction procurement laws, regulations, policies and procedures, as amended by the 2004 Construction Reform laws.
- 4) **(25 Points)** Management approach: Describe the Respondent’s approach to providing the level and nature of services required as evidenced by proposed project staffing for a potential (hypothetical) proposed project for new construction of **80,000 – 120,000** square feet or renovation of **40,00-60,000** square feet; plus some new construction to make up the difference needed, proposed project management systems; effective information management; and

examples of problem solving approaches to resolving issues that impact time and cost. [A prior publicly released monthly OPM report shall be submitted with this proposal and will be reviewed for clear demonstration of tracking project schedule and project actuals and to the projected remaining expenses to the budget.](#)

- 5) **(20 Points)** Key personnel: Provide an organizational chart that shows the interrelationship of key personnel to be provided by the Respondent for this project and that identifies the individuals and associated firms (if any) who will fill the roles of Project Director, Project Representative and any other key roles identified by the Respondent, including but not limited to roles in design review, estimating, cost and schedule control. Specifically, describe the time commitment, experience and references for these key personnel including relevant experience in the supervision of construction of several projects that have been either successfully completed or in process that are similar in type, size, dollar value and complexity to the project being considered.
- 6) **(10 Points)** Capacity and skills: Identify existing employees by number and area of expertise (e.g. field supervision, cost estimating, schedule analysis, value engineering, constructability review, quality control and safety). Identify any services provided by sub-consultants.
- 7) **(10 Points)** Identify the Respondent's current and projected workload for projects estimated to cost in excess of \$1.5 million.
- 8) **(20 Points)** Familiarity with US Green Building Council's LEED for Schools Rating System. Demonstrated experience working on high performance green buildings (if any), green building rating system used (e.g., LEED-S), completed projects with functioning geothermal systems for heating and cooling, life cycle cost analysis and recommendations to Owners about building materials, finishes etc., ability to identify and integrate grants and utility rebate opportunities and requirements into overall integrated project plan and track Owner documentation for LEED-S prerequisites.
- 9) **(20 Points)** Thorough knowledge and demonstrated experience with life cycle cost analysis, cost estimating and value engineering with actual examples of recommendations and associated benefits to Owners. [Two samples of OPM analysis of life cycle cost of materials or systems or value engineering are required as part of this proposal.](#) Examples are heating systems, roofing materials and design, flooring materials, wall materials, or any product or system analysis completed during the feasibility or design development phase for a public school customer in the last seven years that helped the owner make a decision on how best to proceed.
- 10) **(5 Points)** Knowledge of the purpose and practices of the services of Building Commissioning Consultants.
- 11) **(10 Points)** Financial Stability: Provide current balance sheet and income statement as evidence of the Respondent's financial stability and capacity to support the proposed contract.

Points will be awarded based on the fixed amount or range indicated below.

Points	Highly Advantageous	Advantageous	Not Advantageous
25	22- 25	15 to 20	10
20	18 - 20	10 to 15	5
10	9-10	5-7	2
5	5	3	1

Criteria #	Highly Advantageous	Advantageous	Not Advantageous
1a	4 or more projects completed meeting the criteria by the proposed onsite project manager/director	At least two projects completed by the proposed onsite project manager/ director meeting the criteria	Zero to 1 project completed by the proposed onsite project manager/ director meeting the criteria
1b	Would hire the OPM again without hesitation or changes to contract or process	Would work with the OPM again, but with some changes to contract or process	Would prefer working with or trying a different OPM
2	4 or more projects completed meeting the criteria by the proposed onsite project manager/director	At least two projects completed by the proposed onsite project manager/ director meeting the criteria	Zero to 1 project completed by the proposed onsite project manager/ director meeting the criteria
3	4 or more projects completed meeting the criteria by the proposed onsite project manager/director	At least two projects completed by the proposed onsite project manager/ director meeting the criteria	Zero to 1 project completed by the proposed onsite project manager/ director meeting the criteria
4	Approach, details that are easily understandable and monthly report that explains via text and with charts or graphs that demonstrate where the project is at and where the project is headed in relation to project schedule and project budget.	Approach, details that are understandable and monthly report that explains via text or charts/ graphs that demonstrate where the project is at and where the project is headed in relation to project schedule and project budget.	Approach does not include details and examples how budget and schedule will be tracked
5	Qualifications, demonstrated successful (on time and under budget) experience on Massachusetts public school construction projects , proposed team has worked successfully together on two prior projects, and capacity in key staff schedule aligns very well this project schedule.	Qualifications, demonstrated successful (on time and under budget) experience on Massachusetts public school construction projects , proposed team has worked successfully together on a prior project, and capacity in key staff schedule aligns fairly well with this project schedule.	Qualifications, demonstrated successful (on time and under budget) experience on Massachusetts public school construction project, and capacity in key staff schedule aligns partially with this project schedule.

6	Proposed team has the relevant credentials and demonstrated experience, completing 4 or more of their respective assignments, accurately or effectively (cost estimating and value engineering, quality control, and safety) , on time and under budget in a public school construction setting.	Proposed team has the relevant credentials and demonstrated experience, completing 2 or more of their respective assignments, accurately or effectively (cost estimating and value engineering, quality control, and safety) , on time and under budget in a public school construction setting.	Proposed team has the relevant credentials and demonstrated experience, completing zero to one of their respective assignments, accurately or effectively in a public school construction setting.
7	Workload demonstrates full capacity of proposed project team to fully focus on this project.	Workload demonstrates probable capacity of proposed staff to fully focus on this project.	Workload demonstrates staff may have a significant portion of the work week already committed to other projects.
8	Demonstrates incorporating geothermal, low energy consumption (per SF) and EUI index score below national median score , or LEED for Schools rating system, MA CHiPs, and Net Zero scoring systems for design with 4 or more projects exceeding the average standard minimum for certification.	Demonstrates incorporating geothermal, low energy consumption (per SF) and EUI index score below national median score , or LEED for Schools rating system, MA CHiPs, and Net Zero scoring systems for design with two or more projects exceeding the average standard minimum for certification.	Demonstrates incorporating geothermal, low energy consumption (per SF) and EUI index score below national median score , or LEED for Schools rating system, MA CHiPs, and Net Zero scoring systems for design with zero or one projects exceeding the average standard minimum for certification.
9	4 or more cost estimates used at end of Schematic Design were accurate enough to come in under budget when the project was bid and completed. Life cycle cost analysis of incorporating certain materials or systems that clearly compares and contrasts the estimated pros and cons of each option enabling the owner to make the best decision that reflects the community's values and ability to sustain the decision. Examples provided are highly relevant to providing value to an elementary school project with the estimated size and	Two or more cost estimates used at end of Schematic Design were accurate enough to come in under budget when the project was bid and completed. Life cycle cost analysis of incorporating certain materials or systems that clearly compares and contrasts the estimated pros and cons of each option enabling the owner to make the best decision that reflects the community's values and ability to sustain the decision. Examples provided are relevant to providing value to an elementary school project with the estimated size and scope the Memorial Elementary.	Zero to one cost estimates used at end of Schematic Design were accurate enough to come in under budget when the project was bid and completed. Life cycle cost analysis of incorporating certain materials or systems compares and contrasts the estimated prices between options. Examples provided with some relevance the estimated size and scope the Memorial Elementary.

	scope the Memorial Elementary.		
10	Approach, and details and examples on project commissioning, punch list close out, and getting project tasks in the bid completed as designed . Examples confirmed via positive reference check that problems and omissions were well resolved to meet designed intent.	Approach, and details on project commissioning, punch list close out, and getting project tasks in the bid completed as designed. Reference check confirms close out was completed.	General info on approach, some details and tasks listed as part of commissioning process. Reference check neutral or negative.
11	Demonstrates ability to exceed two months of staff payroll without new revenue.	Demonstrates ability to exceed one month's payroll without new revenue.	Unable to meet 1 month's of payroll if revenue is received late for any reason
12	Communicates with the written and spoken word clearly and effectively. The committee member finds the approach, sample past reports and analysis very helpful with making decisions and being able to explain the recent status of the project in regards to schedule and budget.	Communicates with the written and spoken word. The committee member finds the approach, sample past reports and analysis somewhat helpful with making decisions and being able to explain the recent status of the project in regards to schedule and budget.	Communicates with the written and spoken word. The committee member finds the approach and past reports and analysis not very helpful with making decisions and/or being able to explain the recent status of the project in regards to schedule and budget.

In order to establish a short-list of Respondents to be interviewed, the Owner will base its initial ranking of Respondents on the above Evaluation Criteria and references from previous owners. The Owner will establish its ranked list of finalists and may rerank the list after conducting interviews. Please see process below. *

Post interview of the three top ranked finalists, the voting members of the Committee will rank each firm in order of one, two, or three. The firm with the lowest score total shall be the top ranked firm and the firm with the second lowest point total will be the runner up and the firm with the third highest point total shall be ranked third.

The Owner reserves the right to consider any other relevant criteria that it may deem appropriate, within its sole discretion, and such other relevant criteria as the MSBA may request. The Owner may or may not, within its sole discretion, seek additional information from Respondents.

This RFS, any addenda issued by the Owner, and the selected Respondent's response, will become part of the executed contract. The key personnel that the Respondent identifies in its response must be contractually committed for the Project. **No substitution or replacement of key personnel or change**

in the sub-consultants identified in the response shall take place without the prior written approval of the Owner and the MSBA.

The selected Respondent(s) will be required to execute a Contract for Project Management Services with the Owner in the form that is attached hereto as Attachment B and incorporated by reference herein. Prior to execution of the Contract for Project Management Services with the Owner, the selected Respondent will be required to submit to the Owner a certificate of insurance that meets the requirements set forth in the Contract for Project Management Services.

Prior to execution of the Contract for Project Management Services, the fee for services shall be negotiated between the Owner and the selected Respondent to the satisfaction of the Owner, within its sole discretion. The initial fee structure will be negotiated through the Feasibility Study/Schematic Design Phase. The selected Respondent, however, will be required to provide pricing information for all Phases specified in the Contract at the time of fee negotiation.

5. Selection Process and Selection Schedule

Process

- 1) *Identify the six persons are responsible for reviewing responses to get to three finalists for the entire School Building Committee to interview before affirming or selecting the top ranked finalist to MSBA for approval.*
 - a. *Stephen Meyler, Chair SBC*
 - b. *Melissa Spash, Superintendent of Schools*
 - c. *James Erickson, Town Administrator*
 - d. *Matthew Gilis, Assistant Superintendent*
 - e. *Karen Ghilnai, Memorial School Principal*
 - f. *Doug Tierney, School Building Committee*
- 2) Identified reviewers must rank the Responses based on the weighted evaluation criteria identified in the RFS and must short-list a minimum of three Responses.
- 3) A minimum of the top three ranked firms shall be invited for an interview on Monday April 13, 2026 by the entire [Memorial School Building Committee](#) . [The key personnel in the proposal, especially the person proposed as the on-site, Project Director, are expected to attend and participate in the interview.](#)
- 4) The finalists will be interviewed one firm at a time and will be asked questions to demonstrate they can verbally communicate clearly and effectively with the School Building Committee during feasibility, design, construction and project close out phases. OPM personnel will be permitted at the interview only during the time their firm is interviewing, not when the other finalist firms are interviewing. Firms will be given their interview times.
- 5) The basis of ranking the interviews will be based on how well the quality and clarity of their verbal answers matched the written proposal and improved the SBC's understanding of topic and what they can expect from this firm to help represent the owner and manage the Memorial School Building. Firms will be asked the same questions and can answer them based off their proposal submittal and their personal relevant experience to the question topic.

- 6) References will be checked before the interviews. The owner reserves right to check references after the interview process if the Committee deems it in the best interest of the owner.
- 7) After selecting the first-ranked respondent, the Owner will then negotiate the fee for services dependent upon an evaluation of the level of effort required, job complexity, specialized knowledge required, estimated construction cost, comparison with past project fees, and other considerations. The Owner will require the following documentation from the first-ranked respondent:
 - a. A description of the scope, timeline, personnel assigned, projected hours and hourly rates per job title.
 - b. An itemized breakdown of all other costs included in the fee proposal.
- 8) If the Owner is unable to negotiate a contract with the first-ranked selection, the Owner will then commence negotiations with its second-ranked selection and so on, until a contract is successfully negotiated and approved by the Owner.
- 9) The selected firm will be submitted to the MSBA for its approval.
- 10) The selected firm may be asked to participate in a presentation to the MSBA and/or submit additional documentation, as required by MSBA, as part of the MSBA approval process.
- 11) The Owner may re-advertise if less than three responses are received or to re-advertise if fee negotiations fail.

The following is a tentative schedule of the selection process, subject to change at the Owner's and MSBA's discretion.

March 4, 2026 RFS appears in Central Register of the Commonwealth of Massachusetts and the MetroWest Daily News

March 11, 2026 4 PM Informational meeting and site walkthrough
Memorial Elementary, 107 Eliot Street, Natick MA

March 18, 2026 4:00 PM Last day for questions from Respondents

March 26, 2026 12:00 PM, Responses due

April 2, 2026 Respondents short-listed

April 13 2026 Interview short-listed Respondents

April 14-16 , 2026 Negotiate with selected Respondent

By April 17, 2026 Final selection submitted to the MSBA for review and approval

June 1, 2026 Anticipated MSBA OPM Review Panel Meeting

June 8, 2026 Anticipated execution of contract

The RFS may be obtained from:

Allison Assensoa, Accounts Payable Coordinator
Natick Town Hall
13 East Central Street, 3rd Floor
Natick, MA 01760
508-647-6400 ext. 1397
aassensoa@natickps.org

On or after Wednesday March 4, 2026 .

Any questions concerning this RFS must be submitted in writing, **via email, with “OPM RFQ Question”** in the subject line of the email to:

Matthew J. Gillis, Assistant Superintendent of Finance and Operations
Natick Town Hall
13 East Central Street, 3rd Floor
508-848-8466
matgillis@natickps.org

By 4:00 PM on Tuesday, March 12, 2026.

Sealed Responses to the RFS for OPM services **must be clearly labeled “Owner’s Project Management Services for the Memorial Elementary School”** and delivered to:

Matthew J. Gillis, Assistant Superintendent of Finance and Operations
Natick Town Hall
13 East Central Street, 3rd Floor
508-848-8466 or 508-647-1397

Responses due no later than March 26, 2026, 12:00 PM

The Owner assumes no responsibility or liability for late delivery or receipt of Responses. **All responses received after the stated submittal date and time will be judged to be unacceptable and will be returned unopened to the sender.**

6. Requirements for content of response:

Submit *seven (7)* hard copies of the response to this RFS and one electronic version in PDF format on a **USB Flash Drive**. All responses shall be:

- In ink or typewritten;
- Presented in an organized and clear manner;
- Must include the required forms in Attachment C;
- Must include all required Attachments and certifications;

- Must include the following information:

1. Cover letter **shall be a maximum of two pages in length** and include:
 - a. An acknowledgement of any addendum issued to the RFS.
 - b. An acknowledgement that the Respondent has read the RFS. Respondent shall note any exceptions to the RFS in its cover letter.
 - c. An acknowledgement that the Respondent has read the Contract for Project Management Services. Respondent shall note any exceptions to the Contract for Project Management Services in its cover letter.
 - d. A specific statement regarding compliance with the minimum requirements identified in Item 4 of this RFS to include identification of registration, number of years of experience and where obtained (as supported by the resume section of Attachment C), as well as the date of the MCPPO certification. (A copy of the MCPPO certification must be attached to the cover letter).
 - e. A description of the Respondent's organization and its history.
 - f. The signature of an individual authorized to negotiate and execute the Contract for Project Management Services, in the form that is attached to the RFS, on behalf of the Respondent.
 - g. The name, title, address, e-mail and telephone number of the contact person who can respond to requests for additional information.
2. Selection Criteria: The response shall address the Respondent's ability to meet the "Selection Criteria" Section including submittal of additional information as needed. The total length of the Response (including Attachment C only but excluding Attachments A, B, D, H and I) may not exceed twenty (20) single-sided numbered pages with a minimum acceptable font size of "12 pt" for all text.

Respondents may supplement this proposal with graphic materials and photographs that best demonstrate its project management capabilities of the team proposed for this project. **Limit this additional information to a maximum of three 8½" x 11" pages, double-sided.**

7. **Payment Schedule and Fee Explanation:**

The Owner will negotiate the fee for services dependent upon an evaluation of the level of effort required, job complexity, specialized knowledge required, estimated construction cost, comparison with past project fees, and other considerations. As construction cost is but one of several factors, a final construction figure in excess of the initial construction estimate will not, in and of itself, constitute a justification for an increased OPM fee.

8. **Other Provisions**

A. **Public Record**

All responses and information submitted in response to this RFS are subject to the Massachusetts Public Records Law, M.G.L. c. 66, § 10 and c. 4, § 7(26). Any statements in submitted responses that are inconsistent with the provisions of these statutes shall be disregarded.

B. Waiver/Cure of Minor Informalities, Errors and Omissions

The Owner reserves the right to waive or permit cure of minor informalities, errors or omissions prior to the selection of a Respondent, and to conduct discussions with any qualified Respondents and to take any other measures with respect to this RFS in any manner necessary to serve the best interest of the Owner and its beneficiaries.

C. Communications with the Owner

The Owner's Procurement Officer for this RFS is:

Matthew J. Gillis, Assistant Superintendent of Finance and Operations

Natick town Hall

13 East Central Street, 3rd Floor

508-848-8466:

matgillis@natickps.org

Facsimile: N/A

Respondents that intend to submit a response are prohibited from contacting any of the Owner's staff or volunteers on the School Building Committee other than staff that work for and support the Procurement Officer. An exception to this rule applies to Respondents that currently do business with the Owner, but any contact made with persons other than the Procurement Officer must be limited to that business, and must not relate to this RFS. In addition, such respondents shall not discuss this RFS with any of the Owner's consultants, legal counsel or other advisors. ***FAILURE TO OBSERVE THIS RULE MAY BE GROUNDS FOR DISQUALIFICATION.***

D. Costs

Neither the Owner nor the MSBA will be liable for any costs incurred by any Respondent in preparing a response to this RFS or for any other costs incurred prior to entering into a Contract with an OPM approved by the MSBA.

E. Withdrawn/Irrevocability of Responses

A Respondent may withdraw and resubmit their response prior to the deadline. No withdrawals or re-submissions will be allowed after the deadline.

F. Rejection of Responses, Modification of RFS

The Owner reserves the right to reject any and all responses if the Owner determines, within its own discretion, that it is in the Owner's best interests to do so. This RFS does not commit the Owner to select any Respondent, award any contract, pay any costs in preparing a response, or procure a contract for any

services. The Owner also reserves the right to cancel or modify this RFS in part or in its entirety, or to change the RFS guidelines. **A Respondent may not alter the RFS or its components.**

G. Subcontracting and Joint Ventures

Respondent's intention to subcontract or partner or joint venture with other firm(s), individual or entity must be clearly described in the response.

H. Validity of Response

Submitted responses must be valid in all respects for a minimum period of ninety (90) days after the submission deadline.

FURTHER INFORMATION

Attachment A: Statement of Interest (separate PDF)

Attachment B: Contract for Owner's Project Management Services (separate PDF)

Attachment C: OPM Application Form – March 2017

Attachment D: MSBA Enrollment Letter and Enrollment Certification

Attachment E: Enrollment Snapshot

Attachment F: Required Certifications

Attachment G: Authorized Signatures

Attachment H: Prior Actual Monthly OPM Report showing project schedule and project budget actuals to projections and/or contract terms.

Attachment I: Two samples of Life Cycle Cost Analysis the OPM has presented to an owner in the past seven years.

ATTACHMENT A
Statement of Interest

(District to Attach)

ATTACHMENT B
MSBA Standard Contract
(Design/Bid/Build or CM-at-Risk)

CONTRACT FOR PROJECT MANAGEMENT SERVICES

This Contract is made this _____ day of _____ in the year _____ between
(day) (month) (year)
 the _____, _____
(Owner) (street)
 _____, _____
(City) (State) (Zip Code)
 hereinafter called "the Owner" and _____
(Owner's Project Manager)

 _____, _____, _____
(street) (city) (State) (Zip Code)
 hereinafter called the "Owner's Project Manager" to provide the Project Management services required to complete
 the Basic and Extra Services described herein at _____
(name/description of Project)

The Owner's Project Manager is authorized to perform the services required by this Contract through the Feasibility Study Phase and, pending receipt of a written Approval to proceed from the Owner, through the Schematic Design Phase. At the Owner's option, the Owner's Project Manager may be authorized to perform services for subsequent design phases and/or the Construction Phases and Completion Phase, at which time a mutually agreed upon amendment to this Contract will be executed between the Owner and the Owner's Project Manager. If the Owner elects to construct the project pursuant to G.L. c. 149, the amendment to this Contract shall include the Authority's Base OPM Contract Amendment for DBB for Basic Services required for the design-bid-build construction delivery method. If the Owner elects to construct the project pursuant to G.L. c. 149A, the amendment to this Contract shall include the insertion of the Authority's Base OPM Contract Amendment for CM at Risk, for Basic Services required for the CM at Risk construction delivery method.

For the performance of the services required under this Contract for the Feasibility Study Phase and the Schematic Design Phase, the Owner's Project Manager shall be compensated by the Owner for Basic Services in accordance with the Payment Schedule included as Attachment A.

Additional terms and conditions of this Contract are as set forth in Attachment C.

IN WITNESS WHEREOF, the Owner and the Owner's Project Manager have caused this Contract to be executed by their respective authorized officers.

OWNER

(print name)

(print title)
 By _____
(signature and seal)
 Date _____

OWNER'S PROJECT MANAGER

(print name)

(print title)
 By _____

Date _____
(signature)

(Attach Certificate of Vote of Authorization)

CONTRACT FOR PROJECT MANAGEMENT SERVICES

ATTACHMENT A

PAYMENT SCHEDULE

In consideration of Owner's Project Manager's delivery of Basic Services, the Owner shall pay the Owner's Project Manager on an hourly basis, up to a total fee that shall not exceed \$[insert total fee amount]. The \$[insert total fee amount] fee is a cap for Basic Services related to this Contract, and the actual amount paid by the Owner for Basic Services required during the duration of this Contract may be an amount less than \$[insert total fee amount]. The Owner's Project Manager shall invoice the Owner based on hours worked pursuant to this Contract, according to the hourly rates below and the schedule set forth below. During the course of this Contract, the rates in effect shall not be increased above those delineated in the following table:

Hourly Rate Schedule

<u>Title</u>	<u>Rate/Hr.</u>
--------------	-----------------

The Owner's Project Manager shall perform the Services in accordance with the following Schedule:

<u>Project Phase/Item of Work</u>	<u>Not-to-Exceed Fee</u>	<u>Completion Date</u>
-----------------------------------	--------------------------	------------------------

Feasibility Study/Schematic Design Phase

Design Development/Construction
Document/Bidding Phase

Construction Phase/Final Completion

Extra Services
(Identify by Category)

Reimbursable Services (Identify by
Category)

Independent Cost Estimates

Task 8.2.2 – Up to two estimates	\$X/per estimate	N/A
Task 8.4.2 – One Estimate	\$X/per estimate	N/A

OPM Contract - ATTACHMENT B**CONTRACT FOR PROJECT MANAGEMENT SERVICES****AMENDMENT NO. _____**

WHEREAS, the _____ (“Owner”) and _____, (the “Owner’s Project Manager”) (collectively, the “Parties”) entered into a Contract for Project Management Services for the _____ Project (Project Number _____) at the _____ School on _____ “Contract”; and

WHEREAS, effective as of _____, the Parties wish to amend the Contract, as amended:

NOW, THEREFORE, in consideration of the promises and the mutual covenants contained in this Amendment, and other good and valuable consideration, the receipt and legal sufficiency of which are hereby acknowledged, the Parties, intending to be legally bound, hereby agree as follows:

1. The Owner hereby authorizes the Owner’s Project Manager to perform services for the Design Development Phase, the Construction Phases, and the Final Completion Phase of the Project, pursuant to the terms and conditions set forth in the Contract, as amended.
2. For the performance of services required under the Contract, as amended, the Owner’s Project Manager shall be compensated by the Owner in accordance with the following Fee for Basic Services:

Fee for Basic Services:	Original Contract	After this Amendment
Feasibility Study Phase	\$ _____	\$ _____
Schematic Design Phase	\$ _____	\$ _____
Design Development Phase	\$ _____	\$ _____
Construction Document Phase	\$ _____	\$ _____
Bidding Phase	\$ _____	\$ _____
Construction Phase	\$ _____	\$ _____
Completion Phase	\$ _____	\$ _____
Total Fee	\$ _____	\$ _____

This Amendment is a result of: _____

3. The Construction Budget shall be as follows:

Original Budget: \$ _____
 Amended Budget \$ _____

4. The Project Schedule shall be as follows:

Original Schedule: _____
 Amended Schedule _____

5. The Authority's standard OPM Contract Amendment for *[DBB OR CM RISK]*, which is attached hereto and incorporated by reference herein, is made a part of the Contract in its entirety.
6. This Amendment contains all of the terms and conditions agreed upon by the Parties as amendments to the original Contract, as amended. No other understandings or representations, oral or otherwise, regarding amendments to the original Contract, as amended, shall be deemed to exist or bind the Parties, and all other terms and conditions of the Contract, as amended, remain in full force and effect.

IN WITNESS WHEREOF, the Owner, with the prior approval of the Authority, and the Owner's Project Manager have caused this Amendment to be executed by their respective authorized officers.

OWNER

(print name)

(print title)

By _____
(signature)

Date _____

OWNER'S PROJECT MANAGER

(print name)

(print title)

By _____
(signature)

Date _____

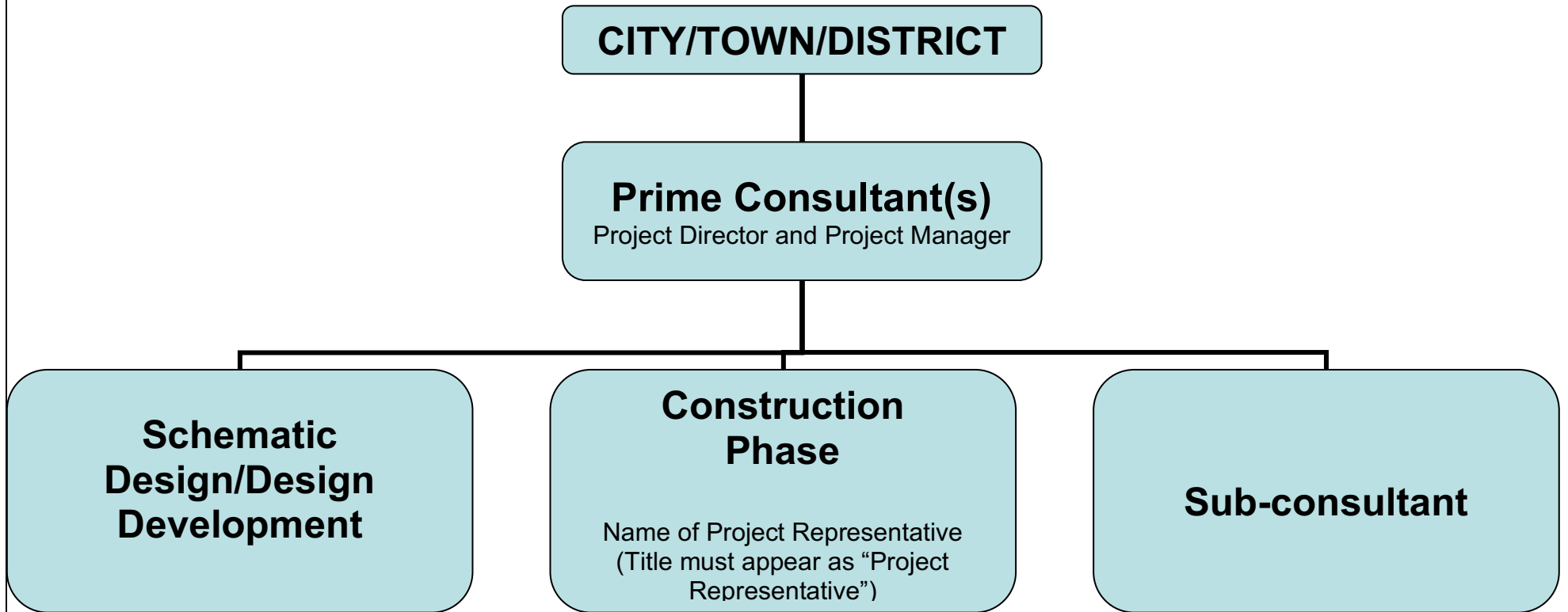
Full and Latest MSBA contract for OPM can be found here:

<https://www.massschoolbuildings.org/sites/default/files/edit-contentfiles/OPM/NEW%20DEC%202025%20-%20OPM%20Base%20Contract%20for%20DBB%20or%20CM%20at%20Risk%20v.12.31.25.pdf>

ATTACHMENT C

Owner's Project Manager Application Form – March 2017																																							
1. Project Name/Location for Which Firm is Filing: 1a. MSBA Project Number:																																							
2a. Respondent, Firm (Or Joint-Venture) - Name And Address Of Primary Office To Perform The Work:	2b. Name And Address Of Other Participating Offices Of The Prime Applicant, If Different From Item 3a Above:																																						
2c. Date Present And Predecessor Firms Were Established:	2d. Name And Address Of Parent Company, If Any:																																						
2e. Federal ID #:	2f. Name of Proposed Project Director:																																						
3. Personnel From Prime Firm Included In Question #2 Above By Discipline (List Each Person Only Once, By Primary Function -- Average Number Employed Throughout The Preceding 6 Month Period. Indicate Both The Total Number In Each Discipline): <table style="width: 100%; border: none;"> <tr> <td style="width: 25%;">Admin. Personnel</td> <td style="width: 10%; text-align: center;">_____</td> <td style="width: 25%;">Cost Estimators</td> <td style="width: 10%; text-align: center;">_____</td> <td style="width: 20%;">Other</td> <td style="width: 10%; text-align: center;">_____</td> </tr> <tr> <td>Architects</td> <td style="text-align: center;">_____</td> <td>Electrical Engrs.</td> <td style="text-align: center;">_____</td> <td></td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Acoustical Engrs.</td> <td style="text-align: center;">_____</td> <td>Environmental Engrs.</td> <td style="text-align: center;">_____</td> <td></td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Civil Engrs.</td> <td style="text-align: center;">_____</td> <td>Licensed Site Profs.</td> <td style="text-align: center;">_____</td> <td></td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Code Specialists</td> <td style="text-align: center;">_____</td> <td>Mechanical Engrs.</td> <td style="text-align: center;">_____</td> <td></td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Construction Inspectors</td> <td style="text-align: center;">_____</td> <td></td> <td></td> <td>Total</td> <td style="text-align: center;">_____</td> </tr> </table>				Admin. Personnel	_____	Cost Estimators	_____	Other	_____	Architects	_____	Electrical Engrs.	_____		_____	Acoustical Engrs.	_____	Environmental Engrs.	_____		_____	Civil Engrs.	_____	Licensed Site Profs.	_____		_____	Code Specialists	_____	Mechanical Engrs.	_____		_____	Construction Inspectors	_____			Total	_____
Admin. Personnel	_____	Cost Estimators	_____	Other	_____																																		
Architects	_____	Electrical Engrs.	_____		_____																																		
Acoustical Engrs.	_____	Environmental Engrs.	_____		_____																																		
Civil Engrs.	_____	Licensed Site Profs.	_____		_____																																		
Code Specialists	_____	Mechanical Engrs.	_____		_____																																		
Construction Inspectors	_____			Total	_____																																		
4. Has this Joint-Venture previously worked together? ☐ Yes ☐ No																																							

5. List **ONLY** Those Prime and Sub-Consultant Personnel identified as Key personnel in the Response to Request for Services. This Information Should Be Presented Below In The Form Of An Organizational Chart modified to fit the firm's proposed management approach. Include Name of Firm And Name Of The Person:



6. Brief Resume for Key Personnel ONLY as indicated in the Request for Services. Resumes Should Be Consistent With The Persons Listed On The Organizational Chart In Question # 5. Additional Sheets Should Be Provided Only As Required For The Number Of Key Personnel And They Must Be In The Format Provided. By Including A Firm As A Subconsultant, The Prime Applicant Certifies That The Listed Firm Has Agreed To Work On This Project, Should The Team Be Selected.	
a. Name And Title Within Firm:	a. Name And Title Within Firm:
b. Project Assignment:	b. Project Assignment:
c. Name And Address Of Office In Which Individual Identified In 6a Resides:	c. Name And Address Of Office In Which Individual Identified In 6a Resides:
d. Years Experience: With This Firm: _____ With Other Firms: _____	d. Years Experience: With This Firm: _____ With Other Firms: _____
e. Education: Degree(s) /Year/Specialization	e. Education: Degree(s) /Year/Specialization
f. Date of MCPPO Certification:	f. Date of MCPPO Certification:
g. Applicable Registrations and Certifications :	g. Applicable Registrations and Certifications:
h. Current Work Assignments And Availability For This Project (<i>availability should be identified as a percentage: eg: "As of 5/30, 50% available"</i>):	h. Current Work Assignments And Availability For This Project (<i>availability should be identified as a percentage: eg: "As of 5/30, 50% available"</i>):
i. Other Experience And Qualifications Relevant To The Proposed Project: (Identify OPM Firm By Which Employed, If Not Current Firm. Please distinguish between OPM work and any design work performed by the firm.):	i. Other Experience And Qualifications Relevant To The Proposed Project: (Identify OPM Firm By Which Employed, If Not Current Firm. Please distinguish between OPM work and any design work performed by the firm.):

7a	Past Performance: List all Completed Projects, in excess of \$1.5 million, for which the Prime Applicant has performed, or has entered into a contract to perform Owner's Project Management Services for all Public Agencies within the Commonwealth within the past 10 years.									
a.	Project Name And Location Project Director	b. Brief Description Of Project And Services (Include Reference To Areas Of Similar Experience)	c. Project Dollar Value	d. Completion Date (Actual Or Estimate)	e. On Time (Yes Or No)	f. Original Construction Contract Value	g. Change Orders	h. Number of Accidents and Safety Violations	i. Dollar Value of any Safety fines	j. Number And Outcome Of Legal Actions
(1)										
(2)										
(3)										
(4)										
(5)										

7b. Past Performance: Provide the following information for those completed Projects listed above in 7a for which the Prime Applicant has performed, or has entered into a contract to perform (cont) Owner's Project Management Services for all Public Agencies within the Commonwealth within the past 10 years.						
a. Project Name And Location Project Director	b. Original Project Budget	c. Final Project Budget	d. If different, provide reason(s) for variance	e. Original Project Completion	e. Actual Project Completion On Time (Yes or No)	f. If different, provide reason(s) for variance.
(1)						
(2)						
(3)						
(4)						
(5)						

8. Capacity: Identify all current/ongoing Work by Prime Applicant, Joint-Venture Members or Sub-consultants. Identify project participants and highlight any work involving the project participants identified in the response.								
Project Name And Location Project Director	b. Brief Description Of Project And Services (Include Reference To Areas Of Similar Experience)	c. Original Project Budget	d. Current Project Budget	d. Project Completion Date	e. Current forecast completion date On Time (Yes Or No)	f. Original Construction Contract Value	g. Number and dollar value of Change Orders	h. Number and dollar value of claims
1.								
2.								
3.								
4.								
5.								
6.								
7.								
8.								

9. References: Provide the following information for completed and current Projects listed above in 7 and 8 for which the Prime Applicant has performed, or has entered into a contract to perform Owner's Project Management Services for all Public Agencies within the Commonwealth within the past 10 years.						
a.	Project Name And Location Project Director	Client's Name, Address and Phone Number. Include Name of Contact Person	Project Name And Location Project Director	Client's Name, Address and Phone Number. Include Name of Contact Person	Project Name And Location Project Director	Client's Name, Address and Phone Number. Include Name of Contact Person
1)			5)		9)	
2)			6)		10)	
3)			7)		11)	
4)			8)		12)	

9.	Use This Space To Provide Any Additional Information Or Description Of Resources Supporting The Qualifications Of Your Firm And That Of Your Sub-consultants. If Needed, Up To Three, Double-Sided 8 ½" X 11" Supplementary Sheets Will Be Accepted. <u>APPLICANTS ARE REQUIRED TO RESPOND SPECIFICALLY IN THIS SECTION TO THE AREAS OF EXPERIENCE REQUESTED.</u>			
10.	I hereby certify that the undersigned is an Authorized Signatory of Firm and is a Principal or Officer of Firm. The information contained in this application is true, accurate and sworn to by the undersigned under the pains and penalties of perjury.			
	<table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border: none;"> Submitted By (Signature) _____ </td> <td style="width: 5%; border: none; text-align: center;"> Printed Name And Title </td> <td style="width: 45%; border: none;"> _____ Date _____ </td> </tr> </table>	Submitted By (Signature) _____	Printed Name And Title	_____ Date _____
Submitted By (Signature) _____	Printed Name And Title	_____ Date _____		

ATTACHMENT D
Enrollment Letter and Enrollment Certification

(District to Attach)

Deborah B. Goldberg James A. MacDonald Mary L. Pichetti

Chair, State Treasurer

October 29, 2025 Chief Executive Officer Executive Director / Deputy CEO

Mr. James Errickson, Town Administrator Town of Natick

Natick Town Hall

Town Administrator's Office, Second Floor

13 East Central Street Natick, MA 01760

Re: Town of Natick, Memorial Elementary School Dear Mr. Errickson:

I would like to thank representatives of the Town of Natick (the "District") for meeting with Massachusetts School Building Authority (the "MSBA") staff on July 30, 2025, to review enrollment projections and methodologies for the Memorial Elementary School project (the "Proposed Project") and for the additional information provided on August 15, 2025 and August 28, 2025. As discussed, the next critical step is for the MSBA and the District to agree on a design enrollment for the Proposed Project.

The MSBA works with local communities to create affordable, sustainable, and energy-efficient schools across Massachusetts. A critical early component in achieving these objectives begins with an appropriate design enrollment that positions the District to efficiently meet space capacity needs throughout potential future enrollment variations.

The MSBA uses a data-driven enrollment projection methodology based on the widely accepted modified grade-to-grade cohort survival methodology (the "enrollment methodology"). The MSBA's enrollment methodology generates a baseline enrollment projection, as discussed

during the July 30, 2025, enrollment meeting and further described on the MSBA's website, located under the 'Building With Us' section, specifically the 'MSBA Enrollment Methodology' subsection. For specifics on how the MSBA's methodology impacts the Proposed Project, please refer to the District's Enrollment Projection package.

Based on discussions with and information provided by the District, including the Department of Elementary and Secondary Education ("DESE") and the Department of Public Health, the MSBA has created an enrollment projection for the Proposed Project, as follows. Memorial

Elementary School is one of four elementary schools currently serving the District's K-4 grade

enrollment. The MSBA understands that the District would also like Memorial Elementary School to serve neighborhood PreK students, currently located at Natick High School. As discussed, PreK enrollment is not included in these projections, as the determination of required space occurs early in the feasibility study phase of the MSBA's process, at the time of reviewing the District's proposed educational space program for the Proposed Project.

Accordingly, this analysis will focus on enrollment projections for grades K-4. The table below illustrates the District's grade K-12 enrollment during the most recent ten-year period, including enrollment for the most recent school year (2024-2025) as reported by DESE.

School Year	K-4	5-8	9-12	Total
2015-16	2,211	1,599	1,513	5,323
2016-17	2,212	1,596	1,539	5,347
2017-18	2,191	1,586	1,600	5,377
2018-19	2,167	1,641	1,600	5,408
2019-20	2,105	1,662	1,626	5,393
2020-21	1,961	1,664	1,550	5,175
2021-22	1,962	1,668	1,546	5,176
2022-23	1,957	1,662	1,589	5,208
2023-24	1,901	1,659	1,619	5,179
2024-25	1,898	1,638	1,637	5,173

A version of the above table with more detail regarding the District's historic enrollment may also be found in the District's Enrollment Projection package.

The total grade K-4 enrollment in the Town of Natick as reported by the DESE for the 2024-2025 school year was 1,898 students, reflecting a decrease of 314 students (-14.20%) from the grade K-4 enrollment reported in the 2016-2017 school year, which was the maximum grade K-4 enrollment reported in the preceding ten years. Additionally, the current year's grade K-4 enrollment reflects a decrease of approximately 159 students (-7.71%) from the average grade K-4 enrollment reported during the preceding ten-year period. The MSBA understands that the District is proposing a design enrollment of approximately 699 students in grades PreK-4 at Memorial Elementary School. The grade K-4 enrollment reported to DESE for this school in the 2024-2025 school year is 455 students.

With respect to future enrollments, the MSBA's base enrollment projection indicates that the District's grade K-4 enrollment will experience a decreasing trend before stabilizing in the 2029-30 school year. In accordance with the MSBA's Enrollment Methodology, baseline enrollment is calculated using the ten-year average of projected enrollments. As such, the average base enrollment projection for grades K-4 in the Natick Public Schools through the 2034-2035 school year is 1,755 students.

As a result of a sensitivity analysis performed by the MSBA on this base enrollment projection and further discussion with the District, the following adjustments have been made to the base enrollment projection:

- Student Migration Adjustment

- o The MSBA's default methodology projects enrollment utilizing the most recent five-year average grade-to-grade cohort survival ratios.

- o In order to account for the recently observed changes in the pattern of grade-to-grade cohort survival ratios, the MSBA enrollment model was adjusted to use the three-year average grade-to-grade cohort ratio rather than the five-year survival ratio.

- o This adjustment added approximately 40 students to the average grade K-4 enrollment as compared to the projection without this adjustment.

- Out-of-District Enrollment

- o In order to adjust for fluctuations in the out-of-district enrollment patterns of the District's residents over time, the MSBA has made an additional adjustment to the base enrollment projection.

- o In order to make this adjustment, the MSBA adjusted the grade-to-grade survival ratios for grade K-4 enrollment by a total of 3.3% throughout a four-year period in the projection.

- o This adjustment added 20 students to the base grade K-4 enrollment as compared to the projection without this adjustment.

Development

Based on the discussions between the District and the MSBA regarding new housing developments and housing development information provided by the District, the MSBA enrollment model was adjusted to use the five-year 75th percentile cohort survival rate for the 2026 and 2027 years rather than the five-year average cohort survival rate, which is utilized throughout the base enrollment forecast to account for the potential impact of developments that are beyond what is typically experienced in the District.

This adjustment added 25 students to the base grade K-4 enrollment as compared to the base enrollment projection.

In order to recommend an enrollment for an appropriately sized grade K-4 Proposed Project, the MSBA performed a review of the "school use" for non-project schools serving grade K-4 enrollment: the Bennett-Hemenway Elementary School, the Brown Elementary School, and the Lilja Elementary School, (the "non-project schools"), using "school use" capacity information on file with the MSBA. This review identified a total of 65 general classrooms (exclusive of Special Education, Art, Music, and "other"), and when multiplied by 23 students per classroom, results in space for 1,495 students in the non-project schools identified above. The MSBA understands that year-to-year fluctuations in enrollment occur. Therefore, a 15% buffer has been applied,

resulting in the capacity for 1,270 students (rounded to the nearest five students) in grade K-4 in the non-project schools.

As a result of the analysis of the base enrollment forecast, the historical enrollment trends of the District, and the adjustments described above, the MSBA recommends a design enrollment of 570 students in grades K-4 (plus neighborhood PreK) for the Memorial Elementary School.

As mentioned, the MSBA understands that the District would like the Proposed Project to include space for neighborhood PreK students. If the District's Preferred Schematic includes programming space for neighborhood PreK students, it will be required to document in the Preferred Schematic Report the proposed use of existing spaces vacated or otherwise reprogrammed as a result of the Proposed Project, and that the School Committee and other necessary District officials have approved the inclusion of PreK students.

The MSBA believes that this design enrollment recommendation will position the District to efficiently meet space capacity needs throughout future enrollment variations. Please sign and return the attached certification within 14 calendar days to confirm agreement on this

design enrollment. If the District feels that this design enrollment does not meet the needs of the District, please respond to this letter via e-mail to Maria Caprigno and propose three meeting/ conference call times for which the District can be available to discuss enrollment.

If you have any questions regarding this matter, please do not hesitate to contact me or Maria Caprigno (Maria.Caprigno@MassSchoolBuildings.org) at 617-720-4466.

Sincerely,

Michael McGurl

Director of Capital Planning

Cc: Legislative Delegation

Bruce T. Evans, Chair, Natick Select Board Elise Gorseth, Chair, Natick School Committee

Dr. Melissa Spash, Superintendent, Natick Public Schools

Matthew Gillis, Assistant Superintendent of Finance, Natick Public Schools Stephen Meyler, Chair, Natick School Building Committee

Linda McGrath, Executive Assistant to the Superintendent, Natick Public Schools File: 10.2 Letters (Region 4)

ATTACHMENT E

Natick Enrollment Snapshot

	October 01, 201025														TOTAL
	NPK	K	1	2	3	4	5	6	7	8	9	10	11	12	
PRE-K EAST	58														58
PRE-K NHS	58														58
PRE-K BEN	13														13
Total:															129
BEN-HEM		17	20	19	18	20									
		17	23	20	19	20									
		19	23	20	20	20									
		18	20	20	20	21									
		18	22	23		19									
						21									
Total:		89	108	102	77	121									497
BROWN		17	17	22	18	20									
		18	18	22	19	21									
		19	18	23	20	21									
		18	17	23	20	21									
		15	18		22	21									
						22									
Total:		87	88	90	99	126									490
LILJA		16	18	18	23	21									
		17	20	21	23	22									
		20	20	21	23	23									
		19	20		23	24									
		20													
	Access Program:	3	4	3		3									
	Gr 1/2 Class:		11	7											
	Gr 1/2 Class:		11	7											
Total:		95	104	77	92	93									461
MEMORIAL		22	18	20	22	18									
		22	18	21	22	19									
		22	18	21	23	19									
		23	19	22	23	20									
						21									
Total:		89	73	84	90	97									433
KENNEDY							206	218	229	214					867
WILSON							168	184	182	189					723
NHS											386	395	425	419	1625
* Enrollment change at NHS: 9th grader approved to transfer out as 8/27. 12th Grader enrolled after 10/1															
GRAND TOTALS:	129	360	373	353	358	437	374	402	411	403	386	395	425	419	5225

ATTACHMENT F

Required Certifications

CERTIFICATE OF NON-COLLUSION

The undersigned hereby certifies that s/he will comply with all laws and regulations applicable to awards made subject to Massachusetts General Laws Chapter 7C.

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

Signature of individual submitting Proposal _____

Name of Business (please type or print) _____

This form is required with RFQ proposal submission.

CERTIFICATE OF TAX COMPLIANCE

Pursuant to Ch.62C, S.49A (b) of the Massachusetts General Laws, I, _____, authorized signatory for (name) _____, do hereby certify under the pains and penalties (name of Consultant) of perjury that said contractor has complied with all laws of the Commonwealth of Massachusetts relating to taxes.

Consultant By: _____

(Signature of authorized representative)

(Title)

_____ -

(Date)

CERTIFICATE OF MA Conflict of Interest Training

Please attach the certificate of completion for all staff expected to be working on site routinely during feasibility study through Construction close out and all staff authorized to sign contracts for this firm.

ATTACHMENT G
Required Certifications

SIGNATURE PAGE

This Bid must bear the written signature of the Bidder or authorized agent of the Bidder. If the Bidder is a corporation or a partnership, the Bid must be signed by a duly authorized officer of such corporation or by a partner; the title of such officer must be stated.

The bidder hereby acknowledges the receipt of, and has included in this BID, the following Addenda:

(To be filled in by Bidder, if Addendums are issues.)

Addendum No. __, dated _____

Addendum No. __, dated _____

Addendum No. __, dated _____

Signature

Name of Corporation, Company or Individual

Printed Name of Person Authorized to Sign

Date & Title of Person Authorized to Sign Contracts and amendments on behalf of the Bidder

ATTACHMENT H
Required Prior Monthly Project Report

The owner would like see a representative sample of past (public) school project report that was shared publicly for a similar project of size and complexity.

ATTACHMENT I

Two samples of Life Cycle Cost Analysis the OPM has presented to an owner in the past seven years.

The Natick Memorial SBC will be reviewing examples of life cycle cost analysis presented by the OPM to previous owner/client that proved helpful in decision making to keep a project on schedule and under budget. This could be HVAC system options, roofing design and materials options, flooring options, lighting options, a value engineering list, site analysis, options for attaining LEED points or other relevant certification, etc.

