

TO: Board of Directors, Massachusetts School Building Authority
FROM: James A. MacDonald, First Deputy Treasurer, Chief Executive Officer
John K. McCarthy, Executive Director, Deputy Chief Executive Officer
SUBJECT: Post Occupancy Evaluation Program - Consultant Contract Extension
DATE: June 16, 2021

Introduction

MSBA staff has worked closely with its consultants, Perkins + Will, to establish the process and tools necessary for implementing and maintaining a successful Post Occupancy Evaluation Program (the “Program”) since the approval of the MSBA Board of Directors to implement the Program as part of the MSBA’s grant process. In an effort to further support the Program in the upcoming 2022 fiscal year, staff recommends amending the term of the contract between the MSBA and Perkins + Will from July 1, 2021, to June 30, 2022. MSBA staff also recommends increasing the total contract amount from \$211,649 to approximately \$263,649. Pursuant to the MSBA’s by-laws, the MSBA Board of Directors must vote to authorize the Executive Director to enter into contracts valued at more than \$250,000.

Background

In December of 2018, the MSBA hired Perkins + Will, to assist the MSBA in creating Pre and Post Occupancy Review Guidelines. This effort included the review of relevant MSBA feasibility and construction documentation, and review of survey questions associated with the MSBA’s 2018 Post Occupancy Review Pilot Program. Perkins + Will’s expertise and guidance was instrumental in the efforts leading up to MSBA’s recommendation to implement a permanent Program.

During the April 15, 2020, MSBA Board meeting, the Board approved the staff’s recommendation to implement the Program as part of the MSBA’s grant process. Subsequently, the MSBA amended the contract between the MSBA and Perkins + Will in order to further assist staff with establishing the process and tools necessary for implementing and maintaining a successful Program. Perkins + Will has a vast amount of experience with conducting post occupancy evaluations in the industry, which has played a key role in reaching the present milestone associated with preparation for the live testing of data collection tools and database technology. The total value of the contract with the first amendment remained under the \$250,000 threshold requiring Board authorization. As the value of the contract will exceed \$250,000 with the current proposed contract amendment, staff are recommending this amendment for approval by the Board of Directors.

Schedule

The coronavirus pandemic has caused delays with completing some of the tasks included in the original schedule. The original schedule established as part of the plan to implement the Program anticipated having a fully staffed Program team in place and the completion of the pilot testing in 2020, prior to staff conducting building visits in early 2021.

The current schedule anticipates that testing of data collection tools will now be completed in July 2021 and formal post occupancy evaluations, including building visits, will commence in the fall of 2021. Given Perkins + Will’s knowledge of the Program and efforts to date, it will be advantageous for the MSBA to continue its working relationship with Perkins + Will beyond

June 2021 as staff prepares to enter fiscal year 2022. A presentation outlining the updated efforts associated with the Program is attached to this memorandum.

The updated roll-out of the Program is as follows:

- June/July 2021: Testing of data collection tools at two schools
- July – September 2021: MSBA will perform District outreach in preparation for the formal evaluations
- October 2021: Formal evaluations will commence at up to 12 schools
- January 2022: Progress check-in
- January – April 2022: Continue formal evaluations
- May – June 2022: Adjustments and reporting

Recommendation: To authorize the Executive Director to execute and deliver one or more amendments to the master services agreement that the MSBA has executed with Perkins + Will for additional support services for the MSBA's Post Occupancy Evaluation Program in the upcoming fiscal year, the cost of which additional services will cause the total contract value to exceed \$250,000. Pursuant to the MSBA's by-laws, the Board must authorize the Executive Director to enter into agreements that exceed this amount.

Attachment A:

Post Occupancy Evaluation Program update – PowerPoint Presentation

MSBA Post Occupancy Status Update

June 23, 2021

Key Points:

- ❖ Historic Timeline & Projections
- ❖ Technology Components, Goal & Approach
- ❖ Anticipated Roll-out

Historic Timeline & Projections (Updated as of June 2021)

- Internal Kick-off ✓
- Establish Pilot Scope ✓
- Identify Participants ✓
- Pilot Recommendation ✓

FY17

- Pilot Test ✓
- District Outreach ✓
- Develop Application ✓
- Initial Building Visits ✓
- Analyze Data ✓
- Designer Roundtable ✓
- Pilot Extension ✓

FY18

- Establish Scope ✓
- District Outreach ✓
- Consultant Procurement ✓
- Bldg. Visits to Observe Operation/Perf ✓
- Review of the MSBA Process, Guidelines, Data Col. Opps ✓
- Consultant Collaboration ✓

FY19

- Consultant Collaboration ✓
- Final Reporting (Pilot) ✓
- Implementation Approval ✓
- IT Development
- MSBA Recruitment
- Application Testing
- District Outreach

FY20

FY21

- POE Commencement
- Memorialize Mod 9
- Est. Consultant W.O.'s
- Provide Consultant Training
- Coordinate Bldg. Visits
- Initial Visit Check-in

FY22

- Continue Bldg. Visits
- Apply Lessons from Year 1
- Consider Adjustments
- Coordinate Bldg. Visits

FY23

- Continue Bldg. Visits
- Apply Lessons from Year 1-2
- Consider Adjustments
- Coordinate Bldg. Visits

FY24

- Continue Bldg. Visits
- Apply Lessons from Year 1-3
- Consider Adjustments
- Coordinate Bldg. Visits

FY25

Technology Goal and Approach

Project Data Collection (Info from Modules 1-8)

Online Survey for End-users (Feedback from occupants)

Pre-Visit Questionnaire (Data from District and Facilities)

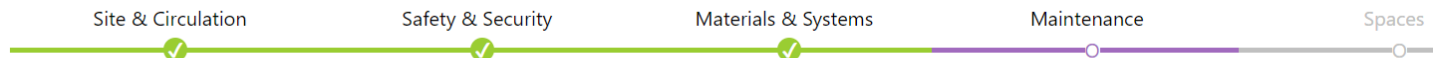
Building Visit (Observations by Professionals)

Build a new application as an extension of the current MSBA suite of applications, leveraging existing project data and supporting new Post Occupancy data collection for analysis and reporting.

- Easy to access web applications for different user groups (internal and external) on various types of devices
- Easy to use interfaces and screens
- Central, consolidated data repository
- Easy access to data and templates for reporting
- Administration tool for POE Team to setup and manage systems for projects in Post Occupancy phase

Online Survey

Leadership - District or Schools Questionnaire



Maintenance

M1. Please indicate how strongly you agree or disagree with the following statements about the maintenance practices in the building:*

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A
The district has general maintenance protocols for the site (the grounds and outdoor spaces)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The district has general maintenance protocols for the building	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The district has changed their maintenance practices to adapt to the building	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There was training for staff for all building systems (e.g. HVAC, lighting) when the building opened	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retraining for staff is available if needed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is training for new staff for all building systems	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The district responds to repairs or malfunction of equipment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Systems and components in the ceiling are easy to access for maintenance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is easy-to-use documentation of the materials used in the building for maintenance, updates, and replacements.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

District Report

Key Findings

1 Educationally Appropriate

Please enter key points here



supports student's learning needs



supports productivity

2 Flexible

Please enter key points here

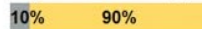


Agree responds to the curriculum

Lighting control is very good



Temperature control is very good



3 Sustainable

Please enter key points here

EUI (kBTU/gsf/year)



4 Cost Efficient

Please enter key points here

Water Usage (gal/gsf/year)



Final Cost per SF

\$210/SF

Electricity Usage (kBTU/year)



5 User Satisfaction

Please enter key points here



Teacher/Staff Satisfaction



Leadership/District Satisfaction



Parent/Guardian Satisfaction



of students like their classroom

Interactive Dashboard

MSBA Post Occupancy Evaluation / Summary

School Name
Multiple values

Procurement Type
All

Project Scope
All

School Type
All

POE Completion Date
All

Substantial Completion Date
All

Number of Schools with
POE's

10

Total Gross Square
Footage

950K

Total Project Cost

\$3.0B

Average Project Cost

\$300M

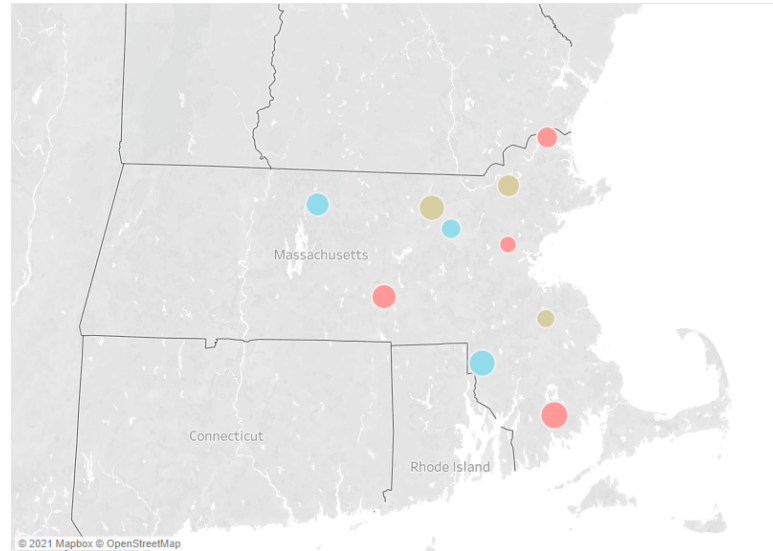
Board Approved TFG
Amount

\$1.5B

Total POE Survey
Respondents

3200

Elementary School Middle School High School



Last Updated: 5/14/2021

Interactive Dashboard

MSBA Post Occupancy Evaluation / Sustainability

School Name
Multiple values

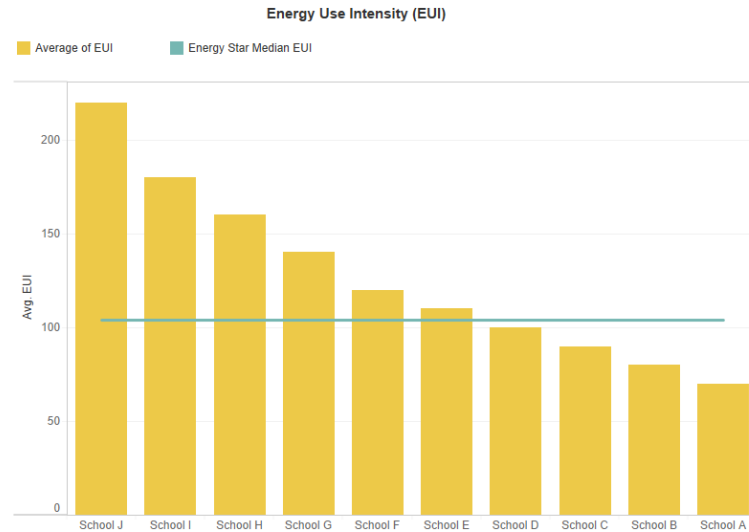
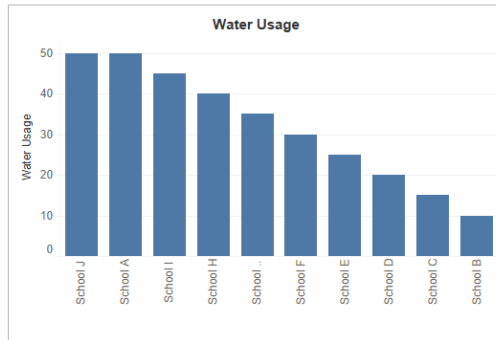
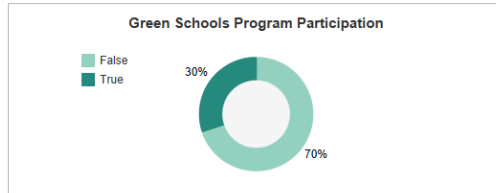
Procurement Type
All

Project Scope
All

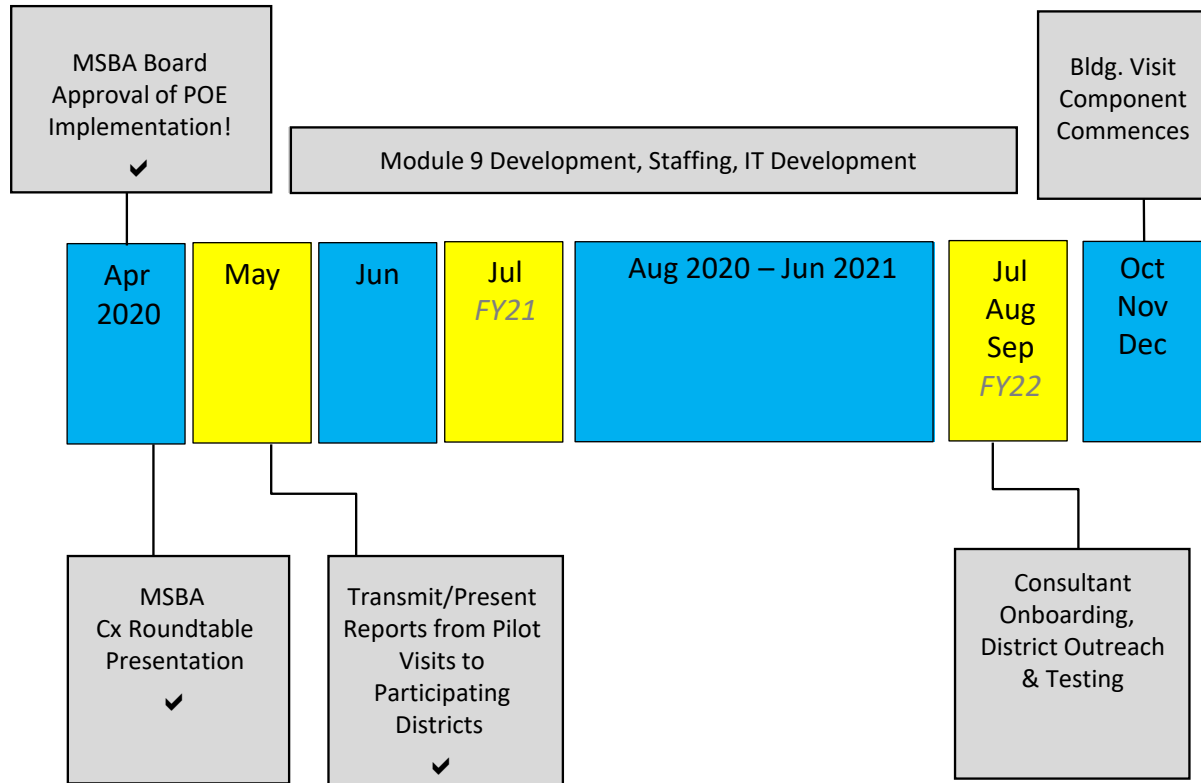
School Type
All

POE Completion Date
All

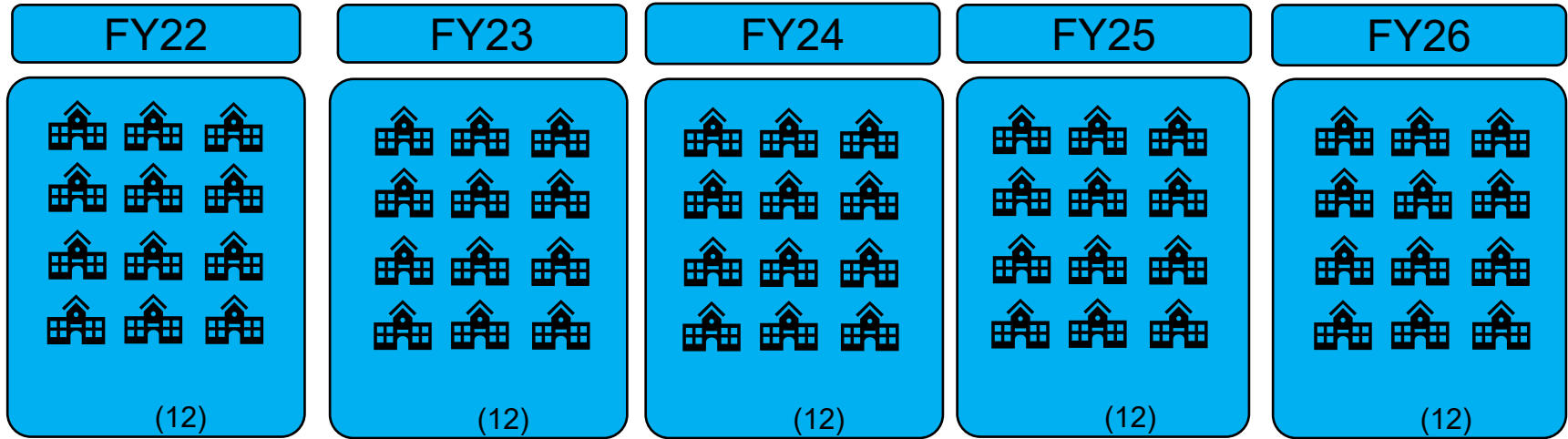
Substantial Completion Date
All



Anticipated Roll-out, Revised June 2021



Projected POEs & Associated Construction Cost (FY22-26)*



~9M sf **~\$4B***

Approximate totals

*Based on project schedules, this assumes an average of (12) visits per year. Assume 60 evaluations through FY26.