

# Massachusetts School Building Authority

Deborah B. Goldberg, State Treasurer and Receiver-General

*Chair*

Mary L. Pichetti

*Executive Director/Deputy CEO*

James A. MacDonald  
*Chief Executive Officer*



## Procurement Overview

### Accelerated Repair Program Heat Pump Pilot Study



## Heat Pump Pilot Study | Scope of Work

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- Understand existing MSBA 2016 School Survey Data and potential use of future School Survey Data
- Identify criteria to select the best buildings and MEP systems for heat pump conversion
- Develop generic scope and criteria for heat pump options that can apply to a range of building types
- Provide cost and schedule metrics for proposed heat pump options to support financial forecasting for the Accelerated Repair Program
- Visit schools from interested districts to develop existing MEP conditions reports and options analysis
- Make programmatic recommendations to incorporate heat pump projects within the framework of the Accelerated Repair Program

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## Procurement Schedule

Accelerated Repair Program  
Heat Pump Pilot Study



# Heat Pump Pilot Study | Procurement Schedule

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- Approximate Procurement Schedule
  - Issuance of RFR for HP consultant: Late February, 2024
  - Question Deadline: Early March, 2024
  - RFR Response Deadline: Late March, 2024
  - Update to Designer Selection Panel: June 2024
  - Selection: June 2024 Board Meeting
- Selection Outcome
  - MSBA anticipates selection of 1 firm
  - Multi-year agreement with MSBA beginning July 2024

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## Procurement Overview

### Commissioning Services



# Commissioning Services | Scope of Work

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- **Scope of Services:**
  - Cx Procurement is directed to firms or individuals to assist the MSBA with Commissioning Services
  - MSBA assigns CxA to both Core and Accelerated Repair Program Projects
  - Scope of Commissioning Services will vary by project
  
- **Categories of Work:**
  - Full Building Commissioning
  - Partial Building or Individual System Commissioning
  - Roofing and Building Envelope Commissioning
  
- **Project Phases:**
  - Design Development through Building Occupancy and Warranty Phase



## Commissioning Services | Scope of Work

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- Fees:
  - Full building commissioning of new construction projects and major addition/renovation projects
  - Partial building or individual system(s)
  
- Commissioning Support During First Year of Operation:
  - Assisting the building owner with developing and implementing commissioning support
  - Support efforts to meet the Owner's Project Requirements ("OPR")
  
- Re-commissioning Services:
  - Assisting the building owner with the development and implementation of the re-commissioning of buildings that have been occupied for a minimum of 3-5 years.

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## Procurement Schedule

### Commissioning Services





## Commissioning Services | Procurement Schedule

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- Approximate Procurement Schedule
  - Issuance of RFR: Early March, 2024
  - Question Deadline: Mid March, 2024
  - RFR Response Deadline: Mid April, 2024
  - Selection: June 2024 Board Meeting
- Selection Outcome
  - MSBA anticipates selection of 18-20 firms
  - Multi-year agreement with MSBA beginning July 2024

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## Procurement Overview

### Accelerated Repair Program

- Owner's Project Managers
- Designers



## Accelerated Repair Program | Scope of Work

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- Projects will consist of partial or full replacement of roofs and/or windows/doors
  - Districts can be invited for multiple schools and/or scopes of work
  - Projected cost per school must be \$250,000 or more
- District invitations are based upon MSBA's review of Statements of Interest
  - Districts submit SOIs specifically for the Accelerated Repair Program
    - SOI opening historically occurs from mid-January to mid-February
      - At the October 26, 2022 Board of Directors meeting, a temporary pause in the Accelerated Repair Program was approved, resulting in no new Accelerated Repair Program Statements of Interest in 2023.
    - Districts receive invitations in October by MSBA Board of Directors
  - Consultant assignments occur from January to March
    - Consultant assignments will be made for anticipated district invitations beginning in 2024 and extending to 2026



# Accelerated Repair Program | District Participation

Repair Program	Districts	Projects	Total Project Budgets	Maximum Facility Grants	Number of Projects Final Audit Approved
2022 Accelerated *	12	27	\$45,798,434	\$32,584,855	0
2021 Accelerated	15	26	\$109,602,763	\$59,925,011	0
2020 Accelerated	15	21	\$81,731,451	\$43,329,550	1
2019 Accelerated	24	38	\$85,180,989	\$52,047,959	9
2018 Accelerated	20	30	\$83,172,480	\$47,018,557	15
2017 Accelerated	19	34	\$117,020,597	\$73,280,673	19
2016 Accelerated	28	48	\$156,598,234	\$83,007,586	39
2015 Accelerated	24	43	\$136,680,652	\$91,974,052	42
2014 Accelerated	34	47	\$108,410,084	\$65,388,035	44
2013 Accelerated	25	45	\$94,650,790	\$54,662,551	45
2012 Accelerated	24	36	\$63,009,653	\$38,267,952	36
Green	93	189	\$366,647,226	\$222,889,218	189

\* Financial totals reflect Project Funding Agreement approvals through the August 30, 2023 Board of Directors Meeting (13 projects).



## Accelerated Repair Program | Scope of Work

- Staff recommendations to be presented at the October 25, 2023 Board of Directors meeting will include:

Description	Recommended
Open ARP January 2024	Open for windows and roofs with an estimated budget of \$150 million
Roof Restoration	Include this provision in the feasibility study for roof invitations to determine fit
Heat Pump Conversion	Procure a consultant in 2024 with goal to offer in January 2025 SOI opening
Open biennially (every two years)	Commence biennial (every other year) opening in January 2025



## Accelerated Repair Program | Consultant Assignments

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- Districts are randomly assigned OPMs and Designers
  - Number of assignments are based upon the number of districts invited into ARP
    - MSBA cannot guarantee any specific number of assignments or any assignments at all to those selected through the procurements
  - Assignment process is restarted with each new cohort of Statements of Interest
  - Assignments are made upon districts' completion of prerequisite documents and schematic design funding



## Accelerated Repair Program | Consultant Contracts

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- MSBA standard OPM and Designer contracts for Accelerated Repair Program
  - Updated MSBA standard contracts will be incorporated into the procurement documents
    - Contracts should not be altered in any way
    - OPM contract anticipated to include a not-to-exceed fee for the schematic design phase
  - Workforce Participation (See Project Advisory #66)
    - OPM Contract – OPM shall monitor and report on the Designer’s and Contractor’s compliance with the Commonwealth’s Workforce Participation requirements
    - Designer Contract – Designer shall be required to provide regular reports of the gender and race/ethnicity of employees engaged in work under the contract, for both prime and subconsultants, in the form and format required by the District, including but not limited to, by electronic reporting through the requested means and with the frequency required by the District.



## Accelerated Repair Program | Commissioning

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- MSBA will assign a commissioning consultant to each project following MSBA's receipt of district's schematic design package
  - MSBA pays 100% of commissioning consultant costs
- OPM is responsible to coordinate commissioning consultant activities from construction documents to closeout





## Accelerated Repair Program | Construction Admin.

- Per OPM contract, Project Representative is present during contractor operations
  - 8.6.2 The Owner’s Project Manager shall provide an on-site Project Representative, who shall be dedicated exclusively to the Project, either as an employee of the Owner’s Project Manager or as a subconsultant to the Owner’s Project Manager.
    - 8.6.2.1 The Project Representative shall be subject to the approval of the Owner and the Owner reserves the right to require the Owner’s Project Manager to replace the Project Representative at any time during the course of the Project.
    - 8.6.2.2 The Project Representative shall have **at least five years of experience** in on-site supervision of projects similar in size and complexity to the Project.
    - 8.6.2.3 The Project Representative shall be present at all times when the Contractor is conducting operations at the site starting from issuance by the Owner of a Notice to Proceed to the Contractor and continuing until substantial use or substantial completion as determined by the Owner and thereafter on an, as needed basis, until issuance to the Contractor of a Certificate of Final Completion by the Owner.
- Designer certifies percentage of work for contractor payment requisitions
- OPM assists district in completing “Study”, “Design”, and “Construction” evaluation of the Designer as well as 50% and Final DCAMM evaluation of the Contractor(s)

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## Procurement Schedule

### Accelerated Repair Program

- Owner's Project Managers
- Designers



## Accelerated Repair Program | OPM Procurement

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- Approximate Procurement Schedule
  - Issuance: Early April, 2024
  - Question Deadline: Mid April, 2024
  - Response Deadline: Early May, 2024
  - Anticipated Presentation to OPM Review Panel: August 2024
  - Selection: August 2024 Board Meeting
- Selection Outcome
  - MSBA anticipates selection of 15-20 OPMs
  - Assignment to Districts invited to Accelerated Repair Program
    - ARP invitations in 2024 and 2025 (pending Board approval)
    - Assignment to 2024 invitations anticipated Spring 2025



# Accelerated Repair Program | Designer Procurement

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- Approximate Procurement Schedule
  - Issuance of RFR: Late March, 2024
  - Question Deadline: Mid April, 2024
  - RFR Response Deadline: Late April, 2024
  - Anticipated Selection by Designer Selection Panel: July 2024
  - Selection: August 2024 Board Meeting
- Selection Outcome
  - MSBA anticipates selection of 15-20 Designers
  - Assignment to Districts invited to Accelerated Repair Program
    - ARP invitations in 2024 and 2025 (pending Board approval)
    - Assignment to 2024 invitations anticipated Spring 2025