

Massachusetts School Building Authority

Deborah B. Goldberg, State Treasurer and Receiver-General

James A. MacDonald
Chief Executive Officer

Chair

Mary L. Pichetti
Executive Director/Deputy CEO



FY24 Procurement Overview for Engineers, Architects, and Project Managers





Procurement Overview Agenda

- Introductions
 - Mary L. Pichetti, Executive Director/Deputy CEO, Massachusetts School Building Authority
 - John Fitzpatrick, Director, Supplier Diversity Programs
 - Meghan Costa, Construction and Disability Program Coordinator, Supplier Diversity Office
- Technical Services
 - Karl Brown, Design Director, MSBA
- Enrollment Studies
 - John Jumpe, Director of Project Management, MSBA
- School Survey
 - Peter Falk, Data Project Manager II, MSBA



Procurement Overview Agenda

- Commissioning Services
 - Greg Brunell, Director of Construction Administration, MSBA
- Accelerated Repair Program Procurements
 - Owner's Project Managers
 - Designers
 - Heat Pump Pilot Study
 - John Crisley, Construction Administration Senior PM, MSBA
- Questions & Answers



Supplier Diversity Office

Commonwealth of Massachusetts Supplier Diversity Office (SDO)



Meghan G. Costa, Construction Program Coordinator
Meghan.Costa@mass.gov

John B. Fitzpatrick, Director, Supplier Diversity Programs
John.B.Fitzpatrick@mass.gov



Overview of the SDO

SDO Mission: To promote diversity, equity and inclusion in state contracting by certifying minority, women, Portuguese, veteran, service-disabled veteran, disability, LGBT-owned, and small Massachusetts businesses and connecting them with business opportunities and resources.

The SDO:

- Serves as a gateway for businesses interested in accessing a wide range of diverse and small business programs.
- Coordinates the Commonwealth's diverse and small business programs.
- Is being more intentional in promoting and facilitating business opportunities for diverse businesses
- Offers resources for institutional diverse and small business programs.
- Reports on the diverse and small business program results on behalf of the Commonwealth.



SDO Programs



**SUPPLIER DIVERSITY
PROGRAM (SDP)**



**SMALL BUSINESS
PURCHASING PROGRAM
(SBPP)**



**MUNICIPAL CONSTRUCTION
AFFIRMATIVE MARKETING
PROGRAM (MCAMP)**



**INDIVIDUALS WITH
DISABILITIES IN STATE
PROCUREMENT AND
CONTRACTING PROGRAM**



SDO Certification Program

SDO Certifications

- Minority Owned Business Enterprise (MBE)
- Women Owned Business Enterprise (WBE)
- Veteran Business Enterprise (VBE)
- Minority Non-profit Organization (M/NPO)*
- Women Non-profit Organization (W/NPO)*
- Portuguese Owned Business Enterprise (PBE)**

Based on at least 51% ownership

Recognized Third-party Certifications

- Service-Disabled Veteran Owned Business Enterprises (SDVOBE)
- Disability Owned Business Enterprise (DOBE)
- Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)

**based on the majority of board and voting body membership*

***only for programs funded by state transportation bond statutes that include PBEs*

Benefits of Certification

- No cost!
- If awarded a state contract, the ability to market to Commonwealth agencies seeking to meet their supplier diversity spending benchmarks.
- Eligibility to be a supplier diversity partner to Commonwealth prime contractors.
- Invitations to training, networking and matchmaking events.
- Eligibility to participate in supplier diversity programs of quasi-public and private organizations.

Steps to Certification



Complete the Certification Self-Assessment



Attend a Pre-Certification Webinar



Apply for certification within one year of attending the webinar



Application paperwork and documents are processed by Intake Coordinator and assigned to a Certification Investigator



Certification Investigator reviews application and begins verification process, which includes site visits (virtual or in-person) and interviews with business owners



Certification Investigator notifies business owner of results of investigation



Certification Self-Assessment Tool



Conduct a Contractor Certification Drive

Mass.gov

PART OF [Certification Program for SDO](#) OFFERED BY [Operational Services Division](#)

Take the certification self-assessment

This interactive tool will ask you a few questions about your business and will recommend the next steps for SDO and third-party certifications your business may be eligible for.

You will need:

Disclaimer: This self-assessment provides general guidance on whether your company/organization may qualify for the Supplier Diversity Office (SDO) programs. However it does not guarantee eligibility for inclusion in the Small Business Purchasing Program (SBPP) or in any of the diversity categories overseen by SDO. Eligibility for the SBPP is made through the COMMBUYS SBPP registration process and eligibility for SDO certification is determined through a certification investigation conducted by the SDO.

General Questions

Are you a

for-profit business

non-profit organization

government organization

Progress

Woman Business Enterprise (WBE) Certification

Your company should apply for WBE certification. As a Massachusetts-based new applicant, start the process by registering for and attending a **Pre-Certification Workshop**. The workshop covers our certification criteria, process and required documents. Once you complete the workshop, you will receive a copy of the certification application form to complete.

If you have questions please contact the Supplier Diversity Office at webmaster.sdo@mass.gov or 617-720-3129.

Small Business Purchasing Program (SBPP) Validation

You should join the **Small Business Purchasing Program - it is a quick online process**. To start, you need to create (or log into) your seller account in **COMMBUYS**. Here are the step-by-step directions:

- If you already have a COMMBUYS account, follow the guidance of [How to Complete or Renew SBPP Registration: Guidance for Seller Administrators](#) job aid.
- If you do not have a COMMBUYS account, follow the steps in this [COMMBUYS Vendor Registration](#) job aid. You will be prompted to complete the SBPP application during COMMBUYS registration.

If you need help contact the COMMBUYS Help Desk at COMMBUYS@mass.gov, 888-627-8283 or 617-720-3197.

Let us help you get started! Click "Next" to enter your contact information.

Progress

Contact Information

Company Name:*

City:

State:

Your Name:*

Phone:*

Email:*

Please list any specific questions that you may have for SDO:

Progress

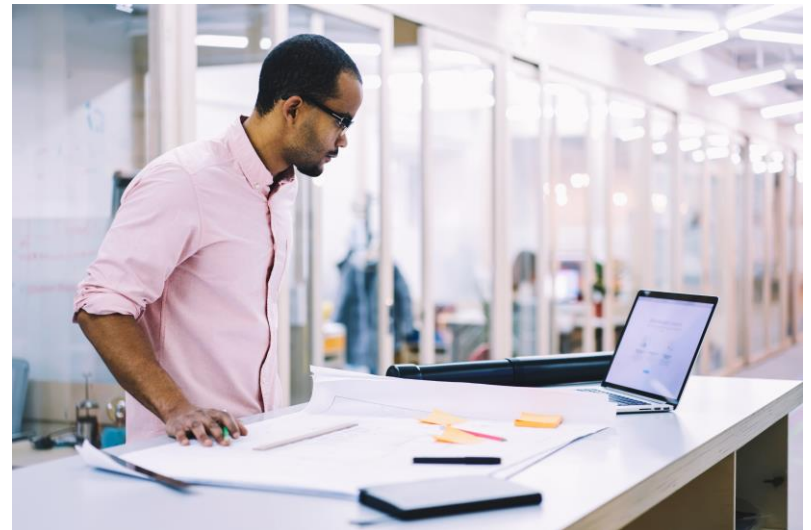
Precertification Webinars

Upcoming Sessions

11/30/2023 10:00 AM to 12:00 PM

12/14/2023 10:00 AM to 12:00 PM

[Register Here](#)



SDO Directory of Certified Businesses

Where potential partners are found

HOME WORKSHOP/EVENT SESSIONS DIRECTORY OF CERTIFIED BUSINESSES COMMBUYS

Directory of Certified Businesses

Search the Directory

Search the Directory → Download the Directory → MassPort Directory →

Search Filters

Business Type All Business Enterprise (for-profit) Non-Profit Organization

Certification Type Match Any Match All

Certification Agency Match Any Match All

- ACDBE - Airport Concession-DBE
- PBE - Portuguese Business Enterprise
- VBE - Veteran Business Enterprise
- SBPP - Small Business Purchasing Program
- LGBTBE - Lesbian Gay Bisexual Transgender Enterprise
- SDO - Supplier Diversity Office - State
- UCP - MassDOT Office
- COB - City of Boston
- WBENC - Women's Business Enterprise National Council
- NMSDC - National Minority Supplier Development

NAICS Code and Description:

Keywords:

+ Advanced Search...

Sort Results By: Company Name

Sort Order: Ascending Descending

Output Type: On Screen As Pdf Export to Excel

SEARCH **CLEAR**

Search Results - 63 Businesses found

Business Type	Certification Type	Certification Agency	NAICS Code	Keywords	Business Name	Certification Date
All	VBE	SDO	[Any]	None	[Any]	[Any]
Client Id	Region	City or Town	County	Product Code	Distance Search	Sorting
[Any]	All	All	All	All	[Any]	Company Name Ascending
Adjust Filters						
Page 1 of 3 Rows 25 per Page						
Company Name	City/Town/State	Certification Summary				
Adams & Norton Construction Company	West Springfield, MA	VBE, VBE (Supplier Diversity Office - SDO) Expand				
Armeda, LLC	Warena, VA	VBE, VBE (Supplier Diversity Office - SDO) Expand				
SSL Home Improvement, LLC	Middleboro, MA	VBE, VBE (Supplier Diversity Office - SDO) Expand				
Sountiful Providence, LLC	Boston, MA	VBE, VBE (Supplier Diversity Office - SDO) Expand				
Stigge Family Enterprises, LLC	Stockbridge, GA	VBE, VBE (Supplier Diversity Office - SDO) Expand				
Subway Underground Utility Locking, LLC	Randolph, MA	VBE, VBE (Supplier Diversity Office - SDO) UBE (UCF-MassDOT Office) Expand				

The SDO diverse and small business directory is public and available to anyone to search.

View, search, or download the directory by clicking [this link](#).



SDO Website Updates (www.mass.gov/sdo)

RESOURCE

Resources for Diverse and Small Businesses

Maximize the value of your diverse and small business certification by exploring training, bidding opportunities, as well as capacity building, financial and technical assistance.

TABLE OF CONTENTS

[Training and Development](#) →

[Bidding Opportunities](#) →

[Capacity Building, Financial and Technical Assistance](#) →

[SDO Organizational Partnerships](#) →

The SDO continues to update its website:

- Resources for Diverse and Small Businesses
- Revised SBPP webpage (www.mass.gov/sbpp)
- Revised SDP webpage (www.mass.gov/sdp)
- Expanded Resources for Departments
 - Policies and guidance
 - SDP/SBPP template language
 - Contractor SDP reporting tools
 - Additional resources

Supplier Diversity Hub



Provide users with a suite of tools to implement SDO programs

- ❑ Facilitate connections between prime contractors, diverse businesses and buyers
- ❑ Buyers can post upcoming procurements and notices to diverse and small businesses



Massachusetts Map of SDO Certified Diverse Businesses

SDO Certified Businesses Geographical Location

9/20/2023 12:33:08 PM

MA-State and Other State

All

List of Counties

All

City Name

All

Zip Code

All

Certification Type

All

Search Business Name

All

Business Count by County Name

DBE Business Count: **1091**

State Business Count: **3731**

Count by Certificate Type

WBE	2249
MBE	1659
DBE	1091
SDVOBE	172
VBE	152
DOBE	71
PBE	69
LGBTBE	66

Count by Profit And Non-Profit

Profit	4059
Non-Profit	144

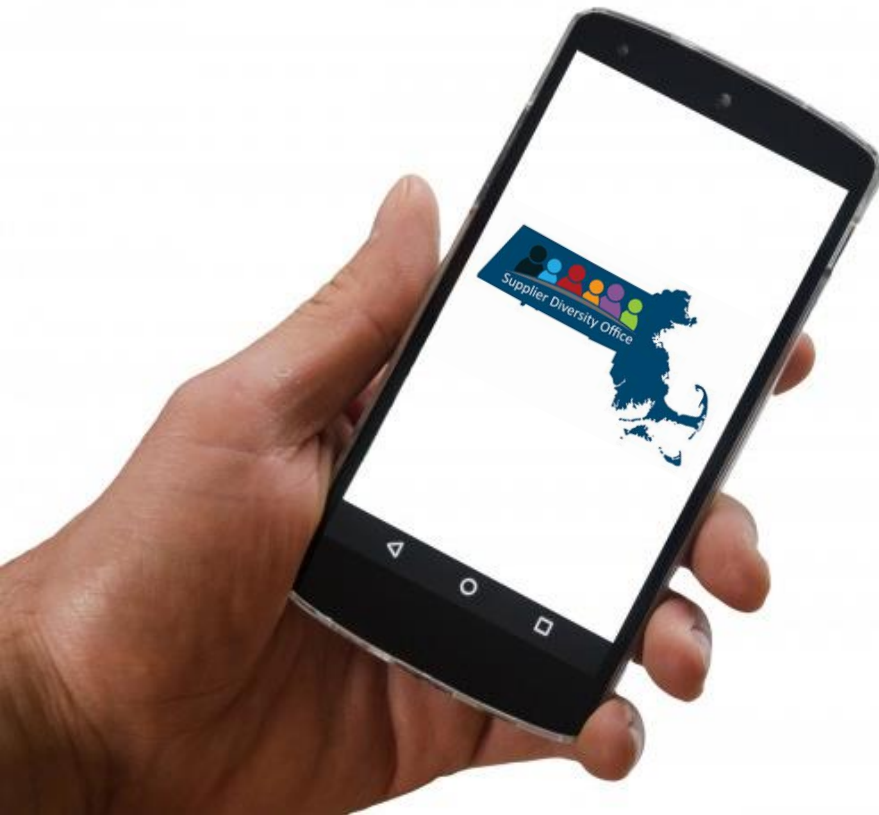
Count by Business Nature Type

Service	3154
Construction	1134
Goods	550
Technology	383
Undefined	189
Manufacturing	183
TransportationPlus	149

Business Name	Certification Types	Business Email	Business City	Business County	Zip Coc [®]
Alison Dowd Marketing, Inc.	WBE	ad@alisondowdmarketing.com	Pocasset	Barnstable	02559
American Translation Partners, Inc.	MBE,WBE	request@atptranslations.com	Buzzards Bay	Barnstable	02532
AMG Realty, LLC	WBE	aamaloney@comcast.net	West Barnstable	Barnstable	02668
AMR Consulting, LLC d/b/a: A-Type Marketing & Design LLC	WBE	angela@a-type.com	Hyannis	Barnstable	02601
Associated Alarm Systems, Inc.	WBE	kkeane@associatedalarms.com	Hyannis	Barnstable	02601
ATA Services, Inc.	DBE	gviana@ataclean.com	Marstons Mills	Barnstable	02648
Barber Drywall, Inc.	MBE	Preston@Barberdrywall.com	Hyannis	Barnstable	02601
Barrows Trucking	DBE,MBE,WBE	barrows_trucking@comcast.net	Harwich	Barnstable	02645
Bernice Wahler Landscapes, Inc.	WBE	bernice@bernicewahler.com	Sandwich	Barnstable	02563
BWell Holdings, Inc.	VBE,WBE	karen@bwell.life	Provincetown	Barnstable	02657

<https://www.mass.gov/info-details/sdo-certified-diverse-business-dashboard>

Resources and Contact Information



Our Website

www.mass.gov/sdo

Certification Self-Assessment

- Website: www.mass.gov/sdo/start

Supplier Diversity Program

- Website: www.mass.gov/sdp
- SDP Help Desk: sdp@mass.gov

SDO Certification Help Desk

- Phone: 617-502-8843
- Email: Webmaster.SDO@mass.gov

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Procurement Overview

Technical Services



Technical Services Overview | Scope of Work

- **Scope of Services:**
 - **Design And Construction Document Review**
 - Perform detailed technical review of design and construction documents including studies, preferred schematic designs, schematic designs, preliminary construction documents, and other design and construction materials to assess compliance with MSBA guidelines and other regulations
 - **Senior Study Assessments**
 - Assist the MSBA in the onsite assessment and reporting of existing school facilities for districts seeking MSBA funding by examining the physical condition of the facility and programmatic issues that may be impacting the delivery of the district's educational program
 - **Post-Occupancy Evaluations**
 - Assist the MSBA in performing onsite post -occupancy evaluations at recently constructed schools using MSBA's standard tools to capture and input collected data in standardized reports
 - **Special Studies**
 - Assist the MSBA in the review of various documents, contracts, procedures, and advisories required for potential modification, development, and/or implementation of the MSBA's grant program



Technical Services | Procurement Schedule

- Approximate Procurement Schedule
 - Issuance: Early November, 2023
 - Question Deadline: Mid November, 2023
 - Response Deadline: Mid December, 2023
 - Anticipated Presentation to Panel: Not applicable
 - Selection: April 2024 Board Meeting
- Selection Outcome
 - MSBA anticipates selection of 2-3 firms
 - Multi-year agreement with MSBA beginning July 2024

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Procurement Overview

Enrollment Studies



Enrollment Studies | Anticipated Scope of Work

- **Review MSBA's Enrollment Projection Methodology**
 - Perform a detailed review of MSBA projection methodology templates and data sources
 - Assess potential enhancements
- **Generate and Provide Enrollment Projections for Core Projects in the MSBA's Grant Program**
- **Special Studies**
 - Assist the MSBA in the review of various demographic and enrollment related data and documents as requested



Enrollment Studies | Procurement Schedule

- Approximate Procurement Schedule
 - Issuance of RFR: Mid February, 2023
 - Question Deadline: Early March, 2023
 - RFR Response Deadline: Mid March, 2023
 - Anticipated Presentation to Panel: Not applicable
 - Selection: June 2024 Board Meeting
- Selection Outcome
 - MSBA anticipates selection of 1-2 firms
 - Multi-year agreement with MSBA beginning July 2024

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Procurement Overview

School Survey



School Survey Procurement Overview

- School Survey is a school facilities assessment that evaluates several key factors, including building condition, educational environment, capacity, technology, security and maintenance.
- MSBA has conducted similar surveys in 2006, 2010, and 2016. The “2025 School Survey” will serve as an update of the 2016 School Survey.
- MSBA anticipates site visits to be conducted at all schools potentially eligible for MSBA funding, and not currently in the MSBA’s pipeline.
 - Represents approximately 1,550 schools.
- School Survey is used as a tool for project selection and to understand the spectrum of need across Massachusetts.
- School Survey has three Phases: Planning, Assessment, and Reporting.



School Survey Procurement | Planning

- First phase of the School Survey will be planning the survey in conjunction with the MSBA. MSBA anticipates the planning phase to include:
 - Working with the MSBA to finalize a methodology for facility assessments and associated ratings across a variety of topics, including: Facilities Condition Index, Educational Adequacy, Capacity, Maintenance.
 - Working with the MSBA to identify software solutions for gathering assessment data, calculating metrics, and generating reports and charts.
 - Identifying a business intelligence platform for displaying survey results in a public-facing dashboard hosted on the MSBA's website.
 - Conducting “Pilot” assessment visits to test and improve the proposed assessment methodology and to provide training to the assessor team.
 - Developing a work plan and schedule for executing the survey across all phases.
 - Beginning district outreach to promote awareness and understanding of the survey effort.



School Survey Procurement | Assessment

- Second phase of the School Survey is the Assessment portion. MSBA anticipates the scope of services for this phase to include:
 - Completion of approximately 1,550 assessments across Massachusetts.
 - Scheduling and coordinating the assessments with school districts.
 - Consultant will schedule the assessments with districts and lead on communicating the survey.
 - Provision of assessors and hardware to complete the assessments.
 - QA/QC of data received by the assessors to ensure data quality and integrity.
 - Creating a process for School districts to review their School Survey assessments and provide comments and corrections.
 - Status updates to the MSBA and milestone reports on the status and completion of assessment visits.



School Survey Procurement | Reporting

- Final phase of the School Survey involves reporting and summarizing the results of the assessments completed in the previous phases. MSBA anticipates the scope of services to include:
 - Written, public-facing report summarizing the findings of the assessments for each of the schools. Recommending charts and graphics for inclusion in the report.
 - Internal data portals to allow for ongoing access to the assessment results and associated scores along with the reports generated from the Survey.
 - Development of an externally facing dashboard on the MSBA's website with publicly available survey information.
 - Participation in public presentations explaining the Survey and showcasing the findings.
 - Training of MSBA staff on the methodology used to complete the School Survey and to utilize the associated tools.



School Survey | Procurement Schedule

- Approximate Procurement Schedule
 - Issuance of RFR: January, 2024
 - Question Deadline: January/February, 2024
 - RFR Response Deadline: February, 2024
 - Anticipated Presentation to Panel: Not applicable
 - 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

- **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

- 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.



Commissioning Services | Procurement Schedule

- 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

- 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

- 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

- 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

- 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)



Accelerated Repair Program | OPM Procurement

- Approximate Procurement Schedule
 - Issuance: Mid March, 2024
 - Question Deadline: Early April, 2024
 - Response Deadline: Mid April, 2024
 - Anticipated Presentation to OPM Review Panel: July 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

- Approximate Procurement Schedule
 - Issuance of RFR: Mid February, 2024
 - Question Deadline: Early March, 2024
 - RFR Response Deadline: Mid March, 2024
 - Anticipated Selection by Designer Selection Panel: June 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

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Procurement Overview

Accelerated Repair Program Heat Pump Pilot Study



Heat Pump Pilot Study | Scope of Work

- 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



Heat Pump Pilot Study | Procurement Schedule

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

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Questions & Answers



October 11, 2023

www.MassSchoolBuildings.org