

MEMORANDUM

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
DATE: December 14, 2022
RE: Recommendation to Execute Master Services Agreements for Post Occupancy Evaluation House Doctor Services Consultant

In September 2021, the Massachusetts School Building Authority (the “MSBA”) launched a Post Occupancy Evaluation Program and visited several previously funded MSBA public K-12 schools occupied for a minimum of three years. Over the last year, the MSBA worked with consultants, met with school district representatives, visited schools, collected and disseminated data, and prepared post occupancy reports.

As the MSBA continues to perform work in the second year of the Post Occupancy Evaluation Program, and as the Master Services Agreement for current consultant services expires, staff recently sought professional services as a continuation of previous efforts to assist the MSBA in maintaining the program, analyzing the process and information, and communicating the associated data. It is anticipated that the firm(s) selected will provide professional (“House Doctor”) services.

On September 28, 2022, the Massachusetts School Building Authority issued a Request for Responses seeking firms or individuals interested in assisting the MSBA in supporting and maintaining MSBA’s Post Occupancy Evaluation Program by providing professional (“House Doctor”) services associated with supporting and maintaining implementation of this program. The scope of work may include the review, analysis, and feedback of relevant post occupancy data/information/processes associated with previously funded MSBA Core Program projects. In addition, the MSBA anticipates that the scope of services for the selected Respondent may also include special studies associated with post occupancy where the specific scope and budget will be determined as necessary.

The MSBA posted this Request for Responses on the MSBA’s website (www.massschoolbuildings.org), on COMMBUYS (a web-based market center for the Commonwealth of Massachusetts), and The Central Register on September 28, 2022. In addition, the MSBA conducted email outreach to firms that appeared to have provided similar services or firms that may be interested in this effort.

The MSBA received a total of two (2) Responses prior to the deadline of October 26, 2022, which included:

- Gienapp Architects
- Jacobs Project Management

Upon completing the Phase One Review of each Response, for responsiveness and completeness, MSBA staff advanced both Responses for Phase Two Review and evaluation.

In accordance with the MSBA's procurement policies, a selection committee of four (4) MSBA staff members was established and individually reviewed the responses and subsequently met as a committee and discussed the Responses applying the following Evaluation Criteria:

- Supplier Diversity.
- Invest in Massachusetts.
- Demonstrated Experience of Key Personnel.
- Capacity and Organizational Structure.
- Overall Approach.

Upon review and discussion, the Selection Committee convened to initially discuss Phase Two evaluations for both Responses and to summarize scoring based on the criteria outlined above. The following is a result of the sum of the averages for each category:

Respondent	Score	Comments
Gienapp Architects	81.25	Complete.
Jacobs Project Management	82.50	Complete.

Upon further discussion, the Selection Committee unanimously agreed to request virtual presentations from both Respondents in accordance with the Request for Responses, and virtual presentations were subsequently performed by both Respondents via Microsoft Teams on the following dates:

- Friday November 18, 2022, by Gienapp Architects
- Tuesday November 22, 2022, by Jacobs Project Management

Following Respondent presentations, the Selection Committee reconvened to discuss the presentations and unanimously agreed that Jacobs Project Management Co. and their proposed subconsultants clearly and concisely demonstrated the ability to add value to the MSBA's post occupancy goals. Further, based on review of the Responses and clarification offered in Respondent's virtual presentations, the Selection Committee determined that the proposed estimated cost associated with Jacobs Project Management Co.'s potential scope of work aligns with MSBA's annual budgetary goals and would result in the best value to the MSBA. Based on the scoring of the categories referenced above and the Respondent's presentations in conjunction with the estimated cost to perform the anticipated scope of work, the recommendation of the Selection Committee would be for Jacobs Project Management to provide these House Doctor services for an initial two-year period with an option to extend for a maximum of two additional years.

Recommendations: Authorize the Executive Director to enter into negotiations and execute a Master Services Agreement with Jacobs Project Management for the purposes of assisting the MSBA to provide House Doctor Services associated with maintaining MSBA's Post Occupancy Evaluation Program. The initial House Doctor services contract would be initially established for a two-year period and will commence January 1, 2023, with an option to extend for a maximum of two additional years through fiscal year 2027 at the discretion of the MSBA.

The value of this contract, including any special studies requested by the MSBA, may exceed \$250,000 during the term of the proposed agreement. Therefore, pursuant to the MSBA's By-laws, the Board must authorize the Executive Director to enter into agreements that exceed this amount.