

MEMORANDUM

TO: Board of Directors, Massachusetts School Building Authority
FROM: James A. MacDonald, First Deputy Treasurer, Chief Executive Officer
Mary Pichetti, Executive Director
DATE: May 22, 2024
RE: Recommendations for Enrollment Projection Analysis and Support Consultants

On February 29, 2024 the Massachusetts School Building Authority (“MSBA”) issued a Request for Responses (“RFR”) to provide review and analysis of the MSBA’s enrollment projection methodology including: 1) survey of available sources of data, 2) review of MSBA’s current enrollment projection methodology and data tables, 3) comparison of enrollment projections based on historic data to actual enrollments for 139 public school districts, 4) review of MSBA’s Out-of-District projection adjustment (a.k.a. construction induced enrollment adjustment), and 5) enrollment projection recommendations for up to 30 school projects per year. The MSBA posted the RFR on the MSBA’s website, on COMMBUYS (a web-based market center for the Commonwealth of Massachusetts) and advertised the RFR in the Goods and Services Bulletin. In addition, the MSBA conducted email outreach to consulting firms that appeared to have provided similar services to other entities.

The Director of Capital Planning and General Counsel appointed five MSBA staff members to serve on the Procurement Management Team (“PMT”): John Jumpe, Diane Sullivan, Zhanna Pekelis, Vlad Nivorozhkin and Kathleen Andrade. Brian Kelley, Graham Waters and Siobhan Tolman participated to provide guidance to the PMT. In collaboration with the Director of Capital Planning and the legal department, the PMT developed the specifications, evaluation criteria, scorecard, and Request for Responses (“RFR”) for posting.

The MSBA received five responses to the RFR before the March 21, 2024 deadline: Auribus Consulting, MGT of America Consulting, LLC, University of Massachusetts Donahue Institute (“UMDI”), Woolpert, Inc. and YUAN3 CHIH4 EDUCATION, INC. The PMT met on April 10, 2024 to discuss the responses. The PMT calculated the response scores based on the cumulative total of individual scores from each of the five PMT members. The phase two review and scorecard was based on the following evaluation criteria that were also included in the RFR:

- Demonstrated intent to further the development of Minority and Woman-Owned Business Enterprises (“M/WBEs”) – (Supplier Diversity Program);
- Demonstrated experience in providing services relative services described in the RFR;
- Knowledge and understanding of demographic and student enrollment analyses;
- Demonstrated capacity and organizational structure to perform the services described in the RFR;
- Proposed overall approach to providing services described in the RFR;
- The overall value of the price is included in the response; and
- Demonstrated intent that 50% or more of the work hours will be performed in Massachusetts - (Invest in Massachusetts).

With the initial review of responses and scoring completed, the PMT adjourned and agreed to meet again.

Respondent	Final Score	Comments
Auribus Consulting	187.5	Complete
MGT of America Consulting, LLC	88	Complete
UMDI	208	Complete
Woolpert, Inc.	120.5	Complete
YUAN3 CHIH4 EDUCATION, INC.	119	Complete

The PMT met again on April 12, 2024, and discussed individual scores for each of the five responses. The PMT unanimously agrees to request virtual presentations from the top three firms in accordance with the RFR: UMDI, Auribus and Woolpert. As part of the virtual presentation process, the PMT prepared questions to send to Respondents to address during their virtual presentations.

Subsequently, virtual presentations were performed by the Respondents via Microsoft Teams on the following dates:

- Tuesday, April 23, 2024, by Auribus
- Tuesday, April 23, 2024, by Woolpert
- Friday, April 26, 2024, by UMDI

Following Respondent presentations, the PMT convened on April 30, 2024, to discuss the Phase 2 evaluation of the Respondents, including the virtual presentations. The PMT calculated the presentation scores based on the cumulative total of individual scores from each of the PMT members. The virtual presentation review and scorecard was based on the questions that the Respondents were asked to address during their presentations in combination with the previous scoring for the responses. One member of the PMT was unable to attend all of the virtual presentations; therefore, they abstained from scoring any of the virtual presentations.

Respondent	Final Score
Auribus Consulting	227.5
UMDI	245
Woolpert	162.5

After completing the Phase 2 evaluation the PMT recommended contracting with UMDI.

Recommendation: The PMT recommends entering into a Master Services Agreement with UMDI, to provide the services solicited in the RFR through June 30, 2025. The contract may be extended for an additional three (3) years, under the same terms and conditions, at the discretion of the MSBA, based on a negotiated scope and not-to-exceed budget. The value of the Master Services Agreement is anticipated 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.