

## 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:** Recommendation for School Survey Consultant

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On January 22, 2024, the Massachusetts School Building Authority (“MSBA”) issued a Request for Responses (“RFR”) seeking qualified firms interested in assisting the MSBA in planning, conducting and managing a School Survey of approximately 1,700 public schools of various grade configurations in the Commonwealth of Massachusetts, including elementary, middle, high, and vocational technical schools. The School Survey will include site visits at approximately 1,580 schools and the compilation of existing data at approximately 120 additional schools. The School Survey will result in a published report sharing an understanding of the building condition and general environment at these schools (the School Survey is not a comprehensive architectural or engineering assessment).

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 Central Register and 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 six MSBA staff members to serve on the Procurement Management Team (“PMT”): Yona Baer, Peter Falk, Sharon George, August Knuth, Michael McGurl and Allison Sullivan. Brian Kelley, Graham Waters and Siobhan Tolman participated to provide guidance to the PMT. In collaboration with the legal department, the PMT developed the specifications, evaluation criteria, scorecard, and Request for Responses (“RFR”) for posting.

The MSBA received two responses to the RFR before the March 12, 2024 deadline: DLR Group and STV Incorporated. The PMT met on March 25, 2024 to discuss the responses. The PMT calculated the response scores based on the cumulative total of individual scores from each of the 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: (a) Facilities Assessment (b) Educational Programming and School Design/Construction (c) Information Technology;
- Knowledge and understanding of Massachusetts building codes, and MSBA and DESE regulations and policies regarding school design and construction;
- Demonstrated Professional Experience;
- Proposed overall approach to providing services described in the RFR;

- Demonstrated capacity and organizational structure to perform the services described in the RFR;
- Demonstrated intent that 50% or more of the work hours will be performed in Massachusetts - (Invest in Massachusetts); and
- The overall value of the price is included in the response.

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

<b>Respondent</b>	<b>Response Score</b>
DLR Group	431
STV Incorporated	626

The PMT met again on March 26, 2024, and discussed individual scores for each of the responses. The PMT unanimously agreed to request virtual presentations from both Respondents in accordance with the RFR. As part of the virtual presentation process, the PMT prepared a list of questions to send to Respondents to address during their virtual presentations.

Subsequently, virtual presentations were performed by both Respondents via Microsoft Teams on Friday, April 5, 2024.

Following Respondent presentations, the PMT convened 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.

<b>Respondent</b>	<b>Presentation Score</b>
DLR Group	307
STV Incorporated	337

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

**Recommendation:** The PMT recommends entering into a Master Services Agreement with STV Incorporated, to provide the services solicited in the RFR through March 31, 2026. The MSBA may extend the contract term for a period of time necessary, as determined by the MSBA in its sole discretion, to complete the services related to the RFR. The aggregate 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.