

Request for Responses

Massachusetts School Building Authority

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RFR File Number: MSBA-RFR-POEHD-2025

RFR Contact Person: Siobhan Tolman, Procurement and Contracts Manager

SECTION I. SUMMARY

The Massachusetts School Building Authority (“MSBA”) is seeking Responses from architectural and/or engineering firms or individuals interested in providing professional (“House Doctor”) services to assist the MSBA in supporting and maintaining the MSBA’s Post Occupancy Evaluation Program in conjunction with previously funded MSBA public K-12 schools.

Pursuant to the provisions of SECTION VI(A), the MSBA may qualify a single Respondent or multiple Respondents for a period of two (2) years beginning July 1, 2026, and may subsequently award a single contract or multiple contracts to one or more of those qualified Respondents under this Request for Responses (“RFR”) during that two (2) year period.

Minority Business Enterprise (MBE), Women Business Enterprise (WBE), Minority and Women Business Enterprise (M/WBE), Veteran-Owned Business Enterprise (VBE), Service-Disabled Veteran-Owned Business Enterprise (SDVOBE), Disability-Owned Business Enterprise, Lesbian, Gay, Bisexual or Transgender Business Enterprise (LGBTB), Minority Nonprofit Organization (M/NPO), Minority and Women Non-Profit Organization (M/W/NPO), or Women Nonprofit Organization (W/NPO) firms are encouraged to submit Responses.

At the conclusion of this RFR process, the MSBA intends to award a contract to one or more responsive and responsible firms submitting the most advantageous proposal or proposals, taking into consideration, among other things, qualifications, experience, capacity, references, approach to providing the services requested, and value.

The MSBA reserves the right to select more than one firm to perform work within the Scope of Services described in this RFR. The MSBA’s award of contract to a firm pursuant to this RFR, however, shall not be a guarantee of any amount of work or a particular division of the work described in the RFR. Contract award and the assignment of work to any firm shall be within the sole discretion of the MSBA.

A. OBJECTIVES

Since its launch in September 2021, the MSBA's Post Occupancy Evaluation Program has evaluated approximately forty (40) previously funded MSBA public K-12 schools. This work has included working with consultants, coordinating and communicating with school district representatives, collecting and analyzing data, and distributing summary reports to participating school districts.

The Post Occupancy Evaluation Program, also referred to as Module 9 in the MSBA building process, was developed in part to assist the MSBA in understanding that funded K-12 school building projects are operating as intended and performing as designed. The data and feedback collected as part of the Post Occupancy Evaluation process enables the MSBA, school districts, and the consultant community to apply lessons learned to future school building projects. The value of the MSBA's Post Occupancy Evaluation process is the cumulative data it gathers and the trends it compiles. It is not intended to single out the performance of individual designers, owners, project managers, contractors, or school districts.

As the MSBA prepares to embark on the sixth year of its Post Occupancy Evaluation Program, it is anticipated that the Respondent(s) selected from this RFR will deliver professional ("House Doctor") services to provide guidance as needed on general post occupancy evaluation processes, data analysis and reporting best practices, and other related topics and tasks. The MSBA may qualify a single Respondent or multiple Respondents under this RFR and may award a single contract or multiple contracts to any qualified Respondent(s). The specific scope of services for each assignment is at the sole discretion of the MSBA and will be outlined and specified in subsequent work order(s).

B. SCOPE OF SERVICES

The MSBA anticipates that the scope of services for any selected firm(s) may include but not be limited to the following:

- Support and advise MSBA staff in the ongoing development of its data analysis and data reporting tools and processes, with the goal of improving the clarity and breadth of data available to internal and public audiences. Potential tasks may include:
 - Evaluate the MSBA's current Post Occupancy Evaluation report format to identify areas for improvement, including report graphics, scope and sequence of content, and coordination with other aspects of the MSBA's Core Program modules.
 - Evaluate the MSBA's current Post Occupancy Evaluation dashboard and internal data summaries to identify areas for improvement and/or expansion including graphics, content, platform (current dashboard is produced in Tableau), and overall alignment/correspondence with the Post Occupancy Evaluation report format.

- Identify design, construction, and commissioning industry trends with the goal of proposing and implementing updates to the Program to maintain the relevance of information shared and reported.
- Assist the MSBA in performing at least two (2) post_occupancy evaluations of an MSBA-funded school building in a format acceptable to the MSBA per fiscal year. Respondent(s) should participate in one evaluation each Fall and Spring to gain and maintain a more direct understanding of how information collected before and during evaluations translates to reporting. With assistance from MSBA staff, Respondent(s) will be responsible for understanding the existing conditions and collecting data related to end-user experience, building performance, and building utilities. With assistance from MSBA staff, Respondent(s) will use the MSBA's standard tools to capture/input the data required. Note that subsequent requests to perform post occupancy evaluations in addition to the minimum described above may be assigned on an as-needed basis for a negotiated price.
- Research and document opportunities for MSBA staff to present post occupancy findings and lessons-learned to industry peers in formats that may include white papers, trade show and/or conference presentations, and continuing education seminars. Collaborate with MSBA staff as needed in the preparation and/or presentation of materials.

The MSBA anticipates that the scope of services for any selected firm(s) may also include special studies, which it considers scope that is singular (i.e., scope that occurs once, rather than as an ongoing effort). Special studies may include, but are not limited to:

- Research and document national, regional, and/or local energy use data to establish a baseline against which the energy use data for MSBA-funded projects can be compared. Baseline data will ideally reflect school buildings but may also include other relevant building types.
- Research and document post occupancy programs developed and implemented by other public agencies or by private companies. Identify potential lessons learned from those programs, to be applied to the MSBA's Module 9 (Post Occupancy Evaluation Program).

For any work completed for this basic scope of services and/or special studies, Respondent(s) will be expected to:

- Prepare written workplan(s) and status reports for assigned work in a format acceptable to the MSBA.
- Attend periodic meetings with MSBA staff, via in-person and/or virtual platforms, to review the status of current and upcoming work assignments. Assume monthly and/or on a more frequent basis as needed.
- Review current data collection and data reporting tools and processes to understand their roles and relationships, and their strengths and challenges. Assume the review of

data collected and distributed reports for Post Occupancy Evaluations completed in FY26.

C. FEES

The anticipated scope of services and fee for a Work Order that is awarded to qualified Respondent(s) will be negotiated and will be performed on an hourly fee basis which may also include a “Not to Exceed” price. All Respondents must submit a proposed budget based on the potential tasks described above as understood by the Respondent and must submit a detailed explanation of the firm’s cost proposal for the provision of services for the Post Occupancy Evaluation House Doctor Services requested by this RFR. Respondents must provide a detailed spreadsheet that itemizes the type of fees or expenses expected to be incurred and the basis for the fee or expense (i.e., hourly rate, daily rate, flat fee, etc.). In addition, all Respondents should submit an hourly rate for each proposed team member for the potential tasks as described above. The final “Not-to-Exceed” price will be negotiated with the successful applicant once a completed work plan is established and approved by the MSBA. Proposed hourly rates and overall cost will be considered by the MSBA as part of its determination of “Best Value” as outlined in **Section III (A) (6)**.

Hourly Rates for Special Studies. Respondents must list the hourly rates that the Respondents will charge to complete any Special Studies that are ordered by the MSBA. Respondents should be advised that these Rates will be used by the MSBA as part of its Evaluation Process; however, the MSBA has the discretion to negotiate Revised Rates for any Special Study.

SECTION II. MSBA BACKGROUND

Chapter 208 of the Acts of 2004 established the Massachusetts School Building Authority. The MSBA is an independent public authority not subject to the supervision and control of any other executive office, department, commission, board, bureau, agency or political subdivision of the Commonwealth. The MSBA’s Board consists of the State Treasurer, who serves as chair, the Secretary of Administration and Finance, the Commissioner of Education, and four additional members appointed by the State Treasurer.

Prior to the establishment of the MSBA, the Department of Education administered and managed the former school building assistance program. Chapter 208 eliminated the former program and created a new program for school building construction, renovation and repair projects (the “Program”), administered by the MSBA. The new Program provides assistance to cities, towns, regional school districts and independent agricultural and technical schools to finance school building projects. The MSBA has adopted regulations necessary to administer the Program and to review and approve applications for reimbursement for school building construction projects.

For more information about the MSBA and its program, please visit our website at www.massschoolbuildings.org and refer to Massachusetts General Laws Chapter 70B, Chapter 208 of the Acts of 2004, and 963 CMR 2.00 *et seq.*

SECTION III. GENERAL INFORMATION

All terms, conditions, requirements, and procedures included in this RFR must be met for a Response to be qualified as responsive. The MSBA reserves the right to waive or permit cure of non-material errors or omissions. The MSBA reserves the right to modify, amend, or cancel the terms of this RFR at any time. All Responses must be submitted in accordance with the specific terms of this RFR. **Responses to this RFR must be submitted electronically.**

All Responses must be submitted electronically through the Commonwealth's procurement website, COMMBUYS. Please see Section IV.(B.). of this RFR.

A. SPECIFICATIONS

1. **Respondent Communication.** All communication regarding this RFR must be submitted **in writing via email** to the RFR Contact Person, Siobhan Tolman, Procurement and Contracts Manager, siobhan.tolman@massschoolbuildings.org. No telephone calls concerning this RFR are permitted. Any individuals and/or firms that intend to submit a Response are prohibited from contacting any employee of the MSBA other than the contact person regarding this RFR. **Failure to observe this rule will result in disqualification.** Furthermore, no other individual MSBA employee or representative is authorized to provide any information or respond to any question or inquiry concerning this RFR. Respondents should notify in writing the contact person for this RFR in the event that the RFR appears incomplete, or the Respondent is having trouble obtaining any required attachments electronically through COMMBUYS or from the MSBA's website.
2. **Reasonable Accommodation.** Respondents that seek reasonable accommodation because of disabilities or other hardships, which may include the receipt of RFR information in an alternative format, may communicate such requests in writing to the contact person. Requests for accommodation will be addressed on a case-by-case basis.
3. **Public Records.** All Responses and related documentation and information submitted in Response to this RFR are subject to the Massachusetts Public Records Law, M.G.L. c. 66, §10; c. 4, §7(26)(h), regarding public access to such documents. Any statements in submitted Responses that are inconsistent with the provisions of these statutes will be void and disregarded. Respondent agrees that the MSBA shall not be liable under any circumstances for the subsequent disclosure of any information submitted to it by Respondent pursuant to this RFR and/or in connection with any contract executed between Respondent and the MSBA as a result of the RFR process.

Respondents are advised that all proposals are deemed sealed, and therefore their contents will be treated as confidential and will not be disclosed to competing Respondents until the evaluation process has been completed and the contract has been awarded.

4. **Submission of Proposed Materials and Virtual Presentation.** All materials, representations, and submissions made within the proposal and at virtual presentation are subject to becoming part of the contract binding the selected Respondent to uphold the materials, representations, and submissions made by the selected Respondent within the proposal and at the oral presentations, if any.
5. **Conflict of Interest.** Prior to award of any contract and/or qualification, the Respondent shall certify in writing that no relationship exists between the Respondent and the procuring or contracting agency that interferes with fair competition or is a conflict of interest, and no relationship exists between the Respondent and another person or organization that constitutes a conflict of interest. No official or employee of the MSBA who exercises any function or responsibility in the review or approval of the undertaking or carrying out of this project shall, prior to the completion of the project, voluntarily acquire any personal interest, either directly or indirectly, in this contract or proposed contract.

The Respondent shall provide assurance that it presently has no interest and shall not acquire any interest, either directly or indirectly, which will conflict in any manner or degree with the performance of its services hereunder. The Respondent shall also provide assurances that no person having any such known interest shall be employed during the performance of this contract.

Individuals performing services to the MSBA may be considered “special state employees” subject to the provisions of the Massachusetts Conflict of Interest Law (M.G.L. 268A). The MSBA’s Master Services Agreement requires contractors to certify, among other things, compliance with the Conflict of Interest Law.

6. **Best Value Selection and Negotiation.** The MSBA will select the Response(s) that demonstrates the “Best Value” overall, including proposed alternatives that will achieve the procurement goals of the MSBA. The MSBA and the selected Respondent(s) may negotiate a change in any element of contract performance or cost identified in the original RFR or the selected Respondent’s Response which results in lower costs or in a more cost effective or better value than was presented in the selected Respondent’s or contractor’s original Response.
7. **Costs.** The MSBA will not reimburse any individual or firm for any costs associated with the preparation or submittal of any Response to this RFR or for any travel and/or per diem incurred in any presentation of such Responses. Costs that are not specifically identified in the Respondent’s submission and accepted by the MSBA as part of a contract will not be compensated.
8. **MSBA Website and COMMBUYS.** This RFR has been distributed electronically using the COMMBUYS system and can be accessed at www.COMMBUYS.com. RFR Attachments that are referenced are available either as separate files along with the RFR, or in the COMMBUYS Forms and Terms Section. The RFR and Attachments are also available at the MSBA’s website: www.massschoolbuildings.org

Respondents are solely responsible for obtaining and completing required attachments that are identified in this RFR; for regularly checking both

COMMBUYS and the MSBA website for any addenda or modifications that are subsequently made to this RFR or attachments; for obtaining, reviewing and appropriately responding to any such addenda or modifications to the RFR of attachments; for acknowledging the receipt of any addenda in the cover letter; and for submitting a Response through COMMBUYS. The MSBA accepts no liability and will provide no accommodation to Respondents who fail to successfully submit a Response through COMMBUYS. The MSBA accepts no liability and will provide no accommodation to Respondents who fail to check for, obtain, review and appropriately respond to addenda or modifications to the RFR and attachments, and then submit inadequate or incorrect Responses. Respondents are advised to check the MSBA's website and COMMBUYS to ensure that they have the most recent RFR files. Respondents may not alter (manually or electronically) the RFR language or any RFR component files. Modifications to the body of this RFR, specifications, terms and conditions, which change the intent of this RFR are prohibited and may disqualify a Response.

Respondents may also contact the COMMBUYS Helpdesk at COMMBUYS@state.ma.us or the COMMBUYS Helpline at 1-888-627-8283 or 617-720-3197 (during normal business hours, 8AM – 5PM Monday – Friday).

9. **Validity of Response.** Responses must remain in effect for at least 180 days from the submission deadline and thereafter until either the Respondent withdraws the Response in writing, a contract is executed with Respondent, or the procurement is canceled, whichever occurs first.
10. **Prohibition against Distribution of Information.** Any Respondent awarded a contract under this RFR is prohibited from selling or distributing any information collected or derived from the contract and/or procurement process, including lists of participating or eligible MSBA employee names, telephone numbers, addresses, including email addresses.
11. **Right to Modify.** The MSBA reserves the right to modify, amend, or cancel the terms of this RFR at any time prior to the closing date. The MSBA reserves the right to negotiate with the selected Respondent(s) as to any element of cost or performance, including without limitation, elements identified in the RFR and/or the selected Response in order to achieve the best value for the MSBA.
12. **Limit on Provision of Post Occupancy Evaluation Services.** The selected Respondent(s) will not be eligible to participate in Post Occupancy Evaluations and/or components of Post Occupancy Evaluations for which the Respondent(s) had direct involvement with the renovation and/or construction of the school building projects being evaluated.

B. PROCUREMENT CALENDAR

The following is the tentative time schedule for the MSBA's selection of recognized architectural and/or engineering firms or individuals interested in providing professional ("House Doctor") services for the MSBA's Post Occupancy Evaluation program. All dates are subject to modification by the MSBA with notice.

Issuance of RFR: November 5, 2025
Virtual Informational Session: November 19, 2025
Question Deadline: November 21, 2025
Responses to Questions Posted: November 25, 2025
RFR Response Deadline: December 10, 2025 (12:00 PM)
Virtual Presentations (if necessary): Week of February 23, 2026
Award of the Contract: April 22, 2026

Questions concerning this RFR must be submitted to the RFR contact person in writing via email only at the address below. No telephone calls concerning this RFR are permitted. Questions must be received no later than 5:00 P.M. on November 21, 2025. Responses to questions will be posted on or before November 25, 2025:

Contact Person: Siobhan Tolman
Procurement and Contracts Manager
Attn: MSBA-RFR-POEHD-2025
E-Mail Address: siobhan.tolman@massschoolbuildings.org

SECTION IV. RESPONSE REQUIREMENTS

A. Contents of the Response

All Responses to this RFR must include the following information:

- 1) Mandatory Cover Letter: Each Response must be accompanied by a cover letter of not more than two (2) pages. The letter, which shall be considered an integral part of the submission, shall be signed by an individual who is authorized to bind the firm contractually, giving his or her title. The letter must acknowledge Addenda to the RFR, if any, and certify that all information contained in the Response is accurate and complete. Inaccurate or incomplete information may adversely affect the evaluation of the submission.
- 2) Firm History: A description of each firm associated with the Respondent's team and their respective roles and history.
- 3) Qualifications Statement: A statement of the team's qualifications and prior experience as a team providing the types of services requested in this RFR.
- 4) Professional Experience: A description of the professional experience of the key personnel who would be assigned to the MSBA for this project, including subcontractors and joint venturers, if applicable. All Responses must include an organizational chart of the key personnel who will be providing services to the MSBA, plus a resume and contact information for each of the key personnel identified. All Respondents also must identify the individual(s) who will have primary responsibility for contacts and communications with the MSBA. The MSBA reserves the right to reject the use of any personnel, within its sole discretion.
- 5) Approach to Providing Services: A description of the firm's approach to providing the Scope of Work described in Section I, Item B, specifically addressing any

timelines described in this RFR. Also, all Responses must include a table that describes the role of each member of your professional team that will be assigned to work on this project.

- 6) Statement of Limitations: Provide a statement clearly describing any limitations to the submitted Response (such as scope of proposed services, geography, etc.).
- 7) Business References: Respondents must identify three (3) client references for which the Respondent has performed similar services as the services described in this RFR.
- 8) Supplier Diversity Program Plan Form: The MSBA is committed to developing and strengthening Minority Business Enterprises (MBE), Women Business Enterprises (WBE), Minority and Women Business Enterprise (M/WBE), Service-Disabled Veteran-Owned Business Enterprises (SDVOBE), Veteran Business Enterprises (VBE), Disability-Owned Business Enterprises, LGBT Business Enterprises, Minority Nonprofit Organizations (M/NPO), and Women Nonprofit Organizations (W/NPO), Minority and Women Non-Profit Organization (M/W/NPO), Disability-Owned Business Enterprise, or LGBT Business Enterprise and expanding equal opportunity in the primary and secondary industries affected by this RFR. Please note, completion of a Supplier Diversity Program Plan Form (Attachment D) by a Respondent is NOT mandatory for the purposes of the MSBA's review of a Response. However, if a Respondent has an SDO partner, the Respondent should complete the form to the extent possible. Respondents that clearly demonstrate the intent to further the development of the business enterprises and organizations listed above or the existence of a relationship which does further those goals may receive favorable consideration. If the Form is not completed or provided with a Response, the MSBA will assume that it was omitted intentionally.
- 9) Anti-Discrimination Policy: Each Respondent must include a detailed copy of its policy relative to affirmative actions/equal opportunity and the prohibition of discriminatory employment practices. **(All Respondents must provide this document.)**
- 10) Authorized Respondent's Signature and Acceptance Form: If the Respondent is a corporation, partnership, or other business entity, complete **(Attachment "A")** as indicated.
- 11) Invest in Massachusetts Data Form: The MSBA encourages investment in our local economy and is committed to advancing the creation and preservation of jobs in the Commonwealth. Consequently, all Respondents must submit an Invest in Massachusetts Data Form ("IMD Form"). **(Attachment "E")**.
- 12) Mandatory Certifications: (an example of a comprehensive certification statement is attached as **Attachment "B"**):
 - a. Certification of Compliance with Massachusetts Child Care Laws.
 - b. Certification of Compliance with the Revenue Enforcement and Protection Program.
 - c. Certification Regarding Companies Doing Business in Northern Ireland.
 - d. Certification of Disclosure.
 - e. Certification of No Conflicting Relationship.

- f. Certificate Statement Regarding Criminal Actions and Pending Litigation.
- g. Certification of Solvency.
- h. Certification of Good Standing and Licensure.
- i. Statement of Compliance with RFR Requirements.
- j. Statement of Confidentiality.

B. Instructions for Submission

Responses to this RFR must be submitted electronically by the submission deadline or the response will not be considered. Hard copy submissions will not be accepted. Responses and Attachments received after this deadline date and time will not be evaluated.

All Responses must be submitted electronically through the Commonwealth's procurement website, [COMMBUYS](#). Instructions on how to submit a Response are included as **Attachment G**, Creating a Quote in COMMBUYS: How to Respond to Bid Solicitation.

Respondents may also contact the COMMBUYS Helpdesk at COMMBUYS@state.ma.us or the COMMBUYS Helpline at 1-888-627-8283 or 617-720-3197 (during normal business hours, 8AM – 5PM Monday – Friday).

When responding to this RFR, firms should take note of the following provisions:

- a) Responses should include the information and documents listed in Section IV, Item A – “Contents of the Response.”
- b) The MSBA reserves the right to request additional information from firms responding to this Request. Additionally, upon reviewing the Responses the MSBA may decide to have certain firms make oral presentations.
- c) The MSBA reserves the right to reject any and all Responses to this request, to waive any minor informality in a Response, to request clarification of information from any firm responding and to effect any agreement deemed by the MSBA to be in the MSBA's best interest with one or more of the firms responding. The MSBA reserves the right to amend or cancel this RFR at any time. All Responses and their contents will become the sole property of the MSBA upon receipt by it.
- d) The duration of any contract that may result from this RFR will be for two (2) years initially with an option to renew up to a two-year extension.

C. Submission Format Requirements

Respondents are cautioned to read carefully and conform to the requirements for this specific RFR. Failure to comply with the provisions of this RFR may serve as grounds for rejection of a Response.

- a) **All Responses must be submitted electronically through the Commonwealth's procurement website, [COMMBUYS](#).** Instructions on how to submit a Response are included as Attachment F, Creating a Quote in COMMBUYS: How to Respond to Bid Solicitation, to this RFR. The specific organization and orientation of the Response is at the Respondent's discretion, but it is recommended that the Response be laid out in such a manner that the reader doesn't need to be constantly rotating the proposal.
- b) Submissions must be limited to 10 pages excluding the following:
 - i. Cover Letter
 - ii. Table of Contents
 - iii. Cost Proposal
 - iv. Appendix for resumes
 - v. Anti-Discrimination Policy
 - vi. Attachments A-G
- c) Submissions must be in a font of 12 point or larger.
- d) Any and all data, materials, and documentation submitted to the MSBA in Response to this RFR shall become the MSBA's property and shall be subject to public disclosure under the Massachusetts Public Records Act. In this regard, Respondents are required to sign the Authorized Respondent's Signature and Acceptance Form, set forth as Attachment "A" hereto.

RESPONDENTS PLEASE NOTE: BY EXECUTING THE AUTHORIZED RESPONDENT'S SIGNATURE AND ACCEPTANCE FORM AND SUBMITTING A RESPONSE TO THIS RFR, RESPONDENT AGREES THAT THE MSBA SHALL NOT BE LIABLE UNDER ANY CIRCUMSTANCES FOR THE DISCLOSURE OF ANY MATERIALS SUBMITTED TO THE MSBA PURSUANT TO THIS RFR OR UPON RESPONDENT'S SELECTION AS A PREQUALIFIED CONTRACTOR.

D. Disqualification

- a) Late Proposals. Proposals that are received after the deadline date and time shall be disqualified. A hard copy or facsimile Response will **not** qualify as a "submission"
- b) Nonresponsive Proposals. Proposals which are not responsive or which fail to comply with mandatory requirements of the RFR may be deemed nonresponsive and shall be disqualified. Nonresponsive proposals shall include, but not be limited to, those that fail to address or meet any mandatory item and those submitted in insufficient number. The MSBA reserves the right to disqualify from consideration those Responses that are submitted in an incorrect format if the MSBA determines, in its sole discretion, that the formatting error is prejudicial to the interests of other Respondents and fair competition.

- c) Collusion. Collusion by two or more Respondents agreeing to act in a manner intended to avoid or frustrate fair and open competition is prohibited and shall be grounds for rejection or disqualification of a proposal or termination of this contract.
- d) Debarred Respondents or Subcontractors. A Respondent who is currently subject to any Commonwealth or federal debarment order or determination shall not be considered for evaluation by the Procurement Team. If a Respondent's proposal is dependent upon the services of a named subcontractor and the disqualification of this named subcontractor would materially alter the proposal, then that proposal shall be deemed unresponsive if the named subcontractor is found to be debarred. Proposals that indicate that subcontractors will be used but do not rely on any specifically named subcontractor shall not be deemed unresponsive if the disqualification of a proposed subcontractor will not materially alter the proposal

SECTION V. EVALUATION PROCESS

The RFR Evaluation Process will be conducted in two phases. MSBA staff will complete the Phase One Review for all submitted Responses. The purpose of the Phase One Review is to eliminate any Respondents whose Responses are nonresponsive to the requirements of the RFR. Responses that are deemed to be complete and responsive based on the Phase One Review will be submitted to a committee of MSBA staff for additional review. The Phase Two Review will evaluate the Responses based on a point scoring process. The selection committee will make a recommendation of the qualified firms and/or individuals to the Executive Director of the MSBA and to the MSBA Board of Directors who will then accept or reject the recommendation. The MSBA reserves the right to require virtual presentations of Respondents as part of its review if the MSBA determines in its sole discretion that it is in the best interests to do so.

(Phase One and Phase Two Reviews of this RFR will be Conducted Separately)

A. PHASE ONE REVIEW

Responses will be reviewed based on the completeness of Responses, including mandatory attachments and compliance with submission criteria, legal, and other requirements as described in Section IV of the RFR. Responses that do not comply with these components may be rejected and will not proceed to Phase Two Review. The MSBA reserves the right to waive or permit cure of non-material errors or omissions.

Phase One of the Review will ensure compliance with the submission criteria in Section IV.

B. PHASE TWO REVIEW

In addition to the specific requirements set forth below, all Respondents must demonstrate that they have significant experience, knowledge, and abilities with respect to providing the

Scope of Services described in Section I.B of this RFR. The MSBA will evaluate Responses based on criteria that shall include, but not be limited to, the following:

1. **Supplier Diversity** – “Advantageous” or “Not Advantageous”

Advantageous (5 points): Respondent clearly demonstrates, through the information provided in “Attachment D”, its intent to develop a relationship with SDO certified Minority Business Enterprise (MBE), Women Business Enterprise (WBE), Minority and Women Business Enterprise (M/WBE), Veteran-Owned Business Enterprise (VBE), Service-Disabled Veteran-Owned Business Enterprise (SDVOBE), Disability-Owned Business Enterprise, Lesbian, Gay, Bisexual or Transgender Business Enterprise (LGBTB), Minority Nonprofit Organization (M/NPO), Minority and Women Non-Profit Organization (M/W/NPO), or Women Nonprofit Organization (W/NPO) in performing the services identified in this RFR. Points awarded for this section will be based on the information provided by the Respondent in “Attachment D”.

Not Advantageous (0 points): Respondent does not demonstrate the existence of or intent to develop a relationship with one or more businesses certified in the above-mentioned supplier diversity categories to perform the potential scope of services outlined in Section I.B of this RFR.

An evaluation of “Not Advantageous” on this component shall not prevent the Respondent from being awarded a contract if the Respondent is deemed to be qualified to perform the requested services after the complete evaluation process.

2. **Invest in Massachusetts** – “Advantageous” or “Not Advantageous”

Advantageous (5 points): Respondent provides an IMD Form certifying that 50% or more of the work hours to be performed in connection with any contract arising out of the response to this RFR will be performed in Massachusetts.

Not Advantageous (0 points): Respondent provides an IMD Form certifying that less than 50% of the work hours to be performed in connection with any contract arising out of the response to this RFR will be performed in Massachusetts.

An evaluation of “Not Advantageous” on this component shall not prevent the Respondent from being awarded a contract if the Respondent is deemed to be qualified to perform the requested services after the complete evaluation process.

3. **Demonstrated Experience of the Respondent’s Key Personnel** – “Advantageous”, “Good”, “Fair”, or “Not Advantageous”

The MSBA will award Respondents points depending on the demonstrated experience of the Respondent’s Key Employees in meeting the Objectives stated in Section I.A and in collecting, analyzing, and reporting data associated with post occupancy evaluations and/or similar building and building systems evaluations and

providing potential scope of services outlined in Section I.B of this RFR. (Please note that recent cumulative and related work may factor into MSBA's evaluation.)

Advantageous (30 points): Response demonstrated substantial (more than 10 years) experience for each of the Respondent's Key Employees in meeting the Objectives stated in Section I.A and in collecting, analyzing, and reporting data associated with post occupancy evaluations and/or similar building and building systems evaluations and providing services like the Scope of Work described in Section I.B of this RFR.

Good (20 points): Response demonstrated some (6 -10 years) experience for each of the Respondent's Key Employees in meeting the Objectives stated in Section I.A and in collecting, analyzing, and reporting data associated with post occupancy evaluations and/or similar building and building systems evaluations and providing services like the Scope of Work described in Section I.B of this RFR.

Fair (10 points): Response demonstrated limited (3-5 years) experience for each of the Respondent's Key Employees in meeting the Objectives stated in Section I.A and in collecting, analyzing, and reporting data associated with post occupancy evaluations and/or similar building and building systems evaluations and providing services like the Scope of Work described in Section I.B of this RFR.

Not Advantageous (0 points): Response demonstrated little (less than 3 years) experience for each of the Respondent's Key Employees in meeting the Objectives stated in Section I.A. and in collecting, analyzing, and reporting data associated with post occupancy evaluations and/or similar building and building systems evaluations and providing services like the Scope of Work described in Section I.B of this RFR.

4. **Capacity and Organizational Structure** – “Advantageous”, “Good”, or “Not Advantageous”

The MSBA will award Respondents points depending on the number, qualifications, and availability of key personnel associated with meeting the Objectives stated in Section I.A and providing the services described in Section I.B of this RFR.

Advantageous (30 points): Based on the Respondent's staff size, organizational chart, and the reported current and projected workload of its Key Personnel, the Respondent provides a high level of assurance that it will be able to deploy sufficient and qualified personnel to meet the Objectives stated in Section I.A, as well as manage and support the projected workload that may arise as outlined in the potential Scope of Work described in Section I.B of this RFR in a timely and satisfactory manner.

Good (15 points): Based on the Respondent's staff size, organizational chart, and the reported current and projected workload of its Key Personnel, the Respondent provides a reasonable level of assurance that it will be able to deploy sufficient and qualified personnel to meet the Objectives stated in Section I.A, as well as manage and support the projected workload that may arise as outlined in the potential Scope of Work described in Section I.B of this RFR in a timely and satisfactory manner.

Not Advantageous (0 points): Based on the Respondent’s staff size, organizational chart, and the reported current and projected workload of its Key Personnel, the Respondent does not provide an adequate level of assurance that it will be able to deploy sufficient and qualified personnel to meet the Objectives stated in Section I.A or manage and support the projected workload that may arise as outlined in the potential Scope of Work described in Section I.B of this RFR in a timely and satisfactory manner.

5. **Proposed Overall Approach** – “Advantageous”, “Good”, or “Not Advantageous”

The MSBA will award Respondents points depending on the Respondent’s ability to clearly demonstrate an overall approach to meeting the Objectives stated in Section I.A and the Scope of Work described in Section I.B of this RFR.

Advantageous (30 points): The Respondent’s written approach to meeting the Objectives stated in Section I.A. and providing the potential services described in Section I.B of this RFR is substantial and the Respondent has provided a comprehensive understanding of the MSBA’s grant program and the mission associated with MSBA’s Post Occupancy Evaluation Program.

Good (15 points): The Respondent’s written approach to meeting the Objectives stated in Section I.A. and providing the potential services described in Section I.B of this RFR is sufficient and the Respondent has provided a reasonable understanding of the MSBA’s grant program and the mission associated with MSBA’s Post Occupancy Evaluation Program.

Not Advantageous (0 points): The Respondent’s written approach to meeting the Objectives stated in Section I.A. and providing the services described in Section I.B of this RFR does not demonstrate a reasonable understanding of the MSBA’s approach to funding public school construction projects.

C. Virtual Presentations

After Phase One and Phase Two reviews, the MSBA shall have the option to invite one or more Respondents to make virtual presentations either via “Zoom” or “Microsoft Teams”. Virtual presentations provide the MSBA with an opportunity to evaluate a Respondent through the presentation of their proposal. The MSBA may limit the number of virtual presentations conducted. Respondents will not be informed of their preliminary ranking at the time of the presentations. After presentations, the MSBA reserves the right to adjust any preliminary ranking in the Phase Two review.

The time allotments and format shall be the same for all virtual presentations. Respondents will be given a maximum of 30 minutes to present their proposals followed by a 15-minute question and answer period. The MSBA will give notice of at least five (5) business days prior to the date of a virtual presentation. The MSBA may require the Respondent’s assigned key personnel to conduct the presentation.

A Respondent is limited to the presentation of material contained in its Response, with the limited exception that a Respondent may supplement its Response to address specific

questions posed by the MSBA and provide clarification of information contained in its Response. A Respondent's failure to agree to a virtual presentation may result in disqualification from further consideration.

SECTION VI. COMPONENTS OF THE PROCUREMENT

A. DURATION AND RENEWAL OPTIONS

The MSBA intends to select one or more qualified Respondents to provide the services solicited in this RFR for an initial term of two (2) years. The MSBA may, at its sole option, extend the term for up to two additional one-year renewal periods, under the same terms and conditions.

The selected Respondent(s) will be required to execute the standard Master Services Agreement, a copy of which is attached hereto as **Attachment "C"**. **RESPONDENTS ARE REQUIRED TO SPECIFY ANY EXCEPTIONS TO THE MASTER SERVICES AGREEMENT AND TO MAKE ANY SUGGESTED COUNTERPROPOSAL WITH THEIR RESPONSE. A FAILURE TO SPECIFY EXCEPTIONS AND/OR COUNTERPROPOSALS WILL BE DEEMED AN ACCEPTANCE OF THE MASTER SERVICES AGREEMENT'S TERMS AND CONDITIONS.**

B. CONTRACT PERFORMANCE AND BUSINESS SPECIFICATIONS

1. Rejection of Proposals

The MSBA reserves the right to reject any and all proposals submitted under this solicitation.

2. Withdrawn/Irrevocability of Responses

A firm may withdraw and resubmit a Response prior to the deadline. No withdrawals or re-submissions will be allowed after the deadline.

3. Subcontracting and Joint Ventures

Respondents must obtain prior approval from the MSBA for subcontracting any portion of the Contract. Respondent's intention to subcontract or partner or joint venture with other firm(s) must be clearly stated in the Response. The MSBA reserves the right to reject any and all subcontracts, partners, or joint venture firms.

4. Price Limitation

The Respondent must agree that no other customer of similar size and similar terms and conditions shall receive a lower price for the same commodity and service during the contract period, unless this same lower price is immediately effective for the MSBA. The Respondent must also agree to provide current or historical pricing offered or negotiated with other governmental or private entities at any time during the contract period upon the request of the MSBA.

5. Security Breach Law, M.G.L. c. 93H

The Respondents hereby acknowledge and agree to comply with the requirements and responsibilities, including those of providing notice and Response, as set forth in G.L. c. 93H concerning Security Breaches and any regulations implemented to effectuate security of “personal information” as defined in § 1 of G.L. c. 93H.

SECTION VII. ATTACHMENTS

This RFR consists of a 17-page Request for Responses and the following Attachments:

- Attachment A: Authorized Respondent’s Signature and Acceptance Form
- Attachment B: Certification Statement
- Attachment C: Master Services Agreement
- Attachment D: Supplier Diversity Program Plan Form
- Attachment E: Invest in Massachusetts Form
- Attachment F: MSBA Module 9 Post Occupancy Evaluation Guidelines
- Attachment G: Creating a Quote in COMMBUYS: How to Respond to Bid Solicitation.

SECTION VIII. ADDITIONAL INFORMATION

It is recommended that Respondents refer to chapter 70B of the Massachusetts General Laws, chapters 201, 208, and 210 of the Massachusetts Acts of 2004, and 963 CMR 2.00 *et seq.* for additional information about the MSBA.

Your interest in working with the Massachusetts School Building Authority is appreciated.

Mary Pichetti
Executive Director
Massachusetts School Building Authority