MEMORANDUM

To: Board of Directors, Massachusetts School Building Authority
From: James A. MacDonald, First Deputy Treasurer, Chief Executive Officer
Mary L. Pichetti, Executive Director, Deputy Chief Executive Officer
Date: August 20, 2025
RE: Accelerated Repair Program – Heat Pump Conversion Design Services Procurement 2025 Update

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In connection with its Accelerated Repair Program (the "Program"), the MSBA issued a Request for Responses for Heat Pump Conversion Design Services on February 26, 2025. The objective of the procurement was to select a pool of qualified Heat Pump Conversion Designers that the MSBA will assign to districts invited to participate in the Program beginning in 2025 through 2026. The pool of qualified Designers will be assigned to districts invited to participate in the Program for the design and installation of heat pump systems, some of which will also include the replacement or restoration of roofing, thereby increasing energy efficiency in otherwise sound educational facilities. A pool of qualified Owner's Project Managers ("OPMs") was previously selected by a Project Management Services procurement completed in 2024 (See: "Accelerated Repair Program – Consultant Procurement 2024-2026 Update", August 21, 2024).

Selected applicants will provide heat pump conversion designer services on projects over a period of two years subject to: the number and scope of projects approved for invitation by the MSBA's Board of Directors the results of the MSBA's random assignment process; and satisfactory performance by the selected designer.

The deadline for submission of a response to the Heat Pump Conversion Designer Services Request for Responses ("RFR") was March 31, 2025.

Request for Designer Services

The MSBA received fifteen (15) applications in response to the RFR to provide Heat Pump Conversion Designer Services, as follows:

1. BVH-Salas O'Brien
2. Clough, Harbour & Associates LLP
3. CMTA
4. Dietz & Company Architects, Inc.
5. EDM Engineering & Landscape Architecture, P.C.
6. Fuss & O'Neill, Inc.
7. IMEG Consultants Corp.
8. Matz Collaborative Architects, Inc.
9. Raymond Design Associates Inc
10. Richard D. Kimball Co.
11. Rist-Frost-Shumway Engineering, P.C.
12. Shekar & Associates, Inc.
13. SOCOTEC AE Consulting, LLC

14. Tighe & Bond Designer Services, Inc.
15. van Zelm Heywood & Shadford, Inc.

MSBA staff evaluated the applications based on the criteria as set forth in the RFR:

1. Demonstrated Experience and Performance on Public or Private Projects Entailing Energy Efficient Renovations and Repairs
2. Demonstrated Experience and Performance of Key Personnel (Principal-in-Charge, Project Manager, Project Architect/Engineer, and Sub-consultants)
3. Knowledge of and Experience with Energy Efficient Incentive and Rebate Programs
4. Demonstrated Experience with Renovations in Occupied Buildings
5. Capacity and Organizational Structure
6. Past Performance of the Respondent's Proposed Key Personnel (including Sub-consultants, if any) with Previous MSBA-Funded Projects within the Past Three Years
7. Supplier Diversity Program
8. Invest in Massachusetts

Following a review of MSBA staff recommendations, on July 15, 2025, the Designer Selection Panel ("DSP") determined that the following eleven (11) design firms submitted the strongest applications and best met the requirements for providing services in the Accelerated Repair Program.

1. BVH-Salas O'Brien
2. Clough, Harbour & Associates LLP
3. CMTA
4. Dietz & Company Architects, Inc.
5. IMEG Consultants Corp.
6. Raymond Design Associates Inc.
7. Richard D. Kimball Co.
8. Rist-Frost-Shumway Engineering, P.C.
9. Shekar & Associates, Inc.
10. Tighe & Bond Designer Services, Inc.
11. van Zelm Heywood & Shadford, Inc.