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 6, 2017
RE: Recommendations to Execute Master Services Agreements for Commissioning Consultants

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The MSBA's overall objective for its commissioning program is to provide documented confirmation that a construction project funded by the MSBA fulfills the functional and performance requirements of the Owner, MSBA, occupants and operators. The Commissioning Consultant (CxC) verifies that building systems are in accordance with the building's designs, properly installed, thoroughly tested, and capable of being operated and maintained so that they perform individually and collectively as intended and meet the Owner's expectations. The CxC ensures that construction contract documentation contain appropriate provisions to provide the Owner's staff with adequate training and systems documentation, including operating and maintenance manuals, so that the building systems are operating economically and efficiently.

The CxC serves as an objective advocate of the Owner and the MSBA, overseeing and coordinating the commissioning process and presenting recommendations to the Owner, its consultants, and the MSBA regarding the performance of the commissioned building systems. The CxC follows up with the Owner's Project Manager (OPM) and reports to the MSBA indicating whether such recommendations have been implemented. The CxC works in conjunction with the project design and construction team from schematic design through the warranty phase.

This is the fifth time the MSBA conducted a public Request for Response (RFR) process for commissioning services since implementing the program in 2009. The most recent procurement prior to this one was conducted in 2014 through which the MSBA contracted with 16 firms to provide commissioning services for addition, renovation and new construction projects funded by the MSBA (10 full-service commissioning consultants for core projects and 6 commissioning consultants for roofing and window projects in the Accelerated Repair Program). Different from previous years, this procurement included scope for post occupancy evaluation services to assist the MSBA in assessing the actual performance of buildings that have been occupied and operating for a minimum of 3 years.

Current Program Statistics

No. Work Orders Issued	Work Orders Completed	No. Schools	Bldg. Sq. Ft.	Total Construction Budgets	Cx Fees
410	280	508	59,899,854	$7,448,190,000	$29,295,442

On August 29, 2017, the Massachusetts School Building Authority issued a Request for Responses to Provide Building Commissioning Services at MSBA-funded school construction, renovation, and repair projects across the Commonwealth. Categories included full building commissioning, partial building or individual system commissioning, roofing and building envelope commissioning, and post occupancy evaluations. The MSBA posted the RFR on the MSBA's website (www.massschoolbuildings.org) and on COMMBUYS (a web-based market center for the Commonwealth of Massachusetts) on August 29, 2017. In addition, the MSBA conducted outreach to commissioning firms that have provided services to the MSBA in the past or who have expressed an interest in doing so.

The MSBA received 26 Responses prior to the deadline of September 20, 2017 at 3:00 p.m. with each respondent self-selecting the category of services for which they wished to be considered (full building commissioning, partial building or individual system(s) commissioning, roofing and building envelope commissioning, and/or post occupancy evaluations).

After completing the Phase One Review of each Response for responsiveness and completeness, MSBA staff advanced all responses for Phase Two Review and substantive evaluation:

	Commissioning Categories			
Respondent	**Full Cx**	**Partial Bldg./ Single System**	**Roof/ Envelope**	**Post Occupancy**
Fitzemyer & Tocci Associates, Inc	✓	✓	✓	✓
Rist-Frost-Shumway Engineering, P.C.	✓	✓	✓	✓
Strategic Building Solutions, LLC (dba Colliers)	✓	✓	✓	✓
Horizon Engineering Associates, LLP	✓	✓	✓	✓
Jacobs Engineering Group Inc.	✓	✓	✓	✓
Alares, LLC	✓	✓	✓	✓
Vanderweil	✓	✓	✓	✓
Cannon Boston Inc.	✓	✓	✓	✓
Sustainable Engineering Solutions	✓	✓	✓	✓
SMMA	✓	✓	✓	
BR+A (Bard, Rao + Athanas Consulting Engineers)	✓	✓		✓
BVH Intergrated Services, P.C.	✓	✓		
CES Engineering Services, LLC	✓	✓		✓
RDK Engineers, An NV5 Company	✓	✓		✓
Cadmus Group LLC	✓	✓		✓
Sparhawk Group	✓	✓		✓
WSP USA Buildings Inc.	✓			
Wang Commissioning, LLC	✓			
Building Enclosure Associates, LLC		✓	✓	✓
Gale Associates, Inc.		✓	✓	
Simpson Gumpertz & Heger, Inc.		✓	✓	
Thompson & Lichtner		✓	✓	
CBI Consulting Inc.			✓	
R.J. Kenney Associates, INC.			✓	
Russo Barr Associates, Inc.			✓	
Energy Engineering and Design, Inc.		✓		✓

A committee of MSBA staff members reviewed the responses. Evaluation criteria included the following:

- Demonstrated intent to further the development of Minority and Woman-Owned Business Enterprises ("M/WBEs") – (Supplier Diversity Program);
- Demonstrated intent that 50% or more of the work-hours will be performed in Massachusetts - (Invest in Massachusetts);
- Experience of the Respondent and the personnel identified to provide the services described in this RFR;
- Knowledge and understanding of building systems;
- Education and licensing of personnel identified to provide the services described in this RFR;
- Demonstrated capacity and organizational structure to perform the types of services described in this RFR; and
- Respondent's proposed overall approach to this RFR.

Recommendations: Authorize the Executive Director to enter into negotiations and execute Master Commissioning Services Agreements with the following firms:

Full Building Commissioning
BR+A (Bard, Rao + Athanas Consulting Engineers)
BVH Intergrated Services, P.C.
Cadmus Group LLC
CES Engineering Services, LLC
Fitzemyer & Tocci Associates, Inc
Horizon Engineering Associates, LLP
Jacobs Engineering Group Inc.
RDK Engineers, An NV5 Company
Rist-Frost-Shumway Engineering, P.C.
SMMA
Strategic Building Solutions, LLC (dba Colliers)
WSP USA Buildings Inc.

Building Envelope Commissioning
Building Enclosure Associates, LLC
CBI Consulting Inc.
Gale Associates, Inc.
Simpson Gumpertz & Heger, Inc.
R.J. Kenney Associates, INC.
Russo Barr Associates, Inc.
Thompson & Lichtner

Partial Systems Commissioning
BR+A (Bard, Rao + Athanas Consulting Engineers)
BVH Intergrated Services, P.C.
Cadmus Group LLC
CES Engineering Services, LLC
Fitzemyer & Tocci Associates, Inc
Horizon Engineering Associates, LLP
Jacobs Engineering Group Inc.
RDK Engineers, An NV5 Company
Rist-Frost-Shumway Engineering, P.C.
SMMA
Strategic Building Solutions, LLC (dba Colliers)

Post Occupancy Evaluations
BR+A (Bard, Rao + Athanas Consulting Engineers)
Cadmus Group LLC
CES Engineering Services, LLC
Fitzemyer & Tocci Associates, Inc
Horizon Engineering Associates, LLP
Jacobs Engineering Group Inc.
RDK Engineers, an NV5 Company
Rist-Frost-Shumway Engineering, P.C.
Strategic Building Solutions, LLC (dba Colliers)

The aggregate value of each Master Commissioning Services Agreement will 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.