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
SUBJECT: Post Occupancy Evaluation Program Recommendation
Date: April 8, 2020

## Introduction

The Massachusetts School Building Authority (the "MSBA") continues to assess its policies and practices in support of its mission to advance the design and construction of educationally appropriate, flexible, sustainable, and cost-effective public school facilities. In an effort to further this mission, staff recommends implementing a Post Occupancy Evaluation program as part of the MSBA's grant process commencing July 1, 2020. This will require the MSBA to add five additional staff positions to the MSBA team as well as procure consultant support.

## Background

The MSBA's grant program supports $750 million to $1 billion annually in school construction projects. There is an imperative responsibility to ensure that the Commonwealth's investment is protected. Throughout MSBA's Post-Occupancy Pilot Program, staff and professional consultants collaborated to establish a process intended to focus on understanding that Core Program projects that have received a grant from the MSBA are operating and performing per the intended design.

As presented to the Board on February 13, 2020, it is anticipated that Post-Occupancy Evaluation guidelines, "Module 9", central database, and reporting format will continue to be developed in the coming months in anticipation for the commencement of Post-Occupancy Evaluations in spring 2021. Staff estimates that approximately 50-60 Post-Occupancy Evaluations will be performed over the next five years for previously completed MSBA Core Program projects.

## Staffing and Schedule

Based on the staffing analysis completed as part of the Post-Occupancy Pilot, additional internal staff as well as external consultants will be required for the MSBA's proposed Post-Occupancy Evaluation program. As presented to the Board on February 13, 2020, the MSBA is seeking to hire an appropriate number of full-time individuals to manage the efforts of external consultants, integrate lessons-learned into the grant program, distribute feedback to districts and consultants, and to maintain a sustainable Post-Occupancy Evaluation program moving forward.

The anticipated roll-out of MSBA's Post-Occupancy Evaluation program is as follows:

- April-May 2020 – Transmit/present Pilot Information to Participating Districts
- May 2020 – Establish Capital Planning Budget for the Post-Occupancy Evaluation Program as part of the FY21 MSBA Budget
- May-December 2020 – Module 9/ IT development, Staffing, Onboarding/start-up
- Spring 2021 – Commencement of Post-Occupancy Evaluation Building Visits

## Staff Recommendation

In an effort to further MSBA's mission and based on the efforts associated with the Post-Occupancy Pilot Program conducted May 2017 through December 2019, staff recommends

implementing a Post Occupancy Evaluation program as part of the MSBA's grant process commencing July 1, 2020. This will require the MSBA to add five additional staff positions to the MSBA team as well as procure consultant support.