

MEMORANDUM

TO: Board of Directors, Massachusetts School Building Authority
FROM: John K. McCarthy, Executive Director
DATE: March 21, 2012
RE: Recommendations for Technical Review Consultants

The MSBA issued two Requests for Responses from qualified firms that were interested in providing architectural and engineering services to assist the Authority with the detailed review of technical documents and materials. The requested scope of services includes:

- Conducting detailed technical reviews of studies, reports, plans, specifications, cost estimates, and other materials prepared by consultants on behalf of local school districts;
- Assessing compliance with applicable program criteria, including compliance with applicable building codes, procurement statutes, and regulations;
- Assisting MSBA staff with the management and execution of the Senior Study assessment program;
- Working with the MSBA to develop training and public outreach programs related to MSBA policies and initiatives; and
- Assisting the MSBA in its work to translate locally-developed educational program goals into cost-effective school projects.

In October 2011, the MSBA issued the first of two Requests for Responses to Provide Technical Review Services (RFR-1). The MSBA advertised the RFR in the Central Register and posted it on the MSBA's website (www.massschoolbuildings.org) and on Comm-PASS. Seven (7) firms submitted timely Responses. The limited number of proposals was due, in part, to a restriction in RFR-1 that prohibited the MSBA from contracting with any firm that provided or was seeking to provide designer, owner's project manager, contractor, or any other services to a city, town, or regional school district in connection with an MSBA-funded project.

After completing an evaluation of the seven Respondents' qualifications, a selection committee of MSBA staff selected two firms, Arrowstreet and Gienapp Design Associates, LLC, for interviews. Staff conducted interviews on December 13, 2011, and determined that both firms were qualified to provide many of the services requested in the RFR. However, the committee and other MSBA staff had some concern about whether these two firms could adequately handle a large number of projects simultaneously, and that neither Arrowstreet nor Gienapp possessed the proven experience to assist with specialized technical studies. The committee also believed that

the MSBA's conflict-of-interest restrictions in RFR-1 had unnecessarily limited the pool of qualified Respondents.

With those concerns in mind, the MSBA issued a second Request for Responses (RFR-2) on December 28, 2011. Again, the MSBA advertised the RFR in the Central Register and posted it on both the MSBA and Comm-PASS websites.

By the terms of RFR-2, only those firms providing or seeking to provide *designer* services on MSBA-funded projects were categorically ineligible for consideration. Companies providing project management or other non-design services would be considered for selection, subject to the provisions of M.G.L. c. 268A. In addition to modifying the MSBA's conflict of interest policy for this procurement, staff conducted outreach to many of the top 50 firms identified by the Engineering News Report. As a result the MSBA received six (6) timely Responses to RFR-2 as well as "refreshed" Responses from each of the Respondents to RFR-1. During the initial review process, the subcommittee disqualified Bradley Architects without further consideration, because the firm provides designer services on several current Green Repair projects.

The selection committee re-evaluated the Responses to RFR-1 as well as the qualifications and experience of the Respondents to RFR-2. Arrowstreet and Gienapp again rose to the top along with two larger firms, AECOM and STV. Both AECOM and STV appeared to offer the depth of resources required to take on multiple projects simultaneously and the expertise necessary to perform specialized technical reviews.

On February 29, 2012, the MSBA conducted interviews with STV and AECOM. The selection committee agreed that STV had the qualifications, depth of personnel, and experience to provide the full scope of services in the RFR. STV also presented a clear staffing plan for each of the tasks outlined in the RFR. Although AECOM demonstrated depth in terms of the company's overall personnel numbers, it was unclear which of the firm's offices and staff members would be handling each task. In addition, the committee was concerned that the proposed AECOM team members lacked the individual capacity to perform the requested services in the time required, and that no designer with educational experience participated in the interview process.

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

- Arrowstreet
- Gienapp Design Associates, LLC
- STV Incorporated

The value of each agreement may 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.