

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: June 17, 2020
RE: Recommendations to Execute Master Services Agreements for Commissioning Consultants

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 contains 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 additional support during the first year of operation phase.

This is the fifth time the MSBA has 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 2017, through which the MSBA contracted with 19 firms to provide commissioning services for addition, renovation and new construction projects funded by the MSBA (12 full-service commissioning consultants for core projects and 7 commissioning consultants for roofing and window projects in the Accelerated Repair Program). Different from previous years, this procurement includes scope for additional support during the first year of building operation and recommissioning services to provide comprehensive commissioning and assist in the successful turnover of buildings to owners.

Current Program Statistics

No. Work Orders Issued	Work Orders Completed	No. Schools	Bldg. Sq. Ft.	Cx Fees
517	364	607	71,958,447	\$38,783,761

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On March 13, 2020, 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, additional support during the first year of operation and recommissioning. The MSBA posted the Request for Responses on the MSBA’s website (www.massschoolbuildings.org) and on COMMBUYS (a web-based market center for the Commonwealth of Massachusetts) on March 13, 2020. In addition, the MSBA hosted a Commissioning Procurement Overview Informational Session in conjunction with the Supplier Diversity Office to provide outreach to commissioning firms. The meeting was attended by approximately (13) firms.

The MSBA received 33 Responses prior to the deadline of April 30, 2020 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 post occupancy). See Table 1 below.

After completing the Phase One Review of each Response for responsiveness and completeness, MSBA staff advanced 30 responses for Phase Two Review and substantive evaluation. Three firms did not meet the requirements to move forward in the review process.

Table 1

Respondent	Commissioning Categories			
	Full Cx	Partial Bldg./ Single System	Roof/ Envelope	Post Occupancy
Bala Consulting Engineers	✓	✓	✓	✓
BVH Integrated Services, P.C.	✓	✓	✓	✓
Clough Harbour & Associates LLP	✓	✓	✓	✓
Colliers Project Leaders	✓	✓	✓	✓
Consulting Engineering Services, LLC	✓	✓	✓	✓
Cx Associates	✓	✓	✓	✓
Fitzemeyer & Tocci Associates, Inc.	✓	✓	✓	✓
Horizon Engineering Associates, LLP	✓	✓	✓	✓
Jacobs Engineering Group, Inc.	✓	✓	✓	✓
L&S Energy Services, Inc.	✓	✓	✓	✓
Resilient Buildings Group, Inc.	✓	✓	✓	✓
Richard D. Kimball Co. Inc., d/b/a NV5	✓	✓	✓	✓
Rist-Frost-Shumway Engineering, P.C.	✓	✓	✓	✓
Stephen Turner Inc.	✓	✓	✓	✓
SMMA	✓	✓	✓	✓
WSP USA Buildings, Inc.	✓	✓	✓	✓
Bard Rao + Athanas Consulting Engineers, LLC✓	✓	✓		✓
R.W. Sullivan Engineering	✓	✓		✓

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M/E Engineering, P.C.	✓	✓		
Sparhawk Group	✓	✓		
The Cadmus Group LLC	✓	✓		
Van Zelm Heywood & Shadford, Inc.	✓	✓		
Envirobusiness Inc. d/b/a EBI Consulting	✓			
Gale Associates, Inc.		✓	✓	
Interval Data Systems, Inc.		✓		
Building Enclosure Associates, LLC			✓	✓
3IVE LLC			✓	
CBI Consulting, LLC			✓	
R.J. Kenney Associates, Inc.			✓	
Russo Barr Associates, Inc.			✓	
Simpson Gumpertz & Heger			✓	
Synergy Consultants, Inc.				
Terva Engineering Corporation				

A committee of seven MSBA staff members reviewed the 30 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.

Based on the review of the 30 responses, MSBA staff found that 18 firms meet the needs of the MSBA. Staff recommends contracting with 18 firms to provide commissioning services for addition, renovation and new construction projects funded by the MSBA. Eleven firms will provide full building commissioning services for core projects, seven firms will provide building envelope commissioning services for roofing and window projects in the Accelerated Repair Program (Building Envelope Commissioning), eleven firms will provide partial systems commissioning services, and ten firms will provide commissioning services for post occupancy evaluations. The 18 firms and the categories of commissioning services each will provide are listed below:

Full Building Commissioning

Consulting Engineering Services, LLC
Richard D. Kimball Co. Inc., d/b/a NV5
Bard, Rao + Athanas Consulting Engineers, LLC
Van Zelm Heywood & Shadford, Inc.
BVH Intergrated Services, P.C.
Fitzemyer & Tocci Associates, Inc
Jacobs Engineering Group Inc.
Rist-Frost-Shumway Engineering, P.C.
SMMA
Horizon Engineering Associates, LLP
WSP USA Buildings Inc.

Building Envelope Commissioning

3IVE LLC
Building Enclosure Associates, LLC
Russo Barr Associates, Inc.
CBI Consulting Inc.
Gale Associates, Inc.
R.J. Kenney Associates, Inc.
Simpson Gumpertz & Heger, Inc.

Partial Systems Commissioning

Bard Rao + Athanas Consulting Engineers, LLC
BVH Intergrated Services, P.C.
CES Engineering Services, LLC
Fitzemyer & Tocci Associates, Inc
Horizon Engineering Associates, LLP
Jacobs Engineering Group Inc.
Richard D. Kimball Co. Inc., d/b/a NV5
Rist-Frost-Shumway Engineering, P.C.
SMMA
WSP USA Buildings Inc.
Van Zelm Heywood & Shadford, Inc.

Post Occupancy Evaluations

Bard Rao + Athanas Consulting Engineers, LLC
CES Engineering Services, LLC
Fitzemyer & Tocci Associates, Inc
Horizon Engineering Associates, LLP
Jacobs Engineering Group Inc.
Richard D. Kimball Co. Inc., d/b/a NV5
Rist-Frost-Shumway Engineering, P.C.
SMMA
WSP USA Buildings Inc.
BVH Integrated Services, P.C.

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Recommendations: MSBA staff recommends that the Board authorize the Executive Director to enter into negotiations and execute Master Services Agreements for Commissioning Services with the listed firms. The aggregate value of the Master Services Agreements 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.