

REQUEST FOR QUALIFICATIONS (RFQ)
Massachusetts School Building Authority
Model School Program
January 25, 2023

Invitation: The Massachusetts School Building Authority (the “MSBA”), continues to identify, collect, and maintain a clearinghouse of prototypical model school designs that may be used by eligible school districts invited into the MSBA Grant Program. Similar RFQs were issued by the MSBA in December 2015, December 2017, July 2019 and February 2021, resulting in a total of 22 model school designs that were approved by the MSBA Board of Directors. The intent of this RFQ is to supplement those previously approved model school designs with additional model school designs. School designs that were submitted in response to the previous RFQs and approved by the MSBA Board of Directors do not have to be resubmitted; projects that were submitted as previous model school applicants and not approved will not be further considered. To establish the clearinghouse of prototypical model school designs, the MSBA will identify completed designs that were used to construct school projects, as defined in Section C – “Minimum Model School Requirements.” The MSBA will determine, in its sole discretion, which of those designs, if any, are suitable to include in the clearinghouse. The inclusion of designs in the clearinghouse for the use of eligible districts will be referred to as the “Model School Program.” The MSBA also intends to pre-qualify the Designers of school designs that are deemed suitable for the Model School Program to provide “Design Services” for the Model School Program within the meaning of M.G.L. Chapter 7C, §44(b).

The selection of designs for the Model School Program and the pre-qualification of associated Designers will be completed in the following three phases:

- **Phase 1 Review** – School designs that meet the minimum requirements as outlined in Section C will be evaluated in accordance with the criteria described in Section D.
- **Phase 2 Review** – School designs that are selected for further evaluation at the end of Phase 1 will proceed to Phase 2, which may include an MSBA site visit, and the review of any information and/or documentation that is requested by the MSBA as detailed in Section E.
- **Phase 3 Review** – MSBA staff will present suitable designs for use under the Model School Program to the MSBA Facilities Assessment Subcommittee (the “FAS”) and finally to the MSBA Board of Directors for its review and approval.

Designers selected by the MSBA through this RFQ may be eligible to work with the MSBA and school districts participating in the MSBA’s Model School Program. If ultimately selected by a school district for a Model School, a Designer will execute a Contract for Designer Services for a Model School with that school district. Refer to Project Advisory #39 on the MSBA website for additional information regarding the Model School Program.

A. Background:

Chapter 208 of the Acts of 2004 established the Massachusetts School Building Authority. The MSBA is an independent public authority not subject to the supervision and control of any other

executive office, department, commission, board, bureau, agency or political subdivision of the Commonwealth. The MSBA's Board consists of the State Treasurer, who serves as chairperson, the Secretary of Administration and Finance, the Commissioner of Education and four additional members appointed by the State Treasurer.

The MSBA's Model School Program seeks to adapt and re-use the design of successful, recently constructed schools to meet the requirements of a school district that has been invited by the MSBA's Board of Directors to construct a new school. Under the Model School Program, the MSBA intends to select school designs that meet the criteria discussed below and to pre-qualify the respective Designer. The MSBA, in collaboration with school districts participating in the Model School Program, may select one of the pre-qualified model schools and its Designer, and the school district will enter into a contract with the selected Designer for design services. The Designer of the selected model school will be required to adapt the design to a suitable site within the school district and tailor it to the required design enrollment and programmatic needs of the school district. The goal is to minimize redesign of the selected model school and maximize the value of an existing proven design. The MSBA believes the adaptation of existing successful designs will have many benefits, including:

- Proven designs meeting certain criteria will contain many best practices that should be perpetuated in school design;
- Adaptation of an existing design, versus development of a completely new design, will streamline the design process and result in reduced consultant fees;
- The design and bid schedule will be compressed and will accelerate the start of construction and thus reduce the impact and uncertainty of inflation in construction costs on the overall cost of the project; and
- The re-use of the design should limit construction change orders.

B. Project Goals and General Scope:

The objective of this RFQ is to pre-qualify selected model school designs and their associated Designers for subsequent use in the Model School Program. It is anticipated that the list of model schools generated from this RFQ will be updated periodically.

When a pre-qualified model school design is selected by a school district participating in the Model School Program, the general scope of the designer services will include school design adaptations to accommodate code upgrades, and/or (limited) enrollment variation and site requirements. This may include updating the design documents to reflect the most recent revisions to the Massachusetts building code and other design and consulting services incidental and required to fulfill the goals for the construction of a PK-12 public, model school building.

The MSBA will limit its reimbursement to school districts for the use of a Model School Designer to an amount that is equal to 4.75% of the estimated construction cost for basic services. This reimbursement amount is in addition to and does not include any MSBA reimbursement to a school district for designer services that were provided for the feasibility study. In addition, the MSBA will limit its reimbursement for the Owner's Project Manager ("OPM") to an amount that is equal to 3.30% of construction cost for basic services. This amount

will include the OPM's fee for the feasibility study phase. All other MSBA Funding Limits and caps will apply to school districts utilizing the Model School Program.

C. Minimum Model School Requirements:

To be considered for the Model School Program, a proposed school design must meet all the following minimum requirements:

1. Must be entirely new construction of any PK-12 grade configuration (e.g. early childhood, elementary, elementary/middle, middle, middle/high, high, elementary through high, comprehensive or vocational), located within a 125-mile radius of Worcester, MA;
2. Must have been permitted using the 780 CMR Massachusetts State Building Code 9th edition or, if not permitted in Massachusetts, any building code or design criteria using the International Energy Conservation Code (“IECC”) no earlier than 2015 edition, and ASHRAE 90.1 no earlier than the 2013 version;
3. Must have been registered with either USGBC “LEED-S” or Collaborative for High Performance Schools (“CHPS”), and;
4. Must have been open for full occupancy for a minimum of 12 months as of September 15, 2023 (using the substantial completion date as the starting date of occupancy; for phased occupancies, use the final substantial completion date).

Designers who have completed school construction projects meeting these minimum criteria are invited to submit their school(s) as potential model school designs.

D. Phase 1 Review – Evaluation Criteria:

School designs that have been determined to meet the minimum requirements defined above will be further evaluated using the following evaluation criteria:

1. Completeness of the requested submission materials;
2. The adaptability of the school design to other sites without substantial re-design or expense;
3. The extent to which the school classroom wing/areas may be adapted to a 20% addition and reduction in design enrollment by adding or reducing the number of classrooms. The Core Academic portion of the design must be adaptable to expansion or contraction to meet a specific design enrollment, with minimal re-design effort;
4. The adaptability of the design to various educational programs. In particular, the design must be adaptable to various teaching methodologies, grade configurations, class offerings, and reconfiguration of core classroom space with minimal re-design effort;
5. The extent to which the spaces in the school allow for maximum flexibility for multiple and/or future uses;
6. The extent to which the design includes differentiated learning spaces and student and teacher collaboration areas;
7. The efficiency of the design; how closely the school conforms to current MSBA space summary guideline standards, including net square footage by category, total net square

- footage, total gross square footage, overall grossing factor (GSF/NSF), and space utilization of capacity generating spaces;
8. The incorporation of energy efficiency and sustainable design elements based on the current MSBA Sustainable Building Design Guidelines;
 9. The school's environmental qualities and natural lighting;
 10. The extent to which the school complies with the MSBA Guidelines for Science Labs in High School Facilities (if applicable), the Review and Recommendations of Best Practices for K-12 STEM Learning Spaces and/or MSBA's Staff Recommendation for 2018 Science/Technology/Engineering Area Guidelines;
 11. The construction cost per gross square foot exclusive of site development, Furnishings, Fixtures & Equipment ("FF&E"), and soft costs;
 12. The extent of change orders as a percentage of the original bid price (exclusive of Owner directed change orders or change orders related to differing or unforeseen site conditions);
 13. The ability of the proposed design team to comply with the goals of the Model School Program (design "best practices", accelerated production schedule, reduced fees, reduced change orders, etc.) based on previous project experience; and,
 14. Any other criteria that the MSBA may deem relevant to the evaluation of proposed model schools.

E. Phase 2 Review – Site Visits and Additional Information:

School designs that are selected for further consideration at the conclusion of the Phase 1 Review will proceed to Phase 2 Review. As determined by the MSBA, Phase 2 Review may include an MSBA site visit, and the review of any information and/or documentation that is requested by the MSBA from a Designer that is in addition to the information and documentation that was supplied by the Designer in Phase 1. The Phase 2 information and/or documentation may include, without limitation:

1. Designer Application Form - Commonwealth of Massachusetts Standard Designer Application Form for Municipalities and Public Agencies not within DSB Jurisdiction, updated 7/2016. (This is required only for those applicants that do not have a current Master File Brochure at the MSBA).
2. References – Applicants must provide three client references including client (firm) name, contact name, address, telephone number, e-mail address, date(s) of service and a description of the services similar to those requested herein that the Applicant has provided to the client. The MSBA strongly recommends at least one reference be from a Massachusetts state or local government entity. Failure to provide references may result in disqualification from this RFQ.
3. Verification that the Designer is a qualified Designer, within the meaning of M.G.L. Chapter 7C, § 44, employing a Massachusetts registered architect responsible for and being in control of the services to be provided under any contract for Design Services.
4. Written confirmation that the Project Architect/Engineer for the Designer has successfully completed the Massachusetts Certified Public Purchasing Official Program seminar "Certification for School Project Designers and Owner's Project Managers" and

all required recertification's as administered by the Office of the Inspector General of the Commonwealth of Massachusetts.

5. Written confirmation that the Designer is experienced in design and construction administration of public school projects. (Note: to receive credit for this requirement, a list of past projects meeting the criteria will need to be provided and the Designer will need to indicate whether the projects listed were performed directly by the Applicant or in collaboration with or the employ of other Designers).
6. Written confirmation that the Designer has member(s) of the design team who will be responsible for the following: (Firm's name, individual's name and professional registration or license number, as applicable, must be listed in the application for each category of work, as well as whether the firm is certified as an MBE and/or WBE) by the Commonwealth's Supplier Diversity Office.
 - a. Architecture
 - b. Educational Programming
 - c. Civil Engineering
 - d. Landscape Architecture
 - e. Structural Engineering
 - f. Fire Protection Engineering
 - g. Plumbing Engineering
 - h. HVAC Engineering
 - i. Automatic Temperature Controls
 - j. Electrical/Lighting
 - k. Data/Communications
 - l. Environmental Permitting
 - m. Geotechnical Engineering
 - n. Geoenvironmental Engineering
 - o. Hazardous Materials
 - p. Cost Estimating
 - q. Kitchen/Food Service Consultant
 - r. Laboratory Consultant
 - s. Acoustical Consultant
 - t. Specifications Consultant
 - u. Library/Media
 - v. Technology Consultant/Audio Visual Consultant
 - w. Theatrical Consultant
 - x. Sustainable/Green Design/Renewable Energy Consultant
 - y. Code Consultant
 - z. Accessibility Consultant
 - aa. Traffic Consultant
 - bb. Furniture, Fixtures and Equipment Consultant
 - cc. Site Surveying
 - dd. Security Consultant

Applicants will be asked to address each category of work listed above and whether it is to be performed by in-house staff or by sub-consultant(s). **MINORITY AND WOMEN-**

OWNED BUSINESS ENTERPRISES: Pursuant to M.G.L. Chapter 7C, Section 6, the selected Designer(s) must agree to contract with minority and women-owned businesses as certified by the Massachusetts Supplier Diversity Office. In the event that a pre-qualified Designer is selected to provide design services for a District invited into the Model School Program, that Designer will be obligated to meet or exceed any MBE/WBE participation goals that are required under Massachusetts Law on the date that the Designer enters into an agreement with a District for Design Services.

7. Detailed explanation of any changes to the original project design team. The MSBA expects that the consultant team responsible for designing the original model school would be part of the proposed team submitting for model school designation and use. If there are changes to the consultant team, the reasons for the changes must be detailed and any new team member's familiarity with similarly sized projects must be described.
8. Each selected Designer of a Model School will be required to execute a Contract for Designer Services for its Model School with any District which, in collaboration with the MSBA, selects that Model School.

F. Phase 3 – Selection of Pre-Qualified Model Schools/Designers:

Evaluation of responses to the RFQ will be made by a committee selected by the MSBA's Executive Director and likely include MSBA staff and/or such consultants that the MSBA may choose to include. MSBA staff will provide an evaluation summary presentation to the MSBA FAS members and Board of Directors, including recommendations for approval of submissions that meet the goals of the Model School Program, including the following final criteria:

1. Compliance with the minimum requirements and evaluation criteria;
2. Evaluations by the MSBA team performing the site visits;
3. Evaluation of any additional information provided by the applicants; and
4. Any other criteria that the MSBA may deem relevant to the pre-qualification of a proposed Model School.

After the MSBA Board of Directors' consideration of the recommended model school designs, the approved designs would become candidates for potential use by school districts participating in the Model School Program. The MSBA reserves the right to remove schools from the Model School Program, if in the opinion of the MSBA, a school becomes outdated in building code compliance, and/or MSBA policies and practices.

G. Submittal Requirements:

Complete responses to this RFQ must be submitted electronically to Procurement@MassSchoolBuildings.org by the submission deadline or the response will not be considered. A complete response includes all of the items listed below. In addition to the electronic submission, respondents should mail six hard copy responses to the MSBA at the address provided below. The hard copy submission must be received within one week of the deadline for electronic submissions.

Model School Program
Massachusetts School Building Authority
40 Broad Street, Suite 500
Boston, Massachusetts 02109
ATTN: Siobhan Tolman, Procurement and Contracts Specialist

Submissions must include the following:

1. A cover letter certifying that: (a) the proposed Model School design meets the Minimum Model School Requirements set forth in Section C of this RFQ and (b) the Designer meets the Minimum Designer Qualifications set forth in Section F of this RFQ.
2. A completed Model School Application (See Attachment A) that includes, but is not limited to, the following information:
 - a. A detailed narrative describing how the proposed Model School design supports the goals, thresholds requirements, and evaluation criteria of the Model School Program as described in this RFQ. Reference specific submittal material as needed to support this narrative.
 - b. A description of all existing variances of the candidate with MSBA space guidelines including a detailed description that describes how the design would be modified in order to comply with MSBA space standards.
 - c. A description of the sustainable design elements included in the project. Indicate the status of the LEED/CHPS certification process. Provide a dated copy of the most current LEED/CHPS scorecard and a copy of the certification letter (if achieved). Indicate which building code and energy codes were used as a basis of design (e.g. 780 CMR 9th edition, IECC 2015, ASHRAE 90.1 2013, etc.);
 - d. For projects that include high school science labs - provide a narrative describing compliance and all variances with the MSBA Guidelines for Science Labs in High School Facilities, and a detailed written description how the design could be modified in order to comply.
 - e. Construction cost contract amount including all change orders.
3. A completed copy of the MSBA Space Summary spreadsheet (See Attachment B) in .pdf and .xls format indicating spaces based on the appropriate project grade configuration and design enrollment.
4. Floor plans, roof plans, site plans, building sections and elevations of the as-built school (to the extent required to describe the general building design) in both 11 x 17" hard copy and electronic .pdf format. Include detailed drawings, with room labels, north arrows and graphic scales demonstrating the following:
 - a. Floor plans of the proposed Model School that include floor elevations for each floor and intermediate floor elevations at ramps, stairs and entrances.
 - b. Roof plan, elevation and section drawings.

- c. Diagrammatic floor plans that demonstrate both a 20% increase and decrease in the original design enrollment and how associated alterations (limited to classroom areas) are accommodated.
 - d. Diagrammatic floor plans that demonstrate how both a standard / departmental and interdepartmental “team teaching” methodology are accommodated in the design with little or no changes to the design.
 - e. Diagrammatic floor plans and/or a narrative describing how the design supports maximum flexibility for multiple future uses.
 - f. Diagrammatic floor plans that demonstrate how the design would be modified in order to comply with MSBA space summary guidelines.
 - g. Site plans of the original design detailed to the extent required to evaluate topography / slope of the site at the building perimeter and solar orientation.
5. Certification Statement – applicants must certify the following (an example is included as Attachment C):
- a. Certification of Compliance with Massachusetts Child Care Laws
 - b. Certification of Compliance with the Revenue Enforcement and Protection Program
 - c. Certification of Statement of Doing Business in Northern Ireland
 - d. Certification of Disclosure
 - e. Certification of No Conflicting Relationship
 - f. Certification of a Statement Regarding Criminal Actions

Please note that the Respondents should provide signed original certifications with their hardcopy responses.

6. Authorized Applicant’s Signature and Acceptance Form (See Attachment D)
- a) **Responses shall be received by the MSBA no later than 3:00 p.m., Wednesday, May 3, 2023.** Responses must be delivered electronically to: Procurement@MassSchoolBuildings.org

The MSBA assumes no responsibility or liability for late delivery or receipt of any response. Late responses will not be opened or considered.

Respondents should receive an email confirming receipt of submission.

If Respondents do not receive a confirmation email, Respondents are encouraged to contact Siobhan Tolman at Siobhan.Tolman@MassSchoolBuildings.org in advance of the submission deadline.

If responses are received earlier than Wednesday, May 3, 2023, the MSBA reserves the right to commence reviewing these responses upon receipt. The MSBA also reserves the right to request additional information, and to interview Applicants.

Any and all data, materials and documentation submitted to the Authority in response to this RFQ shall become the MSBA’s property and shall be subject to public disclosure under the

Massachusetts Public Records Act. In this regard, Applicants are required to sign the Authorized Applicant’s Signature and Acceptance Form, set forth as Attachment D hereto.

H. Schedule:

The Authority anticipates that the RFQ process will proceed according to the following schedule:

- Issuance of RFQ – January 25, 2023**
- Informational Meeting – March 8, 2023 (10:00 -11:00 AM)**
- Questions Deadline - March 17, 2023 (3:00 PM)**
- Responses to Questions Posted – March 27, 2023**
- RFQ Reponses Deadline – May 3, 2023 (3:00 PM)**

Questions concerning this RFQ must be submitted to the RFQ contact person in writing via email only at the address below. No telephone calls concerning this RFQ are permitted.

Siobhan Tolman, Procurement and Contracts Specialist
Attn: “Model School Program”
E-Mail Address: Siobhan.Tolman@massschoolbuildings.org

I. List of Attachments:

- | | |
|--------------|--|
| Attachment A | Model School Application |
| Attachment B | MSBA “Space Summary” Template |
| Attachment C | Certification Statement |
| Attachment D | Authorized Applicant’s Signature and Acceptance Form |

OTHER PROVISIONS

1. Public Record

All responses and information submitted in response to this RFQ are subject to the Massachusetts Public Records Law, M.G.L. c. 66, § 10; c. 4, § 7(26) (h). Any statements in submitted responses that are inconsistent with the provisions of these statutes shall be disregarded.

2. Waiver/Cure of Minor Informalities, Errors and Omissions

The MSBA reserves the right to waive or permit cure of minor informalities, errors or omissions prior to the selection of finalists, and to conduct discussions with any qualified Applicants and to take any other measures with respect to this RFQ in any manner necessary to serve the best interests of the MSBA and its beneficiaries.

3. Communications with the Authority

The MSBA’s Procurement Officer for this Request for Services is:

Siobhan Tolman
Massachusetts School Building Authority

40 Broad Street, Suite 500
Boston, MA 02109 Telephone: (617) 720-4466
E-mail: Siobhan.Tolman@MassSchoolBuildings.org

Applicants that intend to submit a response are prohibited from contacting any MSBA staff, staff consultants, or any member of the MSBA other than the Procurement Officer. An exception to this rule applies to Applicants which currently do business with the MSBA, but any contact made by any such Applicant with persons other than the Procurement Officer must be limited to that business and must not relate to this RFQ. In addition, such Applicants should not discuss this RFQ with any of the MSBA's consultants, legal counsel or other advisors. ***FAILURE TO OBSERVE THIS RULE MAY BE GROUNDS FOR DISQUALIFICATION.***

4. Costs

The MSBA will not be liable for any costs incurred by any Applicant in preparing a response to this RFQ or for preparing and providing any other information to the MSBA as part of the Applicant's request that a Model be included in the MSBA's clearinghouse of prototypical school designs.

5. Withdrawn/Irrevocability of Responses

A firm may withdraw and resubmit their response prior to the deadline. No withdrawals or re-submissions will be allowed after the deadline.

6. Rejection of Responses, Modification of RFQ

The MSBA reserves the right to reject any and all responses. This RFQ does not commit the MSBA to select any Applicant, award any work order, pay any costs in preparing a response, or procure a contract for any services. The MSBA also reserves the right to cancel or modify this RFQ in part or in its entirety, or to change the RFR guidelines. An Applicant may not alter the RFQ or its components.

7. Subcontracting and Joint Ventures

Applicant's intention to subcontract or partner or joint venture with other firm(s) must be clearly stipulated in the response.

8. Validity of Response

Submitted responses must be valid in all respects for a minimum period of ninety (90) days after the submission deadline.

9. MSBA Website, Central Register and COMMBUYS. This RFQ has been distributed electronically using the COMMBUYS system and can be accessed at www.COMMBUYS.com. RFQ Attachments that are referenced are available either as separate files along with the RFQ, or in the COMMBUYS Forms and Terms section. The RFQ and Attachments are also available at the Central Register and the MSBA's website: www.massschoolbuildings.org

Respondents are solely responsible for obtaining and completing required attachments that are identified in this RFQ and for checking both COMMBUYS and the MSBA's website for any addenda or modifications that are subsequently made to this RFQ,

including its attachments. The MSBA accepts no liability and will provide no accommodation to Respondents who fail to make themselves aware of addenda, amendments, or modifications to this RFQ or its attachments and, as a result, submit incomplete or incorrect Responses. Respondents may not alter (manually or electronically) the RFQ language or any RFQ component files. Modifications to the body of this RFQ, specifications, terms and conditions, which change the intent of this RFQ are prohibited and may disqualify a Response.

ADDITIONAL INFORMATION

Interested applicants are encouraged to attend a non-mandatory informational meeting regarding this RFQ on March 8, 2023, from 10:00-11:00 A.M. Details about the remote informational meeting will be posted on the MSBA’s website (www.massschoolbuildings.org) in the “News” section of the homepage. Interested applicants may also contact Siobhan Tolman at Siobhan.Tolman@MassSchoolBuildings.org for meeting details. Questions from meetings participants and answers will be posted on the MSBA website by March 27, 2023.

It is recommended that Applicants refer to chapters 201, 208 and 210 of the Massachusetts Acts of 2004 and chapter 70B of the Massachusetts General Laws for information on the Authority. Applicants requesting additional information should submit their questions **in writing** no later than 3:00 p.m. on March 17, 2023 via email to Siobhan.Tolman@MassSchoolBuildings.org.

Your interest in the Massachusetts School Building Authority is appreciated.

John K. McCarthy
Executive Director/Deputy CEO
Massachusetts School Building Authority

End of Request for Qualifications