

## MEMORANDUM

**TO:** Board of Directors, Massachusetts School Building Authority  
**FROM:** James A. MacDonald, First Deputy Treasurer, Chief Executive Officer  
Mary Pichetti, Executive Director  
**DATE:** May 22, 2024  
**RE:** Recommendation for Accelerated Repair Heat Pump Consultant

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On February 29, 2024 the Massachusetts School Building Authority (“MSBA”) issued a Request for Responses (“RFR”) from engineering and/or architectural firms or individuals interested in providing consultant services to the MSBA to evaluate existing public K-12 schools to determine scope, schedule, and cost factors to convert buildings to heat pumps for heating and cooling. The MSBA posted the RFR on the MSBA’s website, on COMMBUYS (a web-based market center for the Commonwealth of Massachusetts) and advertised the RFR in the Central Register and the Goods and Services Bulletin. In addition, the MSBA conducted email outreach to consulting firms that appeared to have provided similar services to other entities.

The Director of Capital Planning and General Counsel appointed six MSBA staff members to serve on the Procurement Management Team (“PMT”): John Crisley, Karl Brown, Richard Hudson, Janet Caron, Lexi Winston and Brian Kelley. Graham Waters and Siobhan Tolman participated to provide guidance to the PMT. In collaboration with the Director of Capital Planning and the legal department, the PMT developed the specifications, evaluation criteria, scorecard, and Request for Responses (“RFR”) for posting.

The MSBA received four responses to the RFR before the March 29, 2024 deadline: BVH Integrated Services, Inc., a Salas O’Brien Company; CMTA, Inc.; Fitzmeyer & Tocci Associates, Inc and IMEG. The PMT met on April 24, 2024 to discuss the responses. The PMT calculated the response scores based on the cumulative total of individual scores from each of the five PMT members. The phase two review and scorecard was based on the following evaluation criteria that were also included in the RFR:

- Demonstrated intent to further the development of Minority and Woman-Owned Business Enterprises (“M/WBEs”) – (Supplier Diversity Program);
- Qualifications Statement;
- Demonstrated experience in providing services relative services described in the RFR;
- Knowledge of Relevant Massachusetts Regulations and Policies;
- Proposed overall approach to providing services described in the RFR;
- Demonstrated capacity and organizational structure to perform the services described in the RFR;
- Demonstrated intent that 50% or more of the work hours will be performed in Massachusetts - (Invest in Massachusetts); and
- The overall value of the price is included in the response.

With the initial review of responses and scoring completed, the PMT adjourned and agreed to meet again.

<b>Respondent</b>	<b>Final Score</b>	<b>Comments</b>
BVH Integrated Services, Inc., a Salas O'Brien Company	588	Complete
CMTA, Inc.	610	Complete
Fitzmeyer & Tocci Associates, Inc.	450	Complete
IMEG	440	Complete

The PMT met again on April 26, 2024, and discussed individual scores for each of the four responses. The PMT unanimously agreed to request virtual presentations from the top two firms in accordance with the RFR: BVH Integrated Services, Inc., a Salas O'Brien Company, and CMTA, Inc. As part of the virtual presentation process, the PMT prepared questions to send to Respondents to address during their virtual presentations.

Subsequently, virtual presentations were performed by both Respondents via Microsoft Teams on Friday, May 3, 2024.

Following Respondent presentations, the PMT convened on May 6, 2024, to discuss the Phase 2 evaluation of the Respondents, including the virtual presentations, and to consider a recommendation for the consultant that could best provide the anticipated services and for the best value. The PMT calculated the presentation scores based on the cumulative total of individual scores from each of the PMT members. The virtual presentation review and scorecard was based on the questions that the Respondents were asked to address during their presentations in combination with the previous scoring for the responses.

<b>Respondent</b>	<b>Final Score</b>
BVH Integrated Services, Inc., a Salas O'Brien Company	779
CMTA, Inc.	824

After completing the Phase 2 evaluation, the PMT recommended contracting with BVH Integrated Services, Inc., a Salas O'Brien Company, as they will provide the best overall value and best meet the business needs of the MSBA. In combination with the close Final Scores, the BVH Integrated Services, Inc., a Salas O'Brien Company, proposal provides 75% of the hours at 65% of the cost compared to CMTA, Inc.

**Recommendation:** The PMT recommends entering into a Master Services Agreement with BVH Integrated Services, Inc., a Salas O'Brien Company, to provide the services solicited in the RFR through June 30, 2025. The contract may be extended through October 31, 2025, under the same terms and conditions, at the discretion of the MSBA, based on a negotiated scope and not-to-exceed budget, for participation in approximately 15-20 site visits at existing public K-12 schools in Massachusetts as part of the MSBA 2025 Statement of Interest due diligence review

for potential ARP heat pump project invitations. The MSBA may, at its sole option, extend the contract for a period of time necessary, as determined by the MSBA in its sole discretion, to complete the services related to the RFR. The aggregate value of the Master Services Agreement is anticipated to 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.