

MEMORANDUM

TO: Board of Directors, Massachusetts School Building Authority
FROM: James A. MacDonald, First Deputy Treasurer, Chief Executive Officer
Mary L. Pichetti, Executive Director, Deputy Chief Executive Officer
SUBJECT: Recommendations to Execute Master Services Agreements for Commissioning Consultants
DATE: June 19, 2024

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 sixth 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 2020, through which the MSBA contracted with 18 firms to provide commissioning services for building envelope, addition, renovation and new construction projects funded by the MSBA (11 full-service commissioning consultants for core projects, seven commissioning consultants for building envelope commissioning services for roofing and window projects in the Accelerated Repair Program (Building Envelope Commissioning), eleven commissioning consultants for partial systems commissioning services, and ten commissioning consultants for commissioning services for post occupancy evaluations). 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	Estimated Const. Cost (Millions)	Cx Fees
636	469	703	\$17,332	\$50,148,207

On March 7, 2024, 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), on COMMBUYS (a web-based market center for the Commonwealth of Massachusetts) and advertised the RFR in the Goods and Services Bulletin.. In addition, the MSBA hosted a Procurement Overview Informational Session in conjunction with the Supplier Diversity Office to provide outreach to commissioning firms. The meeting was attended by approximately (9) firms interested in Commissioning Services.

The MSBA received 23 Responses prior to the deadline of April 12, 2024 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, post occupancy and recommissioning). See Table 1 below.

Respondent	Commissioning Categories				
	Full Cx	Partial Bldg./ Single System	Roof/ Envelope	Post Occupancy	Recommissioning
3iVE LLC			√		
Affiliated Engineers, Inc.	√	√	√	√	√
BALA Consulting Engineers	√	√		√	√
Bard, Rao + Athanas Consulting Engineers	√	√		√	√
Building Enclosure Associates, LLC		√	√	√	
Building Enclosure Science, LLC	√	√	√	√	
Building Evolution Corporation	√	√	√	√	√
Colliers Project Leaders USA NE, LLC	√	√	√	√	√
Consulting Engineering Services, LLC	√	√	√	√	√
Cx Associates, LLC	√	√	√	√	√
Fitzemeyer & Tocci Associates, Inc.	√	√	√	√	√
FST-HEA, LLC	√	√	√	√	√

ICO Energy and Engineering, Inc.	✓	✓		✓	✓
Jacobs Engineering Group, Inc.	✓	✓	✓	✓	✓
NV5 Planning and Design, INC.	✓	✓	✓	✓	✓
Rist-Frost-Shumway Engineering, PC	✓	✓	✓	✓	✓
R.J. Kenney Associates, Inc.			✓		
BVH Integrated Services, Inc. a Salas O'Brien Company	✓	✓	✓	✓	✓
SMRT Architects & Engineers	✓	✓	✓	✓	✓
SOCOTEC AE Consulting, LLC			✓		
TERVA Engineering Corporation	✓	✓	✓	✓	✓
Thompson & Lichtner Co., Inc.		✓	✓		
van Zelm Heywood & Shadford, Inc.	✓	✓		✓	✓

After completing the Phase One Review of each Response for responsiveness and completeness, MSBA staff advanced all 23 responses for Phase Two Review and substantive evaluation.

A committee of five MSBA staff members reviewed the 23 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 23 responses, MSBA staff found that 21 firms meet the needs of the MSBA. Staff recommends contracting with 21 firms to provide commissioning services for addition, renovation and new construction projects funded by the MSBA. 16 firms will provide full building commissioning services for core projects, 18 firms will provide building envelope commissioning services for roofing and window projects in the Accelerated Repair Program (Building Envelope Commissioning), 18 firms will provide partial systems commissioning services, 17 firms will provide commissioning services for post occupancy evaluations and 16 firms will provide recommissioning services. The 21 firms and the categories of commissioning services each will provide are listed below:

Full Building Commissioning

Affiliated Engineers, Inc.
Bard, Rao + Athanas (BR+A) Consulting Engineers
Building Enclosure Science
Building Evolution Corporation
BVH Integrated Services, Inc. a Salas O'Brien Company
Colliers Project Leaders USA NE, LLC
Consulting Engineering Services, LLC
Fitzmeyer & Tocci Associates, Inc.
FST-HEA, LLC
ICO Energy and Engineering, Inc.
Jacobs Engineering Group, Inc.
NV5 Planning and Design, INC.
Rist-Frost-Shumway Engineering, PC
SMRT Architects & Engineers
TERVA Engineering Corporation
van Zelm Heywood & Shadford, Inc.

Building Envelope Commissioning

3iVE LLC
Affiliated Engineers, Inc.
Building Enclosure Associates, LLC
Building Enclosure Science
Building Evolution Corporation
BVH Integrated Services, Inc. a Salas O'Brien Company
Colliers Project Leaders USA NE, LLC
Consulting Engineering Services, LLC
Fitzmeyer & Tocci Associates, Inc.
FST-HEA, LLC
Jacobs Engineering Group, Inc.
NV5 Planning and Design, INC.
Rist-Frost-Shumway Engineering, PC
R.J. Kenney Associates, Inc.
SMRT Architects & Engineers
SOCOTEC AE Consulting, LLC
TERVA Engineering Corporation

Thompson & Litchner Co., Inc.

Partial Systems Commissioning

Affiliated Engineers, Inc.
Bard, Rao + Athanas (BR+A) Consulting Engineers
Building Enclosure Associates, LLC
Building Enclosure Science
Building Evolution Corporation
BVH Integrated Services, Inc. a Salas O'Brien Company
Colliers Project Leaders USA NE, LLC
Consulting Engineering Services, LLC
Fitzmeyer & Tocci Associates, Inc.
FST-HEA, LLC
ICO Energy and Engineering, Inc.
Jacobs Engineering Group, Inc.
NV5 Planning and Design, INC.
Rist-Frost-Shumway Engineering, PC
SMRT Architects & Engineers
TERVA Engineering Corporation
Thompson & Litchner Co., Inc.
van Zelm Heywood & Shadford, Inc.

Post Occupancy Evaluations

Affiliated Engineers, Inc.
Bard, Rao + Athanas (BR+A) Consulting Engineers
Building Enclosure Associates, LLC
Building Enclosure Science
Building Evolution Corporation
BVH Integrated Services, Inc. a Salas O'Brien Company
Colliers Project Leaders USA NE, LLC
Consulting Engineering Services, LLC
Fitzmeyer & Tocci Associates, Inc.
FST-HEA, LLC
ICO Energy and Engineering, Inc.
Jacobs Engineering Group, Inc.
NV5 Planning and Design, INC.
Rist-Frost-Shumway Engineering, PC
SMRT Architects & Engineers
TERVA Engineering Corporation
van Zelm Heywood & Shadford, Inc.

Recommissioning

3iVE LLC
Affiliated Engineers, Inc.
Bard, Rao + Athanas (BR+A) Consulting Engineers
Building Evolution Corporation

BVH Integrated Services, Inc. a Salas O'Brien Company
Colliers Project Leaders USA NE, LLC
Consulting Engineering Services, LLC
Fitzmeyer & Tocci Associates, Inc.
FST-HEA, LLC
ICO Energy and Engineering, Inc.
Jacobs Engineering Group, Inc.
NV5 Planning and Design, INC.
Rist-Frost-Shumway Engineering, PC
SMRT Architects & Engineers
TERVA Engineering Corporation
van Zelm Heywood & Shadford, Inc.

Recommendations: Authorize the Executive Director to enter into negotiations and execute Master Services Agreements for Commissioning Services with the listed firms, the cost of which may exceed \$250,000 per agreement. The aggregate value of the Master Services Agreements are 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.