

## **REQUEST FOR RESPONSES (RFR)**

### **Massachusetts School Building Authority**

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**RFR File Name/Title:** Data Master Plan Development

**RFR File Number:** MSBA-RFR-DMP2025

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#### **SECTION I. SUMMARY**

The Massachusetts School Building Authority (MSBA) seeks responses from qualified consultants to assist in developing a comprehensive Data Master Plan that will assess, structure, and optimize MSBA's data collection, management, and analysis practices with a focus on the needs of the Capital Planning Department. This effort aims to enhance operational efficiency, assess and improve overall data governance, improve reporting, and support strategic decision-making. The consultant will conduct a systematic data audit, identify gaps, assess integration opportunities, make recommendations and develop a plan for an optimized data collection user experience ("UX") workflow for multiple user types compile a list of recommended reports and Key Performance Indicators ("KPIs") to improve data-driven decision making, and establish governance protocols to ensure data accountability and consistency across all departments.

The MSBA intends to select and contract with a single, qualified respondent based on a best-value determination, considering qualifications, experience, capacity, organizational structure, and approach to the services requested.

Minority Business Enterprise (MBE), Women Business Enterprise (WBE), Minority and Women Business Enterprise (M/WBE), Veteran Business Enterprise (VBE), Service-Disabled Veteran-Owned Business Enterprise (SDVOBE), Disability-Owned Business Enterprise (DOBE), Lesbian , Gay, Bisexual or Transgender Business Enterprise (LGBT), Minority Nonprofit Organization (M/NPO), Women Nonprofit Organization (W/NPO) or Minority and Women Non-Profit Organization (M/W/NPO) firms are encouraged to submit responses.

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## **SECTION II. MSBA 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 Chair, the Secretary of Administration and Finance, the Commissioner of Education, and four additional members appointed by the State Treasurer.

Prior to the establishment of the MSBA, the Department of Education administered and managed the former school building assistance program. Chapter 208 eliminated the former program and created a new program for school building construction, renovation and repair projects (the "Program"), administered by the MSBA. The new Program provides assistance to cities, towns, regional school districts and independent agricultural and technical schools to finance school building projects. The MSBA has adopted regulations necessary to administer the Program and to review and approve applications for reimbursement for school building construction projects.

For more information about the MSBA and its program, please visit our website at [www.massschoolbuildings.org](http://www.massschoolbuildings.org) and refer to Massachusetts General Laws Chapter 70B, Chapter 208 of the Acts of 2004, and 963 CMR 2.00 et se

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## **SECTION III. OBJECTIVES**

The selected respondent will assist the MSBA in developing a Data Master Plan that provides a strategic approach to understanding and optimizing the organization's data landscape. This includes identifying what data exists, assessing how it is collected and used, determining how additional data should be incorporated, and developing a full-scale plan to implement data collection, processing, and usage. The plan will define clear governance policies, improve interoperability between data systems, and establish standardized processes for data collection, validation, and management. Additionally, it will ensure data quality and accessibility for all stakeholders while aligning data-driven decision-making with MSBA's operational and strategic goals. The engagement will also deliver a framework for continuous monitoring and long-term data improvements, supporting future enhancements in data integration and workflow efficiency.

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## **SECTION IV. SCOPE OF WORK**

The MSBA anticipates that the scope of services for the selected firm will include the following. While the Scope of Work below provides specific direction, the MSBA is willing to consider changes to the methodology based on experience and practice.

### **Focus**

The system update is focused on the needs of the Capital Planning Department at the MSBA. Systems that are not managed by or on behalf of the Capital Planning Department will be assessed for the purpose of data integration into the Capital Planning Department's systems, but will not be modified as part of this

Data Master Plan. The following are the systems to be considered in the study and the role they will play within the Data Master Plan.

Application	Action	Comment
<b>Commissioning Billing System</b>	Review for data cross-integration only, no incorporation into system	This system is for tracking payments to commissioning agents. Commissioning outcomes will be considered, but payments will only be pulled in from the outside system.
<b>Designer Selection Application</b>	Assess for incorporation	
<b>Enrollment Projection Application</b>	Assess for incorporation	
<b>Forecasting Tool</b>	Assess as potential report	This is a tool that may be incorporated as an output.
<b>Maintenance and Capital Planning Application</b>	Review for data cross-integration only, no incorporation into system	This system is for assessment of maintenance and capital planning reports from the district and can be assessed to pull data into the system, but not for updating.
<b>MSBA Reports Application</b>	Assess as reports	
<b>Needs Survey 2010</b>	Review for historical data only	Assessed as historical data, but not for inclusion in a UX.
<b>OPM Reports</b>	Assess for incorporation	
<b>OPM Selection Application</b>	Assess for incorporation	
<b>Post Occupancy Evaluation</b>	Assess for potential incorporation	This application data is collected from a consultant.
<b>Progress Payment System</b>	Review for data cross-integration only, no incorporation into system	This is a finance system. Consultant will review data to understand what will be pulled into the system, but will not be incorporated into the Capital Planning systems.
<b>Project Management Application</b>	Assess for incorporation	
<b>School Survey 2016</b>	Review for historical data only	
<b>School Survey 2025</b>	Assess for incorporation	
<b>Statement of Interest Application</b>	Assess for incorporation	
<b>Website Content Request Form</b>	Assess for incorporation	
<b>SharePoint</b>	Assess Capital Planning SharePoint documents for incorporation only	

## Step 1: Define Authority Objectives

The primary goal of this step is to establish a clear understanding of the strategic priorities of the MSBA to align the Data Master Plan with MSBA's overarching mission, goals, objectives, and needs. This phase will ensure that data management objectives are directly tied to the Authority's operational and decision-making needs.

Tasks:

### 1) Kickoff Meeting:

- Conduct an initial project kickoff meeting with key MSBA stakeholders (e.g., senior leadership, data and IT staff, program managers) to gather context on current Authority goals, data usage, and areas for improvement.
- Review RFR deliverables and milestones and clarify expectations for the Data Master Plan.
- Define roles and responsibilities for the project, including identification of subject-matter experts (SMEs) within MSBA to support the engagement.
- Establish communication and invoicing protocols.
- Discuss the desired outcomes and impact of the Data Master Plan on MSBA's operations and strategic direction.

### 2) Align Data Objectives with MSBA's Mission:

- Review MSBA's mission, vision, long-term strategic goals and objectives to ensure that the Data Master Plan aligns with objectives.
- Map broader MSBA Authority goals to specific data objectives that can help achieve these goals.
- Identify how improved data management supports strategic outcomes.
- Document areas where data plays a key role in decision-making and transparency.

### 3) Outline Initial High Level Desired Outcomes of the Data Master Plan:

- High-level priorities (e.g., enhance data accessibility, support decision-making, ensure data integrity).
- Set the vision for what a successful Data Master Plan will achieve.
- Provide leadership with a roadmap for subsequent steps and plan to develop the Data Master Plan.

Deliverables:

- **Communication and Work Plan:** Documents communication and invoicing protocols, defines task specific expectations and milestones.
- **Authority Objectives Report:** Summarizes MSBA's strategic priorities, decision-making needs, and initial alignment of the Data Master Plan.

## Step 2: Identify and Interview Stakeholders

Engage cross-functional stakeholders—internal and external—to gather comprehensive insights on MSBA's current data practices, challenges, and opportunities. This step ensures that the Data Master Plan addresses the needs and priorities of all relevant users and decision-makers involved in school building projects and funding oversight.

### 1) Compile a List of Stakeholders

- Identify internal and external stakeholders involved in data collection, management, usage, and decision-making processes. Ensure stakeholder coverage across all levels and perspectives, from data entry and operational use to strategic decision-making and governance. Stakeholders may include:
  - **MSBA Staff and Leadership:** Executive leadership, operational staff to include representatives from each project related team and function, Data Team, and IT.
  - **Sample District Staff:** Representatives from school districts participating in MSBA programs, including superintendents, business managers, and facilities directors.
  - **MSBA Professional Services Consultants:** External consultants of the MSBA including Project Management Services, Technical Services, Post Occupancy Evaluation (POE), and School Survey.
  - **Owner's Project Managers (OPMs):** External professionals managing capital projects on behalf of districts.
  - **Designers:** Architects and design professionals involved in school construction and renovation projects.
  - **Contractors:** General contractors and construction managers working on MSBA-funded projects.
  - **MSBA Board Members** (as appropriate): Individuals providing governance, oversight, and high-level decision-making.
- Group stakeholders by their roles and relationship to data:
  - Data Inputters
  - Data Users
  - Decision-Makers

### 2) Develop Stakeholder Engagement Tools

- Create standardized interview and workshop templates to ensure consistency across stakeholder interactions.
- Develop surveys and presentations for engaging District representatives, Owner's Project Managers, Designers and Contractors.
- Develop interview questions and prompts for each identified MSBA group designed to elicit:
  - Current data use cases and workflows.
  - Pain points or inefficiencies in entering, accessing, using, or interpreting data.
  - Suggestions for improving data quality, accessibility, or usability.
  - Perspectives on how better data management could improve decision-making and outcomes.

### 3) Conduct Stakeholder Surveys, Presentations, Interviews, and Workshops

- Schedule and facilitate one-on-one interviews and group sessions with identified stakeholders.
- Capture detailed notes and document key findings, focusing on:
  - Critical data needs and priorities.

- Common challenges in the data lifecycle (UX, data collection, management, reporting, etc.).
- Suggestions for system improvements or data governance practices.
- Encourage open dialogue to uncover hidden issues and innovative ideas.
- Collect reports, data needs, and methodologies of analysis from stakeholders to understand their needs.

#### 4) Analyze Stakeholder Input and Feedback

- Review and synthesize feedback from interviews and workshops.
- Identify recurring themes, such as:
  - Data quality concerns (accuracy, completeness, timeliness).
  - System usability issues (ease of entry, integration, reporting).
  - Workflow inefficiencies or redundancies.
- Highlight shared challenges across departments and roles to prioritize areas for improvement.

#### 5) Validate Initial Findings with MSBA Stakeholders

- Share a summary of key findings and stakeholder input to confirm accuracy.
- Solicit feedback to refine the analysis.
  - Data quality concerns (accuracy, completeness, timeliness).
  - System usability issues (ease of entry, integration, reporting).
  - Workflow inefficiencies or redundancies.
- Ensure stakeholder alignment and buy-in for next steps in the Data Master Plan development.

#### Deliverables:

- **Stakeholder Analysis Report:** A summary of stakeholder input, including pain points, issues, priorities, suggestions, bottlenecks, and public feedback. Provide a comprehensive documentation of stakeholder groups, roles, and responsibilities. Include a map of data flows for all stakeholders and their interactions with available data, the system, and their individual workflows. Identification of critical data needs and data gaps from stakeholder perspective.

### Step 3: Document Data Requirements

Conduct a comprehensive review of MSBA's current data needs and usage, followed by the documentation of future-state data requirements and workflows. Define and categorize all data types, sources, formats, and workflows, identifying how data is currently being used and how it can be improved. This phase builds the foundation for improving data collection, management, and transparency by identifying what data is needed, how it should be structured, and how it supports Authority objectives. Understand and define MSBA's ideal data needs by first reviewing the current data needs and reports in use and then building out a clear set of data requirements that reflect the Authority's policy objectives and transparency goals.

#### 1) Review and Assess Current Data Needs and Reports

- Inventory Existing Reports and Dashboards in Use:
  - Identify reports MSBA teams and leadership currently rely on (internal and external reports, Board reports, public-facing reports).
  - Document their purpose, frequency, and audience.

- Evaluate if current reports adequately support decision-making, compliance, and transparency.
- Assess Current Information Gaps and Pain Points
  - Gather feedback from stakeholders (from Step 2) on where current reports and data outputs fall short.
- Identify Opportunities for New Information and Transparency
  - Explore potential new datasets or reporting opportunities to improve operational efficiency, funding and programmatic outcomes, and transparency and accountability.

## **2) Identify and List Ideal State Data Requirements**

- Define What Data MSBA Needs (Regardless of Current Availability).
  - Develop a comprehensive list of data requirements, guided by MSBA's strategic objectives, stakeholder input, and insights gained from the current report and data needs assessment.
- Define data attributes with context
  - For each requirement, document:
    1. Item Name/Description
    2. Type
    3. Source
    4. Purpose
    5. Input Method
    6. Provider Role
    7. Entry Timing
    8. Module Involved or Business Process
    9. Processing Requirements
    10. Storage Method
    11. Format for Storage
    12. Granularity
    13. Access Level
    14. Integration Points
    15. Retention Requirements
    16. Criticality
    17. Intended Uses

## **3) Develop Initial Data Workflow Concepts**

- Sketch out high-level workflows for key data processes including data intake, validation, analysis and reporting, and decision making.
- Include clear descriptions of roles and responsibilities at each step.
  - These concepts set the foundation for detailed workflow diagrams and swim lanes in later phases.

## **4) Validate and Prioritize Data Requirements**

- Link Each Data Requirement to Business Needs. Connect data points to specific objectives, decisions, or reports they support.
- Share draft data requirements and workflows with stakeholders to ensure alignment with their priorities.

- Update priorities, add missing requirements, and document rationale behind each data need.

#### Deliverables:

- **Current Data Needs and Reporting Assessment:** This deliverable will provide a comprehensive review of the current data needs across MSBA’s functional areas. It will include an inventory of reports and dashboards that are currently used by MSBA staff, leadership, Board members, and external stakeholders, such as districts and OPMs. The assessment will evaluate how these reports support decision-making, transparency, and accountability, and will identify any gaps or inefficiencies that limit their usefulness. Additionally, this deliverable will highlight opportunities for new reports or data insights that could enhance MSBA’s service delivery, operational efficiency, or public transparency.
- **Data Requirements Matrix:** The Data Requirements Matrix will be a structured document that outlines the specific data points required to support MSBA’s policy objectives and decision-making processes. It will categorize each data requirement by each data attribute listed above. The matrix will also link each data requirement to specific reports, workflows, or KPIs it supports or should support. This deliverable ensures a clear and detailed understanding of the ideal data environment needed to meet MSBA’s strategic goals.
- **Validated Data Requirements Report:** The Validated Data Requirements Report will synthesize all data needs identified in this phase, refined and prioritized based on stakeholder feedback. It will provide a clear rationale for each data requirement, explicitly linking it to MSBA’s strategic objectives, decision-making needs, or reporting requirements. This report will document any adjustments made during stakeholder validation sessions and will serve as an authoritative reference for subsequent phases of the project, particularly when evaluating current data systems and designing future-state processes.

#### Step 4: Assess Current Data Availability

This step focuses on understanding the current landscape of data within MSBA and its external partnerships by conducting a comprehensive inventory of existing data sources. It includes evaluating data quality and accessibility as well as mapping current dataflows and dependencies. The goal is to create a clear and objective baseline of where data resides and how it moves throughout the organization—without yet assessing whether these sources fully meet MSBA’s data needs. This step also identifies where data is maintained off-system, such as SharePoint, personal drives, and in file exchanges between MSBA and external stakeholders. Analysts must pay specific attention to identifying data that exists outside the system, such as documents that may end up being shared via email, on personal computer files, and on SharePoint. The placement of this step is intentional to ensure that data needs are reassessed, and not specifically tied to what already exists, with an eye towards considering what is necessary for a finalized system.

##### 1) Inventory Existing Data Sources and Data Points

- Conduct an exhaustive inventory of current data sources and data points available at the MSBA:
  - Identify and collect data in all formats in consultation with MSBA staff.



- Sources may include structured databases, spreadsheets, cloud-based libraries, document storage, and filed documentation.
- Catalog data sources and data points by type, module, origin, system, storage location, responsible party (enter, maintain), end-user, update frequency, format, and other categories as appropriate.
- Note where data is clearly incomplete.
- 2) Evaluate Data Quality, Bottlenecks, and Accessibility**
  - Evaluate and document the observable characteristics of data quality, such as consistency of formatting, presence of incomplete fields, or visible discrepancies between systems.
  - Evaluate the ease of access to data sources for staff and stakeholders, including whether data is stored in centralized systems, distributed across multiple locations, or restricted by access controls.
  - Note where data resides in silos and where it is shared or exchanged between internal and external stakeholders.
- 3) Map Current Dataflows and Dependencies**
  - Develop diagrams or flowcharts to show how data moves between systems and stakeholders. This includes both internal MSBA processes and exchanges with external stakeholders like districts, MSBA consultants, Owner's Project Managers (OPMs), designers, and contractors.
    - Include representation of data dependencies—for example, how one system relies on inputs from another—and how data is shared or handed off at different stages of MSBA's processes.
  - Document where data is manually transferred (e.g., email attachments, spreadsheets) versus integrated system exchanges).

**Deliverables:**

- **Current Data Source Inventory:** A comprehensive inventory of all existing data sources currently in use by MSBA and its external stakeholders. It will categorize data by type, source, owner, storage location, system or platform, purpose, input method, entry timing, module, format, accessibility, integration points, and criticality. The report will specifically document where data is maintained outside of formal systems, such as SharePoint folders, personal drives, and ad hoc exchanges of files and reports. This inventory establishes a detailed snapshot of the current data environment and will serve as the foundation for future gap analysis.
- **Data Quality and Accessibility Review:** This review will summarize observable characteristics of data quality, such as formatting inconsistencies, incomplete records, and visible discrepancies between data sources. This review will also document how accessible each data source is, noting where data is centralized, distributed, or siloed. This descriptive review will also include observations about data sharing practices, such as file exchanges with external stakeholders and storage of documents outside MSBA's official systems.
- **Current-State Dataflow and Dependency Maps:** This deliverable will include a series of diagrams that illustrate the flow of data across MSBA's systems, departments, and external partners. The maps will document where data enters the organization, how it is processed, who uses it, and where it is stored or handed off. They will also show how data is exchanged between MSBA and external stakeholders, including instances of manual file transfers and ad hoc sharing practices.

These visualizations will clarify the movement of data through current workflows and provide the basis for identifying inefficiencies and gaps in the next phase.

## **Step 5: Analyze Data Gaps**

This step identifies and evaluates missing, outdated, incomplete, or inefficient data processes across MSBA's data landscape. It compares MSBA's ideal data requirements—established in Step 3—with the existing data inventory and flows documented in Step 4. The goal is to highlight discrepancies between what data MSBA needs to support operations, decision-making, and transparency, versus what data is currently collected, stored, or accessible. This analysis focuses on understanding both the operational and strategic impacts of these gaps and sets the stage for developing targeted solutions in future phases. In addition to identifying gaps, this step critically assesses whether any existing data collection activities lack business justification or are taking place outside of the enterprise system, or without clear governance or management. These insights set the stage for strategic recommendations on optimizing MSBA's data ecosystem.

### **1) Identify Data Gaps**

- Revisit the data requirements gathered from stakeholders in Step 3 and compare them to the current state of data availability and usage documented in Step 4.
- Identify data being collected and maintained off the enterprise system (e.g., SharePoint files, personal drives, direct exchanges between internal and external stakeholders) and determine whether it should be integrated into MSBA's enterprise system to support data governance, security, and accessibility.
- Document data collection practices that do not have a clear business justification, are duplicative, or fail to align with MSBA's objectives. Evaluate whether these practices should be discontinued or redesigned.

### **2) Evaluate the Impact of Data Gaps and Redundant Collection**

- Assess the operational and strategic impact of missing or incomplete data on decision-making, reporting, compliance, and transparency.
- Evaluate the risks and inefficiencies associated with maintaining critical data off-system, including data fragmentation, duplication, and lack of version control.
- Prioritize gaps and redundant processes based on their business impact, focusing on opportunities to streamline data practices and improve the overall integrity of MSBA's data ecosystem.

### **3) Document Data Gaps and Propose Solutions**

- Create a comprehensive data gap analysis report that includes:
  - Missing or insufficient data needed to support policy objectives.
  - Data currently collected or exchanged off the enterprise system that should be integrated into formal systems and workflows.
  - Data collection activities lacking a clear business justification, with recommendations on whether they should be revised or eliminated.
- Propose potential solutions for each identified gap or inefficiency, such as process improvements, expanded data collection, system integration, or retiring redundant data processes.

- Prioritize proposed solutions by their impact, feasibility, and alignment with MSBA's strategic goals.

**Deliverables:**

- **Data Gap Analysis:** This report compares MSBA's defined data requirements to the current data available both within and outside of the enterprise system. The report identifies missing, outdated, or inefficient data, highlights data that is being collected without a clear business justification, and pinpoints data maintained off-system that should be integrated into the enterprise system. It includes an assessment of the impact these gaps have on operations, reporting, and decision-making, and provides prioritized recommendations for addressing the gaps and improving data alignment with MSBA's objectives.

## **Step 6: Evaluate Data Collection Methods**

This step focuses on assessing MSBA's current data collection methods and identifying opportunities for improving efficiency, accuracy, and effectiveness. The objective is to ensure that data collection processes align with MSBA's business needs, minimize manual effort, and support high-quality, timely data for decision-making and transparency.

### **1) Review Current Data Collection Methods**

- Assess how data is collected across different departments, modules, roles, and systems.
- Review how internal and external stakeholders provide data and how it is received and processed by the MSBA.
- Review how the data is maintained and used by the MSBA.

### **2) Evaluate Opportunities for Improvement**

- Identify inefficiencies, redundancies, and bottlenecks in current data collection processes.
- Analyze opportunities for automation, technology integration, stakeholder integration, and process streamlining.
- Evaluate potential improvements in data accuracy, timeliness, resource utilization, compliance, and user experience.

### **3) Recommend New Data Collection Methods**

- Propose new methods, tools, and technologies to fill data gaps, reduce manual effort, and improve efficiency.
- Recommend solutions such as automated data feeds, standardized templates, Application Programming Interfaces (API), or more user-friendly data entry systems.
- Consider the impact on internal users and external stakeholders, focusing on minimizing burden and supporting consistent, high-quality data collection.

**Deliverables:**

- **Data Collection Methods Assessment and Recommendations Report:** This report summarizes the current data collection practices, identifies challenges and inefficiencies, and outlines recommended methods and technologies to improve efficiency, accuracy, and user experience.

The report will serve as a roadmap for enhancing MSBA's data collection processes, ensuring alignment with organizational objectives and data governance best practices.

## **Step 7: Assess Data Integration Opportunities**

This step focuses on identifying and evaluating opportunities to integrate various data systems within the MSBA to enhance data accessibility, streamline workflows, and ensure accurate, actionable data flowing into and out of the Capital Planning Data Systems. By understanding how data flows between systems and recognizing integration needs, the MSBA can improve operational efficiency and decision-making. The integration strategy developed here will provide a clear roadmap for achieving better data cohesion, scalability, and accessibility between Capital Planning systems and other enterprise systems.

### **1) Map Current Data Systems and Flows**

- Mapping where data is currently stored and processed, including both internal systems and external systems (e.g., third-party services, cloud platforms), where it is necessary for data to be integrated into Capital Planning systems.
- Identify how data flows between systems, including which systems access the data and how it's used.
- Identify any limitations or bottlenecks with the current tools.
- Record any redundancies or silos in data management that could complicate future integration efforts.

### **2) Identify Integration Needs**

- Based on the data gaps identified in Step 5, assess where data integration will be required.
- Focus on areas where data from multiple systems or sources should be merged or centralized to improve efficiency, decision-making, and operational effectiveness.
- Evaluate which systems or data sources need to be integrated to provide a comprehensive view that meets business requirements.

### **3) Develop an Integration Strategy**

- In conjunction with stakeholders, decide on the best approach to implement the integration.
- Develop an integration timeline.

Deliverables:

- **Data Integration Strategy Report** will summarize the current data systems and integrations, identify key integration needs, and outline a strategic plan for implementation.

## **Step 8: Develop Data Governance Framework**

This framework will define roles, policies, and procedures that establish clear accountability and standards for managing data across the organization. It will provide the structure necessary to safeguard data quality and ensure it is used effectively and responsibly.

### **1) Consider Data Governance Needs and Objectives**

- Define the purpose of the data governance framework, such as improving data quality, ensuring compliance, or enhancing decision-making.
- Establish the scope of governance, including the types of data, departments, or systems to be covered by the framework.
- Align governance goals with organizational priorities, regulatory requirements, and industry standards.
- Establish policies for data quality, usage, sharing, and security. Define standards for data accuracy, consistency, and privacy.

## 2) Define Roles and Responsibilities

- Assign specific roles for data governance, including data stewards, data owners, and data custodians responsible for maintaining data quality, security, and compliance.
- Establish accountability for data management and specify who is responsible for maintaining data quality, security, and access control.
- Define metrics for evaluating the success of data governance, such as data accuracy rates or compliance adherence.

## 3) Construct a Data Governance Framework

- Choose appropriate tools to support governance activities.
- Develop detailed documentation outlining recommended governance policies, roles, and responsibilities.
- Develop a data governance roadmap for implementing governance practices, including the necessary resources, technology, and training needed.

### Deliverables:

- **Data Governance Framework Recommendations and Implementation Plan:** This is a document that includes detailed governance policies, roles and responsibilities, governance tools, security measures, and compliance protocols. The framework will be used to ensure data accuracy, security, and compliance while aligning with organizational goals.

## Step 9: Develop a Fully Integrated Workflow

The goal of Step 9 is to develop an integrated workflow for data entry and management that reflects the Grant Program process at MSBA and minimizes manual effort. Each stage of the Grant Program process will involve different workflows, based on the roles and responsibilities of the MSBA team members and stakeholders involved in the data collection process. This step will outline how data enters the system at each point of the process, ensuring that data is captured accurately and efficiently for further analysis and reporting. The goal of this step is to **develop a map** of a future User Experience (UX) for Capital Planning processes, which will include how data enters the system, designed to mirror the MSBA workflow and the parties involved in that workflow.

### a) Break Down Each Stage of the MSBA's Process

- Identify all teams involved. List internal and external teams (e.g., Districts, Consultants, OPMs, Designers, etc.).

- Understand the workflow at each stage and for each team. Review the stages of the school construction process, as defined earlier, and the activities at each stage.
- b) Map Out Data Entry Points and Responsible Parties**
- Define entry points for each team and each timepoint within the process. Identify when, where, and by whom data will be entered during the process, and where it will be displayed across the system.
  - Note cross-departmental data flows. Recognize when data entered by one team is used or updated by another team.
- c) Define Data Fields for Each Entry Point**
- Specify data types, formats, and requirements. For each entry point identified, detail what data is needed, such as text, numbers, dates, or attachments.
  - Develop a list of defined data fields for each portion of the workflow that requires an entry point.
  - Ensure that all data fields are categorized by entry point and locations where they are utilized throughout the workflow.
- d) Create a User Flow Map for Data Entry**
- Develop a workflow diagram. Visualize how data moves through the system, who enters it, and where it is used. This can be a flowchart or a swim-lane diagram.
  - Outline UX touchpoints. Map where users will interact with the system, including screens, forms, and dashboards for each role.
  - Define validation and dependencies. Identify required fields, conditional inputs, and pre-filled/calculated fields.
- e) Review Cross-Functional Dependencies**
- Identify handoffs between external and internal users and determine how data transitions from one team to another, ensuring consistency.
  - Ensure traceability by establishing connections between data points.
  - Supplement flow map with cross-functional dependencies.
- f) Validate and Refine Workflow**
- Conduct stakeholder workshops to review the workflow with teams to ensure accuracy and completeness.
  - Adjust flow maps and data field breakdowns to incorporate feedback and streamline data entry.

**Deliverables:**

- **Integrated Workflow Map:** Visual representation showing tasks, dependencies, and responsible teams for each stage of the construction process.
- **Data Field Breakdown:** Detailed description of each data field, specifying who is responsible for entering the data, the format, use, details, and any dependencies between fields.

**Step 10: Create the Data Master Plan**

The goal of this step is to document a structured Data Master Plan that outlines the design, implementation, and management of the MSBA's integrated data workflow system. This plan will serve as a blueprint for data collection, validation, integration, reporting, and long-term data governance. It will

define the operational and procedural framework for a Capital Planning User Experience, ensuring that all workflows, data points, and reporting structures align with MSBA's Capital Planning operational and analytical needs.

This step will incorporate the findings from Step 9, translating the integrated workflow into a comprehensive implementation strategy. It will also establish protocols for data governance, system integration, and long-term sustainability.

**1) Outline Data Collection Procedures**

- Specify data entry methods. Define whether data is entered manually, imported from external sources, or generated through automated processes.
- Assign responsibility and clarify which teams (internal and external) are responsible for data entry and validation.
- Standardize input formats to establish uniform data entry formats and ensure accuracy and consistency.
- Document the finalized version of how data is entered and flows across different teams.
- Incorporate the Integrated Workflow Map and Data Field Breakdown from Step 9 into the plan.

**2) Establish Data Collection, Storage, and Reporting Protocols**

- Recommend systems and databases that are most suitable platforms for data collection, data storage, and reporting within the MSBA.
- Define data lifecycle procedures and establish guidelines for data retention, archival, and deletion schedules.
- Define authentication procedures, encryption requirements, and role-based access permissions as defined in Step 8.

**3) Plan for Data Integration**

- Develop a strategy for incorporating relevant data from external sources, such as spreadsheets, third-party platforms, or legacy systems.
- Plan for seamless data sharing between this system, other potential systems within the MSBA, and other platforms used by external stakeholders.

**4) Develop Reporting and Analytics Framework**

- Specify key reports, dashboards, and analytics needed for decision-making.
- Map data inputs to reporting outputs to ensure the necessary data fields are collected to generate meaningful insights.
- Define procedures for exporting and aggregating data for analysis and reporting.

**5) Develop an Implementation Plan**

- Outline a step-by-step rollout strategy that defines phases for system development, testing, and deployment.

Deliverables:

- **Final Data Master Plan Document:** A structured planning document detailing all components of the plan to manage and maintain data, including requirements and specifications for data,

including storage, processing, and reporting, human resources, UX recommendations, access control guidelines, planned outputs and reports, and methods of ensuring buy-in.

- **Data Collection and Workflow Map:** A refined version of the Integrated Workflow Map, including final data entry procedures.
- **Implementation Roadmap:** A step-by-step plan for deploying the new system, including development milestones and training requirements.
- **Reporting and Analytics Framework:** A structured approach to generating reports, dashboards, and data pulls.

### **Step 11: Stakeholder Review, Validation, and Finalization**

In this stage, the consultant will engage stakeholders in reviewing and validating the Data Master Plan and other deliverables to ensure alignment with MSBA's strategic goals and operational needs. This step will incorporate direct feedback from internal and external user groups, ensuring that the workflows, data structures, and reporting outputs reflect the real-world requirements of those who will interact with the system.

By involving stakeholders at this stage, the consultant will:

- Confirm that workflows and data structures meet operational needs.
- Identify gaps, inconsistencies, or areas for improvement.
- Facilitate consensus building and buy-in for the proposed data strategy.
- Facilitate smooth adoption and usability of the future system.

This step will result in **refinements to the Data Master Plan and Data Governance Framework** based on stakeholder insights.

#### **1) Share Stakeholder Summaries**

- Develop and share materials targeted for each relevant user group, including:
  - Workflows
  - Breakdowns
  - Potential Outputs
- Share the summaries with stakeholders in a structured format to ensure clarity and accessibility.
- Provide stakeholders with specific questions and guidelines for reviewing the materials to set expectations for feedback.

#### **2) Collect Comments**

- Engage stakeholders in structured discussions. Organize review sessions, workshops, or surveys to gather structured input from user groups.
- Capture insights on usability and alignment, collecting feedback on:
  - Data field definitions and formats.
  - Workflow accuracy and efficiency.
  - Reporting needs and system outputs.
  - Gaps or missing elements in the plan.



### 3) Respond to Comments and Synthesize Feedback

- Analyze and categorize feedback into themes.
- Determine the feasibility of the proposed changes to identify which feedback can be incorporated immediately and which may require further discussion.
- Validate that all updates align with MSBA's strategic and operational priorities.

### 4) Refine the Plan and Analysis

- Make necessary modifications to workflow and data structures based on stakeholder input.
- Conduct follow-up discussions to engage key stakeholders to validate changes and confirm alignment.
- Present refined recommendations for sign-off by executive leadership.

### 5) Update the Data Master Plan

- Incorporate validated changes into the plan to reflect stakeholder modifications.
- Produce a revised version of the Data Master Plan.

#### Deliverables:

- **Up to 10 Stakeholder Discussion Sessions:** Structured meetings that are coordinated through MSBA, facilitated by the Consultant, and led by subject matter experts in data systems and process management.
- **Stakeholder Summaries:** Summaries of the Data Master Plan developed and targeted to each stakeholder for their review and comment.
- **Stakeholder Review Summary:** A document capturing feedback, key discussion points, and decisions.
- **Updated Workflow and Data Field Breakdown:** Incorporating refinements based on stakeholder input.
- **Finalized Data Master Plan** – A final version of the Data Master Plan.

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## SECTION V. FEES

All Respondents must submit a proposed budget based on the tasks described above as understood by the Respondent. Budget should include hourly billing rates for each proposed team member, the projected number of hours that each team member will spend on each task, and a total fee amount. The final not-to-exceed fee will be negotiated with the successful Respondent(s) once a completed work plan is established and approved by the MSBA.

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## SECTION VI. SCHEDULE

The schedule for the project is a guideline and may be negotiated with the consultant during the interview stage of the process.

The duration of the contract resulting from this RFR will be through March 30, 2028. The duration of the contract may be extended for up to three (3) additional years based on a negotiated scope and not-to-exceed budget upon conclusion of the work proposed in this RFR.

		Development of a Data Master Plan		
Phase	Task	Start	Finish	Duration (days)
<b>Phase 1: Define Agency Objectives</b>				
	Kickoff Meeting	Wednesday, April 1, 2026	Tuesday, April 7, 2026	6
	Align Data Objectives with MSBA Mission	Wednesday, April 1, 2026	Friday, April 10, 2026	9
	Outline Initial High Level Outcomes of DMP	Friday, April 10, 2026	Thursday, April 16, 2026	6
	Agency Objectives Report	Friday, April 17, 2026	Friday, April 17, 2026	0
	<b>MSBA Review</b>	Friday, April 17, 2026	Friday, April 24, 2026	7
<b>Phase 2: Identify and Interview Stakeholders</b>				
	Compile a list of Stakeholders	Wednesday, April 1, 2026	Friday, April 24, 2026	23
	Develop Stakeholder Engagement Tools	Friday, April 17, 2026	Friday, April 24, 2026	7
	Conduct Stakeholder Interviews and Workshops	Monday, April 27, 2026	Thursday, May 14, 2026	17
	Analyze Stakeholder Input	Monday, May 4, 2026	Thursday, May 28, 2026	24
	<b>Stakeholder Analysis Report</b>	Thursday, May 28, 2026	Thursday, May 28, 2026	0
	Stakeholder and MSBA Review	Monday, June 1, 2026	Monday, June 15, 2026	14
	Validate Initial Findings	Monday, June 15, 2026	Tuesday, June 30, 2026	15
<b>Step 3: Document Data Requirements</b>				
	Review and Assess Current Data Needs and Reports	Wednesday, July 1, 2026	Thursday, July 30, 2026	29
	<b>Current Data Needs and Reporting Assessment</b>	Thursday, July 30, 2026	Thursday, July 30, 2026	0
	MSBA Review	Monday, August 3, 2026	Thursday, August 13, 2026	10
	Identify and List Ideal State Data Requirements	Monday, August 3, 2026	Thursday, August 20, 2026	17
	<b>Data Requirements Matrix</b>	Thursday, August 20, 2026	Thursday, August 20, 2026	0
	MSBA Review	Monday, August 24, 2026	Tuesday, September 1, 2026	8
	Develop Initial Data Workflow Concepts	Thursday, August 20, 2026	Friday, September 18, 2026	29
	Validate and Prioritize Data Requirements	Friday, September 18, 2026	Wednesday, September 30, 2026	12
	<b>Validated Data Requirements Report</b>	Wednesday, September 30, 2026	Wednesday, September 30, 2026	0
<b>Step 4: Assess Current Data Availability</b>				
	Inventory Existing Data Sources	Friday, October 2, 2026	Thursday, October 29, 2026	27
	<b>Current Data Source Inventory</b>	Thursday, October 29, 2026	Thursday, October 29, 2026	0
	Evaluate Data Quality, Bottlenecks, and Accessibility	Friday, October 2, 2026	Thursday, October 29, 2026	27
	<b>Data Quality and Accessibility Review</b>	Thursday, October 29, 2026	Thursday, October 29, 2026	0
	Map Current Dataflows and Dependencies	Friday, October 2, 2026	Thursday, October 29, 2026	27
	<b>Current-State Dataflow and Dependency Maps</b>	Thursday, October 29, 2026	Thursday, October 29, 2026	0
<b>Step 5: Analyze Data Gaps</b>				
	Identify Data Gaps	Monday, November 2, 2026	Tuesday, December 1, 2026	29
	Evaluate the Impact of Data Gaps and Redundant Collection	Monday, November 2, 2026	Tuesday, December 1, 2026	29
	Document Data Gaps and Propose Solutions	Monday, November 2, 2026	Tuesday, December 1, 2026	29
	<b>Data Gap Analysis</b>	Tuesday, December 1, 2026	Tuesday, December 1, 2026	0

<b>Step 6: Evaluate Data Collection Methods</b>				
	Review Current Data Collection Methods	Tuesday, December 1, 2026	Tuesday, December 22, 2026	21
	Evaluate Opportunities for Improvement	Tuesday, December 22, 2026	Thursday, December 31, 2026	9
	Recommend New Data Collection Methods	Friday, January 1, 2027	Thursday, January 7, 2027	6
	<b>Data Collection Methods Assessment and Recommendations Report</b>	Thursday, January 7, 2027	Thursday, January 7, 2027	0
<b>Step 7: Assess Data Integration Opportunities</b>				
	Map Current Data Systems and Flows	Friday, October 2, 2026	Monday, February 1, 2027	122
	Identify Integration Needs	Thursday, January 7, 2027	Monday, February 1, 2027	25
	Develop an Integration Strategy	Thursday, January 21, 2027	Monday, February 15, 2027	25
	<b>Data Integration Strategy Report</b>	Thursday, January 14, 2027	Monday, February 15, 2027	32
<b>Step 8: Develop Data Governance Framework</b>				
	Consider Governance Needs and Objectives	Wednesday, February 17, 2027	Friday, February 26, 2027	9
	Define Roles and Responsibilities	Wednesday, February 24, 2027	Monday, March 1, 2027	5
	Construct a Data Governance Framework	Monday, March 1, 2027	Monday, March 15, 2027	14
	<b>Data Governance Framework Recommendations and Implementation Plan</b>	Monday, March 15, 2027	Monday, March 15, 2027	0
<b>Step 9: Develop a Fully Integrated Workflow</b>				
	Break Down Each Stage of the MSBA's Process	Monday, March 15, 2027	Friday, April 2, 2027	18
	Map Out Data Entry Points and Responsible Parties	Tuesday, April 6, 2027	Friday, April 30, 2027	24
	Define Data Fields for Each Entry Point	Tuesday, April 6, 2027	Friday, April 30, 2027	24
	Create a User Flow Map for Data Entry	Monday, May 3, 2027	Thursday, May 20, 2027	17
	Review Cross-Functional Dependencies	Thursday, May 20, 2027	Monday, May 31, 2027	11
	<b>Integrated Workflow Map</b>	Monday, May 31, 2027	Monday, May 31, 2027	0
	<b>Data Field Breakdown</b>	Monday, May 31, 2027	Monday, May 31, 2027	0
	Validate and Refine Workflow	Tuesday, June 1, 2027	Monday, June 21, 2027	20
<b>Step 10: Create the Data Master Plan</b>				
	Outline Data Collection Procedures	Monday, June 21, 2027	Thursday, July 15, 2027	24
	Establish Data Collection, Storage, and Reporting Protocols	Monday, July 12, 2027	Wednesday, July 21, 2027	9
	Plan for Data Integration	Monday, July 12, 2027	Friday, July 30, 2027	18
	Develop Reporting and Analytics Framework	Wednesday, July 21, 2027	Monday, August 9, 2027	19
	<b>Develop an Implementation Plan</b>	Monday, August 16, 2027	Monday, August 16, 2027	0
	<b>Final Draft Data Master Plan</b>	Monday, August 16, 2027	Monday, August 16, 2027	0
	<b>Data Collection and Workflow Map</b>	Monday, August 16, 2027	Monday, August 16, 2027	0
	<b>Implementation Roadmap</b>	Monday, August 16, 2027	Monday, August 16, 2027	0
	<b>Reporting and Analytics Framework</b>	Monday, August 16, 2027	Monday, August 16, 2027	0
<b>Step 11: Stakeholder Review, Validation, and Finalization</b>				
	<b>Stakeholder Summaries</b>	Monday, August 16, 2027	Monday, August 16, 2027	0
	<b>Share Stakeholder Summaries</b>	Monday, August 16, 2027	Monday, August 16, 2027	0
	Collect Comments	Monday, August 16, 2027	Wednesday, September 15, 2027	30
	Respond to Comments and Synthesize Feedback	Wednesday, September 1, 2027	Friday, October 1, 2027	30
	<b>Stakeholder Review Summary</b>	Friday, October 1, 2027	Friday, October 1, 2027	0
	Refine the Plan and Analysis	Friday, October 1, 2027	Monday, November 1, 2027	31
	Update the Data Master Plan	Friday, October 15, 2027	Monday, November 15, 2027	31
	<b>Updated Workflow and Data Field Breakdown</b>	Monday, November 1, 2027	Monday, November 1, 2027	0
	<b>Finalized Data Master Plan</b>	Monday, November 15, 2027	Monday, November 15, 2027	0
MSBA Review		Monday, November 15, 2027	Wednesday, December 15, 2027	30
Presentations, final work, and closeout		Wednesday, December 15, 2027	Thursday, March 30, 2028	106
<b>Project Completion</b>		<b>Thursday, March 30, 2028</b>	<b>Thursday, March 30, 2028</b>	

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## SECTION VII. GENERAL INFORMATION

All terms, conditions, requirements, and procedures included in this RFR must be met for a Response to be qualified as responsive. The MSBA reserves the right to waive or permit cure of non-material errors or omissions. The MSBA reserves the right to modify, amend or cancel the terms of this RFR at any time. All Responses must be submitted in accordance with the specific terms of this RFR.

**All Responses must be submitted electronically through the Commonwealth's procurement website, [COMMBUYS](#). Please see Section VII.(2.) of this RFR.**

### A. SPECIFICATIONS

- 1) **Respondent Communication.** All communication regarding this RFR must be **in writing via email** to the contact person designated in Section VII(B) of the RFR. No telephone calls concerning this RFR are permitted. Any individuals and/or firms that intend to submit a Response are prohibited from contacting any employee of the MSBA other than the contact person regarding this RFR. **Failure to observe this rule will result in disqualification.** Furthermore, no other individual MSBA employee or representative is authorized to provide any information or respond to any question or inquiry concerning this RFR and the MSBA shall not be bound by any such unauthorized provision of information or response. Respondents should notify in writing via email the contact person for this RFR in the event that the RFR appears incomplete or if the Respondent is having trouble obtaining any required attachments electronically through COMMBUYS or from the MSBA's website.
- 2) **Reasonable Accommodation.** Respondents that seek reasonable accommodation because of disabilities or other hardship, which may include the receipt of RFR information in an alternative format, may communicate such requests in writing to the contact person. Requests for accommodation will be addressed on a case-by-case basis.
- 3) **Public Records.** All Responses and related documentation and information submitted in Response to this RFR are subject to the Massachusetts Public Records Law, M.G.L. c. 66, §10; c. 4, §7(26)(h), regarding public access to such documents. Any statements in submitted Responses that are inconsistent with the provisions of these statutes will be void and disregarded. Respondent agrees that the MSBA shall not be liable under any circumstances for the subsequent disclosure of any information submitted to it by Respondent pursuant to this RFR and/or in connection with any contract entered into between Respondent and the MSBA as a result of the RFR process.

Respondents are advised that all responses are deemed sealed, and therefore their contents will be treated as confidential and will not be disclosed to competing Respondents until the evaluation process has been completed and the contract has been awarded.

- 4) **Submission of Proposed Materials and Virtual Presentation.** All materials, representations, and submissions made within the response and at virtual presentation are subject to becoming part

of the contract binding the selected Respondent to uphold the materials, representations, and submissions made by the selected Respondent within the response and at the virtual presentations, if any.

- 5) **Conflict of Interest**. Prior to award of any contract and/or qualification, the Respondent shall certify in writing that no relationship exists between the Respondent and the procuring or contracting agency that interferes with fair competition or is a conflict of interest, and no relationship exists between the Respondent and another person or organization that constitutes a conflict of interest. No official or employee of the MSBA who exercises any function or responsibility in the review or approval of the undertaking or carrying out of this project shall, prior to the completion of the project, voluntarily acquire any personal interest, either directly or indirectly, in this contract or proposed contract.

The Respondent shall provide assurance that it presently has no interest and shall not acquire any interest, either directly or indirectly, which will conflict in any manner or degree with the performance of its services hereunder. The Respondent shall also provide assurances that no person having any such known interest shall be employed during the performance of this contract.

Individuals performing services to the MSBA may be considered “special state employees” subject to the provisions of the Massachusetts Conflict of Interest Law (M.G.L. 268A). The MSBA’s Master Services Agreement requires contractors to certify, among other things, compliance with the Conflict of Interest Law. It is the Respondent’s exclusive obligation to determine and certify that the Respondent and its employees, sub-consultants, subcontractors, and the employees of any of them are and shall remain in compliance with M.G.L. Chapter 268A throughout the term of any contract agreement under which the Respondent is retained to provide the services required in this RFR. Moreover, the MSBA may request from a Respondent a written certification of compliance with any provisions of M.G.L. c. 268A during the term of any such contract agreement. The MSBA may require the Respondent to implement certain internal protections to comply with any provisions of M.G.L. c. 268A.

- 6) **Best Value Selection and Negotiation**. The MSBA may select the Response that demonstrates the “Best Value” overall, including proposed alternatives that will achieve the procurement goals of the MSBA. The MSBA and the selected Respondent may negotiate a change in any element of contract performance or cost identified in the original RFR or the selected Respondent’s Response which results in lower costs or in a more cost effective or better value than was presented in the selected Respondent’s or contractor’s original Response.
- 7) **Costs**. The MSBA will not reimburse any individual or firm for any costs associated with the preparation or submittal of any Response to this RFR or for any travel and/or per diem incurred in any presentation of such Responses. Costs that are not specifically identified in the Respondent’s submissions and accepted by the MSBA as part of a contract will not be compensated.

- 8) **MSBA Website and COMMBUYS.** This RFR has been distributed electronically using the COMMBUYS system and can be accessed at [www.COMMBUYS.com](http://www.COMMBUYS.com). RFR Attachments that are referenced are available either as separate files along with the RFR, or in the COMMBUYS Attachments section. The RFR and Attachments are also available at the MSBA's website: [www.massschoolbuildings.org](http://www.massschoolbuildings.org).

Respondents are solely responsible for obtaining and completing required attachments that are identified in this RFR; for regularly checking both COMMBUYS and the MSBA website for any addenda or modifications that are subsequently made to this RFR or attachments; for obtaining, reviewing and appropriately responding to any such addenda or modifications to the RFR or attachments; and for acknowledging the receipt of any addenda in the cover letter. The MSBA accepts no liability and will provide no accommodation to Respondents who fail to check for, obtain, review and appropriately respond to addenda or modifications to the RFR and attachments, and then submit inadequate or incorrect Responses. Respondents are advised to check the MSBA's website and COMMBUYS to ensure that they have the most recent RFR files. Respondents may not alter (manually or electronically) the RFR language or any RFR component files. Modifications to the body of this RFR, specifications, terms and conditions, which change the intent of this RFR are prohibited and may disqualify a Response.

Respondents are required to submit Responses electronically through COMMBUYS. Instructions on how to submit a Response are included as **Attachment G**, Creating a Quote in COMMBUYS: How to Respond to Bid Solicitation, to this RFR.

Respondents may contact the COMMBUYS Helpdesk at [COMMBUYS@state.ma.us](mailto:COMMBUYS@state.ma.us) or the COMMBUYS Helpline at 1-888-627-8283 or 617-720-3197 (during normal business hours, 8AM – 5PM Monday – Friday).

- 9) **Validity of Response.** Responses must remain in effect for at least 120 days from the submission deadline and thereafter until either the Respondent withdraws the Response in writing, a contract is executed with Respondent, or the procurement is canceled, whichever occurs first.
- 10) **Prohibition against Distribution of Information.** Any Respondent awarded a contract under this RFR is prohibited from selling or distributing any information collected or derived from the contract and/or procurement process, including lists of participating or eligible MSBA employee names, telephone numbers, or addresses, including email addresses.
- 11) **Right to Modify.** The MSBA reserves the right to modify, amend, or cancel the terms of this RFR at anytime prior to the closing date. The MSBA reserves the right to negotiate with the selected Respondent(s) as to any element of cost or performance, including without limitation, elements identified in the RFR and/or the selected Response to achieve the best value for the MSBA.

## B. PROCUREMENT CALENDAR

The following is the tentative time schedule for the MSBA's selection of firms and individuals interested in developing a data master plan for the MSBA. All dates are subject to modification by the MSBA with notice.

**Issuance of RFR:** September 15, 2025

**Question Deadline:** October 3, 2025 at 5:00pm

**Responses to Questions Posted:** October 10, 2025

**RFR Response Deadline:** October 20, 2025 at 3:00pm

**Virtual Presentations (If conducted):** December 1-14, 2025

**Award of the Contract:** February 25, 2026

Questions concerning this RFR may be submitted to the RFR Contact Person in writing via email only at the contact information below. No telephone calls concerning this RFR are permitted. Questions must be received no later than 5:00 P.M. on October 3, 2025. Responses to questions will be posted on or before October 10, 2025.

Siobhan Tolman, Procurement and Contracts Manager

ATTN: "MSBA-RFR-Data Master Plan-2025"

E-Mail Address: [siobhan.tolman@massschoolbuildings.org](mailto:siobhan.tolman@massschoolbuildings.org)

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## SECTION VIII. RESPONSE REQUIREMENTS

### 1. Contents of the Response

All Responses to this RFR must include the following information:

- a) **Mandatory Cover Letter:** Each Response must be accompanied by a cover letter of not more than two pages. The letter, which shall be considered an integral part of the submission, shall be signed by an individual who is authorized to bind the firm contractually, giving his or her title. The letter must acknowledge Addenda to the RFR, if any, and certify that all information contained in the Response is accurate and complete. Inaccurate or incomplete information may adversely affect the evaluation of the submission.
- b) **Firm History:** A description of each firm associated with the Respondent's team and their respective roles and history.
- c) **Professional Qualifications and Experience:** A description of the professional qualifications and experience of the key personnel and project team who would be assigned to the MSBA for this project, including subcontractors and joint venturers, if applicable. Respondents should identify the key personnel within the project team who will be leading this project for the

MSBA. Key personnel should include at a minimum those with backgrounds in project management, data strategy, data governance, data architecture, and business/data analysis. All Responses also must include a project team roster which includes the key personnel as well as other project team members recommended for this engagement. The roster should include name and role on the project as well as a resume and contact information for each of the project team members who will be providing services to the MSBA. All Respondents also must identify the individual(s) who will have primary responsibility for contacts and communications with the MSBA. The MSBA reserves the right to reject the use of any personnel, within its sole discretion.

- d) Approach to Providing Services: A description of the firm's approach to providing the Scope of Work described in Section IV, Item B, which specifically addresses any timelines described in this RFR. Also, all Responses must include a staffing plan that lists for each person proposed for the project, qualifications, availability, and their role(s) and responsibilities in completing the work as described in Section IV.B "Scope of Work".
- e) Knowledge of Relevant Massachusetts Regulations and Policies: A statement describing the Respondent's knowledge and understanding of relevant MSBA and DESE regulations and policies.
- f) Statement of Limitations: Provide a statement clearly describing any limitations to the submitted Response (such as scope of proposed services, geography, etc.).
- g) Business References: Respondents must identify three (3) client references for which the bidder has performed similar services as the services described in this RFR.
- h) Supplier Diversity Program Plan Form: The MSBA is committed to developing and strengthening Minority Business Enterprises (MBE), Women Business Enterprises (WBE), Veteran Business Enterprises (VBE), Service-Disabled Veteran-Owned Business Enterprises (SDVOBE), Disability-Owned Business Enterprises, Lesbian , Gay, Bisexual or Transgender Business Enterprises (LGBT),, Minority Nonprofit Organizations (M/NPO), and Women Nonprofit Organizations (W/NPO) and expanding equal opportunity in the primary and secondary industries affected by this RFR. *Please note, completion of a Supplier Diversity Program Plan Form (**Attachment D**) by a Respondent is **NOT** mandatory for the purposes of the MSBA's review of a Response. However, if a Respondent is a certified SDO business or has an SDO partner, the Respondent should complete the form to the extent possible. Respondents that clearly demonstrate the intent to further the development of the business enterprises and organizations listed above or the existence of a relationship which does further those goals may receive favorable consideration. If the Form is not completed or provided with a Response, the MSBA will assume that it was omitted intentionally.*
- i) Anti-Discrimination Policy: Each Respondent must include a detailed copy of its policy relative to affirmative actions/equal opportunity and the prohibition of discriminatory employment practices.



- j) Authorized Respondent's Signature and Acceptance Form: If the Respondent is a corporation, partnership, or other business entity, complete **Attachment "A"** as indicated.
- k) Invest in Massachusetts Data Form: The MSBA encourages investment in our local economy and is committed to advancing the creation and preservation of jobs in the Commonwealth. Consequently, all Respondents must submit an Invest in Massachusetts Data Form ("IMD Form"). (**Attachment "E"**)
- l) Mandatory Certifications: (an example of a comprehensive certification statement is attached as Attachment "B"):
  - a. Certification of Compliance with Massachusetts Child Care Laws.
  - b. Certification of Compliance with the Revenue Enforcement and Protection Program.
  - c. Certification Regarding Companies Doing Business in Northern Ireland.
  - d. Certification of Disclosure.
  - e. Certification of No Conflicting Relationship.
  - f. Certificate Statement Regarding Criminal Actions and Pending Litigation
  - g. Certification of Solvency
  - h. Certification of Good Standing and Licensure
  - i. Certification of Minimum Qualifications (if applicable)
  - j. Statement of Compliance with RFR Requirements
  - k. Statement of Confidentiality
- m) Budget and Fee Proposal: Each Respondent must include a Budget and Fee Proposal in conformance with Section V.

## 2. Instructions for Submission

Responses to this RFR must be submitted electronically by the submission deadline or the response will not be considered. **Hard copy submissions will not be accepted.**

**All Responses must be submitted electronically through the Commonwealth's procurement website, [COMMBUYS](#), no later than Monday, October 20, 2025, 3:00 P.M. EST.**

Instructions on how to submit a Response are included as **Attachment G**, Creating a Quote in COMMBUYS: How to Respond to Bid Solicitation, to this RFR.

Responses should not exceed 75MB in size. The MSBA will not accept ZIP files. Responses should be submitted in a PDF.

Respondents may contact the COMMBUYS Helpdesk at [COMMBUYS@state.ma.us](mailto:COMMBUYS@state.ma.us) or the COMMBUYS Helpline at 1-888-627-8283 or 617-720-3197 (during normal business hours, 8AM – 5PM Monday – Friday).

Responses and Attachments received after this deadline date and time will not be evaluated. **Responses should not exceed 75MB in size.**

When responding to this RFR, firms should take note of the following provisions.

- a) Responses should include the information and documents listed in Section VIII, Item 1 – “Contents of the Response.”
- b) The MSBA reserves the right to request additional information from firms responding to this Request. Additionally, upon reviewing the Responses the MSBA may decide to have certain firms make virtual presentations.
- c) The MSBA reserves the right to reject any or all Responses to this request, to waive any minor informality in a Response, to request clarification of information from any firm responding and to enter into an agreement deemed by the MSBA to be in the MSBA’s best interest with one or more of the firms responding. The MSBA reserves the right to amend or cancel this RFR at any time. All Responses and their contents will become the sole property of the MSBA upon receipt by it.
- d) The duration of any contract that may result from this RFR will be for two (2) years and may be extended for up to three (3) additional extensions of one year each based on a negotiated scope and not- to -exceed budget upon conclusion of the work proposed in this RFR.

### **3. Submission Format Requirements**

Respondents are cautioned to read carefully and conform to the requirements for this specific RFR. Failure to comply with the provisions of this RFR may serve as grounds for rejection of a Response.

- a) The specific organization and orientation of the Response is at the Respondent’s discretion, but it is recommended that the Response be laid out in such a manner that the reader doesn’t need to be constantly rotating the response.
- b) Submissions must be limited to 20 pages excluding the following:
  - i. Cover Letter
  - ii. Table of Contents
  - iii. Appendix for resumes
  - iv. Cost Proposal
  - v. Anti-Discrimination Policy
  - vi. Attachments A-F
- c) Submissions must be in font of 12 point or larger.

RESPONDENTS PLEASE NOTE: BY EXECUTING THE AUTHORIZED RESPONDENT’S SIGNATURE AND ACCEPTANCE FORM AND SUBMITTING A RESPONSE TO THIS RFR, RESPONDENT AGREES THAT THE MSBA SHALL NOT BE LIABLE UNDER ANY CIRCUMSTANCES FOR THE DISCLOSURE OF ANY MATERIALS SUBMITTED TO THE MSBA PURSUANT TO THIS RFR OR UPON RESPONDENT’S SELECTION AS A PREQUALIFIED CONTRACTOR.

#### 4. Disqualification

- a) Late Responses. Responses that are received after the deadline date and time shall be disqualified. A hard copy or facsimile Response will not qualify as a “submission” for deadline purposes in advance of or in lieu of an electronic submission.
- b) Nonresponsive Responses. Responses which fail to comply with mandatory and material requirements of the RFR may be deemed nonresponsive and may be disqualified. Nonresponsive responses shall include, but not be limited to, those that fail to address or meet any mandatory item and those submitted in insufficient number. The MSBA reserves the right to disqualify from consideration those Responses that are submitted in an incorrect format if the MSBA determines, in its sole discretion, that the formatting error is prejudicial to the interests of other Respondents and fair competition.
- c) Collusion. Collusion by two or more Respondents agreeing to act in a manner intended to avoid or frustrate fair and open competition is prohibited and shall be grounds for rejection or disqualification of a response or termination of this contract.
- d) Debarred Bidders or Subcontractors. A Respondent who is currently subject to any Commonwealth or federal debarment order or determination shall not be considered for evaluation by the Procurement Team. If a bidder’s response is dependent upon the services of a named subcontractor and the disqualification of this named subcontractor would materially alter the response, then that response shall be deemed unresponsive if the named subcontractor is found to be debarred. Responses that indicate that subcontractors will be used but do not rely on any specifically named subcontractor shall not be deemed unresponsive if the disqualification of a proposed subcontractor will not materially alter the response.

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#### SECTION IX. EVALUATION PROCESS

The RFR Evaluation Process will be conducted in two phases. MSBA staff will complete the Phase One Review for all submitted Responses. The purpose of the Phase One Review is to identify each Respondent whose Response is nonresponsive to the requirements of the RFR and determine if that Respondent will be disqualified. Responses that are not disqualified after Phase One Review will be submitted to a committee of MSBA staff for additional review. The Phase Two Review will evaluate the Responses based on highly advantageous, advantageous and not advantageous ratings. The selection committee will make a recommendation of the qualified firms and/or individuals to the Executive Director of the MSBA who will then accept or reject the recommendation.

**(Phase One and Phase Two Reviews of this RFR will be Conducted Separately)**

##### A. PHASE ONE REVIEW

Responses will be reviewed based on the completeness of Responses, including mandatory attachments and compliance to submission criteria, legal, and other requirements as described in Section VIII of the RFR. Responses that do not comply with these components may be rejected and, if rejected, will not

proceed to Phase Two Review. The MSBA reserves the right to waive or permit cure of non-material errors or omissions.

## **B. PHASE TWO REVIEW**

In addition to the specific requirements set forth below, all Respondents must demonstrate that they have significant experience, knowledge, and abilities with respect to providing the services described in the Scope of Work in Section IV. The MSBA will evaluate Responses based on criteria that shall include, but not be limited to, the following:

### **1. Supplier Diversity Program - Advantageous and Not Advantageous**

**Advantageous (5 points)** - Respondent clearly demonstrates, through the information provided in Attachment D, its intent to develop a relationship with SDO certified Minority Business Enterprises (MBE), Women Business Enterprises (WBE), Veteran Business Enterprises (VBE), Service-Disabled Veteran-Owned Business Enterprises (SDVOBE), Disability-Owned Business Enterprises, Lesbian, Gay, Bisexual or Transgender Business Enterprises (LGBT), Minority Nonprofit Organizations (M/NPO), Women Nonprofit Organization (W/NPO), or Minority and Women Non-Profit Organization (M/W/NPO) in performing the services identified in this RFR. Points awarded for this section will be based on the information provided by the Respondent in Attachment D.

**Not Advantageous (0 points)** – Respondent does not demonstrate the existence of or an intent to develop a relationship with one or more businesses certified in the above-mentioned supplier diversity categories to perform the services identified in this RFR.

A rating of “Not Advantageous” on this component shall not prevent the MSBA from selecting a Respondent who otherwise demonstrates the knowledge, experience, and capacity to perform the requested scope of services. Respondents that do not complete “Attachment D” will not receive points under this section.

### **2. Demonstrated Experience of Key Personnel – Highly Advantageous, Advantageous, and Not Advantageous**

Key personnel should include at a minimum those with backgrounds in areas such as project management, data strategy, data governance, data architecture, and business/data analysis.

**Highly Advantageous (25 points):** The Respondent’s key personnel each have at least ten (10) years of experience providing services related to designing and implementing enterprise-level data systems, including data collection tool development, data analysis and visualization, and enterprise system planning. This includes experience using Agile or equivalent human-centered project management methods to lead the development of a comprehensive Data Master Plans that integrate workflows, data governance, and reporting across multiple operational units.

**Advantageous (15 points):** The Respondent’s key personnel each have at least seven (7) years of experience providing services related to designing and implementing enterprise-level data systems, including data collection tool development, data analysis and visualization, and

enterprise system planning. This includes experience using Agile or equivalent human-centered project management methods to lead the development of a comprehensive Data Master Plans that integrate workflows, data governance, and reporting across multiple operational units.

**Not Advantageous (0 points):** The Respondent's key personnel each have less than seven (7) years of experience providing services related to designing and implementing enterprise-level data systems, including data collection tool development, data analysis and visualization, and enterprise system planning. This includes experience using Agile or equivalent human-centered project management methods to lead the development of a comprehensive Data Master Plans that integrate workflows, data governance, and reporting across multiple operational units.

3. **Knowledge and Understanding of planning UX development for workflow data capture** – Highly Advantageous, Advantageous, and Not Advantageous

**Highly Advantageous (25 points):** The Respondent has at least seven (7) years of experience providing services related to planning user-centered UX solutions for workflow data capture, emphasizing efficiency, accuracy, and usability. This includes designing interfaces and processes that guide users through complex data entry and management tasks, ensuring high-quality data collection and facilitating analytical insights.

**Advantageous (15 points):** The Respondent has at least five (5) years of experience providing services related to planning user-centered UX solutions for workflow data capture, emphasizing efficiency, accuracy, and usability. This includes designing interfaces and processes that guide users through complex data entry and management tasks, ensuring high-quality data collection and facilitating analytical insights.

**Not Advantageous (0 points):** The Respondent has less than five (5) years of experience providing services related to planning user-centered UX solutions for workflow data capture, emphasizing efficiency, accuracy, and usability. This includes designing interfaces and processes that guide users through complex data entry and management tasks, ensuring high-quality data collection and facilitating analytical insights.

4. **Capacity and Organizational Structure** – Advantageous and Not Advantageous

**Advantageous (15 points):** Respondent clearly demonstrates the adequacy, quality and depth of its personnel resources to support the satisfactory and timely performance of the services sought in this RFR and to provide quick turnaround on time-sensitive matters.

**Not Advantageous (0 points):** Respondent does not demonstrate the adequacy, quality and depth of personnel resources that would be required to support the satisfactory and timely performance of the services sought in this RFR and to provide quick turnaround on time-sensitive matters.

5. **Proposed Overall Approach** – Highly Advantageous, Advantageous, and Not Advantageous

**Highly Advantageous (20 points):** The Respondent's description of the firm's approach to providing the Scope of Work described in Section IV has demonstrated a clear, detailed, and comprehensive plan addressing all the project objectives stated in the RFR.

**Advantageous (10 points)** – The Respondent’s description of the firm’s approach to providing the Scope of Work described in Section IV has demonstrated a clear, detailed, and comprehensive plan addressing many of the project objectives stated in the RFR.

**Not advantageous (0 points)** – The Respondent’s description of the firm’s approach to providing the Scope of Work described in Section IV has not demonstrated a clear, detailed, and comprehensive plan addressing the project objectives stated in the RFR.

6. **Invest in Massachusetts** – Highly Advantageous, Advantageous, and Not Advantageous

**Advantageous (5 points):** A Respondent submits an IMD Form certifying that 50% or more of the work-hours performed in connection with any contract arising out of its Response will be performed in Massachusetts.

**Not Advantageous (0 points):** A Respondent submits an IMD Form certifying that less than 50% of the work-hours performed in connection with any contract arising out of its Response will be performed in Massachusetts.

A rating of “Not Advantageous” on this component shall not prevent the Respondent from being awarded a contract if the Respondent is deemed to be the most advantageous to the MSBA after the complete evaluation process. Points awarded for this section will be based on the information provided by the Respondent in Attachment E.

**Value**

The MSBA may select the Response that demonstrates the “Best Value” overall, including proposed alternatives that will achieve the procurement goals of the MSBA. The MSBA and the selected Respondent may negotiate a change in any element of contract performance or cost identified in the original RFR or the selected Respondent’s Response which results in lower costs or in a more cost effective or better value than was presented in the selected Respondent’s or contractor’s original Response.

The order of these factors generally does not denote relative importance, and the MSBA reserves the right to consider any other relevant factors as it deems appropriate, in its sole discretion. The MSBA may or may not seek additional information from Respondents.

**C. VIRTUAL PRESENTATIONS**

After Phase One and Phase Two reviews, the MSBA shall have the option to invite one or more Respondents to make virtual presentations. Virtual presentations provide the MSBA with an opportunity to evaluate a Respondent through the presentation of their response. The MSBA may limit the number of virtual presentations conducted. Respondents will not be informed of their preliminary ranking at the time of the virtual presentations. After virtual presentations the MSBA reserves the right to adjust any preliminary ranking in the Phase Two review.

The time allotments and format shall be the same for all virtual presentations. Respondents will be given a maximum of 45 minutes to present their responses followed by a 15-minute question and answer period. The MSBA will give notice of at least five (5) business days prior to

the date of a virtual presentation. The MSBA may require the Respondent's assigned key personnel to conduct the virtual presentation.

A Respondent is limited to the presentation of material contained in its Response, with the limited exception that a Respondent may supplement its Response to address specific questions posed by the MSBA and provide clarification of information contained in its Response. A Respondent's failure to agree to a virtual presentation may result in disqualification from further consideration.

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## **SECTION X. EVALUATION PROCESS**

### **A. DURATION AND RENEWAL OPTIONS**

The MSBA intends to select one qualified Respondent to provide the services solicited in this RFR through March 30, 2028. The duration of the contract may be extended for an additional three (3) years, as up to three one-year options to renew, under the same terms and conditions, based on a negotiated scope and not-to-exceed budget.

The selected Respondent will be required to execute the standard Master Services Agreement, a copy of which is attached hereto as **Attachment "C."** **RESPONDENTS ARE REQUIRED TO SPECIFY ANY EXCEPTIONS TO THE MASTER SERVICES AGREEMENT AND TO MAKE ANY SUGGESTED COUNTERPROPOSAL WITH THEIR RESPONSE. A FAILURE TO SPECIFY EXCEPTIONS AND/OR COUNTERPROPOSALS WILL BE DEEMED AN ACCEPTANCE OF THE MASTER SERVICES AGREEMENT'S TERMS AND CONDITIONS.**

### **B. CONTRACT PERFORMANCE AND BUSINESS SPECIFICATIONS**

#### **1. Rejection of Responses**

The MSBA reserves the right to reject any or all responses submitted under this solicitation.

#### **2. Withdrawn/Irrevocability of Responses**

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

#### **3. Subcontracting and Joint Ventures**

Respondents must obtain prior approval from the MSBA for subcontracting any portion of the Contract. Respondent's intention to subcontract or partner or joint venture with other firm(s) must be clearly stated in the Response. The MSBA reserves the right to reject any or all subcontracts, partners, or joint venture firms.

#### **4. Price Limitation**

The Respondent must agree that no other customer of similar size and similar terms and conditions shall receive a lower price for the same commodity and service during the contract period, unless this same lower price is immediately effective for the MSBA. The Respondent must also agree to provide current or historical pricing offered or negotiated with other

governmental or private entities at any time during the contract period upon the request of the MSBA.

#### **5. Security Breach Law, M.G.L. c. 93H**

The bidders hereby acknowledge and agree to comply with the requirements and responsibilities, including those of providing notice and Response, as set forth in G.L. c. 93H concerning Security Breaches and any regulations implemented to effectuate security of “personal information” as defined in § 1 of G.L. c. 93H.

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### **SECTION XI. ATTACHMENTS**

This RFR consists of a 32-page Request for Responses and the following Attachments:

Attachment A: Authorized Respondent’s Signature and Acceptance Form

Attachment B: Certification Statement

Attachment C: Master Services Agreement

Attachment D: Supplier Diversity Program Plan Form

Attachment E: Invest in Massachusetts Form

Attachment F: Creating a Quote in COMMBUYS: How to Respond to Bid Solicitation

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### **SECTION XII. ADDITIONAL INFORMATION**

It is recommended that Respondents refer to chapter 70B of the Massachusetts General Laws, chapters 201, 208, and 210 of the Massachusetts Acts of 2004, and 963 CMR 2.00 *et seq.* for additional information about the MSBA.

Your interest in working with the Massachusetts School Building Authority is appreciated.

Mary L. Pichetti  
Executive Director  
Massachusetts School Building Authority