

Request for Responses (“RFR”)

Massachusetts School Building Authority

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RFR File Name/Title: Document Management Consulting Services

RFR File Number: MSBA-RFR-DMC-2025

RFR Contact Person: Siobhan Tolman, Procurement and Contracts Manager

SECTION I. SUMMARY

The Massachusetts School Building Authority (“MSBA”) seeks to engage a qualified Document Management Consultant to help design and support the implementation of a comprehensive Document Management Program for the MSBA. Primary goals are to improve document management, increase operational efficiency, and support digital transformation to best meet the business needs of the MSBA.

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

At the conclusion of this RFR, the MSBA intends to directly contract with the responsive and responsible firm or firms submitting the most advantageous proposal, taking into consideration qualifications, experience, capacity, references, approach to providing the services requested, and price.

A. OBJECTIVES

The Massachusetts School Building Authority (the “MSBA”) is seeking Document Management Consultant Services to help design and support the implementation of a comprehensive Document Management Program for the MSBA. Primary goals are to improve document management, increase operational efficiency, and support digital transformation to best meet the business needs of the MSBA.

The MSBA will evaluate the submissions of all Respondent firms pursuant to the evaluation criteria set forth in this RFR.

B. SCOPE OF WORK

The MSBA is seeking Document Management Consultant Services to help design and support the implementation of a comprehensive Document Management Program for the MSBA. Primary goals are to improve document management, increase operational efficiency, and support digital transformation to best meet the business needs of the MSBA.

The selected respondent will work with the MSBA to:

(1) Assess Existing Program: Review and assess the MSBA's existing document management systems and processes, which currently includes electronic and paper documents and identify areas for improvement, including the MSBA's known improvement goals: (a) move to all electronic files and signatures, (b) improve document search capabilities for retrieval of documents for business use and records request; (c) improve e-mail management processes; (d) improve correspondence management and tracking; (e) move to all electronic internal and external document signoffs and signatures.

(2) Gather Business Requirements: Meet with MSBA key stakeholders to identify specific business needs and MSBA document management goals and requirements.

(3) Develop a Document Management Strategy to meet the MSBA's business needs, including recommending technological solutions and a plan for implementation, and helping to develop a budget. The goal is to have a detailed plan and recommendation specified in a report prepared by the selected consultant within 12-14 weeks from project kick-off. This report shall be detailed and in a format that can be presented to the MSBA's Board of Directors. The report will be reviewed and approved by MSBA staff prior to presenting it to the Board of Directors.

(4) Provide Procurement Support: Assist in drafting technical requirements and evaluation criteria and help assess potential solutions.

(5) Implementation Oversight: Support the implementation of the chosen Document Management strategies and related systems; ensure alignment with specifications, timelines, and budgets; coordinate with MSBA IT team and vendors.

As noted above, the MSBA's goal is to have a detailed plan and recommendation specified in a report prepared by the selected consultant within 12-14 weeks from project kick-off, which kick-off would be in November or December 2025. The MSBA hopes to be implementing the recommendations by July 1, 2026. The implementation phase and schedule can be further discussed with the selected respondent.

In addition to the categories listed above, the MSBA invites Respondents to identify in their response any additional services that it is qualified to provide that may complement the services specified above and for which it would like to be considered for selection under this RFR. The MSBA may choose in the sole exercise of its discretion to select all, some, or

none of the Respondents. In addition, selection of a Respondent pursuant to this RFR does not guarantee that the MSBA will award any work orders to any of the Respondent firms.

C. FEES

Cost Proposal

Respondent must provide a Cost Proposal for all services listed and any proposed ancillary services. The MSBA may reach out to Respondents for clarification on the Cost Proposal.

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.

SECTION II. MSBA BACKGROUND

Chapter 208 of the Acts of 2004 (the Act) 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. The Act 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 and refer to Massachusetts General Laws Chapter 70B, Chapter 208 of the Acts of 2004, and 963 CMR 2.00 *et seq.*

SECTION III. 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. **Responses to this RFR must be submitted electronically.**

All Responses must be submitted electronically through the Commonwealth's procurement website, COMMBUYS. Please see Section IV.(B.). of this RFR.

A. SPECIFICATIONS

1. **Respondent Communication.** All communication regarding this RFR must be submitted **in writing via email** to the RFR Contact Person, Siobhan Tolman, Procurement and Contracts Manager, siobhan.tolman@massschoolbuildings.org. 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. Respondents should notify in writing the contact person for this RFR in the event it is incomplete, or 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 hardships, 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 proposals 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 proposal and at oral 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 proposal and at the oral 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.

6. **Best Value Selection and Negotiation.** The MSBA may select the Response(s) that demonstrates the “Best Value” overall, including proposed alternatives that will achieve the procurement goals of the MSBA. The MSBA and the selected Respondent(s) 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. 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

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 of 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 may also contact the COMMBUYS Helpdesk at 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 any time 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 in order to achieve the best value for the MSBA.

B. PROCUREMENT CALENDAR

The following is the tentative time schedule for the MSBA’s selection of qualified firms and individuals interested in providing consulting services for the MSBA. All dates are subject to modification by the MSBA with notice.

Issuance of RFR: September 11, 2025

Question Deadline: September 25, 2025 by 5:00 PM

Responses to Questions Posted: October 1, 2025

RFR Response Deadline: October 9, 2025 by 2:00 PM

Oral Presentations (If conducted): Week of November 3, 2025

Award of the Contract: Anticipated November or December 2025

Questions concerning this RFR may be submitted to the RFR Contact Person in writing via email (No Telephone Calls):

Siobhan Tolman, Procurement and Contracts Manager
Attn: “MSBA-RFR-DMC-2025”
E-Mail Address: Siobhan.Tolman@massschoolbuildings.org

SECTION IV. 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. Each Respondent must certify in the cover letter that it meets the minimum qualifications of Section V of this RFR. 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 should 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 who would be assigned to the MSBA for this project, including subcontractors and joint venturers, if applicable. All Respondents must identify the individual(s) who will have primary responsibility for contact and communications with the MSBA and will serve as the project lead. Respondents should provide any public sector experience. All Responses also must include a resume and contact information for each of the key personnel who will be providing services to the MSBA. The MSBA reserves the right to reject a firm's use of any particular individual, within the MSBA's sole discretion. Any changes to personnel require approval by the MSBA, and the MSBA reserves the right to terminate a contract if changes are not approved.
- d) Approach to Providing Services: A description of the firm's approach to providing the Scope of Work described in Section I, Item B, specifically addressing any timelines described in this RFR. Also, all Responses must include a table that describes the role of each member of your professional team that will be assigned to work on this project. Please indicate whether the professional team includes in-house staff, subcontractors and/or joint venturers.
- e) Statement of Limitations: Provide a statement clearly describing any limitations to the submitted Response (such as scope of proposed services, geography, etc.).
- f) Professional References: Respondents must identify three (3) client references for which the bidder has performed similar services as the services described in this RFR. Please include contact information. The MSBA reserves the right to contact references.
- g) Supplier Diversity Program Plan Form: The MSBA is committed to developing and strengthening Minority Business Enterprises (MBE), Women Business Enterprises (WBE), Minority and Women Business Enterprise (M/WBE), Service-Disabled Veteran-Owned Business Enterprises (SDVOBE), Veteran Business Enterprises (VBE), Disability-Owned Business Enterprises, LGBT Business Enterprises, Minority Nonprofit Organizations (M/NPO), and Women Nonprofit Organizations (W/NPO), Minority and Women Non-Profit Organization (M/W/NPO), Disability-Owned Business Enterprise, or LGBT Business Enterprise 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 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.

- h) 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.
- i) Authorized Respondent's Signature and Acceptance Form: If the Respondent is a corporation, partnership, or other business entity, complete **Attachment "A"** as indicated.
- j) 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"**.
- k) 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. Statement of Compliance with RFR Requirements
 - j. Statement of Confidentiality
- l) Cost Proposal: Each Respondent must include a detailed Cost Proposal as described in Section 1 C.

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.** Responses and Attachments received after this deadline date and time will not be evaluated.

All Responses must be submitted electronically through the Commonwealth's procurement website, [COMMBUYS](https://www.commbuys.com). Instructions on how to submit a Response are

included as **Attachment F**, Creating a Quote in COMMBUYS: How to Respond to Bid Solicitation.

Respondents may also contact the COMMBUYS Helpdesk at 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).

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

- a) Responses should include the information and documents listed in Section IV, 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 oral presentations.
- c) The MSBA reserves the right to reject any and all Responses to this request, to waive any minor informality in a Response, to request clarification of information from any firm responding and to effect any 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 three (3) years with a one-year option to renew at the sole discretion of the MSBA.

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) **All Responses must be submitted electronically through the Commonwealth’s procurement website, [COMMBUYS](#).** Instructions on how to submit a Response are included as Attachment F, Creating a Quote in COMMBUYS: How to Respond to Bid Solicitation, to this RFR. 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 proposal.
- b) Submissions must be limited to 20 pages excluding the following:
 - i. Cover Letter
 - ii. Table of Contents
 - iii. Cost Proposal
 - iv. Anti-Discrimination Policy
 - v. Resumes
 - vi. Attachments A-F
- c) Submissions must be in a font of 12 point or larger.

- d) Any and all data, materials, and documentation submitted to the MSBA in Response to this RFR shall become the MSBA's property and shall be subject to public disclosure under the Massachusetts Public Records Act. In this regard, Respondents are required to sign the Authorized Respondent's Signature and Acceptance Form, set forth as Attachment "A" hereto.

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 Proposals. Proposals 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 Proposals. Proposals which are not responsive, or which fail to comply with mandatory requirements of the RFR shall be deemed nonresponsive and shall be disqualified. Nonresponsive proposals 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 proposal 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 proposal is dependent upon the services of a named subcontractor and the disqualification of this named subcontractor would materially alter the proposal, then that proposal shall be deemed unresponsive if the named subcontractor is found to be debarred. Proposals 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 proposal

SECTION V. MINIMUM QUALIFICATIONS AND 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

eliminate any Respondents that do not meet the minimum qualifications and/or whose Responses are nonresponsive to the requirements of the RFR. Responses that are deemed to be complete and responsive based on the 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. The MSBA intends to select one firms and/or individual.

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

A. MINIMUM QUALIFICATIONS

In order to be eligible for further review and selection, each Respondent must certify in its cover letter that it meets the following minimum qualifications. Any Respondent that fails to include such certification in its Response, demonstrating that these criteria have been met, may be rejected without further consideration.

- *A minimum of five years of experience providing document management consulting services, as such services are specified in this RFR.*

B. 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 IV of the RFR. Responses that do not comply with these components will be rejected and will not proceed to Phase Two Review. The MSBA reserves the right to waive or permit cure of non-material errors or omissions.

Phase One of the Review will ensure compliance with the submission criteria in Section IV.

C. 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 document management consulting services. The MSBA will evaluate Responses based on criteria that shall include, but not be limited to, the following:

1. **Supplier Diversity Program** – To be evaluated as Advantageous and Not Advantageous.

Advantageous (5 points): Respondent clearly demonstrates the intent to further the development of Minority and Woman-Owned Business Enterprises (“M/WBEs”) or the existence of a relationship which does further these goals, as demonstrated in Attachment D.

Not Advantageous (0 points): Respondent does not demonstrate an intent to further the development of Minority and Woman-Owned Business Enterprises (“M/WBE’s”)

or the existence of a relationship which does further these goals.

An evaluation of “Not Advantageous” on this component shall not prevent the Respondent from being awarded a contract if the Respondent is deemed to be qualified to perform the requested services after the complete evaluation process.

2. **Invest in Massachusetts** – To be evaluated as Advantageous and Not Advantageous based upon the percentage of workhours that will be performed in Massachusetts in connection with any contract arising out of its Response.

Advantageous (5 points): 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): 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.

An evaluation of “Not Advantageous” on this component shall not prevent the Respondent from being awarded a contract if the Respondent is deemed to be qualified to perform the requested services after the complete evaluation process.

3. **Demonstrated Experience** – To be evaluated as Highly Advantageous, Advantageous, or Not Advantageous based upon information contained in the Response regarding the Respondent’s professional experience, specifically the experience of the project lead assigned to the MSBA’s project. Experience working with public sector owners is a plus.

Highly Advantageous (20 points): The Respondent’s project lead has more than ten years of experience providing document management consulting services.

Advantageous: (10 points): The Respondent’s project lead has five to ten years of experience providing document management consulting services

4. **Knowledge and Understanding of the Document Management process and related systems** – To be evaluated as Highly Advantageous, Advantageous, or Not Advantageous based upon information contained in the Response, regarding the Respondent’s approach to providing services, and whether they demonstrate knowledge and understanding of the documents management process and related systems, including the work set forth in the scope.

Highly Advantageous (20points): Respondent clearly demonstrates a high level of knowledge and understanding of providing document management services.

Advantageous: (10 points): Respondent demonstrates some knowledge and understanding of providing document management services.

Not Advantageous (0 points): Respondent does not demonstrate knowledge and understanding of providing document management services.

5. **Approach to Providing Services** – To be evaluated as Highly Advantageous, Advantageous, or Not Advantageous based on the approach to providing services indicated in the Response.

Highly Advantageous (30 points): The Respondent’s written approach to providing the services requested in this RFR demonstrates a clear, detailed and comprehensive plan and approach to meeting all of the objectives and timelines stated in the RFR.

Advantageous (15 points): The Respondent’s written approach to providing the services requested in this RFR demonstrates a clear plan and approach to meeting some of the objectives and timelines stated in the RFR.

Not Advantageous (0 points): The Respondent does not demonstrate a plan to meet the objectives and timelines stated in the RFR.

6. **Capacity and Organizational Structure** – To be evaluated as Highly Advantageous, Advantageous or Not Advantageous based on the professional qualifications and experience and personnel depth indicated in the Response, including the availability of resources and capacity for this project and the ability to develop a strategy in 12-14 weeks, and complete the other objectives as noted.

Highly Advantageous (20 points): Respondent demonstrates extensive quality and depth of personnel resources to support the satisfactory and timely performance of the services sought in this RFR.

Advantageous (10 points): Respondent demonstrates the adequate quality and depth of personnel resources to support the satisfactory and timely performance of the services sought in this RFR.

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.

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.

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, which will be conducted either via “Zoom”,

“Microsoft Teams” or a similar platform. 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 30 minutes to present their proposals 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.

SECTION VI. COMPONENTS OF THE PROCUREMENT

A. DURATION AND RENEWAL OPTIONS

The MSBA intends to select one or more qualified Respondents to provide the services solicited in this RFR for a one-year term. The MSBA may, at its sole option, extend the term for three additional one-year terms, under the same terms and conditions.

The selected Respondent(s) 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 Proposals

The MSBA reserves the right to reject any and all proposals 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 and 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.

SECTION VII. ATTACHMENTS

This RFR consists of a 15-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.

SECTION VIII. 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