

Massachusetts School Building Authority

Deborah B. Goldberg, State Treasurer and Receiver-General

Chair

Mary L. Pichetti

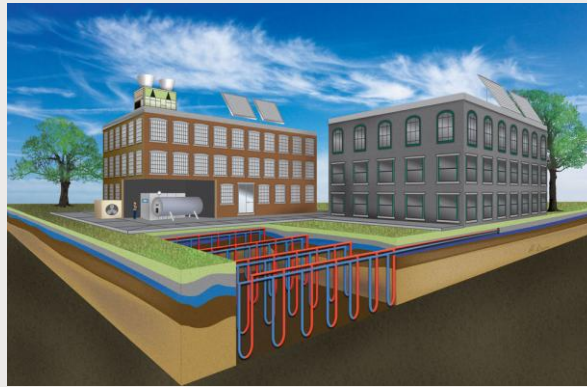
Executive Director/Deputy CEO

James A. MacDonald

Chief Executive Officer



FY25 Procurement Overview for Heat Pump Designers





Procurement Overview Agenda

- Introductions
 - Mary L. Pichetti, Executive Director/Deputy CEO, Massachusetts School Building Authority
 - Meghan Costa, Construction and Disability Program Coordinator, Supplier Diversity Office
- Accelerated Repair Designer Procurement
 - John Crisley, Construction Administration Senior PM, MSBA
- Questions & Answers



Supplier Diversity Office

Commonwealth of Massachusetts Supplier Diversity Office (SDO)



Meghan G. Costa, Construction Program Coordinator
Meghan.Costa@mass.gov

Overview of the SDO



SDO Mission: To promote diversity, equity and inclusion in state contracting by certifying minority, women, Portuguese, veteran, service-disabled veteran, disability, LGBT-owned, and small Massachusetts businesses and connecting them with business opportunities and resources.

The SDO:

- Serves as a gateway for businesses interested in accessing a wide range of diverse and small business programs.
- Coordinates the Commonwealth's diverse and small business programs.
- Is being more intentional in promoting and facilitating business opportunities for diverse businesses
- Offers resources for institutional diverse and small business programs.
- Reports on the diverse and small business program results on behalf of the Commonwealth.

SDO Programs



**SUPPLIER DIVERSITY
PROGRAM (SDP)**



**SMALL BUSINESS
PURCHASING PROGRAM
(SBPP)**



**MUNICIPAL CONSTRUCTION
AFFIRMATIVE MARKETING
PROGRAM (MCAMP)**



**INDIVIDUALS WITH
DISABILITIES IN STATE
PROCUREMENT AND
CONTRACTING PROGRAM**

SDO Certification Program



SDO Certifications

- Minority Owned Business Enterprise (MBE)
- Women Owned Business Enterprise (WBE)
- Veteran Business Enterprise (VBE)
- Minority Non-profit Organization (M/NPO)*
- Women Non-profit Organization (W/NPO)*
- Portuguese Owned Business Enterprise (PBE)**

**Based on at
least 51%
ownership**

Recognized Third-party Certifications

- Service-Disabled Veteran Owned Business Enterprises (SDVOBE)
- Disability Owned Business Enterprise (DOBE)
- Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE)

**based on the majority of board and voting body membership*

***only for programs funded by state transportation bond statutes that include PBEs*

Benefits of Certification

- No cost!
- If awarded a state contract, the ability to market to Commonwealth agencies seeking to meet their supplier diversity spending benchmarks.
- Eligibility to be a supplier diversity partner to Commonwealth prime contractors.
- Invitations to training, networking and matchmaking events.
- Eligibility to participate in supplier diversity programs of quasi-public and private organizations.

Why Certify Your Business?

Build Trust

- Verify that your business is owned, controlled, and operated by a person or persons from a diverse category

Unlock Opportunities

- Participate in the Commonwealth's supplier diversity programs and partner with prime vendors

Expand Your Network

- Access matchmaking opportunities exclusive to SDO-certified vendors

Increase Marketability

- Strengthen your brand recognition with a logo and certificate to include in your marketing materials and project proposals

SDO Directory of Certified Businesses

Where potential partners are found

The screenshot shows the homepage of the SDO Directory of Certified Businesses. At the top, there is a navigation bar with links: HOME, WORKSHOP/EVENT SESSIONS, DIRECTORY OF CERTIFIED BUSINESSES (which is highlighted), and COMMBUYS. Below the navigation bar, the title "Directory of Certified Businesses" is displayed. Underneath the title, there is a search bar with the placeholder text "Search the Directory". Below the search bar, there are three buttons: "Search the Directory +", "Download the Directory +", and "MassPort Directory +".

Search Filters

The screenshot shows the search filters section. It includes several sections for filtering results:

- Business Type:** Radio buttons for "All" (selected), "Business Enterprise (for-profit)", and "Non-Profit Organization".
- Certification Type:** Radio buttons for "Match Any" (selected) and "Match All".
- Certification Agency:** Radio buttons for "Match Any" (selected) and "Match All".
- Business Type List:** A list of checkboxes for various business types: ACDBE - Airport Concession-DBE, PBE - Portuguese Business Enterprise, VBE - Veteran Business Enterprise (checked), SBPP - Small Business Purchasing Program, and LGBTBE - Lesbian Gay Bisexual Transgender Enterprise.
- Certification Agency List:** A list of checkboxes for various certification agencies: SDO - Supplier Diversity Office - State (checked), UCP - MassDOT Office, COB - City of Boston, WBENC - Women's Business Enterprise National Council, and NMSDC - National Minority Supplier Development Council.
- NAICS Code and Description:** A text input field.
- Keywords:** A text input field.
- Sort Results By:** A dropdown menu with "Company Name" selected.
- Sort Order:** Radio buttons for "Ascending" (selected), "Descending", and "On Screen".
- Output Type:** Radio buttons for "On Screen" (selected), "As Pdf", and "Export to Excel".
- Buttons:** "SEARCH" and "CLEAR" buttons.

Search Results - 63 Businesses found

Business Type	Certification Type	Certification Agency	NAICS Code	Keywords	Business Name	Certification Date
All	VBE	SDO	[Any]	None	[Any]	[Any]
Client ID	Region	City or Town	County	Product Code	Distance Search	Sorting
[Any]	All	All	All	All	[Any]	Company Name Ascending
Adjust Filters						
Page 1 of 3 Rows 25 per Page						
Company Name		City/Town/State	Certification Summary			
Adams & Ruxton Construction Company		West Springfield, MA	VBE, VBE (Supplier Diversity Office - SDO)			
Annette, LLC		Vienna, VA	VBE, VBE (Supplier Diversity Office - SDO)			
SSL Home Improvement, LLC		Middleboro, MA	VBE, VBE (Supplier Diversity Office - SDO)			
Sountiful Providence, LLC		Boston, MA	VBE, VBE (Supplier Diversity Office - SDO)			
Briggs Family Enterprises, LLC		Stockbridge, GA	VBE, VBE (Supplier Diversity Office - SDO)			
Bulhepe Underground Utility Locating, LLC		Hamdolph, MA	VBE, VBE (Supplier Diversity Office - SDO)			
			DBE (UCP-MassDOT Office)			

The SDO diverse and small business directory is public and available to anyone to search.

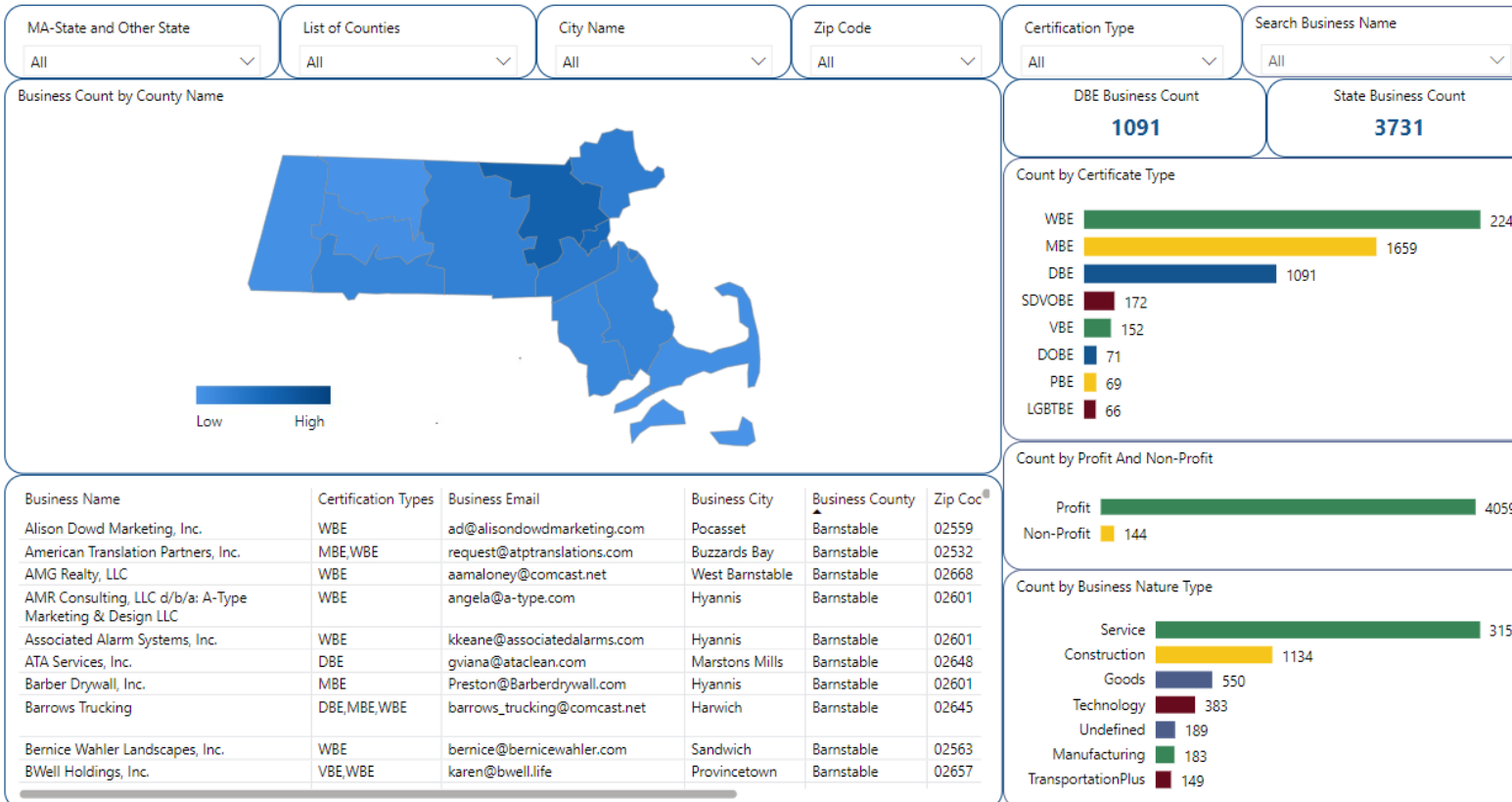
View, search, or download the directory by clicking [this link](#).

Massachusetts Map of SDO Certified Diverse Businesses



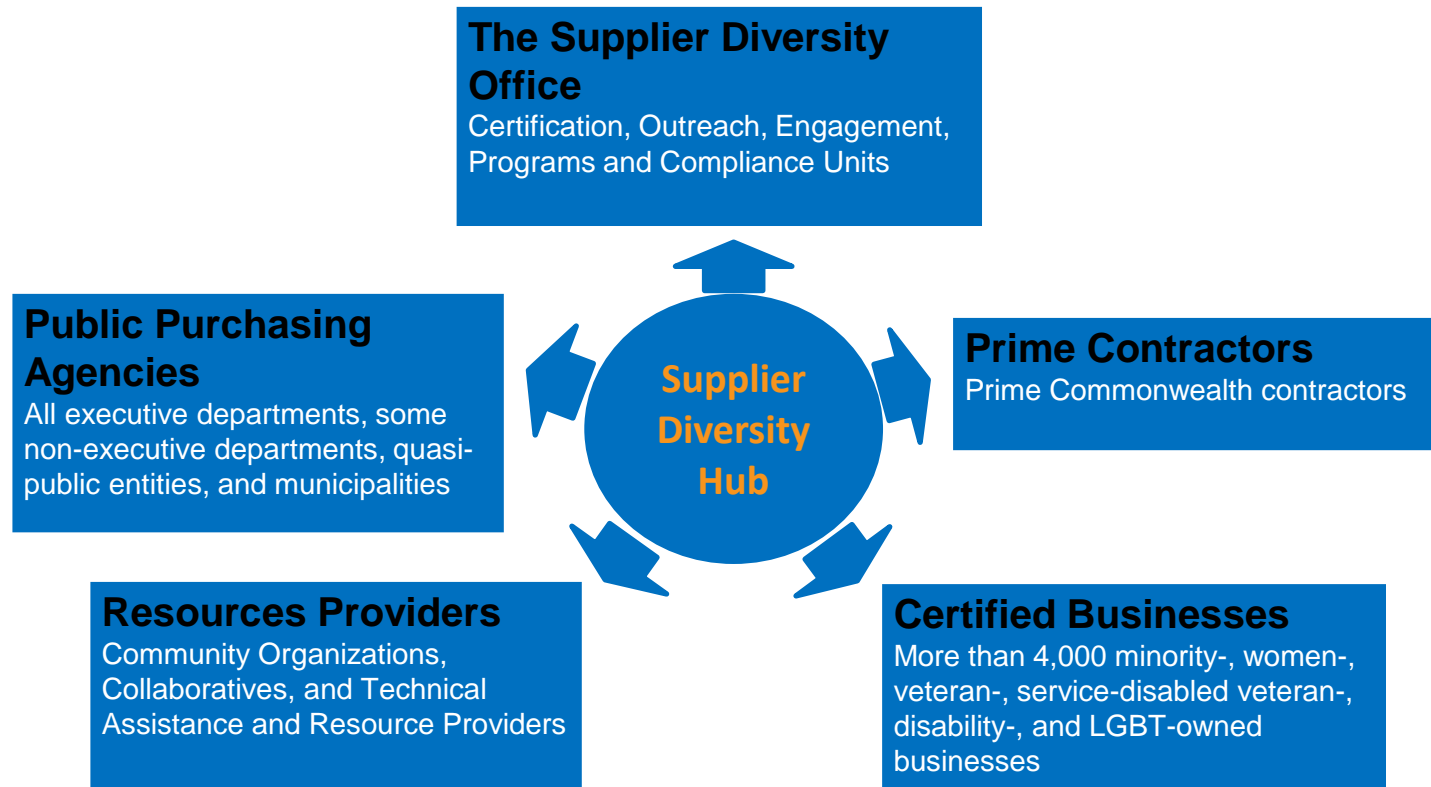
SDO Certified Businesses Geographical Location

9/20/2023 12:33:08 PM



<https://www.mass.gov/info-details/sdo-certified-diverse-business-dashboard>

Serving All SDO Stakeholders



Steps to Certification



Complete the Certification Self-Assessment



Attend a Pre-Certification Webinar



Apply for certification within one year of attending the webinar



Application paperwork and documents are processed by Intake Coordinator and assigned to a Certification Investigator



Certification Investigator reviews application and begins verification process, which includes site visits (virtual or in-person) and interviews with business owners



Certification Investigator notifies business owner of results of investigation



Are You Ready to Apply?

**Is your business
registered?**

SDO cannot certify businesses that are not yet legal entities registered with the Secretary of State.

**Do you have the
necessary licensing?**

For instance, if you are an electrician but do not have a master license you cannot form your business an LLC.

**Do you have time to fill
out your application?**

Many applications are submitted missing documents or signatures, which draws out the process on both sides!

Before You Apply

Take the Certification Self-Assessment

Take the certification self-assessment

This interactive tool will ask you a few questions about your business and will recommend the next steps for SDO and third-party certifications your business may be eligible for.

Disclaimer: This self-assessment provides general guidance on whether your company/organization may qualify for the Supplier Diversity Office (SDO) programs. However it does not guarantee eligibility for inclusion in the Small Business Purchasing Program (SBPP) or in any of the diversity categories overseen by SDO. Eligibility for the SBPP is made through the COMMBUYS SBPP registration process and eligibility for SDO certification is determined through a certification investigation conducted by the SDO.

General Questions

Are you a

- ☐ for-profit business
- ☐ non-profit organization
- ☐ government organization

[Take the certification self-assessment.](#)

Attend a Pre-Certification Webinar



[Click here to register.](#)

Certification Partners

Disability:IN

- **SDVOBE** and **DOBE**
- Application fee waived for MA-based companies
- Visit www.disabilityin.org for more information



National LGBT Chamber of Commerce

- **LGBTBE**
- Fee for certification
- Visit www.nglcc.org for more information



U.S. Small Business Administration (VetCert)

- **VOSB** and **SDVOSB**
- No application fee
- Visit www.veterans.certify.sba.org for more information



Is your business certified by one of these organizations? Apply for third-party recognition [HERE](#)

Recognized Certifications

City of Boston

- **MBE and WBE**
- Requires City of Boston business certificate (\$65 filing fee)
- Learn more [here](#)

CITY of BOSTON

Greater New England Minority Supplier Development Council

- **MBE**
- Fee for certification
- Offers business development and matchmaking opportunities
- Visit www.gnemsdc.org for more information



Center for Women & Enterprise

- **WBE**
- Fee for certification
- Offers training and networking for businesses in the public and private sector
- Visit www.cweonline.org for more information



National Veteran- Owned Business Association

- **VBE and SDVOBE**
- Fee for certification
- Offers training and networking for businesses in the public and private sector
- Visit www.navoba.org/ more information



Is your business certified by one of these organizations? Apply for third-party recognition [HERE](#)

Frequently Asked Questions

What if I need help with my business or documents?

- [SCORE](#) mentors



- [Massachusetts Small Business Development Center Network](#)



How long do I need to be in business to apply?

- There is no requirement, but your business must be active and ongoing long enough to provide the required documentation and for you to be knowledgeable about your industry.

How long does this process take?

- Generally, 30-60 days from the date you submit your application.

SDO Website Updates (www.mass.gov/sdo)



RESOURCE

Resources for Diverse and Small Businesses

Maximize the value of your diverse and small business certification by exploring training, bidding opportunities, as well as capacity building, financial and technical assistance.

TABLE OF CONTENTS

[Training and Development →](#)

[Bidding Opportunities →](#)

[Capacity Building, Financial and Technical Assistance →](#)



[SDO Organizational Partnerships →](#)

The SDO continues to update its website:

- Resources for Diverse and Small Businesses
- Revised SBPP webpage (www.mass.gov/sbpp)
- Revised SDP webpage (www.mass.gov/sdp)
- Expanded Resources for Departments
 - Policies and guidance
 - SDP/SBPP template language
 - Contractor SDP reporting tools
 - Additional resources

Welcome to COMMBUYS



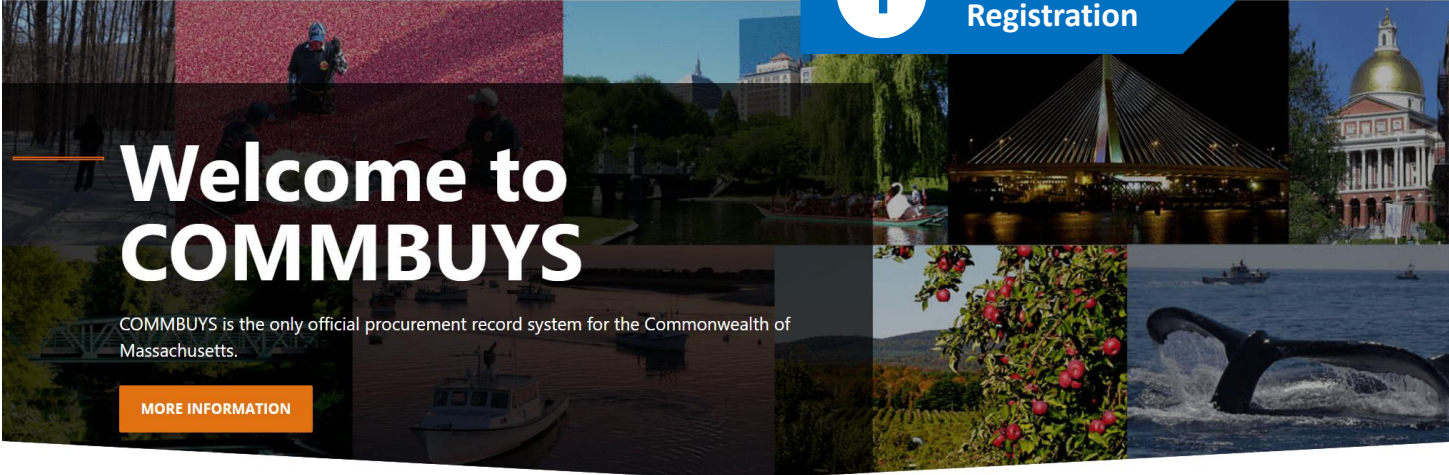
 Search... Bid Solicitation: 

1 No-cost Vendor Registration [Register](#) [Sign In](#)

Welcome to COMMBUYS

COMMBUYS is the only official procurement record system for the Commonwealth of Massachusetts.

[MORE INFORMATION](#)



Current and Planned Statewide Contracts

3

Statewide Contract Purchasing

[Statewide Contract Index](#)
[Contract User Guides](#)
[Procurement Schedule](#)
[Tradespersons Contract Index](#)

Local Government Resources

[Quick Reference](#)
[Implementation Team](#)

Vendor Training Resources

[Vendor Training Overview](#)
[Job Aids for Vendors](#)
[Vendor Webcast Training](#)

4

No-cost Vendor Training

Other Resources

[Newly Posted Bids](#)
[Public Bulletins](#)
[Important Links](#)

2

Weekly Bid List

If you have any questions or concerns contact the OSD Help Desk at OSDHLPDESK@MASS.GOV or call us during normal business hours (8am - 5pm ET Monday - Friday) at 1-888-627-8283 or 617-720-3197.



COMMBUYS Screen Shot



COMMBUYS - Bid Solicitation x +

https://www.commbuys.com/bso/external/bidDetail.sdo?docId=BD-23-1339-UXBSC-SCH-77958&external=true&parentUrl=bid

COMMBUYS
— OPERATIONAL SERVICES DIVISION —

Bid Solicitation: BD-23-1339-UXBSC-SCH-77958

Header Information

Bid Number:	BD-23-1339-UXBSC-SCH-77958	Description:	Installation of Lights at Uxbridge High School Football Field	Bid Opening Date:	08/19/2022 10:00:00 AM
Purchaser:	Don Aicardi	Organization:	Town of Uxbridge		
Department:	UXBSC - School Department	Location:	SCH - Uxbridge School		
Fiscal Year:	23	Type Code:		Allow Electronic Quote:	Yes
Alternate Id:		Required Date:		Available Date :	08/03/2022 07:30:00 AM
Info Contact:	Don Aicardi	Bid Type:	OPEN	Informal Bid Flag:	No
Purchase Method:	Open Market				

Pre Bid Conference: A pre-conference conference will be held at Uxbridge High School Football field 300 Quaker Highway, Uxbridge, MA 01569 at 10:00am at August 10, 2022.

Bulletin Desc: Installation of Lights at Uxbridge High School Football field

Ship-to Address:	Don Aicardi Uxbridge Public Schools Food Services 9 North Main Street Uxbridge, MA 01569 US Email: daicardi@uxbridge.k12.ma.us Phone: (508)577-5869	Bill-to Address:	Don Aicardi Uxbridge Public Schools Food Services 9 North Main Street Uxbridge, MA 01569 US Email: daicardi@uxbridge.k12.ma.us Phone: (508)577-5869	Print Format:	Bid Print
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File Attachments: Uxbridge High School Field Lighting Prevailing Wage July 29, 2022.pdf
Uxbridge High School Field Lighting - Electrical Construction Documents - 03.25.2022-1.pdf
MUSCO Lighting Purchase Details-1.pdf
RFP for High School Lights August 2022.pdf

Form Attachments:

Required Quote Attachments



COMMBUYS Resources



Job Aids:

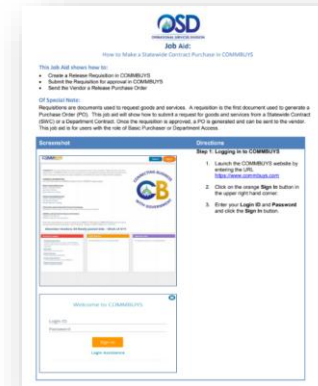
How to Navigate in COMMBUYS (Public View):

<https://www.mass.gov/doc/how-to-navigate-in-commbuys-public-view/download>

How to Navigate in COMMBUYS (Logged-in View):

<https://www.mass.gov/doc/how-to-navigate-in-commbuys-logged-in-view/download>

Note: When establishing your COMMBUYS Profile, you must choose at least one UNSPSC code. It is advisable to choose all applicable UNSPSC codes that describe your business, so you do not miss any bid opportunities

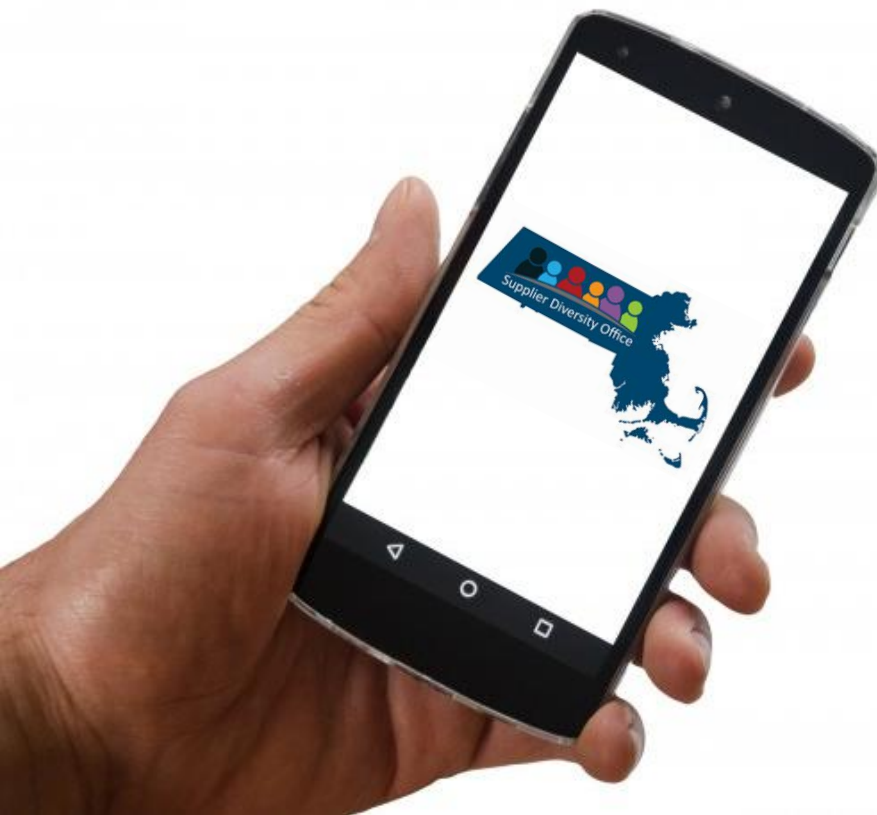


I'm Certified – Now What?



- Download your certification badge for business marketing use
 - Add it to your website, social media, email signature, and capabilities statement!
- Attend SDO's certified vendor onboarding session to learn about:
 - Registering for the Supplier Diversity Hub
 - Unlocking opportunities using your diversity certification
 - Participating in Commonwealth supplier diversity programs
 - Accessing resources to help with finding and bidding on public procurement opportunities

Resources and Contact Information



Our Website

www.mass.gov/sdo

Certification Self-Assessment

- Website: www.mass.gov/sdo/start

Supplier Diversity Program

- Website: www.mass.gov/sdp
- SDP Help Desk: sdp@mass.gov

SDO Certification Help Desk

- Phone: 617-502-8843
- Email: Webmaster.SDO@mass.gov

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Procurement Overview

Accelerated Repair Program

- Heat Pump Designers



Accelerated Repair Program | Scope of Work

- Staff recommendations presented at the October 25, 2023 Board of Directors meeting included:

Description	Recommended
Open ARP January 2024	Open for windows and roofs with an estimated budget of \$150 million
Roof Restoration	Include this provision in the feasibility study for roof invitations to determine fit
Heat Pump Conversion	Procure a consultant in 2024 with goal to offer in January 2025 SOI opening
Open biennially (every two years)	Commence biennial (every other year) opening in January 2025



Accelerated Repair Program | Heat Pump Study



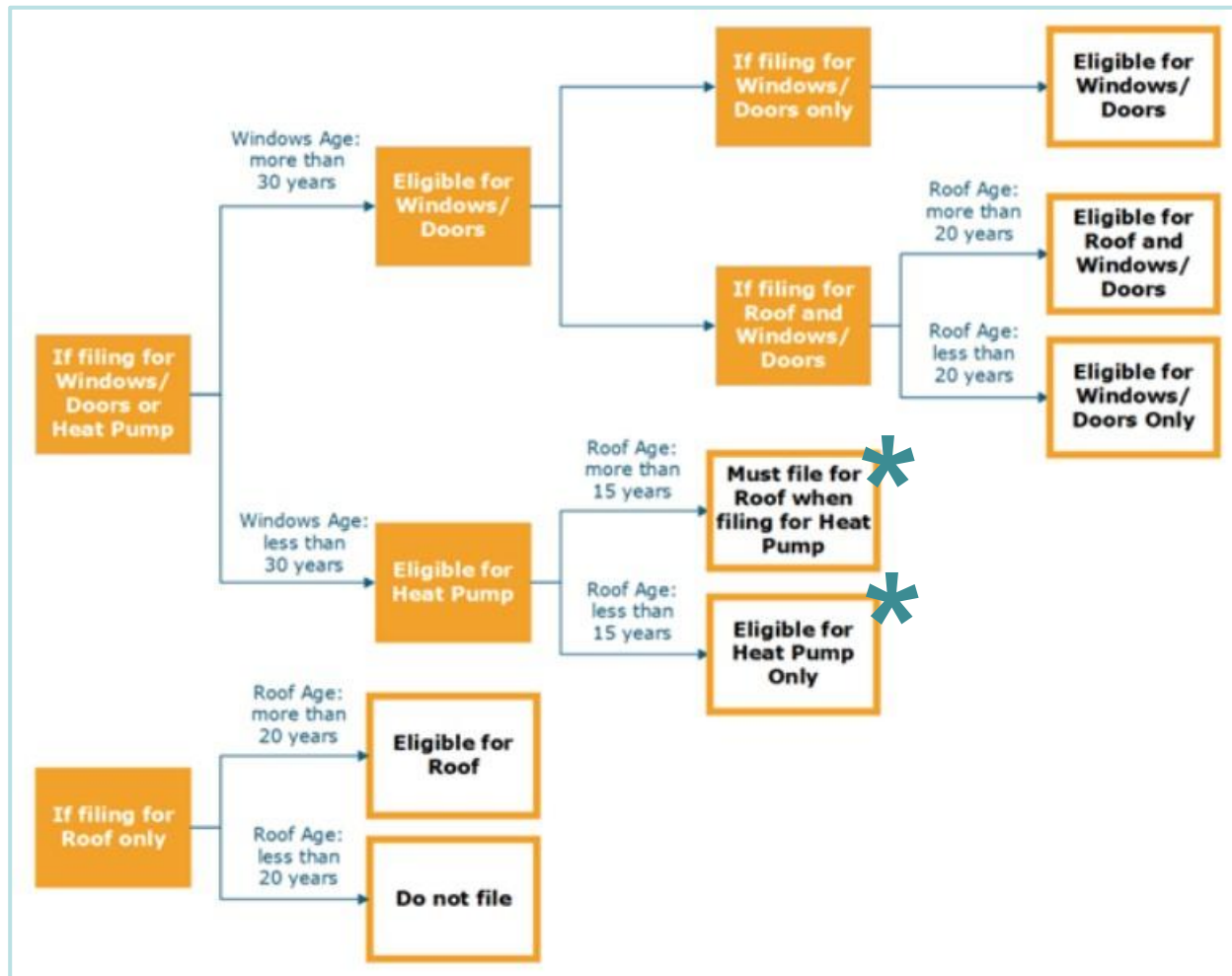


Accelerated Repair Program | Scope of Work

- In 2025, the Accelerated Repair Program is introducing heat pump conversion projects in addition to partial or full replacement of roofs and windows/doors projects.
 - Districts can be invited for multiple schools and/or scopes of work
 - Projected cost per school must be \$250,000 or more
- District invitations are based upon MSBA's review of Statements of Interest
 - Districts submit SOIs specifically for the Accelerated Repair Program
 - SOI opening historically occurs from mid-January to mid-February
 - Districts receive invitations in October by MSBA Board of Directors
 - Consultant assignments occur from January to May
 - Consultant assignments will be made for anticipated district invitations beginning in 2025 and extending to 2026



Accelerated Repair Program | Scope of Work





Accelerated Repair Program | District Participation

Repair Program	Districts	Projects	Total Project Budgets	Maximum Facility Grants	Number of Projects Final Audit Approved
2024 Accelerated	37	70	-	-	-
2022 Accelerated	12	27	\$45,798,434	\$32,584,855	-
2021 Accelerated	15	26	\$109,602,763	\$59,925,011	1
2020 Accelerated	15	21	\$81,731,451	\$43,329,550	2
2019 Accelerated	24	38	\$85,180,989	\$52,047,959	23
2018 Accelerated	20	30	\$83,172,480	\$47,018,557	19
2017 Accelerated	19	34	\$117,020,597	\$73,280,673	20
2016 Accelerated	28	48	\$156,598,234	\$83,007,586	40
2015 Accelerated	24	43	\$136,680,652	\$91,974,052	42
2014 Accelerated	34	47	\$108,410,084	\$65,388,035	44
2013 Accelerated	25	45	\$94,650,790	\$54,662,551	45
2012 Accelerated	24	36	\$63,009,653	\$38,267,952	36
Green	93	189	\$366,647,226	\$222,889,218	189

* Financial totals reflect Project Funding Agreement approvals through the December 13, 2024 Board of Directors Meeting.



Accelerated Repair Program | Consultant Assignments

- Districts are randomly assigned OPMs and Designers
 - Number of assignments are based upon the number of districts invited into ARP
 - MSBA cannot guarantee any specific number of assignments or any assignments at all to those selected through the procurements
 - Assignment process is restarted with each new cohort of Statements of Interest
 - Assignments are made upon districts' completion of prerequisite documents and schematic design funding



Accelerated Repair Program | Consultant Contracts

- MSBA standard OPM and Designer contracts for Accelerated Repair Program
 - Updated MSBA Heat Pump Designer contract will be incorporated into the procurement documents
 - Contracts should not be altered in any way
 - OPM contract may include a not-to-exceed fee for the schematic design phase
 - Workforce Participation (See Project Advisory #66)
 - OPM Contract – OPM shall monitor and report on the Designer's and Contractor's compliance with the Commonwealth's Workforce Participation requirements
 - Designer Contract – Designer shall be required to provide regular reports of the gender and race/ethnicity of employees engaged in work under the contract, for both prime and subconsultants, in the form and format required by the District, including but not limited to, by electronic reporting through the requested means and with the frequency required by the District.



Accelerated Repair Program | Commissioning

- MSBA will assign a commissioning consultant to each project following MSBA's receipt of District's schematic design package
 - MSBA pays 100% of commissioning consultant costs
- OPM is responsible to coordinate commissioning consultant activities from construction documents to closeout



Accelerated Repair Program | Construction Administration

- Per OPM contract, Project Representative is present during contractor operations
 - 8.6.2 The Owner's Project Manager shall provide an on-site Project Representative, who shall be dedicated exclusively to the Project, either as an employee of the Owner's Project Manager or as a subconsultant to the Owner's Project Manager.
 - 8.6.2.1 The Project Representative shall be subject to the approval of the Owner and the Owner reserves the right to require the Owner's Project Manager to replace the Project Representative at any time during the course of the Project.
 - 8.6.2.2 The Project Representative shall have **at least five years of experience** in on-site supervision of projects similar in size and complexity to the Project.
 - 8.6.2.3 The Project Representative shall be present at all times when the Contractor is conducting operations at the site starting from issuance by the Owner of a Notice to Proceed to the Contractor and continuing until substantial use or substantial completion as determined by the Owner and thereafter on an, as needed basis, until issuance to the Contractor of a Certificate of Final Completion by the Owner.
- Designer certifies percentage of work for contractor payment requisitions
- OPM assists district in completing "Study", "Design", and "Construction" evaluation of the Designer as well as 50% and Final DCAMM evaluation of the Contractor(s)

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Procurement Schedule

Accelerated Repair Program

- Heat Pump Designers



ARP Heat Pump Designer Procurement | Scope of Work

- MSBA is seeking “Heat Pump Designers” to provide professional design and construction administration services for heat pump conversion projects, some of which will also include the replacement or restoration of roofing, thereby increasing energy efficiency in otherwise sound educational facilities.
 - For any invited Program project in 2025, the MSBA will participate in ADA accessibility upgrades and fire protection upgrades required by code. The MSBA will also participate in electrical system upgrades required to support the heat pump solution(s). The “Heat Pump Designer” should be prepared to provide design services to include these scopes of work in the final design.
- Please note: the procurement for ARP designers for the windows/doors and roof scopes only was completed in 2024. The next procurement for windows/doors & roof designers will be in 2027.



ARP Heat Pump Designer Procurement | Schedule

- **Approximate Procurement Schedule**

- Issuance of RFR: Late February or Early March 2025
- Question Deadline: Early March 2025
- RFR Response Deadline: Late March or Early April 2025
- Anticipated Selection by Designer Selection Panel: June or July 2025
- Selection: August 2025 Board Meeting

- **Selection Outcome**

- MSBA anticipates selection of 10-15 Designers
- Assignment to Districts invited to Accelerated Repair Program
 - ARP invitations in 2025 (pending Board approval)
 - Assignment to 2025 invitations anticipated Spring 2026

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Questions & Answers

