



OPERATIONAL SERVICES DIVISION

Professional Services Contracts Demystified

Part I

January 12, 2023, 1:00 – 2:00 p.m.

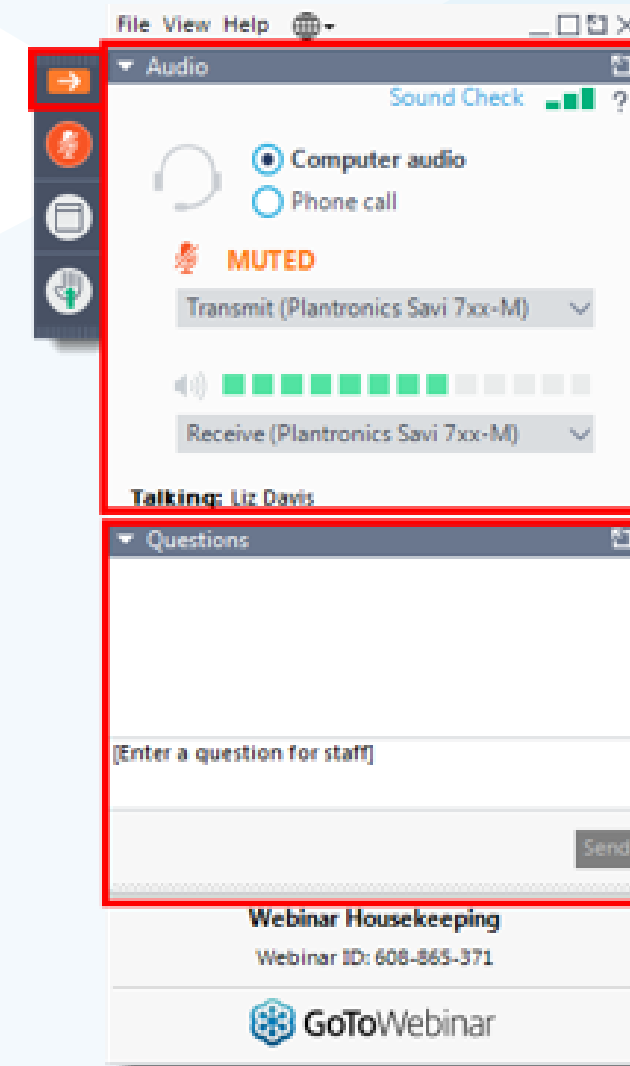


Webinar Logistics



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- Today's presentation is being recorded
- Click "Audio" in the Control Panel and select the Phone Call option to receive dial-in information
- All participants are muted
- We will address questions at the end of the presentation. Submit questions via the Questions panel
- Refer to the "Handouts" section to download a copy of this presentation



Today's Presenters

Ann-Maria Bennett, Sourcing Manager
Strategic Sourcing Services

Patricia Burke, Account Manager
Local Government Enablement Team

Jennifer Forsey, Account Manager
Local Government Enablement Team

Marge MacEvitt, Sourcing Manager
Strategic Sourcing Services



Agenda



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- Background: Why spotlight Professional Services Contracts?
- Overview of the PRF69 Facilities Engineering Services and PRF76 Management Consultants, Program Coordinators and Planners Services Contracts:
 - What's covered/ contract exclusions
 - Examples of work completed
 - How to engage vendors
- Benefits of using Statewide Contracts
- Statewide Contract Index
- Working with the Local Government Team
- Q&A and Survey



Why Spotlight Professional Services Contracts?



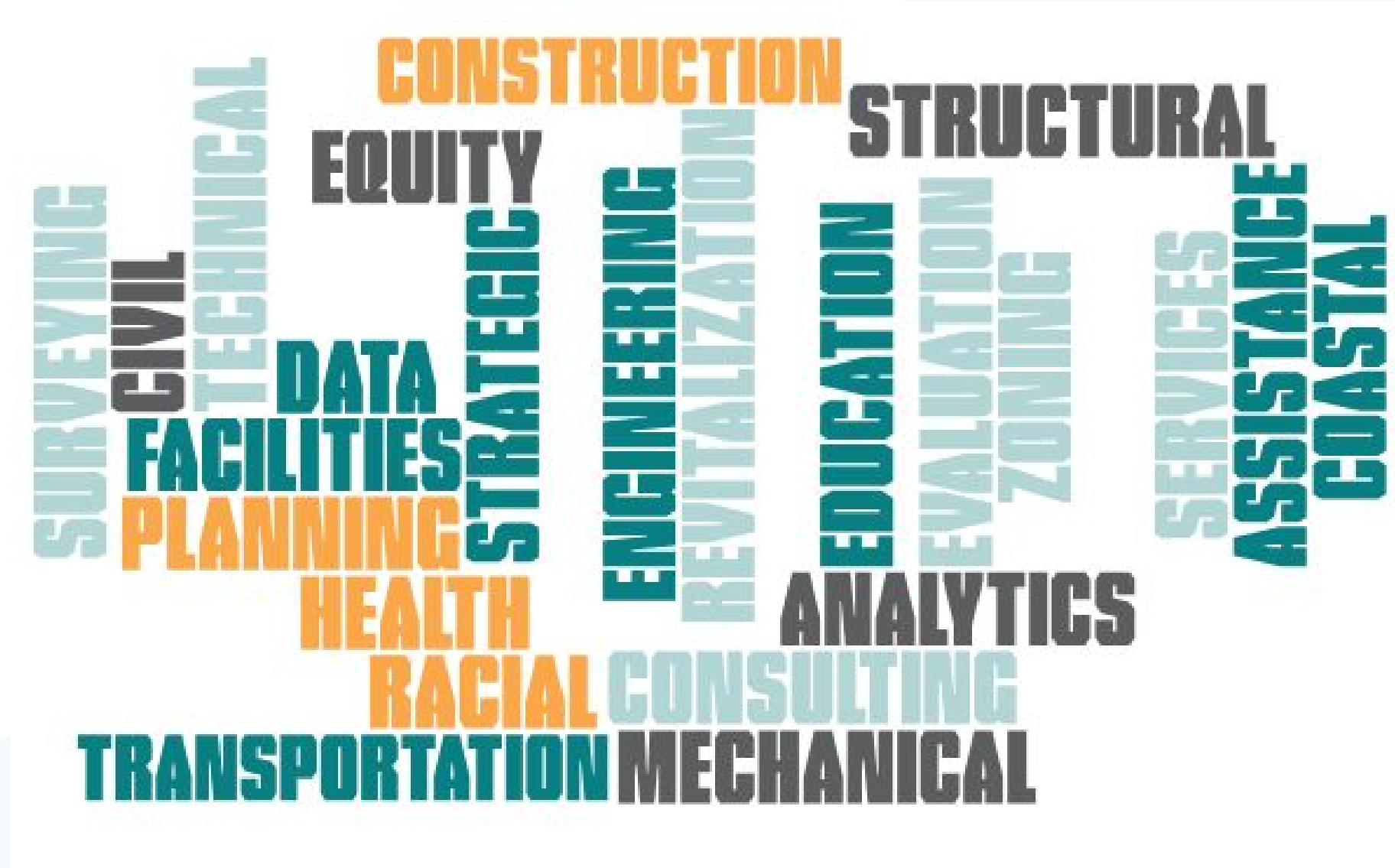
In FY22, Massachusetts buyers spent more than \$131M on OSD's Professional Services Contracts.

Less than 10% represented municipal spend

Array of PRF69 and PRF76 Services



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Takeaways for Today



- Scope of PRF Offerings
- Resources
- Confidence

Poll Question #1



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How many awarded engineering companies are available for hire through PRF69?

- a) Less than 35
- b) 36 – 50
- c) More than 50



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PRF69 Facilities Engineering Services

Marge MacEvitt



PRF69 Overview



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The PRF69 contract provides a wide-ranging array of engineering services.

- Current term: December 22, 2022 – December 21, 2025
- Eleven contract categories
- 52 awarded vendors

Contract Categories



- Category 1: Civil Engineering
- Category 2: Coastal Engineering
- Category 3: Mechanical Engineering
- Category 4: Energy Systems Engineering
- Category 5: Surveying
- Category 6: Facilities Engineering
- Category 7: Construction Engineering
- Category 8: Geotechnical Engineering
- Category 9: Structural Engineering
- Category 10: Transportation Engineering
- Category 11: Water Resources Engineering

PRF69 Areas of Expertise



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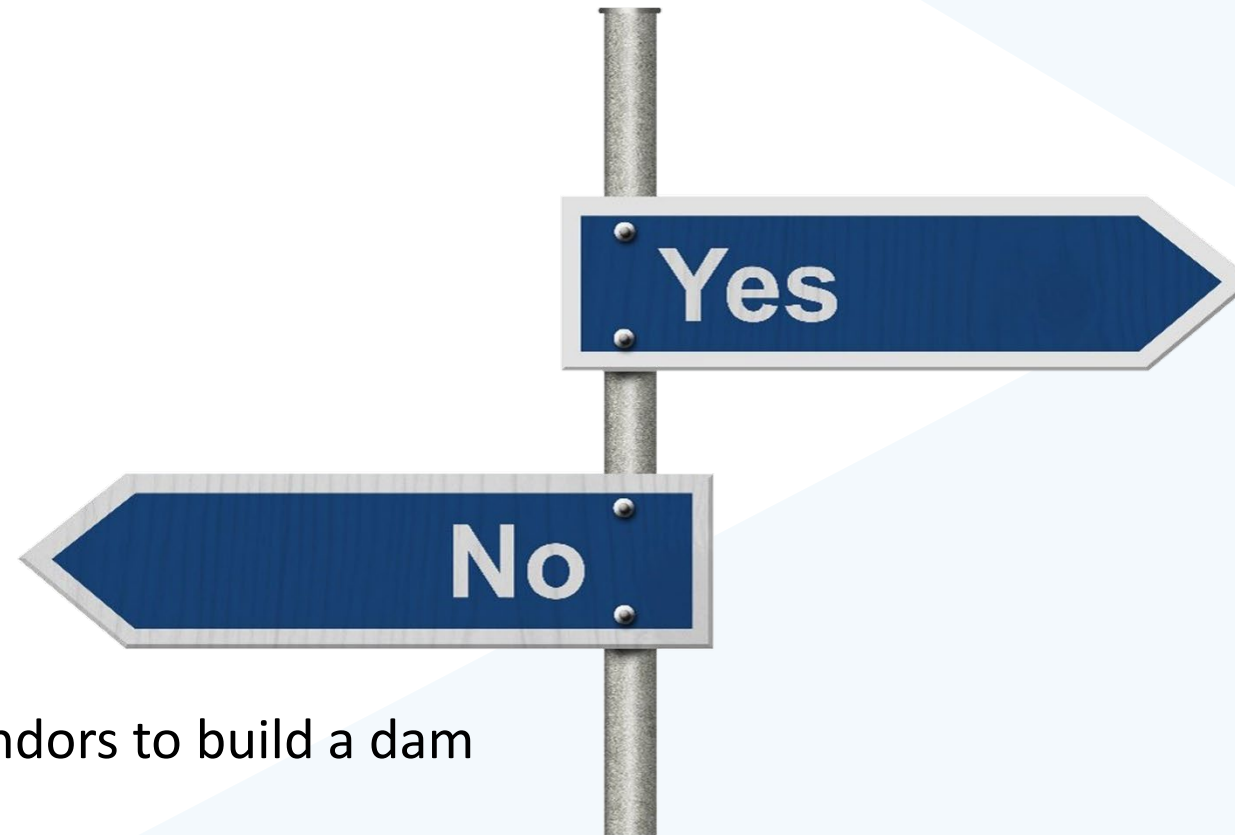
- Facilities
- Roads
- Bridges
- Utility Systems
- Ice Rinks
- Pools
- Athletic Fields
- Trails
- Docks
- Dams
- And many other areas!



What Is and Isn't Covered under PRF69



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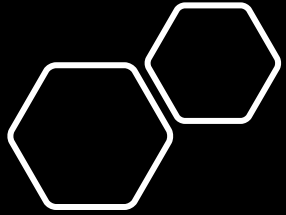


No Actual Building

Don't contact PRF69 vendors to build a dam or dig a swimming pool.

Contact PRF69 Vendors for:

- Site evaluation
- Technical Analysis and Reports
- Schematics
- Design
- Technical Specifications
- Cost Estimation
- Construction Oversight
- Permitting Assistance
- Other Related Tasks



PRF69 Project Examples

A few projects completed by PRF69 vendors:

- Preliminary and final design of the Magazine Street Pedestrian Bridge in Cambridge
- Design, engineering, and consulting services to evaluate condition of four outdoor pool facilities in Chicopee, including evaluation of the facilities, water use/loss data, filtration systems, and hazardous materials assessment and abatement plans
- Preparation of a rehabilitation plan for Gallops Island, which had been closed to the public due to asbestos and other contaminants
- Construction administration services, such as construction management, shop drawing review, change order support, and assistance with regulatory agencies
- Feasibility study and design, environmental permitting, and construction supervision for the Hathaway Dam removal in Pittsfield.

Engaging Vendors: Quotes & Pricing

-
- Statement of Work (SOW) based; Sample SOW available on the [Master Contract Record](#) in COMMBUYS.
 - Hourly and other rates for each vendor on the Master Contract Record
 - Quoting Requirements: Projects with an estimated value of \$10,000+ require at least three quotes. Large projects: Recommended to seek quotes from all vendors in the applicable Category and Geographic area.*

* Additional vendor selection requirements for engineering construction projects. See [Contract User Guide](#) for details.



Contract User Guide



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Contract User Guide for PRF69

PRF69: Facilities Engineering Services

UPDATED: November 21, 2022	
Contract #:	PRF69
MMARS MA #:	PRF69*
Initial Contract Term:	December 22, 2017 – December 21, 2020
Maximum End Date:	Up to 12 years with 3 options to renew for three years each
Current Contract Term:	December 22, 2020 – December 21, 2022
Contract Manager:	Marge MacEvitt, 617-720-3121, marge.macevitt@mass.gov
This Contract Contains:	Environmentally Preferable Products, Small Business Purchasing Program, MBE/MWBE/WBE, Service Disabled Veteran-Owned Business, Prompt Payment Discounts
UNSPSC Codes:	See Appendix D

*The asterisk is required when referencing the contract in the Massachusetts Management Accounting Reporting System (MMARS).

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TIP: To return to the first page throughout this document, use the CTL + Home command.

NOTE: Contract User Guides are updated regularly. Print copies should be compared against the current version posted on mass.gov/osd.
Updated: November 21, 2022 Template version: 7.0 Page 1 of 21
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Tel: (617) 720 - 3300 | www.mass.gov/osd | TDD: (617) 727 - 2716 | Twitter: @Mass_OSD | Fax: (617) 727 - 4527

The [PRF69](#) Contract User Guide provides:

- Vendor Information
- Awarded Categories by Vendor
- Coverage by Geographic Area
- Other Details to Navigate the Contract

Poll Question #2



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How many awarded companies are available for hire through PRF76?

- a) Less than 50
- b) 51 – 75
- c) 76 – 125



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PRF76 Management Consultants, Program Coordinators, and Planners Services

Ann-Maria Bennett



PRF76 Overview



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The [PRF76](#) contract provides Management Consulting, Program Coordinating and Planning Services to the Commonwealth and its Eligible Entities.

- Current term: October 1, 2022 - September 30, 2027
- Nine contract categories
- 110 current vendors across categories

Contract Categories

- Category 1: Education Services
- Category 2: Program Development, Organizational and Strategic Planning Services
- Category 3: Professional Development Services
- Category 4: General Data Analytics Services and Evaluation Services
- Category 5: Downtown/Town Center/Commercial Area Revitalization Consulting Services
- Category 6: Planning, Zoning and Development Consulting Services
- Category 7: DESE Facilities Technical Assistance Services and Operations
- Category 8: Health and Human Services
- Category 9: Specialized Racial and Health Equity Services

Category 1: Education Services

- Educational leadership evaluation, development, coaching, and interim leadership services
- Curriculum, performance, and achievement frameworks/standards protocols
- Project management for school/district performance reviews or assistance services
- Act as School Turnaround Operators offering statewide education improvement services to manage and operate low-performing, underperforming, and chronically underperforming schools
- Development of online curriculum/instruction/assessment content for pre-k to 12 students and adults and for teachers and/or administrators of pre-k to 12 students and adults
- Administration and operation of special education departments and programs



Category 2: Program Development, Organizational and Strategic Planning Services

- Administrative, human resource, engineering, personnel, and physical distribution management
- Scientific administration; economics; education; labor; health and social services
- Budget analysis, market analysis and projections in business development, economic forecasting, development of funding formulas and total cost analysis

Restriction for this category includes Financial Audit services currently provided under the [PRF78](#) Audit, Accounting, Compliance, Revenue Enhancement Services Statewide Contract

Category 3: Professional Development Services



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- Leadership Development Programs
- Team building/ Capacity Building Programs
- Coaching Programs
- Change Management Programs
- Communication Skills Programs
- Customer Relationship Management Programs
- Business Process Redesign Programs
- Executive searches for Head of Commonwealth Agencies

Not covered under this category is professional development for **specialized** public safety, law enforcement, fire, healthcare, mental health, highway, environmental, legal, food preparation or Information Technology Training.

Category 4: General Data Analytics Services and Evaluation Services



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Primarily a research category covering:

- Survey research, including data collection, analysis and development of needs assessment
- Forecasting analytic techniques
- Qualitative analysis and mixed method of analysis
- Preparing and analyzing large data, comparative and cost-effective studies
- Preparing and using electronic data for quality improvement work, service utilization, comparative effectiveness
- Expertise geo-spatial analysis



Exclusions: This category is intended to cover general data analytics and/ or evaluation services for the Commonwealth; it is not intended to cover specialized healthcare and health safety consulting related services.

Category 5: Downtown/Town Center/Commercial Area Revitalization Consulting Services



Provide technical assistance related consultant services related to:

- Downtown/Town Center/Commercial Area development in the areas of Business Development
- Business District Management
- Climate Impacts
- Cultural and Arts Development and Management
- District Branding and Management
- Planning for Housing/ Housing Development
- Quality of Life – Homeless Services, Addiction Services, Mental Health & Wellness
- Technical Assistance related to Downtown Revitalization: Tourism Development; Traffic Engineering and Design; Transportation Planning
- Urban Design/Architectural Services; Wayfinding; Zoning and Land Use related to Downtown/Town Center/Commercial Area Revitalization

Category 6: Planning, Zoning and Development Consulting Services

- Technical assistance in the context of a workshop(s) and/or on-site technical assistance
- Guide the community through a visioning exercise to identify the desired future for the community
- Train the community in conducting an assets and liabilities review
- Guidance on commercial, downtown and revitalization
- Guidance on how communities can analyze their upper story potential
- Advice and guidance on a broad range of housing opportunities and gaps
- Transportation Consulting Services
- Zoning Technical Services
- Geographic Information System (GIS) Services



Category 7: DESE Facilities Technical Assistance Services and Operations

Provide technical assistance and training to public educational entities (public school districts, individual public schools, public universities) to maximize safety in school facilities, supplemental facilities, and grounds to enable continuous full-time in-person schooling.

- DESE is administering a federal COVID relief program that requires the state to provide services via Statewide Contract to eligible private schools
- Category expanded to include private schools participating in the Massachusetts Emergency Assistance to Non-public Schools program (EANS-I or EANS-II)
- Fiscal intermediary processing fee of 2.5% to be assumed by the vendor



Category 8: Health and Human Services

- Public Health Services
- Mental Health Services
- Developmental Services
- Employment Services
- Child Service organizations
- Emergency Preparedness
- Financial Services
- Integrated human services that aid communities, families and individuals in a faster and cost-effective way to self-sufficiency

Direct services to clients are not covered.



Category 9: Specialized Racial and Health Equity Services



Development of policies and technical assistance to address institutional and structural inequities through change management; project and program development, and strategic planning using a racial equity framework. Projects include:

- Hiring and retention
- Evaluation, Technical Assistance (TA), and Capacity Building around Culturally and Linguistically Appropriate Services (CLAS)
- Training and TA around strategies to engage:
 - Black, Indigenous, and People of Color (BIPOC); Latinx individuals; Individuals who do not speak English or who prefer to speak in another language; Individuals who do not have access to transportation, either personal or public, or who face barriers getting to a vaccination location; Individuals with disabilities and those who have access and functional needs; Individuals experiencing homelessness; Individuals with mental illness and/or residents with substance use disorder; Individuals who identify as LGBTQ+

PRF76 Pricing and Quote Requirements


- This is a fee for service contract
- Engagements that are limited in scope, time and value might be best quoted on hourly rate compensation structure
- Purchases made through this contract will be direct, outright purchases: there are no predetermined price files
- The compensation structure is according to individual projects as described and agreed to in the SoW and the accepted bidder response
- Final prices may be negotiated between the vendor and the hiring department
- Engagements valued at less than \$10,000 require at least one quote or an accepted Statement of Work with an estimated value
- Engagements valued to exceed \$10,000 require buyers to solicit at least three written quotes



Contract User Guide



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Contract User Guide for PRF76

PRF76: Management Consultants, Program Coordinators and Planners Services

Contract #: PRF76

MMARS MA #: PRF76*

Initial Contract Term: October 1, 2022 -September 30, 2027

Maximum End Date: One (2) year extension to 2029

Current Contract Term: October 1, 2022 -September 30, 2027

Contract Manager: Marge MacEvitt, 617-720-3121, marge.macevitt@mass.gov

This Contract Contains: Small Business Purchasing Program, MBE/MWBE/WBE, Service-Disabled Veteran-Owned Business

UNSPSC Codes:

80-10-00	Management Advisory Services
86-10-18	In Service Training and Manpower Development
86-13-00	Specialized Educational Services
77-10-00	Environmental Management

UPDATED: December 30, 2022

*The asterisk is required when referencing the contract in the Massachusetts Management Accounting Reporting System (MMARS).

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Updated: December 30, 2022 Template version: 8.0 Page 1 of 31

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The [PRF76](#) Contract User Guide provides:

- Vendor Information
- Awarded Categories by Vendor
- How to Use the Contract
- Other Details to Navigate the Contract

Statewide Contract Index Key Word Search

The Statewide Contract Index provides answers to commonly asked questions, such as: Where may I find this product on Statewide Contract?

- Use the Keyword Search function to search for professional services terms.
- Find the [Statewide Contract Index](#) on COMMBUYS or the [Contract User Guide](#) page.
- View our [six-minute video](#) that highlights information provided in the Statewide Contract Index.



Statewide Contract Benefits

- Comply with 30B
- Comprehensive selection
- Competitive pricing and benefits



Professional Services Contracts Demystified Part II



OPERATIONAL SERVICES DIVISION

Join our Strategic Sourcing unit and Local Government Enablement Team as we demystify two additional Professional Services Contracts:

- PRF70 Advertising, Marketing and Event Planning Services
- PRF75 Foreign Language Interpretation and Translation Services.

January 26, 2023

1:00 – 2:00 p.m.

[REGISTER](#)

Upcoming Webinars!

WITH 200+ PROFESSIONAL SERVICES FIRMS
ON STATEWIDE CONTRACT,
LOOK NO FURTHER

In FY22, Massachusetts public buyer spend on the Operational Services Division's (OSD) Professional Services Contracts equaled \$131M. OSD has 13 PROFESSIONAL SERVICES STATEWIDE CONTRACTS with more than 200 vetted businesses, so experts are within arm's reach.

→ **Learn about our Professional Services Contracts!
Attend Our Two-Part Webinar Series**

Join our Strategic Sourcing unit and the Local Government Enablement team as we demystify four of our most popular professional services contracts.
Each webinar session will feature information about two PRF contracts, highlighting services provided, contract benefits, and how to engage awarded vendors.

Register to Reserve a Spot:

» **THURSDAY, JANUARY 12, 2023, 1:00-2:00 P.M.**
PRF69 – Facilities Engineering Services
PRF76 – Management Consultants, Program Coordinators and Planners Services
Q&A
[REGISTER](#)

» **THURSDAY, JANUARY 26, 2023, 1:00-2:00 P.M.**
PRF70 – Advertising, Marketing and Event Planning Services
PRF75 – Foreign Language Interpretation and Translation Services
Q&A
[REGISTER](#)

We hope to see you at one or both of our sessions!
Send questions to OSD-Events@mass.gov.

 FACILITIES ENGINEERING	 MANAGEMENT CONSULTANTS	 ADVERTISING & MARKETING	 FOREIGN LANGUAGE INTERPRETATION/ TRANSLATION SERVICES
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Local Government Enablement Team



The Local Government Enablement Team works with municipal organizations to understand their local purchasing and procurement processes and requirements and provides recommendations and support.

Eric Murphy – eric.murphy@mass.gov

Jennifer Forsey – jennifer.forsey@mass.gov

Jackie Needham – jackie.needham@mass.gov

Trish Burke – patricia.burke@mass.gov

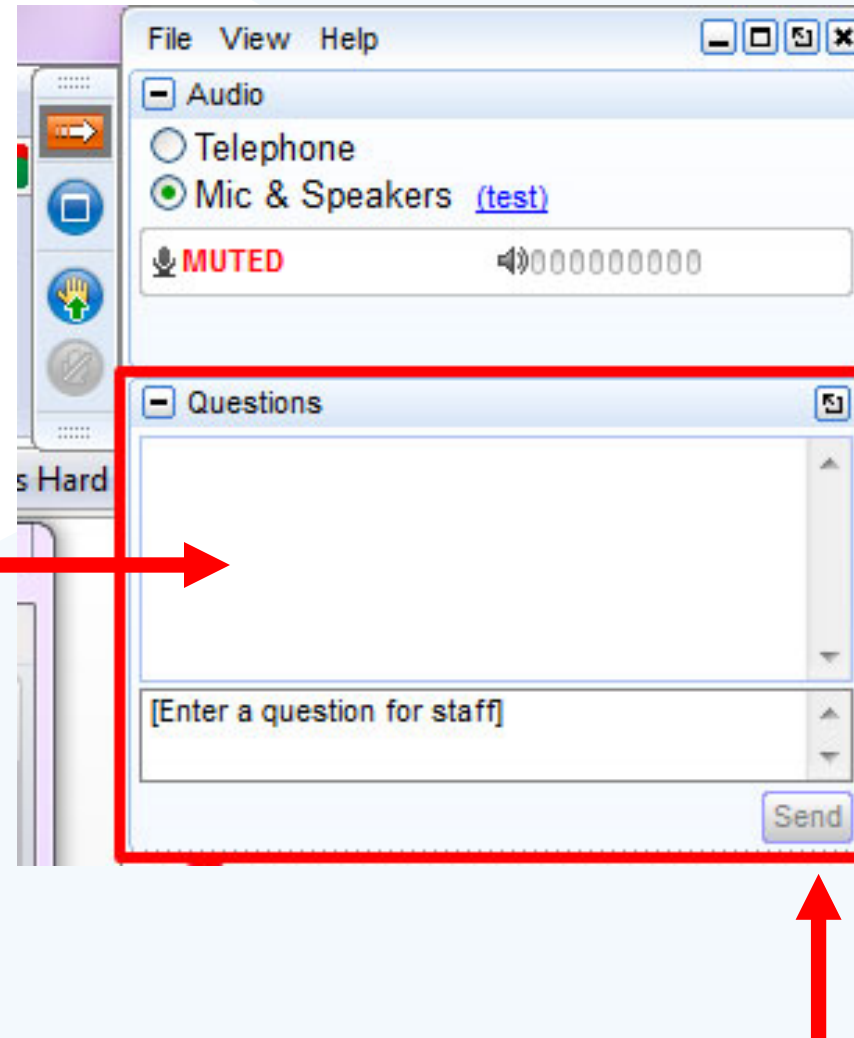
Also reach the Local Government Enablement Team at COMMBUYSEnablement@mass.gov.

Question & Answer Period



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From the Control Panel, enter your question in the Questions Panel



Select *Send* to submit your question

We Want Your Feedback!



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Find a [link](#) to our brief survey in the Chat.

Please take a moment to share your thoughts about today's presentation.



Additional OSD Resources



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OSD: www.mass.gov/osd

COMMBUYS: <https://www.commbuys.com/bsa/>

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Thank you for attending!