MEMORANDUM

TO: Board of Directors, Massachusetts School Building Authority
Massachusetts School Building Authority
FROM: James A. MacDonald, First Deputy Treasurer and Chief Executive Officer
John K. McCarthy, Executive Director and Deputy Chief Executive Office
DATE: June 19, 2019
RE: Recommendation for 2019 Accelerated Repair Program Invitations

Recommendation

That the Executive Director be authorized to invite each of the schools listed in Attachment A, attached hereto, into the Accelerated Repair Program (the "ARP") to collaborate with the Massachusetts School Building Authority (the "MSBA") to conduct a Feasibility Study, as described in 963 CMR 2.00 et seq. The purpose of each Feasibility Study shall be to better understand the problems identified by the district in the Statement of Interest submitted to the MSBA and explore options to repair said problems.

That the Executive Director be authorized to do all acts, to execute and deliver any and all documents and agreements, and to expend all funds necessary or desirable, in connection with conducting said Feasibility Study for each of the schools listed in Attachment A.

Discussion

Following the receipt of 83 Statements of Interest (the "SOIs") filed in 2019 for the Accelerated Repair Program (the "ARP"), the Massachusetts School Building Authority (the "MSBA") performed a review of the information provided by the districts based upon the non-qualifying conditions noted below and for conformance with the ARP program. The initial review resulted in 79 of the 83 schools qualifying for consideration for participation in the ARP program.

Non-Qualifying Accelerated Repair Program Conditions*

Roof Age <20	System is less than 20 years of age
Window Age <30	System is less than 30 years of age
Boiler Age <20	System is less than 20 years of age
Proposed Project Cost	Proposed total project cost is projected as less than $250,000
Overcrowding	School is judged by the district to be over-crowded
School Consolidation	District is considering the facility for potential consolidation
Building Usage	Primary use of the building is for non-educational purposes
Outside Scope	SOI itself identifies construction beyond roofs, windows, or boilers
Excess Boiler Scope	SOI itself identifies boiler construction, excluding heating fuel storage and/or delivery, beyond the physical limits of the existing boiler room(s)
School SOI History	Facility condition not identified in the SOI remains unresolved from previous MSBA SOI review
Future Project	District plans a future construction project for MSBA participation going beyond roofs, windows/doors, and boilers for the school
District-Wide Review	District is reviewing facility deficiencies to further identify its needs and priorities

*The conditions were described in the 2019 Statement of Interest ("SOI") for Accelerated Repair Program overview provided to all Superintendents.

Historically, the MSBA has invited approximately 35 to 50 SOIs for the ARP program annually. Consistent with the communication provided annually regarding the SOI process, among the factors the MSBA may consider should the MSBA be required to limit the number of invitations due to its annual statutory funding cap are the degree of the disrepair of the systems to be replaced and the frequency with which issues associated with that disrepair arise.

In 2017, given the budget impact from the number of SOIs filed for the ARP program, the MSBA was only able to consider SOIs with systems of 30 years or more. The MSBA staff's recommendation to invite systems of 30 years or more resulted in the invitation of 36 schools from the otherwise qualifying 69 schools for which SOIs were received.

In 2018, the budget for the ARP was established in the Statement of Interest Process Overview as approximately $50 million. The qualifying system age requirement to submit an SOI for roofs and boilers remained at 20 years while the qualifying age requirement for windows/doors increased to 30 years. Given the budget impact from the number of SOIs filed in 2018, the MSBA was only able to consider SOIs with roof and boiler systems of 25 years or more and window/door systems of 30 years or more resulting in the invitation of 34 of the 51 otherwise qualifying schools.

In 2019, the budget for the ARP was again established in the Statement of Interest Process Overview as approximately $50 million. The qualifying system age requirement to submit an SOI for roofs and boilers remained at 20 years and the qualifying age requirement for windows/doors remained at 30 years. It was noted that dependent upon the quantity of the ARP SOIs received, the MSBA may again need to limit the number of invitations to meet its budget and therefore, there may be further changes to the age requirements.

Given the budget impact from the number of SOIs filed for the ARP program in 2019, at the June 5, 2019 Facilities Assessment Subcommittee Meeting, MSBA staff recommended further narrowing the qualifications for consideration to participate in the ARP this year. For 2019, MSBA staff recommended that only roof systems of 27 years or more and boiler systems of 20 years or more be considered for invitation. Furthermore, MSBA staff recommended that no window/door systems be recommended for invitation.

For the 2019 ARP program, MSBA staff's recommendation to invite roof systems of 27 years or more and boiler systems of 20 years or more resulted in the consideration of 47 of the 79 otherwise qualifying schools. The MSBA conducted site visits at 47 of the 79 schools from April 11, 2019 to May 7, 2019. Upon collecting and reviewing additional information during and after the site visits, MSBA staff recommends 42 schools for invitation to the 2019 ARP program at the June 26, 2019 Board of Directors Meeting. The age of the systems used to qualify a district for consideration to participate in the ARP is based upon the information received from the district. If during the Feasibility Study it is determined that the age of the roofs and/or boilers does not meet the qualifying criteria, the MSBA will ask the district to remove its SOI and will not authorize a Project Funding Agreement for a project.

Attached to this memorandum are three Attachments:

- Attachment A identifies the schools recommended for invitation at the June 26, 2019 Board of Directors Meeting as well as the recommended project scope.
- Attachment B identifies the schools not recommended for invitation as well as the reason(s).
- Attachment C is the Statement of Interest ("SOI") Overview for Accelerated Repair Program

Attachment A
Recommendation for Invitation to the 2019 Accelerated Repair Program

District Name	School Name	Age of Existing Building	Grade	2018/2019 Enrollment	Existing Square Footage	Scope Requested by District	Invited Scope Recommendation	Partial Scope Description	Declined Scope Recommendation	Reasons for Declined Invitation
Acushnet	Acushnet Elementary School	1971	PK-4	565	95,709	Roof	Partial Roof	Roof Section A		
Agawam	Agawam Junior High School	1973	7-8	591	131,000	Boiler	Boiler			
Blackstone Valley Regional Vocational Technical School District	Blackstone Valley Regional Vocational Technical High School	1964, 1968, 1980, 2005	9-12	1,230	282,290	Roof	Partial Roof	Roof Section A		
Boston	Curley K-8 School	1970	PK-8	968	34,445	Roof	Partial Roof	Roof Section A		
Boston	Mary K. Lyon High School	1925	9-12	133	47,314	Boiler	Boiler			
Boston	William McKinley School	1959	PK-12	327	78,258	Roof	Roof			
Brockton	Huntington Alternative School	1890, 1906, 1915	K-12	59	66,657	Roof	Roof			
Chelmsford	South Row Elementary School	1962, 2000, 2017	K-4	416	49,069	Roof	Partial Roof	Roof Section A		
Dracut	Brookside Elementary School	1968	K-5	439	92,000	Roof	Roof			
Dracut	George H. Englesby Elementary School	1963	K-5	543	93,700	Roof	Roof			
East Bridgewater	Central Elementary School	1951, 1962, 2006	PK-2	586	96,000	Roof	Partial Roof	Roof Section A		
Essex North Shore Agricultural and Technical School District	Essex North Shore Agricultural and Technical School	1967 (Alumni Gym only)	9-12	1,413	417,470	Roof,Windows/ Doors,Boiler	Partial Roof	Roof Section A	Windows/Doors, Boiler	Windows/Doors Not Considered; Excess Boiler Scope
Fitchburg	South Street Elementary School	1937, 1958, 1963, 1995	PK-4	641	202,600	Roof, Windows/ Doors, Boiler	Partial Roof; Partial Boiler	Roof Section A; Boiler Section 1	Windows/Doors	Windows/Doors Not Considered
Hampden-Wilbraham Regional School District	Wilbraham Middle School	1968	6-8	614	99,750	Roof	Roof			
Hanover	Cedar Elementary School	1966, 1968, 2000	PK-4	455	64,700	Roof	Partial Roof	Roof Sections B,C		
Kingston	Kingston Elementary School	1950, 1959, 1974	K-2	440	95,462	Roof,Windows/ Doors,Boiler	Partial Boiler	Boiler Section 1	Roof, Windows/Doors	Roof Age <27; Windows/Doors Age <30
Lowell	Dr. Gertrude Bailey Elementary School	1992	PK-4	508	65,000	Roof,Boiler	Partial Roof; Boiler	Roof Section D		

Attachment A
Recommendation for Invitation to the 2019 Accelerated Repair Program

District Name	School Name	Age of Existing Building	Grade	2018/2019 Enrollment	Existing Square Footage	Scope Requested by District	Invited Scope Recommendation	Partial Scope Description	Declined Scope Recommendation	Reasons for Declined Invitation
Lowell	Frederic T. Greenhalge Elementary School	1994	PK-4	502	66,000	Roof,Boiler	Boiler		Roof	Roof Age <27
Lowell	James S. Daley Middle School	1956	5-8	695	111,800	Roof,Boiler	Boiler		Roof	Roof Age <27
Lowell	James F. Sullivan Middle School	1992	6-8	494	97,200	Roof,Boiler	Roof; Boiler			
Lowell	Rogers Early Learning Center	1994	K-7	738	112,000	Roof,Boiler	Boiler		Roof	Roof Age <27
Lowell	S. Christa McAuliffe Elementary School	1992	PK-4	506	63,600	Roof,Boiler	Boiler		Roof	Roof Age <27
Mohawk Trail Regional School District	Sanderson Academy	1997	PK-6	159	37,000	Boiler	Partial Boiler	Boiler Section 1		
Monson	Quarry Hill Community School	1991	PK-4	402	110,000	Roof	Roof			
Northbridge	Northbridge Middle School	1905, 1927, 1955, 1986	5-8	697	176,924	Windows/ Doors,Boiler	Boiler		Windows/Doors	Windows/Doors Not Considered
Quabbin Regional School District	Hubbardston Center School	1954	K-6	309	64,740	Roof	Roof			
Salem	Bentley Academy	1967, 1990	K-5	339	89,592	Boiler	Boiler			
Sandwich	Forestdale School	1989	PK-2	609	115,600	Boiler	Boiler			
Sandwich	Oak Ridge School	1989	3-6	813	122,500	Boiler	Boiler			
Southborough	Mary E Finn Elementary School	1964	PK-1	326	70,954	Roof,Boiler	Boiler		Roof	Roof Age <27
Springfield	Frederick Harris School	1927, 1947, 1954, 2001	PK-5	625	89,839	Boiler	Boiler			
Springfield	Indian Orchard Elementary School	1924, 1998	PK - 5	656	88,498	Roof,Boiler	Partial Boiler	Boiler Section 1	Roof	Roof Age <27
Springfield	Sumner Avenue School	1912, 1914	PK - 5	530	82,339	Roof, Boiler	Partial Boiler	Boiler Section 1	Roof	Roof Age <27
Wakefield	Greenwood School	1897, 1924	K - 4	220	36,330	Roof	Roof			

Attachment A
Recommendation for Invitation to the 2019 Accelerated Repair Program

District Name	School Name	Age of Existing Building	Grade	2018/2019 Enrollment	Existing Square Footage	Scope Requested by District	Invited Scope Recommendation	Partial Scope Description	Declined Scope Recommendation	Reasons for Declined Invitation
Wayland	Loker Elementary School	1957, 1963, 1991, 1999	K-5	270	50,738	Roof	Partial Roof	Roof Sections B, C, D		
Westport	Westport Elementary	1978	3-6	476	71,748	Roof	Roof			
Weymouth	Ralph Talbot Primary School	1955	K-4	245	34,650	Boiler	Boiler			
Worcester	Burncoat Street Preparatory School	1916, 1925	K-6	309	29,844	Roof	Partial Roof	Roof Section A		
Worcester	Lincoln Street School	1929	K-6	255	25,766	Boiler	Boiler			
Worcester	Tatnuck Magnet School	1960	PK-6	410	42,384	Roof	Roof			
Worcester	Vernon Hill School	1931	PK-6	517	83,060	Roof	Roof			
Worcester	Worcester East Middle School	1924	7-8	766	155,392	Roof,Windows/ Doors	Roof		Windows/Doors	Windows/Doors Not Considered

Attachment B
Not Recommended for Invitation to the 2019 Accelerated Repair Program

District Name	School Name	Age of Existing Building	Grade	2018/2019 Enrollment	Existing Square Footage	Scope Requested by District	Invited Scope Recommendation	Declined Scope Recommendation	Reasons for Declined Invitation
Acton-Boxborough Regional School District	Blanchard Memorial School	1949, 1959, 1967, 1973, 1995	K-6	464	71,395	Roof, Windows / Doors		Roof, Windows / Doors	Roof Age <27; Windows/Doors Not Considered
Amesbury	Amesbury Middle School	1954	5-8	644	144,923	Roof		Roof	Roof Age <27
Amherst-Pelham Regional School District	Amherst Regional Middle School	1969	7-8	416	197,000	Roof		Roof	Roof Age <27
Attleboro	Cyril K. Brennan Middle School	1997	5-8	594	106,000	Roof		Roof	Roof Age <27
Attleboro	Wamsutta Middle School	1997	5-8	578	106,000	Roof		Roof	Roof Age <27
Beverly	Ayers Ryal Side Elementary School	1956	K-4	426	55,250	Roof		Roof	Roof Age <27
Boston	Josiah Quincy Elementary School	1976	PK-5	803	212,079	Windows / Doors		Windows / Doors	Windows/Doors Not Considered
Boston	Ralph Waldo Emerson School	1924, 2016	PK-5	256	30,400	Windows / Doors		Windows / Doors	Windows/Doors Not Considered
Boston	English High School	1973	9-12	521	225,560	Windows / Doors		Windows / Doors	Windows/Doors Not Considered
Cambridge	Morse School	1955, 1995	PK-5	297	84,021	Roof		Roof	Roof Age <27
Chesterfield-Goshen Regional School District	New Hingham Regional Elementary School	1998	PK-6	129	32,865	Roof		Roof	Roof Age <27
Fitchburg	Fitchburg High School	1999	PK-12	1,158	246,000	Roof		Roof	Roof Age <27
Fitchburg	Goodrich Academy	1891	9-12	207	14,400	Roof		Roof	Roof Age <27
Florida	Gabriel Abbott Memorial School	1951, 1966	PK - 8	87	24,400	Windows / Doors		Windows / Doors	Windows/Doors Not Considered
Framingham	Miriam F. McCarthy Elementary School	1952, 1994	K-5	528	94,936	Roof		Roof	Roof Age <27
Gill-Montague Regional School District	Gill Elementary School	1955, 1985	K - 6	128	18,320	Roof		Roof	Roof Age <27

Attachment B
Not Recommended for Invitation to the 2019 Accelerated Repair Program

District Name	School Name	Age of Existing Building	Grade	2018/2019 Enrollment	Existing Square Footage	Scope Requested by District	Invited Scope Recommendation	Declined Scope Recommendation	Reasons for Declined Invitation
Haverhill	Golden Hill Elementary School	1993	1-4	501	73,875	Roof		Roof	Roof Age <27
Haverhill	Haverhill High School	1962	9-12	1,841	355,000	Roof		Roof	Roof Age <27
Haverhill	Moody Pre-School	1914	PK	200	27,000	Roof		Roof	PK-only School
Lowell	Abraham Lincoln Elementary School	1993	PK-4	509	60,100	Roof		Roof	Roof Age <27
Lowell	Lowell High School	1920, 1939	9-12	3,174	109,294	Roof, Windows / Doors		Roof, Windows / Doors	Roof Age <27; Windows/Doors Not Considered
Lynn	Lynn Vocational Technical Institute	1971	PK-12	1,063	227,855	Windows / Doors		Windows / Doors	Windows/Doors Not Considered
Marshfield	Martinson Elementary School	1964, 1999	PK-5	423	92,000	Roof		Roof	Roof Age <27
Northampton-Smith Regional School District	Smith Vocational and Agricultural High School	1976	9-12	495	166,958	Windows / Doors		Windows / Doors	Windows/Doors Not Considered
Peabody	South Memorial Elementary School	1950	PK-5	471	67,082	Roof		Roof	Roof Age <27
Peabody	West Memorial Elementary School	1961	PK-5	261	50,508	Roof		Roof	Roof Age <27
Quabbin Regional School District	Hardwick Elementary School	1992	K-6	174	40,248	Roof, Windows / Doors		Roof, Windows / Doors	Roof Age <27; Windows/Doors Not Considered
Quabbin Regional School District	New Braintree Grade School	1997	K-1	61	27,750	Roof		Roof	Roof Age <27
Quaboag Regional School District	Quaboag Regional High School	1968	9-12	350	170,542	Roof		Roof	Roof Age <27
Revere	Abraham Lincoln School	1967	PK-5	669	87,017	Roof, Windows / Doors		Roof, Windows / Doors	Roof Age <27; Windows/Doors Not Considered
Shutesbury	Shutesbury Elementary School	1972	PK-6	128	22,000	Roof, Boiler		Roof, Boiler	Roof Age <27; District-Wide Review
Southborough	P. Brent Trottier Middle School	1996, 2002	6-8	431	128,121	Roof		Roof	Roof Age <27

Attachment B
Not Recommended for Invitation to the 2019 Accelerated Repair Program

District Name	School Name	Age of Existing Building	Grade	2018/2019 Enrollment	Existing Square Footage	Scope Requested by District	Invited Scope Recommendation	Declined Scope Recommendation	Reasons for Declined Invitation
Spencer-East Brookfield Regional School District	Knox Trail Junior High School	1994	5-8	438	90,000	Boiler		Boiler	District-Wide Review
Springfield	Arthur T. Talmadge School	1954	K-5	240	37,055	Windows / Doors		Windows / Doors	Windows/Doors Not Considered
Springfield	Edward P. Boland School	2001	PK-5	764	130,441	Roof		Roof	Roof Age <27
Springfield	Glenwood School	1930	K-5	285	38,637	Roof		Roof	Roof Age <27
Springfield	High School of Commerce	1915, 1998	9-12	1,015	266,952	Roof		Roof	Roof Age <27
Springfield	Springfield High School of Science and Technology	1951, 1996	9-12	1,260	238,745	Windows / Doors		Windows / Doors	Windows/Doors Not Considered
Springfield	Samuel Bowles School	1920, 1924, 1926, 1954, 1963	K-5	327	50,444	Roof		Roof	Roof Age <27
Springfield	Thomas M. Balliet Elementary School	1948, 2017	PK-5	324	56,778	Windows / Doors		Windows / Doors	Windows/Doors Not Considered
Wakefield	Mary E. Walton School	1952, 2018	K-4	231	26,000	Roof		Roof	Roof Age <27

Statement of Interest ("SOI") Overview for Accelerated Repair Program

Introduction

The Massachusetts School Building Authority's (the "MSBA") grant program is a non-entitlement, competitive program, and its grants are distributed by the MSBA Board of Directors, based on need and urgency, as expressed by the district and validated by the MSBA. The MSBA completes a review of available information regarding all districts that submit a Statement of Interest ("SOI") for the Accelerated Repair Program ("ARP") each year. The MSBA encourages all interested districts to submit an SOI to the MSBA, but the ARP is not appropriate for all potential projects. The ARP is for the partial or full replacement of roofs, windows/doors, and/or boilers.

The following information provides an overview of the SOI process from initial opening of the SOI period each January until the Board of Directors votes to authorize invitations at a subsequent late spring/summer Board meeting.

The SOI Filing Period

The MSBA opens its SOI system annually for districts to file one or more SOIs for either the Core Program or the ARP. The SOI is the tool districts use to identify the deficiencies and/or programmatic issues that exist in their facilities. Districts should submit one SOI per school for each school that they believe requires a project. An SOI should only be filed for a facility where a district has the ability after the SOI submission to fund a schematic design within nine months (September 2019) and a total project budget within 18 months (June 2020). Over the last several years, the SOI system has opened in early January. SOIs are typically due for the ARP in early February and for the Core Program in early April.

Historically, the MSBA has invited approximately 35 to 50 SOIs for the ARP annually. The number of invitations that the Board is allowed to authorize each year varies. Among the factors the MSBA may consider should the MSBA be required to limit the number of invitations due to its annual statutory funding cap are the degree of the disrepair of the systems to be replaced and the frequency with which issues associated with that disrepair arise. The table below illustrates the number of SOIs that have resulted in approved projects in the ARP.

Repair Program	Districts	Schools	Total Project Budgets	Maximum Facility Grants
2017 Accelerated	19	34	$117,020,597	$73,280,673
2016 Accelerated	28	48	$156,598,234	$83,007,586
2015 Accelerated	24	43	$136,680,652	$91,974,052
2014 Accelerated	34	47	$108,410,084	$65,388,035
2013 Accelerated	25	45	$94,650,790	$54,662,551
2012 Accelerated	24	36	$63,009,653	$38,267,952

Attachment C
Statement of Interest ("SOI") Overview for Accelerated Repair Program

In 2017, given the budget impact from the number of SOIs filed for the ARP, the MSBA was only able to consider SOIs with systems of 30 years or more. The MSBA staff's recommendation to invite systems of 30 years or more resulted in the invitation of 36 schools from the otherwise qualifying 69 schools for which SOIs were received.

In 2018, the budget for the ARP was approximately $50 million in grants. The qualifying age requirement for applications for windows/doors was changed from 20 years to 30 years prior to the SOI opening. The qualifying age requirement for roofs and boilers opened at 20 years; however, due to the volume of otherwise qualifying applications, the qualifying age requirement for roofs and boilers was increased to 25 years. The MSBA staff's final recommendation to invite roofs and boilers of 25 years or more resulted in the invitation of 34 schools from the otherwise qualifying 51 schools for which SOIs were received.

In 2019, the budget for the ARP will be approximately $50 million in grants. The qualifying age requirements will again be 30 years for windows/doors and 20 years for roofs and boilers. Dependent upon the quantity of the ARP SOIs received, the MSBA may need to again limit the number of invitations to meet its budget, which may require further changes to the qualifying age of each system.

Based on the qualifications for the ARP, a district should not file an SOI if:

- the roof is less than twenty years old (installed in or after 2000);
- the boiler is less than twenty years old (installed in or after 2000);
- the windows/doors are less than thirty years old (installed in or after 1990);
- the proposed project cost is projected as less than $250,000;
- the school is judged by the district to be over-crowded;
- the district is considering the facility for potential consolidation;
- the primary use of the building is for non-educational purposes;
- the SOI itself seeks construction beyond roofs, windows/doors, or boilers;
- the SOI itself seeks boiler construction, excluding heating fuel storage and/or delivery, beyond the physical limits of the existing boiler room(s);
- a facility condition not identified in the SOI remains unresolved from a previous MSBA SOI review;
- the district plans a future construction project for MSBA participation going beyond roofs, windows/doors, and boilers for the school;
- or the district is reviewing facility deficiencies to further identify its needs and priorities.

If a project does qualify for the ARP, the scope of the project may not be fully reimbursable. Scope that may be required to complete the project but will not be eligible for reimbursement include:

- Building systems in spaces deemed ineligible per MSBA Regulations (swimming pools, hockey rinks, field houses and other such systems)
- Americans with Disabilities Act ("ADA") upgrades necessitated when the estimated cost of the repair project exceeds 30% of the assessed value of the building

- Building systems beyond ARP scope (extended floor or ceiling replacements, fire protection systems, photovoltaic panels and other such systems)
- Partial replacement of building systems with years of service less than what has been invited to the 2019 ARP
- Installation of canopies and vestibules
- Replacement of underground storage tanks or gas lines up to the boiler room
- Replacement of rooftop heating, ventilation and air conditioning units
- Masonry restoration including cleaning and sealing beyond the invited project scope
- Site work associated with sub-grade roof drainage
- Temporary repairs to building systems

The Funding Cap

The Commonwealth irrevocably dedicated a 1% statewide sales tax, known as the School Modernization Trust fund ('SMART Fund'), to the MSBA's capital program. The sales tax collection informs the amount of the annual funding cap to which the MSBA can obligate funds for projects. The enabling legislation limits increases or decreases annually thereafter by the lesser of four and one half percent (4.5%) of the limit for the prior fiscal year or the percentage increase or decrease of the dedicated sales tax revenue amount over the prior fiscal year.

The SOI Due Diligence Process

The SOI process involves the district filing an electronic version of an SOI with the MSBA. MSBA staff is readily available to address concerns, questions, and issues during the filing period. Once the filing period has closed, MSBA staff commences the due diligence process for all SOIs.

This 4-phase process includes:

1. Review SOI submissions for completeness;
2. Review SOI submissions and accompanying documents for content;
3. Conduct staff study visits, if required; and
4. Recommend SOIs for invitation into the ARP

During this process, the MSBA may seek to obtain additional or clarifying information from districts. As the MSBA reviews the entire cohort of SOIs received, it will determine the appropriate level of due diligence that will be required for each SOI and will notify districts of next steps accordingly.

1. Review SOI submission for completeness:

Once the SOI system has closed, MSBA staff review each submission to check that all of the required materials have been received. The MSBA works with districts throughout the filing period to ensure that the SOI is complete.

Attachment C
Statement of Interest ("SOI") Overview for Accelerated Repair Program

For all SOI submissions, the district needs to provide:

- An electronic version of the SOI with the required electronic signatures; there are two separate certifications in each SOI where district officials need to sign;
- An electronic version of the Closed Schools Certification with the required electronic signatures;
- Hard copies of the required local vote documentation that is detailed in the SOI; and
- Any supporting materials required to be submitted with the SOI.

Districts are expected to submit materials and have them post-marked on or before the due date for the ARP submission deadline. The district and the MSBA should discuss in advance of the filing date any extenuating circumstances or requests for exceptions to receipt of the hard copy material.

2. <u>Review each SOI submission and accompanying documents for content:</u>

Once an SOI is determined to be complete, MSBA staff review the information and any additional documents submitted by the district. MSBA staff then compile the data necessary to assess which SOIs filed in that calendar year may qualify for the ARP. Evaluating the qualifying factors relies on many different data sources. MSBA staff use the SOI, the MSBA project management system, the MSBA's 2016 School Survey, as well as information from the Department of Elementary and Secondary Education ("DESE") website. Many factors can impact the assessment of an SOI, such as overcrowding, building condition, general environment and program deficiencies. As such, it is important to assemble as much data as possible so that staff may gain a thorough understanding of the issues identified in the SOI. An analysis of the qualifying factors produces a group of SOIs for further consideration. Depending on the volume of qualifying SOIs, the MSBA may have to introduce additional or more limiting factors to maintain the 2019 ARP budget. Further review of SOIs may or may not require a staff study visit.

3. <u>Conduct Staff Study Visits, if required:</u>

If MSBA staff determine that a staff study visit is needed to complete the due diligence process, MSBA staff will visit the facility identified in the SOI. The staff study visit lasts approximately one hour and is an opportunity for the MSBA to further understand the issues identified in the district's SOI. MSBA staff request that the district have someone familiar with the facilities and systems present for the visit. The district is requested to provide a copy of the SOI floor plans (emergency/evacuation plans are sufficient) ahead of the MSBA's visit.

The staff study visit starts with a meeting to review the SOI and the MSBA process, and then to hear district concerns. The discussion is followed by a tour of the main areas of the school, as well as typical general classrooms and specialty spaces. If the district's SOI includes the replacement of the roof, then access to the roof should be provided to MSBA staff.

Dependent upon the number of staff study visits that are required, this phase can take approximately 4 to 6 weeks, with visits typically scheduled from March through April.

4. Recommend SOIs for Invitation into the Accelerated Repair Program:

Once the content review and staff study visits have been completed, MSBA staff once again review the factors, noted above, that can impact the assessment of the SOIs. As stated above, due to the statutory cap, the MSBA may be constrained to limit the number of ARP projects in a given year. Among the factors that MSBA may consider should it be required to limit the number of ARP projects, are the degree of the disrepair of the systems to be replaced and the frequency with which issues associated with the disrepair arise.

MSBA staff then provide their findings to the Chief Executive Officer, Deputy Chief Executive Officer/Executive Director, and the MSBA's Facilities Assessment Subcommittee. Once the recommendations have been accepted, MSBA staff present the recommended SOIs to the Board of Directors for a vote to receive an invitation into the ARP.

Exhibit C

Invitation to Accelerated Repair Program

District	School	Age of Existing Building	Grade Configuration	2018-2019 Enrollment	Existing Square Footage	Invited Scope Recommendation
Acushnet	Acushnet Elementary School	1971	PK-4	565	95,709	Partial Roof
Agawam	Agawam Junior High School	1973	7-8	591	131,000	Boiler
Blackstone Valley Regional Vocational Technical School District	Blackstone Valley Regional Vocational Technical High School	1964	9-12	1,230	282,290	Partial Roof
Boston	Curley K-8 School	1970	PK-8	968	34,445	Partial Roof
	Mary K. Lyon High School	1925	9-12	133	47,314	Boiler
	William McKinley School	1959	1-12	327	78,258	Roof
Brockton	Huntington Alternative School	1890	3-12	59	66,657	Roof
Chelmsford	South Row Elementary School	1962	K-4	416	49,069	Partial Roof
Dracut	Brookside Elementary School	1968	K-5	439	92,000	Roof
	George H. Englesby Elementary School	1963	K-5	543	93,700	Roof
East Bridgewater	Central Elementary School	1951	PK-2	586	96,000	Partial Roof
Essex North Shore Agricultural and Technical School District	Essex North Shore Agricultural and Technical School	1967	9-12	1,413	417,470	Partial Roof
Fitchburg	South Street Elementary School	1937	PK-4	641	202,600	Partial Roof; Partial Boiler
Hampden-Wilbraham Regional School District	Wilbraham Middle School	1968	6-8	614	99,750	Roof
Hanover	Cedar Elementary School	1966	PK-4	455	64,700	Partial Roof
Kingston	Kingston Elementary School	1950	K-2	440	95,462	Partial Boiler
Lowell	Dr. Gertrude Bailey Elementary School	1992	PK-4	508	65,000	Partial Roof; Boiler
	Frederic T. Greenhalge Elementary School	1994	PK-4	502	66,000	Boiler
	James S. Daley Middle School	1956	5-8	695	111,800	Boiler
	James F. Sullivan Middle School	1992	6-8	494	97,200	Roof; Boiler
	Rogers Early Learning Center	1994	K-7	738	112,000	Boiler
	S. Christa McAuliffe Elementary School	1992	PK-4	506	63,600	Boiler
Mohawk Trail Regional School District	Sanderson Academy	1997	PK-6	159	37,000	Partial Boiler
Monson	Quarry Hill Community School	1991	PK-4	402	110,000	Roof
Northbridge	Northbridge Middle School	1905	5-8	697	176,924	Boiler
Quabbin Regional School District	Hubbardston Center School	1954	K-6	309	64,740	Roof
Salem	Bentley Academy	1967	K-5	339	89,592	Boiler
Sandwich	Forestdale School	1989	PK-2	609	115,600	Boiler
	Oak Ridge School	1989	3-6	813	122,500	Boiler
Southborough	Mary E. Finn Elementary School	1964	PK-1	326	70,954	Boiler
Springfield	Frederick Harris School	1927	PK-5	625	89,839	Boiler
	Indian Orchard Elementary School	1924	PK-5	656	88,498	Partial Boiler
	Sumner Avenue School	1912	PK-5	530	82,339	Partial Boiler
Wakefield	Greenwood School	1897	K-4	220	36,330	Roof
Wayland	Loker Elementary School	1957	K-5	270	50,738	Partial Roof
Westport	Westport Elementary School	1978	3-6	476	71,748	Roof
Weymouth	Ralph Talbot Primary School	1955	K-4	245	34,650	Boiler
Worcester	Burncoat Street Preparatory School	1916	K-6	309	29,844	Partial Roof
	Lincoln Street School	1929	K-6	255	25,766	Boiler
	Tatnuck Magnet School	1960	PK-6	410	42,384	Roof
	Vernon Hill School	1931	PK-6	517	83,060	Roof
	Worcester East Middle School	1924	7-8	766	155,392	Roof