MEMORANDUM

TO: Board of Directors, Massachusetts School Building Authority
FROM: James A. MacDonald, First Deputy Treasurer, Chief Executive Officer
John K. McCarthy, Executive Director/Deputy Chief Executive Officer
DATE: April 7, 2021
RE: Statement of Interest for Core Program – 2020 Recommendations for Invitations to Eligibility Period

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The Massachusetts School Building Authority (the "MSBA") opened the 2020 Statement of Interest (the "SOI") filing period on January 8, 2020. The filing deadline for the Core Program was May 6, 2020, with 71 SOIs submitted for consideration.[1] Of the 71 SOIs submitted, 41 were designated as the priority school. Beginning in May 2020, the MSBA conducted its due diligence on the SOIs that were submitted for the Core Program, as outlined in **Attachment A**, "SOI Process Overview for Core Program", and as noted below:

- Review SOI submissions for completeness – votes, signatures and supporting documentation;
- Review SOI submissions and accompanying documents for content; and,
- Conduct senior study visits, if necessary.

Due to ongoing public health issues, the MSBA's due diligence for the 2020 Core Program, which includes senior study visits to select schools was delayed. Unlike prior years in which project invitations were approved at the December Board meeting, staff completed virtual senior study meetings and site visits in January and February 2021 after reviewing and discussing further review recommendations at the December 2, 2020 Facilities Assessment Subcommittee meeting.

As discussed with the Board during the 2020 SOI process and most recently at the March 24, 2021 Facilities Assessment Subcommittee meeting, the MSBA has now concluded its due diligence for the 2020 SOIs. MSBA staff is recommending that the Board vote to invite the 15 Districts and schools listed below and found in **Attachment B** into the Eligibility Period.

Upon approval by the Board, each District and school is invited into the 270-day Eligibility Period with a specified effective date for commencement, and any approval of a potential grant for the scope of work as identified herein will not be made before July 1, 2023. As part of its due diligence, MSBA staff has discussed the Eligibility Period requirements and the specific funding timelines with Districts. The Districts are aware of the effective dates for commencement of Eligibility Period as found below and the dates for potential grant approval.

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[1]The filing deadline for the Accelerated Repair Program (the "ARP") was February 14, 2020 with 90 SOIs submitted. Invitations into the ARP concluded at the December 16, 2020 Board of Directors meeting and 18 districts, representing 25 projects, were invited into the ARP.

Attachment C to this memorandum lists the names of the remaining 41 Districts and 56 schools that submitted an SOI in 2020 but are not being considered for an invitation into the MSBA's grant program.

Recommended Invitation for Commencement of Eligibility Period on May 3, 2021

District	School	Age of Existing Building	Current Grade Configuration
Hopkinton	Elmwood Elementary School	1965	2-3
Lynn	Pickering Middle School	1916	6-8
New Bedford	John B. Devalles Elementary School	1912	K-5
Stoughton	South Elementary School	1957	K-5

Recommended Invitation for Commencement of Eligibility Period on June 1, 2021

District	School	Age of Existing Building	Current Grade Configuration
Burlington	Fox Hill Elementary School	1967	K-5
Clinton	Clinton Middle School	1975	5-8
Newton	Countryside Elementary School	1953	K-5
Quincy	Squantum Elementary School	1919	K-5

Recommended Invitation for Commencement of Eligibility Period on July 1, 2021

District	School	Age of Existing Building	Current Grade Configuration
Belchertown	Jabish Brook Middle School	1964	7-8
Dedham	Oakdale Elementary School	1902	1-5
Scituate	Hatherly Elementary School	1963	K-5
Wilmington	Wildwood Elementary School	1955	PK-K

Recommended Invitation for Commencement of Eligibility Period on August 2, 2021

District	School	Age of Existing Building	Current Grade Configuration
Agawam	Agawam High School	1955	9-12
Berkley	Berkley Community School	1962	PK-4
Holyoke	William R. Peck School	1973	4-8

Attachment A

Core Program Statement of Interest Process Overview

Introduction

The Massachusetts School Building Authority's (the "MSBA's") 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 an exhaustive review of available information regarding all districts that submit a Statement of Interest ("SOI") for the Core Program each year. The goals of this review include:

- To determine those schools that are the most urgent and needy relative to the pool of SOI submittals filed in that year. The MSBA considers many factors when looking at the totality of the SOIs including, but not limited to, the age of the building, the amount of space per student, the current and projected enrollment, the condition of the major systems of the school, the general environment of the building and the appropriateness of the building to the educational mission;
- To collaborate with districts on the potential project that they have identified as the priority school if they are filing more than one SOI for that given year;
- To understand if the MSBA is currently partnering with the district on another Core project already underway; and,
- To understand the range of options each district faces when planning for district-wide educational facilities.

The following information provides an overview of the SOI process from initial opening of the SOI period, which is typically in January until the Board of Directors votes to authorize invitations to the MSBA's grant program at a subsequent winter Board meeting. The MSBA reviews these dates annually and may adjust the opening and closing dates as may be needed. Each year, the SOI opening information is published on the MSBA's website in addition to each superintendent receiving email communications in advance, on the day of and throughout the filing period until the closure of the Accelerated Repair Program and the Core Program.

The SOI Filing Period

The MSBA opens its Statement of Interest System annually for districts to file one or more SOIs for either the Core Program or the Accelerated Repair Program. 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 to fund a project in the next two years. Over the last several years, the SOI system has opened in early January. SOIs are typically due for the Accelerated Repair Program in early February and for the Core Program in early April; however, this timeline may vary as needed.

Attachment A

The MSBA has received approximately 100 to 125 SOIs for the Core Program annually. The number of invitations that the Board is able to authorize each year varies and is contingent on a number of factors. The MSBA has to operate within its annual statutory budget cap. The number of invitations varies based on the characteristics of the pool of applicants, including the number of elementary, middle or high schools that file, total square footage of the schools, and the reimbursement rates of the districts that are invited to participate in the MSBA's grant program. Thus, applying for an MSBA grant is competitive, and not every SOI can be invited into the grant program.

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 state sales tax collections inform the amount of annual funding the MSBA can commit for projects. The MSBA's 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 by the dates established. 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 is a 4-phase process, which includes:

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

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 reviews 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. 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 and/or any supplemental materials districts want to submit with the SOI.

Districts are expected to submit materials and have them post-marked on or before the due date of the Program 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. Review each SOI submission and accompanying documents for content:

Once an SOI is determined to be complete, MSBA staff review the information and any additional documents submitted by the district. MSBA staff then compiles the data necessary to assess which SOIs filed in that calendar year may be categorized as the most urgent and needy. Determining the most urgent and needy SOIs relies on many different data sources. MSBA staff use over 50 data points that include the SOI, the MSBA project management system, the MSBA's enrollment tool, the MSBA's 2016 School Survey, and information from the Department of Elementary and Secondary Education ("DESE"). There are many factors that can impact the assessment of urgency and need in an SOI, such as increasing enrollment, 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 as complete of a picture of the submitted SOI as possible.

Due to the volume of SOIs submitted for the Core Program, the MSBA requests that each district identify a priority SOI for consideration. This enables the district and the MSBA to focus financial and staff resources on completing a project and ensures that an opportunity for a grant is possible for as many districts as possible. This narrows down the pool of potential projects if districts have submitted multiple schools within the district for consideration.

With its focus on the district identified SOI priority, MSBA staff then looks at this smaller pool of submitted SOIs to assess urgency and need focusing on:

- School Survey rating of building condition;
- School Survey rating of general environment;
- Previous or ongoing project activity with the MSBA; and
- Section 8 of the MSBA's statute.

Consideration of these factors produces a smaller subset of the priority SOIs that appear to be more urgent and needy than the other SOIs submitted that year. With this assessment, a group of SOIs are identified for further consideration. This further review may or may not require a senior study visit. If the MSBA is familiar with the school facility identified in the SOI or if the SOI has already received a senior study visit within the previous two or three years, a senior study visit may not be needed for that SOI. The MSBA may choose to re-visit a school within this two-year window if the SOI contains new information since the last visit.

Attachment A

3. Conduct Senior Study Visits, if required:

If MSBA staff determines that a senior study visit is needed to complete the due diligence process, MSBA staff, accompanied by its technical consultant, will visit the SOI facility. The MSBA may conduct facility visits either virtually, in-person or a combination of virtual and in-person. The MSBA may request the use of alternative technology to complete the visits such as virtual meetings, drones, district-supplied recordings or other means. Dependent upon the method used, the senior study visit may be conducted in two parts, holding the meeting and the facility tour, at different times and days.

The senior study visit lasts approximately two hours and is an opportunity for the MSBA to further understand the issues identified in the district's SOI. MSBA staff requests that the district have someone familiar with the facilities and systems present, as well as someone who is familiar with the curriculum as it relates to the program offered. The district is requested to provide a copy of the school's floor plans (emergency/evacuation plans are sufficient) ahead of the MSBA's visit.

The senior study visit starts with a meeting to review the SOI, the MSBA process, and 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.

Dependent upon the number of senior study visits that are required, this phase can take approximately 8 to 10 weeks, with visits typically scheduled from September through November, but this may vary depending upon the opening and closing dates.

4. Recommend SOIs for Invitation into Eligibility Period:

Once the content review and senior study visits have been completed, MSBA staff once again review the factors, noted above, that can impact the assessment of urgency and need in an SOI (increasing enrollment, evidence of overcrowding, building condition, general environment and program deficiencies), to understand the total impact of all of the factors on the overall need of the SOI. As the number of invitations that the MSBA can issue varies each year, and the number of SOIs received each year exceeds the MSBA's annual cap expenditure, MSBA staff compares the SOIs that were selected for further review to each other to determine a degree of urgency and need, ranging from minor to major, for each of the SOIs. MSBA staff then provide their findings to the Chief Executive Officer, Executive Director/Deputy Chief Executive Officer, the MSBA's Facilities Assessment Subcommittee, and the Board of Directors. Once the recommendations have been accepted, MSBA staff works with the districts to determine the optimum Board meeting for the district to receive an invitation into Eligibility Period from the Board of Directors.

Attachment B - 2020 Statement of Interest Board Memo

District	School Name	Year Built	Building Gross SF	School Type	Current Grade Configuration	2019-2020 DESE Enrollment	MSBA Check Section 8 Priorities
Agawam	Agawam High School	1955	266,892	HS	9-12	1,074	3,5,7
Belchertown	Jabish Brook Middle School	1964	69,430	MS	7-8	372	5,7
Berkley	Berkley Community School	1962	76,000	ES	PK-4	522	5
Burlington	Fox Hill Elementary School	1967	59,000	ES	K-5	446	5,7
Clinton	Clinton Middle School	1975	98,470	MS	5-8	603	5,7
Dedham	Oakdale Elementary School	1902	48,909	ES	1-5	254	5,7
Holyoke	William R. Peck School	1973	158,198	MS	4-8	261	5,7
Hopkinton	Elmwood Elementary School	1965	80,000	ES	2-3	557	2,4,5,7
Lynn	Pickering Middle School	1916	99,500	MS	6-8	639	2,4,5,7
New Bedford	John B. Devalles Elementary School	1912	57,030	ES	K-5	355	5,7
Newton	Countryside Elementary School	1953	65,000	ES	K-5	413	5,7
Quincy	Squantum Elementary School	1919	44,000	ES	K-5	363	5,7
Scituate	Hatherly Elementary School	1963	41,426	ES	K-5	268	4,5,7
Stoughton	South Elementary School	1957	38,000	ES	K-5	234	5,7
Wilmington	Wildwood Elementary School	1955	29,160	ES	PK-K	183	5,7

Attachment C - 2020 Statement of Interest Board Memo

District	School Name	MSBA Check Section 8 Priorities	MSBA Due Diligence Findings
Acton-Boxborough Regional School District	Luther Conant Elementary School	2,4,5,7	Not district priority, active MSBA Core project, high School Survey scores
Andover	Andover High School	4,5,7	Not district priority, active MSBA Core project, high School Survey scores
Berkshire Hills Regional School District	Monument Mountain Regional High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Braintree	Braintree High School	3,5,7	Not district priority, active MSBA Core projects, high School Survey scores
Brockton	Brockton High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Canton	William H. Galvin Middle School	4,5,7	Deficiencies not among highest within cohort of most urgent/needy
Chelmsford	Chelmsford High School	4,5,7	Active MSBA ARP project, high School Survey scores
Concord	Concord Middle School	2,5,7	Deficiencies not among highest within cohort of most urgent/needy
Dennis-Yarmouth Regional School District	Marguerite E. Small Elementary School	5	Not district priority, active MSBA Core project, high School Survey score
Dracut	Joseph A. Campbell Elementary School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Dudley-Charlton Regional School District	Shepherd Hill Regional High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Fall River	Stone PK-12	5	Not district priority, active MSBA ARP projects, active MSBA Core project, high School Survey score
Franklin County Regional Vocational Technical High School	Franklin County Regional Vocational Technical High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Hadley	Hopkins Academy	5	High School Survey scores
Hamilton-Wenham Regional School District	Bessie Buker Elementary School	4,5,7	Not district priority, other district SOI in FRR category, high School Survey scores
Hamilton-Wenham Regional School District	Cutler School	4,5,7	Deficiencies not among highest within cohort of most urgent/needy
Hamilton-Wenham Regional School District	Winthrop School	4,5,7	Not district priority, SOI under consideration by district consolidation, other district SOI in FRR category, high School Survey scores
Haverhill	John G. Whittier School	2,5,7	Not district priority, active MSBA ARP projects, active MSBA Core project, high School Survey score
Holliston	Holliston High School	5,7	High School Survey scores
Lexington	Lexington High School	2,5,7	High School Survey scores
Littleton	Shaker Lane Elementary School	2,4,5,7	Deficiencies not among highest within cohort of most urgent/needy
Longmeadow	Glenbrook Middle School	5,7	High School Survey scores
Longmeadow	Williams Middle School	5,7	Not district priority, high School Survey scores

Attachment C - 2020 Statement of Interest Board Memo

District	School Name	MSBA Check Section 8 Priorities	MSBA Due Diligence Findings
Lynnfield	Huckleberry Hill Elementary School	2,4,7	District indicated proceeding on its own
Lynnfield	Summer Street Elementary School	2,4,7	District indicated proceeding on its own
Martha's Vineyard Regional School District	Martha's Vineyard Regional High School	5,7	District indicated not ready to proceed
Milton	Cunningham School	2,4,7	Deficiencies not among highest within cohort of most urgent/needy
New Bedford	James B. Congdon Elementary School	5,7	Not district priority, SOI under consideration by district consolidation, other district SOI in FRR category, high School Survey score
Newburyport	Newburyport High School	5,7	High School Survey scores
Newton	Franklin Elementary School	5,7	Not district priority, active MSBA ARP projects, other district SOI in FRR category, High School Survey scores
Norfolk	Freeman-Kennedy School	4,7	High School Survey scores
North Andover	North Andover Middle School	7	High School Survey scores
North Attleborough	Amvet Boulevard Elementary School	5,7	Not district's priority, active MSBA ARP project, other district SOI in FRR category, high School Survey scores
North Attleborough	Community Elementary School	5,7	Not district's priority, active MSBA ARP project, other district SOI in FRR category, high School Survey scores
North Attleborough	North Attleborough High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Old Colony Regional Vocational Technical School District	Old Colony Regional Vocational Technical High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Oxford	Alfred M. Chaffee Elementary School	5	Not district's priority, other district SOI in FRR cateogry, high School Survey scores
Oxford	Clara Barton Elementary School	5	Not district's priority, other district SOI in FRR cateogry, high School Survey scores
Oxford	Oxford High School	5	Not district's priority, other district SOI in FRR cateogry, high School Survey scores
Oxford	Oxford Middle School	5	Deficiencies not among highest within cohort of most urgent/needy
Peabody	Center Elementary School	2,4,5,7	Not district's priority, active MSBA ARP project, active MSBA Core project, high school survey scores
Peabody	Peabody Veterans Memorial High School	2,4,5,7	Not district's priority, active MSBA ARP project, active MSBA Core project, high school survey scores
Salem	Salem High School	5,7	Active MSBA ARP project, high School Survey scores
Scituate	Cushing Elementary School	4,5,7	Not district's priority, SOI under consideration by district consolidation, other district SOI in FRR category, high School Survey score
South Shore Regional Vocational Technical School District	South Shore Regional Vocational Technical High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Springfield	German Gerena Community School	5,7	Not district priority, active MSBA ARP projects, active MSBA Core projects, high School Survey scores

Attachment C - 2020 Statement of Interest Board Memo

District	School Name	MSBA Check Section 8 Priorities	MSBA Due Diligence Findings
Wareham	Wareham Senior High School	5	Not district priority, active MSBA ARP project, active MSBA Core project, high School Survey scores
Westfield	Westfield High School	5,7	Not district priority, active MSBA Core project, high School Survey score
Westfield	Westfield Technical Academy	7	Not district priority, active MSBA Core project, high School Survey score
Weston	Weston Middle School	5	High School Survey scores
Wilmington	Boutwell Elementary School	5,7	Not district priority, SOI under consideration by district consolidation, other district SOI in FRR category, high School Survey score
Wilmington	North Intermediate School	5,7	Not district priority, SOI under consideration by district consolidation, other district SOI in FRR category, high School Survey scores
Wilmington	Shawsheen Elementary School	5,7	Not district priority, other district SOI in FRR category, high School Survey scores
Wilmington	West Intermediate School	5,7	Not district priority, other district SOI in FRR category, high School Survey scores
Wilmington	Woburn Street Elementary School	5,7	Not district priority, SOI under consideration by district consolidation, other district SOI in FRR category, high School Survey scores
Worcester	Burncoat Senior High School	3,5,7	Not district priority, active MSBA ARP projects, active MSBA Core projects, high School Surey score

[1]Exhibit A

2020 SOI Invitations to Eligibility Period

District	School	Age of Existing Building	Current Grade Configuration	2019-2020 DESE Enrollment	Existing Square Footage	Eligibility Period Commencement Date
Agawam	Agawam High School	1955	9-12	1,074	266,982	August 2, 2021
Belchertown	Jabish Brook Middle School	1964	7-8	372	69,430	July 1, 2021
Berkley	Berkley Community School	1962	PK-4	522	76,000	August 2, 2021
Burlington	Fox Hill Elementary School	1967	K-5	446	59,000	June 1, 2021
Clinton	Clinton Middle School	1975	5-8	603	98,470	June 1, 2021
Dedham	Oakdale Elementary School	1902	1-5	254	48,909	July 1, 2021
Holyoke	William R. Peck School	1973	4-8	261	158,198	August 2, 2021
Hopkinton	Elmwood Elementary School	1965	2-3	557	80,000	May 3, 2021
Lynn	Pickering Middle School	1916	6-8	639	99,500	May 3, 2021
New Bedford	John B. Devalles Elementary School	1912	K-5	355	57,030	May 3, 2021
Newton	Countryside Elementary School	1953	K-5	413	65,000	June 1, 2021
Quincy	Squantum Elementary School	1919	K-5	363	44,000	June 1, 2021
Scituate	Hatherly Elementary School	1963	K-5	268	41,426	July 1, 2021
Stoughton	South Elementary School	1957	K-5	234	38,000	May 3, 2021
Wilmington	Wildwood Elementary School	1955	PK-K	183	29,160	July 1, 2021

[1]Any approval of a potential grant for a scope of work as identified herein will not be made before July 1, 2023