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: December 13, 2022
RE: Statement of Interest for Core Program – 2022 Recommendations for Invitations to Eligibility Period

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The Massachusetts School Building Authority (the "MSBA") opened the 2022 Statement of Interest (the "SOI") filing period on January 28, 2022. The filing deadline for the Core Program was April 29, 2022, with 54 SOIs submitted for consideration.[1] Of the 54 SOIs submitted, 32 were designated as the priority school. Beginning in April 29, 2022, 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.

As discussed with the Board during the 2022 SOI process and most recently at the November 22, 2022 Facilities Assessment Subcommittee meeting, the MSBA has now concluded its due diligence for the 2022 SOIs. MSBA staff is recommending that the Board vote to invite the ten 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, 2025. As part of its due diligence, MSBA staff has discussed the Eligibility Period requirements and the specific funding timelines with the ten Districts. The Districts are aware of the effective dates for commencement of Eligibility Period as found below and the dates for potential grant approval.

Attachment C to this memorandum lists the names of the remaining 36 Districts and 44 schools that submitted an SOI in 2022 but are not being considered for an invitation into the MSBA's grant program.

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[1]The filing deadline for the Accelerated Repair Program (the "ARP") was March 25, 2022 with 67 SOIs submitted. Invitations into the ARP concluded at the October 26, 2022 Board of Directors meeting and 16 districts, representing 33 projects, were invited into the ARP.

Recommended Invitation for Commencement of Eligibility Period on March 1, 2023

District	School	Age of Existing Building	Current Grade Configuration
Brockton	Brockton High School	1970	9-12
West Bridgewater	Rose L. MacDonald Elementary School	1968	1-3

Recommended Invitation for Commencement of Eligibility Period on April 3, 2023

District	School	Age of Existing Building	Current Grade Configuration
Chicopee	Barry Elementary School	1963	K-5
East Bridgewater	Central Elementary School	1951	PK-2

Recommended Invitation for Commencement of Eligibility Period on May 1, 2023

District	School	Age of Existing Building	Current Grade Configuration
Franklin County Regional Vocational Technical School District	Franklin County Technical High School	1975	9-12
Salem	Salem High School	1976	9-12
Swansea	Joseph Case Junior High School	1927	6-8

Recommended Invitation for Commencement of Eligibility Period on June 1, 2023

District	School	Age of Existing Building	Current Grade Configuration
Blackstone-Millville Regional School District	Blackstone-Millville Regional High School	1969	9-12
Marlborough	Richer Elementary School	1965	K-5
Wrentham	Charles E. Roderick School	1968	4-6

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 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; this timeline may vary as needed. 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 construction 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.

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 submitted 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 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 and accompanying votes 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 four 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.

SOI VOTE REQUIREMENTS – NEW FOR FILING AN SOI IN 2022:

All required votes must be taken prior to the SOI submission filing deadline. The documentation for the completed votes is required in order to complete the filing for the SOI submission as noted in detail below.

1. Review SOI submissions 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;
- Any supporting materials required to be submitted with the SOI and/or any supplemental materials districts want to submit with the SOI; and,

- **NEW IN 2022: SOI VOTE REQUIREMENTS:**
    - All required vote documentation must be uploaded in the SOI system in order to submit an SOI and in the prescribed format set forth within the MSBA's SOI Application System.
    - **Cities and Towns** must submit the following vote documentation:
        - Vote of the municipal governing body (i.e. City Council/Board of Aldermen/Board of Selectmen/equivalent governing body) authorizing the Superintendent of Schools to submit the SOI.
        - Vote of the School Committee authorizing the Superintendent of Schools to submit the SOI (meeting minutes are NOT required).
    - **Regional School Districts** must submit the following vote documentation:
        - Vote of the Regional School Committee authorizing the Superintendent of Schools to submit the SOI (meeting minutes are NOT required).

If applicable, districts are expected to submit materials and have them post-marked, specific to certain statutory priorities selected by the district:

- If the district selects statutory priority 1, a hard copy of the engineering or other report detailing the nature and severity of the problem and a written professional opinion of how imminent the system failure is likely to manifest itself is required. The district must also submit photographs of the problematic building area or system to the MSBA.
- If the district selects statutory priority 3, the district must submit the full accreditation report(s) and any supporting correspondence between the district and the accrediting entity to the MSBA.

The supplemental materials just mentioned must be 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:

- The 2016 School Survey rating of building condition;
- The 2016 School Survey rating of general environment;
- The 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 or three-year window if the SOI contains new information since the last visit.

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 staff 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 that can impact the assessment of urgency and need in an SOI (e.g., 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 expressed in 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, and the MSBA's Facilities Assessment Subcommittee; these recommendations are then presented to the MSBA Board of Directors.

Attachment B - 2022 Statement of Interest Board Memo

District	School Name	Year Built	Building Gross SF	School Type	Current Grade Configuration	2021-2022 DESE Enrollment	*MSBA Check Section 8 Priorities
Blackstone-Millville Regional School District	Blackstone-Millville Regional High School	1969	190,000	HS	9-12	413	5,7
Brockton	Brockton High School	1970	548,000	C-HS	9-12	3,943	5,7
Chicopee	Barry Elementary School	1963	50,078	ES	K-5	377	5,7
East Bridgewater	Central Elementary School	1951	77,100	ES	PK-2	450	4,5,7
Franklin County Regional Vocational Technical School District	Franklin County Technical High School	1975	160,000	V-HS	9-12	583	5,7
Marlborough	Richer Elementary School	1965	66,000	ES	K-5	524	2,5,7
Salem	Salem High School	1976	465,000	C-HS	9-12	1,065	5,7
Swansea	Joseph Case Junior High School	1927	69,690	MS	6-8	499	4,5,7
West Bridgewater	Rose L. MacDonald Elementary School	1968	39,000	ES	1-3	318	2,4,5,7
Wrentham	Charles E. Roderick School	1968	55,963	ES	4-6	380	5,7

*Red font denotes MSBA added Section 8 Priority

Attachment C - 2022 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	4,5,7	Not district priority, active MSBA Core project, high School Survey scores
Boston	Blackstone Elementary School	5,7	Not district priority, active MSBA ARP projects, active MSBA Core projects, high School Survey score
Boston	James Otis Elementary School	5,7	Not district priority, active MSBA ARP projects, active MSBA Core projects, high School Survey score
Braintree	Braintree High School	5,7	Not district priority, active MSBA ARP project, active MSBA Core project, high School Survey scores
Burlington	Burlington High School	5,7	Not district priority, active MSBA Core project, high School Survey scores
Chelmsford	Colonel Moses Parker Middle School	4,5,7	Deficiencies not among highest within cohort of most urgent/needy
Cohasset	Cohasset High School	4,5,7	Deficiencies not among highest within cohort of most urgent/needy
Dedham	Greenlodge Elementary School	5,7	Not district priority, SOI under consideration by district consolidation, active MSBA Core project, high School Survey scores
Dedham	Riverdale Elementary School	5,7	Not district priority, SOI under consideration by district consolidation, active MSBA Core project, high School Survey scores
Dennis-Yarmouth Regional School District	Marguerite E. Small Elementary School	5,7	Not district priority, active MSBA Core project, high School Survey score
Dracut	Greenmont Avenue Elementary School	5,7	Not district priority, SOI under consideration by district consolidation, active MSBA Core project
Essex North Shore Agricultural and Technical Regional School District	Essex Technical High School	5,7	High School Survey scores
Everett	Everett High School	2,7	Active ARP project, high School Survey scores
Foxborough	Charles Taylor Elementary School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Framingham	Hemenway Elementary School	4,5,7	Deficiencies not among highest within cohort of most urgent/needy
Granby	Granby Junior/Senior High School	5,7	District not ready to proceed
Haverhill	John G. Whittier School	2,4,5,7	Not district priority, active MSBA ARP projects, active MSBA Core project, high School Survey score
Holliston	Holliston High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Lenox	Lenox Memorial Middle and High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Medfield	Dale Street Elementary School	2,4,5,7	High School Survey score
Medford	Medford High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Milford	Milford High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Milton	Cunningham School	2,4,7	High School Survey scores
Mohawk Trail Regional School District	Buckland-Shelburne Regional Elementary School	5	High School Survey scores
Natick	Memorial Elementary School	5,7	High School Survey scores

Attachment C - 2022 Statement of Interest Board Memo

District	School Name	*MSBA Check Section 8 Priorities	MSBA Due Diligence Findings
New Bedford	Charles S. Avery Elementary School	5,7	Not district priority, active MSBA ARP projects, active MSBA Core project
New Bedford	Jireh Swift Elementary School	5,7	Not district priority, active MSBA ARP projects, active MSBA Core project
Newburyport	Newburyport High School	5,7	High School Survey scores
Norfolk	Freeman-Kennedy School	4	High School Survey scores
Peabody	Center Elementary School	4,5,7	Not district's priority, active MSBA ARP project, active MSBA Core project, high school survey score
Peabody	Peabody Veterans Memorial High School	3,5,7	Not district's priority, active MSBA ARP project, active MSBA Core project, high school survey scores
Shawsheen Valley Regional Vocational Technical School District	Shawsheen Valley Technical High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Southborough	Albert S. Woodward Memorial School	7	Not district priority, SOI under consideration by district consolidation, active MSBA ARP project, active MSBA Core project, high School Survey scores
South Middlesex Regional Vocational Technical School District	Joseph P. Keefe 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
Springfield	Washington Elementary School	5,7	Not district priority, active MSBA ARP projects, active MSBA Core projects, high School Survey scores
Springfield	White Street Elementary School	5,7	Not district priority, active MSBA ARP projects, active MSBA Core projects, high School Survey score
Triton Regional School District	Triton Regional High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Triton Regional School District	Triton Regional Middle School	5,7	Not district priority, SOI under consideration by district consolidation, other district SOI in FRR category, high School Survey scores
Upper Cape Cod Regional Vocational Technical School District	Upper Cape Cod Regional Vocational Technical High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Wayland	Claypit Hill Elementary School	2,5,7	Active ARP project, high School Survey scores
West Bridgewater	Spring Street School	4,5,7	Not district priority, SOI under consideration by district consolidation, other district SOI in FRR category, high School Survey scores
Westwood	William E. Sheehan Elementary School	5,7	Not district priority, active MSBA Core project, high School Survey score
Worcester	Burncoat Senior High School	3,5,7	Not district priority, active MSBA ARP projects, active MSBA Core project, high School Survey score

*Red font denotes MSBA added Section 8 Priority

[1]Exhibit A

2022 SOI Invitations to Eligibility Period

District	School	Age of Existing Building	Current Grade Configuration	2021-2022 DESE Enrollment	Existing Square Footage	Eligibility Period Commencement Date
Blackstone-Millville Regional School District	Blackstone-Millville Regional High School	1969	9-12	413	190,000	June 1, 2023
Brockton	Brockton High School	1970	9-12	3,943	548,000	March 1, 2023
Chicopee	Barry Elementary School	1963	K-5	377	50,078	April 3, 2023
East Bridgewater	Central Elementary School	1951	PK-2	450	77,100	April 3, 2023
Franklin County Regional Vocational Technical School District	Franklin County Technical High School	1975	9-12	583	160,000	May 1, 2023
Marlborough	Richer Elementary School	1965	K-5	524	66,000	June 1, 2023
Salem	Salem High School	1976	9-12	1,065	465,000	May 1, 2023
Swansea	Joseph Case Junior High School	1927	6-8	499	69,690	May 1, 2023
West Bridgewater	Rose L. MacDonald Elementary School	1968	1-3	318	39,000	March 1, 2023
Wrentham	Charles E. Roderick School	1968	4-6	380	55,963	June 1, 2023

[1]Any approval of a potential grant for a scope of work as identified herein will not be made before July 1, 2025