MEMORANDUM

TO: Board of Directors, Massachusetts School Building Authority
FROM: James A. MacDonald, First Deputy Treasurer and Chief Executive Officer
Mary L. Pichetti, Executive Director and Deputy Chief Executive Officer
DATE: October 23, 2024
RE: Recommendation for 2024 Accelerated Repair Program Invitations

Recommendation

That the Executive Director be authorized to invite each of the schools for the recommended project scope 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 ("SOI") 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

After a temporary pause in 2023, the 2024 SOI submittal period for the ARP opened on January 12, 2024, with an increased estimated budget following the approval of the Commonwealth's FY24 Budget. Section 36, approved as part of the Commonwealth's FY 24 Budget, provided that grant amounts related to the MSBA's Accelerated Repair Program beginning in FY23 will not count against the Annual Cap limit set forth in Section 7 of Chapter 70B of the General Laws. In accordance with the October 18, 2023 Board of Directors Memorandum, the ARP reopening in 2024 was for the partial or full replacement of roofs and windows/doors only. The deadline to file for consideration in the ARP was March 1, 2024.

Following the receipt of 72 SOIs filed in 2024 for the ARP, 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. The initial review resulted in 71 of the 72 schools qualifying for consideration for participation in the ARP.

Non-Qualifying Accelerated Repair Program Conditions*

Roof Age <25	System is less than 25 years of age
Window Age <30	System is less than 30 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
Pre-kindergarten Students Only	School provides for pre-kindergarten students only
Outside Scope	SOI itself identifies construction beyond roofs or windows/doors

Non-Qualifying Accelerated Repair Program Conditions* (Continued)

School SOI History	Facility condition not identified in the SOI remains unresolved from previous MSBA SOI review
District-wide Review	District is reviewing facility deficiencies to further identify its needs and priorities
District Funding	District is unable to fund a schematic design within 90 days of invitation and a total project budget within 12 months of invitation

*These conditions were described in the 2024 Statement of Interest ("SOI") Overview for Accelerated Repair Program shared with all Superintendents.

Historically, the MSBA has invited approximately 25 to 50 SOIs for the ARP annually based on the budget allowance set within the Annual Cap. The number of invitations that the Board authorizes each year varies. In 2017, due to the volume of SOIs submitted, the MSBA for the first time increased the qualifying ages of systems after SOIs were received. The MSBA reviews these advertised qualifying ages for systems as well as the grant budget annually and may adjust one or both as may be needed. Similar to the dates for the SOI filing period, the SOI opening information is published on the MSBA's website each year along with notice provided to all districts via the superintendent.

Since the Board's approval of the recommendations described in the aforementioned October 18, 2023 Memorandum, staff have continued to analyze and assess the budget and scope for the ARP, resulting in the following additions for projects invited in 2024:

- For roof projects, Designers will complete an analysis at Schematic Design to determine the viability of roof restoration as a possible solution.
- For roof projects, Designers will complete an evaluation to determine potential solar zone areas of the existing roof as well as the scope and estimated cost to make identified roof areas solar ready.
- The MSBA will participate in the costs of accessibility upgrades required by code for potential projects to be in compliance with 521 CMR.

In the 2024 Statement of Interest ("SOI") Overview for the Accelerated Repair Program, the qualifying system age requirement to submit an SOI for roofs remained at 25 years and the qualifying age requirement for windows/doors remained at 30 years. It was noted that dependent upon the quantity of 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.

As presented during the July 31, 2024 Facilities Assessment Subcommittee meeting, after review of the qualifying ARP SOIs received and the associated budget impact, MSBA staff did not recommend further limiting the number of ARP invitations in 2024 for the following reasons:

- 2024 is the first year that the budget for ARP invitations will not apply against the Annual Cap.
- Inviting a higher number of districts is more manageable following a one-year pause in the Program.
- As the MSBA prepares to launch a heat pump conversion grant program in 2025 within the ARP, having additional school facilities with more efficient building envelopes, including new roofs and windows, is a step toward increased readiness for possible future heat pump conversions.

Following one district's request to be removed from further consideration as a result of a planned district-wide review, for the 2024 ARP, the MSBA conducted site visits for roof and window/door projects at 70 of the 71 qualifying schools from August 7, 2024 to September 3, 2024. MSBA staff provided an update for the 2024 ARP at the September 25, 2024 Facilities Assessment Subcommittee meetings.

Upon collecting and reviewing additional information during and after the site visits, staff recommend invitation to 70 schools for the recommended project scope listed in Attachment A. The age of the systems 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 windows/doors does not meet the qualifying criteria for invitation, the MSBA will ask the district to remove its SOI and will not authorize a Project Funding Agreement for an approved project.

Attached to this memorandum are four Attachments:

- Attachment A identifies the schools recommended for invitation at the October 30, 2024 Board of Directors Meeting as well as the recommended project scope.
- Attachment B identifies the schools not recommended for invitation as well as the reasons.
- Attachment C is the Statement of Interest ("SOI") Overview for Accelerated Repair Program as referenced in the Statement of Interest Process Overview.
- Attachment D is the October 18, 2023 Board of Directors memorandum referenced above.

Attachment A
Recommendation for Invitation to the 2024 Accelerated Repair Program

District Name	School Name	Age of Existing Building	Grade	2023/2024 Enrollment	Existing Square Footage	Scope Requested by District	Invited Scope Recommendation	Partial Scope Description	Declined Scope Recommendation	Reasons for Declined Invitation
Amherst-Pelham	Amherst Regional Middle	1969	7-8	369	197,000	Roof	Partial Roof	Roof Section A	Roof Section B	Roof Age <25
Ashburnham-Westminster	Meetinghouse School	1993	PK-1	195	36,000	Roof	Roof			
Berlin-Boylston	Boylston Elementary	1955	PK-5	336	60,200	Roof	Roof			
Blackstone Valley Regional Voc Tech	Blackstone Valley	1965	9-12	1250	285,000	Partial Roof	Partial Roof	Roof Section A		
Boston	Edward Everett	1909	PK-5	278	30,634	Windows/Doors	Windows/Doors			
Boston	Gardner Pilot Academy	1906	PK-8	371	59,196	Windows/Doors	Windows/Doors			
Boston	Hugh Roe O'Donnell	1932	PK-5	275	24,648	Roof	Roof			
Boston	James J Chittick	1933	PK-5	228	48,697	Windows/Doors	Windows/Doors			
Boston	Lyndon	1919	PK-8	528	93,374	Windows/Doors	Windows/Doors			
Boston	Richard J Murphy	1973	PK-8	839	147,548	Windows/Doors	Windows/Doors			
Boston	Samuel Adams	1910	PK-5	251	41,336	Windows/Doors	Windows/Doors			
Boston	Thomas J Kenny	1962	PK-5	338	38,865	Roof	Roof			
Boxford	Harry Lee Cole	1954	PK-2	354	75,373	Partial Roof	Partial Roof	Roof Section A		
Chelmsford	South Row	1961	K-4	465	44,580	Partial Roof	Partial Roof	Roof Sections A and B		
Cohasset	Joseph Osgood	1998	PK-2	389	68,000	Roof	Roof			
Dedham	Dedham High	1959	9-12	731	307,323	Partial Roof	Partial Roof	Roof Section A		
East Bridgewater	Gordon W. Mitchell	1968	3-6	616	164,399	Roof; Windows/Doors	Roof; Partial Windows/Doors	Window Section from original 1967 building	Window Section from 1997 Addition	Window Age <30
East Longmeadow	Mapleshade	1955	3-5	287	43,000	Partial Roof	Partial Roof	Roof Section A		
Gardner	Gardner Middle School	1997	5-7	483	121,066	Roof	Roof			
Gill-Montague	Gill Elementary	1955	K-6	114	18,320	Roof	Roof			

Attachment A
Recommendation for Invitation to the 2024 Accelerated Repair Program

District Name	School Name	Age of Existing Building	Grade	2023/2024 Enrollment	Existing Square Footage	Scope Requested by District	Invited Scope Recommendation	Partial Scope Description	Declined Scope Recommendation	Reasons for Declined Invitation
Greater Lawrence Regional Voc Tech	Gr Lawrence Regional Voc Tech	1965	9-12	1,774	365,000	Roof	Partial Roof	Roof Sections B-E	Roof Section A	Roof Age <25
Hamilton-Wenham	Hamilton-Wenham Regional High	1962	9-12	442	125,600	Roof	Roof			
Haverhill	Silver Hill	1993	K-4	441	73,875	Roof	Roof			
Holyoke	Holyoke High	1964	9-12	1,567	200,000	Roof	Roof			
Holyoke	Kelly Elementary	1972	PK-5	459	86,302	Roof	Roof			
Holyoke	Lt Clayre Sullivan Elementary	1962	6-8	494	112,000	Partial Roof	Partial Roof	Roof Section A		
Holyoke	Lt Elmer J McMahon Elementary	1961	PK-5	331	35,201	Roof	Roof			
Holyoke	Maurice A Donahue Elementary	1973	PK-5	430	70,550	Partial Roof	Partial Roof	Roof Section A		
Kingston	Kingston Elementary	1950	PK-2	648	95,462	Roof; Windows/Doors	Roof		Windows/Doors	Window Age <30
Longmeadow	Center	1928	K-5	409	83,000	Roof	Roof			
Lynn	Edward A Sisson	1953	PK-5	427	66,615	Windows/ Doors	Windows/ Doors			
Marshfield	Martinson Elementary	1965	K-5	453	92,900	Roof	Roof			
Mendon-Upton	Nipmuc Regional High	1997	9-12	559	147,000	Roof	Roof			
Middleton	Fuller Meadow	1964	K-1	285	60,675	Partial Roof	Partial Roof	Roof Section A	Roof Section B	Roof Age <25
Monomoy	Monomoy Regional Middle School	1963	5-7	414	125,000	Roof	Roof			
Narragansett	Narragansett Middle	1957	5-7	366	106,324	Roof	Partial Roof	Roof Sections E-G, I, and J	Roof Sections A-D and H	Roof Age <25
Narragansett	Narragansett Regional High	1998	8-12	475	93,676	Roof	Roof			
New Bedford	Alfred J Gomes	1973	PK-5	610	103,009	Roof	Roof			
New Bedford	Carlos Pacheco	1907	K-5	254	61,840	Roof	Roof			
New Bedford	Casimir Pulaski	1975	PK-5	560	130,322	Roof	Roof			

Attachment A
Recommendation for Invitation to the 2024 Accelerated Repair Program

District Name	School Name	Age of Existing Building	Grade	2023/2024 Enrollment	Existing Square Footage	Scope Requested by District	Invited Scope Recommendation	Partial Scope Description	Declined Scope Recommendation	Reasons for Declined Invitation
New Bedford	Ellen R Hathaway	1962	PK-5	245	35,300	Roof	Roof			
New Bedford	Elwyn G Campbell	1956	PK-5	278	46,749	Roof	Roof			
New Bedford	Hayden/McFadden	1975	PK-5	713	80,868	Roof	Roof			
New Bedford	Sgt Wm H Carney Academy	1973	PK-5	613	127,518	Roof	Roof			
New Bedford	Whaling City Jr./Sr. High	1912	6-12	179	183,450	Roof	Roof			
Newburyport	Newburyport High	1937	9-12	785	215,000	Partial Roof	Partial Roof	Roof Sections A and B		
Newburyport	Rupert A Nock Middle	1972	4-8	473	100,000	Partial Roof	Partial Roof	Roof Section A		
Northborough	Marion E Zeh	1950	K-5	255	68,000	Roof	Roof			
Northern Berkshire Regional Voc Tech	Charles McCann Voc Tech	1962	9-12	520	116,000	Roof; Windows/Doors	Roof; Windows/Doors			
Norton	Norton Middle	1998	6-8	559	168,900	Roof	Roof			
Peabody	South Memorial	1950	PK-5	474	67,082	Roof	Roof			
Peabody	West Memorial	1961	PK-5	277	50,508	Roof	Roof			
Salem	Bates	1968	PK-5	397	91,223	Roof	Roof			
Somerset	North Elementary	1973	PK-5	458	137,000	Windows/Doors	Windows/Doors			
Somerset	South Elementary	1952	K-5	262	29,900	Windows/Doors	Windows/Doors			
Southborough	P Brent Trottier	1998	6,7,8	407	130,000	Roof	Roof			
Springfield	Glenwood	1930	PK-5	296	38,637	Roof	Roof			
Springfield	High School Of Commerce	1915	9-12	1,060	266,952	Roof	Roof			
Springfield	Indian Orchard Elementary	1924	PK-5	565	88,498	Roof	Roof			
Springfield	Mary O Pottenger	1953	PK-5	366	42,694	Windows/Doors	Windows/Doors			

Attachment A
Recommendation for Invitation to the 2024 Accelerated Repair Program

District Name	School Name	Age of Existing Building	Grade	2023/2024 Enrollment	Existing Square Footage	Scope Requested by District	Invited Scope Recommendation	Partial Scope Description	Declined Scope Recommendation	Reasons for Declined Invitation
Springfield	Milton Bradley School	1995	PK-5	391	113,026	Partial Windows/Doors	Partial Windows/Doors	Window Sections A-C		
Springfield	Rebecca M Johnson	1993	PK-5	595	150,407	Windows/Doors	Windows/Doors			
Springfield	Samuel Bowles	1926	PK-5	310	50,444	Roof	Roof			
Springfield	Springfield Central High	1986	9-12	2,042	295,644	Windows/Doors	Windows/Doors			
Springfield	Sumner Avenue	1912	PK-5	488	82,339	Roof	Roof			
Sudbury	General John Nixon Elementary	1960	K-5	334	58,215	Partial Roof	Partial Roof	Roof Section from 1994 Addition		
Sudbury	Josiah Haynes	1965	K-5	389	61,811	Roof	Roof			
Winchendon	Memorial	1975	PK-2	302	140,000	Roof; Windows/Doors	Roof; Windows/Doors			
Winchendon	Murdock Middle/High	1995	6-12	542	210,000	Roof; Windows/Doors	Roof		Windows/Doors	Window Age <30
Winchendon	Toy Town Elementary	1965	3-5	276	110,000	Roof; Windows/Doors	Roof; Windows/Doors			

Attachment B
Not Recommended for Invitation to the 2024 Accelerated Repair Program

District Name	School Name	Age of Existing Building	Grade	2023/2024 Enrollment	Existing Square Footage	Scope Requested by District	Invited Scope Recommendation	Declined Scope Recommendation	Reasons for Declined Invitation
Falmouth	Morse Pond School	1963	5-6	480	103,000	Roof		Roof	District-wide Review
Holliston	Robert H. Adams Middle School	1955	6-8	655	135,000	Roof		Roof	Roof Age <25

Accelerated Repair Program Statement of Interest Process Overview

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.

After a temporary pause in the ARP in 2023, the MSBA Board of Directors voted to reopen the Program in 2024 with an increased estimated budget following the approval of the Commonwealth's FY 24 Budget, which provides that grant amounts related to the ARP shall not be calculated as part of the MSBA's Annual Cap limit, as set forth in Section 7 of Chapter 70B of the General Laws. For additional information, please refer to the October 25, 2023 Board of Directors memorandum, which details the recommendations specific to the ARP, located on our website, here.

The ARP reopening in 2024 is for the partial or full replacement of roofs and windows/doors. Beginning in 2024, the feasibility study for each invited roof project will consider roof replacement as well as roof restoration. Although not the right fit for every school, roof restoration may allow a more economical solution and thereby a more affordable project for some districts. The feasibility study for roof projects will also include an evaluation to make the building solar ready. Supporting roofs and windows will continue to prolong the longevity of the building and improve the environment of the school.

To facilitate schools moving toward Massachusetts' goal for net-zero carbon emissions by 2050, the MSBA plans to develop a study for public school facilities that could offer heat pump conversion for existing buildings. This study will be done in lieu of offering boiler replacement as part of the ARP annual opening in 2024. Staff anticipate procuring the services of a consultant for the study in 2024 in preparation for including this option as part of the January 2025 SOI opening.

Given the proposed budgetary growth of the program and the introduction of the new scope for heat pump conversion, commencing in January 2025, the program will have a biennial SOI opening (every two years). Districts will file SOIs biennially and staff will review invitations for roofs and windows/doors based on a budget of $300 million (representing 2 years' worth of projects). The biennial budget for heat pump conversion projects will be determined in consultation with the heat pump study and the MSBA's financial capacity. MSBA believes that a biennial opening will provide more predictability and flexibility for districts who are administering facilities improvements in their districts and that pacing the start dates for invited districts will not only help mitigate the impact of introducing so many projects into the construction market but will also help districts who need longer preparatory time than the current program allows.

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 at a subsequent fall 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.

The SOI Filing Period

The MSBA opens its SOI system annually for districts to file one or more SOIs for consideration in the MSBA's grant 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 schematic design within 90 days of invitation and a total project budget within 12 months of invitation. Over the last several years, the SOI system has opened in early January and has closed for the ARP in late February. The MSBA reviews these dates annually and may adjust opening and closing dates as may be needed from time to time. Each year, the SOI opening information is published on the MSBA's website in addition to each superintendent receiving email communications in advance of the SOI opening, on the day of and throughout the filing period until the closure of the filing period.

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

- the age of the system is less than the advertised age criteria;
  - the roof is less than twenty-five years old (installed in or after 2000);
  - the windows/doors are less than thirty years (installed in or after 1995);
- the proposed total 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 school provides for pre-kindergarten students only;
- the SOI itself seeks construction beyond roofs or windows/doors;
- a facility condition not identified in the SOI remains unresolved from a previous MSBA SOI review;
- the district is reviewing facility deficiencies to further identify its needs and priorities; or,
- the district is unable to fund a schematic design within 90 days of invitation and a total project budget within 12 months of invitation.

Historically, the MSBA has invited approximately 25 to 50 SOIs for the ARP annually. The number of invitations that the Board authorizes each year varies. Should the MSBA be required to limit the number of invitations due to its annual program budget, the MSBA will re-evaluate the advertised qualifying age criteria.

In 2017, due to the volume of SOIs submitted, the MSBA for the first time increased the qualifying ages of systems after SOIs were received. After the 2017 SOI opening advertised 20 years as the qualifying age for all three systems, only systems of 30 years or more were invited. In 2018, in anticipation of continued high volume of SOIs, the MSBA advertised a budget of approximately $50 million for grants. The MSBA reviews these advertised qualifying ages for systems as well as the grant budget annually and may adjust one or both as may be needed. Similar to the dates for

the SOI filing period, the SOI opening information is published on the MSBA's website each year along with notice provided to all districts via the superintendent.

The table below illustrates a summary of qualifying and invited SOIs beginning in 2018. A table illustrating the number of SOIs which have resulted in Project Funding Agreements for the ARP can be found here.

	2018	2019	2020	2021	2022	2023*
Advertised Age Thresholds (Roofs / Windows / Boilers)	20 / 30 / 20	20 / 30 / 20	25 / 30 / 25	25 / 30 / 25	25 / 30 / 25	N/A
SOIs Received	60	83	90	60	67	N/A
Age Thresholds After Review (Roofs / Windows / Boilers)	25 / 30 / 25	27 / - / 20	30 / 35 / 35	29 / 30 / 29	30 / 35 / 25	N/A
SOIs Invited	34	42	25	28	33	N/A
Roofs / Windows / Boilers	17 / 11 / 15	24 / 0 / 21	14 / 9 / 4	14 / 11 / 8	10 / 7 / 16	N/A

* ARP paused per October 26, 2022 Board of Directors Vote

The Program Budget

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 funding which the MSBA can obligate for projects.

Based on the popularity of the Green Repair Program, created in 2010 through Qualified School Construction Bonds, the MSBA introduced the Accelerated Repair Program, starting in 2012, with an estimated budget within the Annual Cap of $50 million. In 2021, the MSBA increased the estimated budget within the Annual Cap to $75 million.

Section 36, approved as part of the Commonwealth's FY 24 Budget, provides that grant amounts related to the MSBA's Accelerated Repair Program shall no longer count against the Annual Cap limit. Subsequently, the MSBA Board of Directors approved an estimated annual budget of $150 million for projects invited to the ARP in 2024.

The SOI Due Diligence Process

The SOI process involves the district filing an electronic version of an SOI and accompanying vote(s) with the MSBA by the established submission deadline. MSBA staff is readily available to address concerns, questions, and issues during the filing period. Once the filing period has closed, MSBA staff commence the due diligence process for all SOIs. This is a four-phase process, which includes:

This four-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 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,
- 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).

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 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 annual ARP budget. Further review of SOIs may or may not require a staff study visit.

3. Conduct Staff Study Visits, if required:

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 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 to conduct the visit. Depending 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 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 as well as someone familiar with the financial readiness of the district 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 8 weeks, with visits typically scheduled from July through September. This timeframe may vary.

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 program budget, the MSBA may be constrained to limit the number of ARP projects in a given year.

MSBA staff then provide their findings to the Chief Executive Officer, Executive Director/Deputy Chief Executive Officer and the MSBA's Facilities Assessment Subcommittee. Recommendations are then presented to the MSBA Board of Directors and the Board of Directors vote to invite districts into the Eligibility Period.

MEMORANDUM

TO: Board of Directors, Massachusetts School Building Authority
FROM: James A. MacDonald, First Deputy Treasurer, Chief Executive Officer
Mary L. Pichetti, Executive Director/Deputy Chief Executive Officer
SUBJECT: MSBA Accelerated Repair Program Recommendations
DATE: October 18, 2023

This memorandum is provided to seek the Board of Directors of the Massachusetts School Building Authority (the "MSBA") approval of staff recommendations for the Accelerated Repair Program. At the October 26, 2022 Board of Directors meeting, a temporary pause in the Accelerated Repair Program was approved, resulting in no new Accelerated Repair Program Statements of Interest in 2023. Subsequent to this pause, MSBA staff have reviewed the scope and the administration of the Accelerated Repair Program to consider possible changes. The information and recommendations below were also presented at the Facilities Assessment Subcommittee meetings on August 2, 2023 and September 6, 2023.

Discussion

The Accelerated Repair Program has provided grants for key, stand-alone systems, including roofs, windows and boilers, that prolong the longevity of the building and offer improvement to the educational environment. Based on the popularity of the Green Repair Program, created in 2010 through Qualified School Construction Bonds, the MSBA introduced the Accelerated Repair Program, starting in 2012 with an estimated budget within the Annual Cap of $50 million and later increasing the estimated budget in 2021 to $75 million. The Green Repair Program and the Accelerated Repair Program have supported projects totaling over $1.4 billion over the last 11 years with grants of over $830 million.

The number of Statements of Interest ("SOIs") for the Accelerated Repair Program has remained strong year after year. As the number of SOIs filed and the cost of construction have increased, the MSBA has had to limit the number of invitations to stay within the statutory Annual Cap, and to increase the system age thresholds on which district invitations are based.

Since 2018, the MSBA has only been able to accept approximately half of the SOIs received based on the Accelerated Repair Program budget allowance set within the Annual Cap.

SOI History	2018	2019	2020	2021	2022
Advertised Age Thresholds (Roofs / Windows / Boilers)	20 / 30 / 20	20 / 30 / 20	25 / 30 / 25	25 / 30 / 25	25 / 30 / 25
SOIs Received	60	83	90	60	67
Age Thresholds After Review (Roofs / Windows / Boilers)	25 / 30 / 25	27 / - / 20	30 / 35 / 35	29 / 30 / 29	30 / 35 / 25
SOIs Invited	34	42	25	28	33
Roofs / Windows / Boilers	17 / 11 / 15	24 / 0 / 21	14 / 9 / 4	14 / 11 / 8	10 / 7 / 16

In addition, using data from the 2016 School Survey and excluding schools over 60 years old with the highest of building needs, staff have estimated the amount needed to support existing roofs, windows and boilers that are over the system ages of 25 years for roofs and boilers and 30 years for windows. Staff estimate that the current estimated existing need for this group of systems represents 1,150 system replacements and approximately $3 billion in grants.

The MSBA appreciates the changes that the Legislature has granted providing further resources and flexibility for projects partnering with the MSBA. Section 36, approved as part of the Commonwealth's FY 24 Budget, provides that grant amounts related to the MSBA's Accelerated Repair Program shall not count against the Annual Cap limit set forth in Section 7 of Chapter 70B of the General Laws, as revised in this same section to $1.2 billion commencing July 1, 2022 (See Attachment A).

Staff have been reviewing the effect of this change as well as proposed funding limit changes and are recommending re-opening the Accelerated Repair Program in January 2024 with an annual estimated budget of $150 million. While this doubles the previous budget, the MSBA understands that the existing need is still greater. Staff will continue to analyze and assess the budget and the scope for the Accelerated Repair Program. Meanwhile, staff will also look to further understand the MSBA's financial capacity as well as the impact of doubling system replacements in a challenging construction market. In addition, the MSBA will need to perform an assessment of its staffing and structure to properly manage this expanded program.

Recommendations

With the proposed increase to the estimated budget for the Accelerated Repair Program, staff recommend the following:

- The Accelerated Repair Program annual opening in January 2024, budgeted at $150 million, will continue to offer consideration for windows and roofs. The qualifying age criteria for windows will be 30 years and the qualifying age criteria for roofs will be 25 years. Replacement of exterior doors will remain within the scope of window projects. The advertised qualifying ages may need to be adjusted after the opening based on the volume of qualifying Statements of Interest. The feasibility study for each roof invited to the Accelerated Repair Program will consider roof replacement as well as roof restoration. Although not the right fit for every school, roof restoration may allow a more economical solution and thereby a more affordable project for some districts. Supporting roofs and windows will continue to prolong the longevity of the building and improve the environment of the school.
- To facilitate schools moving toward Massachusetts' goal for net-zero carbon emissions by 2050, the MSBA plans to develop a study for public school facilities that could offer heat pump conversion for existing buildings. This study will be done in lieu of offering boiler replacement as part of the Accelerated Repair Program annual opening in January 2024. Staff anticipate procuring the services of a consultant for the study in 2024 in preparation for including this option as part of the January 2025 Statement of Interest opening.
- Given the proposed budgetary growth of the Accelerated Repair Program and the introduction of the new scope for heat pump conversion, staff are recommending a

biennial Statement of Interest opening (every two years) for the Accelerated Repair Program, commencing in January 2025. Districts will file SOIs biennially and staff will review invitations for windows and roofs based on a budget of $300 million (representing 2 years' worth of projects). The biennial budget for heat pump conversion projects will be determined in consultation with the heat pump study and the MSBA's financial capacity. The start date for the projects invited would be spaced similar to the roll-out of Core Program invitations. Staff believe that pacing the start dates will not only help mitigate the impact of introducing so many projects into the construction market but will also help districts who need longer preparatory time than the current Accelerated Repair Program allows. The biennial opening will be more efficient than performing the due diligence every year and will help to balance staff workload. Staff believe that a biennial opening will not only introduce critical efficiencies for MSBA staff in offering this larger program but also provide more predictability and flexibility for districts who are administering facilities improvements in their districts.

As noted above, MSBA staff recommend its annual opening for the Accelerated Repair Program in January 2024 and commencing the biennial opening in January 2025 and after.

Attachment A
Full language from the Commonwealth's FY 24 Budget

Section 36 Massachusetts School Building Authority Cap

Chapter 70B of the General Laws is hereby amended by striking out section 7 and inserting in place thereof the following section:-

Section 7. There shall be a limit on the estimated amount of grants approved by the authority during a fiscal year. For fiscal year 2023, the limit shall be $1,200,000,000; provided, however, that grant amounts relating to the authority's accelerated repair program shall not count against the limit set forth in this section. For each fiscal year thereafter, the limit shall be the limit for the previous fiscal year plus the lower of: (i) the rate of growth in the dedicated sales tax revenue amount as defined in subsection (a) of **section 35BB of chapter 10**; or (ii) 6.5 per cent.

Exhibit A
Invitation to Accelerated Repair Program

District	School	Age of Existing Building	Grade Configuration	2023-2024 Enrollment	Existing Square Footage	Invited Scope Recommendation
Amherst-Pelham	Amherst Regional Middle	1969	7-8	369	197,000	Partial Roof
Ashburnham-Westminster	Meetinghouse School	1993	PK-1	195	36,000	Roof
Berlin-Boylston	Boylston Elementary	1955	PK-5	336	60,200	Roof
Blackstone Valley Regional Voc Tech	Blackstone Valley	1965	9-12	1250	285,000	Partial Roof
Boston	Edward Everett	1909	PK-5	278	30,634	Windows/Doors
	Gardner Pilot Academy	1906	PK-8	371	59,196	Windows/Doors
	Hugh Roe O'Donnell	1932	PK-5	275	24,648	Roof
	James J Chittick	1933	PK-5	228	48,697	Windows/Doors
	Lyndon	1919	PK-8	528	93,374	Windows/Doors
	Richard J Murphy	1973	PK-8	839	147,548	Windows/Doors
	Samuel Adams	1910	PK-5	251	41,336	Windows/Doors
	Thomas J Kenny	1962	PK-5	338	38,865	Roof
Boxford	Harry Lee Cole	1954	PK-2	354	75,373	Partial Roof
Chelmsford	South Row	1961	K-4	465	44,580	Partial Roof
Cohasset	Joseph Osgood	1998	PK-2	389	68,000	Roof
Dedham	Dedham High	1959	9-12	731	307,323	Partial Roof
East Bridgewater	Gordon W. Mitchell	1968	3-6	616	164,399	Roof; Partial Windows/Doors
East Longmeadow	Mapleshade	1955	3-5	287	43,000	Partial Roof
Gardner	Gardner Middle School	1997	5-7	483	121,066	Roof
Gill-Montague	Gill Elementary	1955	K-6	114	18,320	Roof
Greater Lawrence Regional Voc Tech	Gr Lawrence Regional Voc Tech	1965	9-12	1,774	365,000	Partial Roof
Hamilton-Wenham	Hamilton-Wenham Regional High	1962	9-12	442	125,600	Roof
Haverhill	Silver Hill	1993	K-4	441	73,875	Roof
Holyoke	Holyoke High	1964	9-12	1,567	200,000	Roof
	Kelly Elementary	1972	PK-5	459	86,302	Roof
	Lt Clayre Sullivan Elementary	1962	6-8	494	112,000	Partial Roof
	Lt Elmer J McMahon Elementary	1961	PK-5	331	35,201	Roof
	Maurice A Donahue Elementary	1973	PK-5	430	70,550	Partial Roof
Kingston	Kingston Elementary	1950	PK-2	648	95,462	Roof
Longmeadow	Center	1928	K-5	409	83,000	Roof
Lynn	Edward A Sisson	1953	PK-5	427	66,615	Windows/Doors
Marshfield	Martinson Elementary	1965	K-5	453	92,900	Roof
Mendon-Upton	Nipmuc Regional High	1997	9-12	559	147,000	Roof

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Invitation to Accelerated Repair Program

District	School	Age of Existing Building	Grade Configuration	2023-2024 Enrollment	Existing Square Footage	Invited Scope Recommendation
Middleton	Fuller Meadow	1964	K-1	285	60,675	Partial Roof
Monomoy	Monomoy Regional Middle School	1963	5-7	414	125,000	Roof
Narragansett	Narragansett Middle	1957	5-7	366	106,324	Partial Roof
	Narragansett Regional High	1998	8-12	475	93,676	Roof
New Bedford	Alfred J Gomes	1973	PK-5	610	103,009	Roof
	Carlos Pacheco	1907	K-5	254	61,840	Roof
	Casimir Pulaski	1975	PK-5	560	130,322	Roof
	Ellen R Hathaway	1962	PK-5	245	35,300	Roof
	Elwyn G Campbell	1956	PK-5	278	46,749	Roof
	Hayden/McFadden	1975	PK-5	713	80,868	Roof
	Sgt Wm H Carney Academy	1973	PK-5	613	127,518	Roof
	Whaling City Jr/Sr High	1912	6-12	179	183,450	Roof
Newburyport	Newburyport High	1937	9-12	785	215,000	Partial Roof
	Rupert A Nock Middle	1972	4-8	473	100,000	Partial Roof
Northborough	Marion E Zeh	1950	K-5	255	68,000	Roof
Northern Berkshire Regional Voc Tech	Charles McCann Voc Tech	1962	9-12	520	116,000	Roof, Windows/Doors
Norton	Norton Middle	1998	6-8	559	168,900	Roof
Peabody	South Memorial	1950	PK-5	474	67,082	Roof
	West Memorial	1961	PK-5	277	50,508	Roof
Salem	Bates	1968	PK-5	397	91,223	Roof
Somerset	North Elementary	1973	PK-5	458	137,000	Windows/Doors
	South Elementary	1952	K-5	262	29,900	Windows/Doors
Southborough	P Brent Trottier	1998	6,7,8	407	130,000	Roof
Springfield	Glenwood	1930	PK-5	296	38,637	Roof
	High School Of Commerce	1915	9-12	1060	266,952	Roof
	Indian Orchard Elementary	1924	PK-5	565	88,498	Roof
	Mary O Pottenger	1953	PK-5	366	42,694	Windows/Doors
	Milton Bradley School	1995	PK-5	391	113,026	Partial Windows/Doors
	Rebecca M Johnson	1993	PK-5	595	150,407	Windows/Doors
	Samuel Bowles	1926	PK-5	310	50,444	Roof
	Springfield Central High	1986	9-12	2042	295,644	Windows/Doors
	Sumner Avenue	1912	PK-5	488	82,339	Roof

Exhibit A
Invitation to Accelerated Repair Program

District	School	Age of Existing Building	Grade Configuration	2023-2024 Enrollment	Existing Square Footage	Invited Scope Recommendation
Sudbury	General John Nixon Elementary	1960	K-5	334	58,215	Partial Roof
	Josiah Haynes	1965	K-5	389	61,811	Roof
Winchendon	Memorial	1975	PK-2	302	140,000	Roof; Windows/Doors
	Murdock Middle/High	1995	6-12	542	210,000	Roof
	Toy Town Elementary	1965	3-5	276	110,000	Roof; Windows/Doors