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
DATE: December 5, 2024
RE: Statement of Interests for Core Program – 2024 Recommendations for Invitations to Eligibility Period

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The Massachusetts School Building Authority (the "MSBA") opened the 2024 Statement of Interest (the "SOI") filing period on January 12, 2024. The filing deadline for the Core Program was April 12, 2024, with 47 SOIs submitted by 36 districts for consideration.[1] Of the 47 SOIs submitted, 29 were designated by the district as their priority school. Beginning on April 12, 2024, the MSBA began the due diligence on the SOIs that were submitted for the Core Program, as outlined in **Attachment A**, "SOI Process Overview for Core Program" issued December 13, 2023, and as noted below:

- Review SOI submissions for completeness, which includes the 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 2024 SOI process and most recently at the November 13, 2024, Facilities Assessment Subcommittee meeting, the MSBA has now concluded the due diligence for the 2024 SOIs. MSBA staff are recommending that the Board vote to invite the 22 districts and schools listed in the tables below and found in **Attachment B** into the Eligibility Period.

Upon approval by the Board, each district and school are invited into the 270-day Eligibility Period with a specified effective date for commencement with any potential approval of an invitation to Project Scope and Budget eligible after July 1, 2027. As part of its due diligence, MSBA staff discussed the Eligibility Period requirements and the specific funding timelines with the 22 districts. The districts are aware of the effective dates for commencement of Eligibility Period as found below and the date for potential Project Scope and Budget approval.

Attachment C to this memorandum lists the names of the remaining 25 schools from 21 districts that are not being considered for an invitation into the MSBA's grant program in 2024. The 21 districts include seven districts with schools included for invitation in Attachment B, resulting in 14 districts without a school being considered for an invitation. Furthermore, four of the remaining 14 districts have active Core Program projects including three schools under consideration for consolidation by their respective districts.

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[1]The filing deadline for the Accelerated Repair Program (the "ARP") was March 1, 2024, with 72 SOIs submitted by 39 districts. Invitations into the ARP concluded at the October 30, 2024, Board of Directors meeting, with 37 districts, representing 70 projects invited into the ARP.

Recommended Invitation for Commencement of Eligibility Period on February 3, 2025

District	School	Age of Existing Building	Current Grade Configuration
Natick	Memorial Elementary School	1968	K-4
Pittsfield	Crosby Elementary School	1962	PK-5
Triton Regional School District	Triton Regional High School	1971	9-12

Recommended Invitation for Commencement of Eligibility Period on March 3, 2025

District	School	Age of Existing Building	Current Grade Configuration
Plymouth	Hedge Elementary School	1910	K-5
Shrewsbury	Shrewsbury Senior High School	2002	9-12
West Springfield	John Ashley Elementary School	1949	PK-K

Recommended Invitation for Commencement of Eligibility Period on April 1, 2025

District	School	Age of Existing Building	Current Grade Configuration
Dennis-Yarmouth Regional School District	Marguerite E. Small Elementary School	1963	PK-3
Medfield	Dale Street Elementary School	1941	4-5
Norwell	Norwell High School	1973	9-12
Upper Cape Cod Regional Vocational Technical School District	Upper Cape Cod Regional Vocational Technical High School	1969	9-12

Recommended Invitation for Commencement of Eligibility Period on May 1, 2025

District	School	Age of Existing Building	Current Grade Configuration
Athol-Royalston Regional School District	Athol High School	1957	9-12
Lenox	Lenox Memorial High School	1966	6-12
Milton	Cunningham School	1938	PK-5

Recommended Invitation for Commencement of Eligibility Period on June 2, 2025

District	School	Age of Existing Building	Current Grade Configuration
Duxbury	Alden School	1949	3-5
Pioneer Valley Regional School District	Northfield Elementary School	1910	PK-6
Springfield	White Street Elementary School	1905	PK-5
West Boylston	West Boylston Junior/Senior High School	1958	6-12

Recommended Invitation for Commencement of Eligibility Period on July 1, 2025

District	School	Age of Existing Building	Current Grade Configuration
Boston	John W. McCormack School	1967	7-12
Ipswich	Paul F. Doyon Memorial School	1965	PK-5

Recommended Invitation for Commencement of Eligibility Period on August 1, 2025

District	School	Age of Existing Building	Current Grade Configuration
Shawsheen Valley Regional Vocational Technical School District	Shawsheen Valley Regional Vocational Technical High School	1970	9-12
South Middlesex Regional Vocational Technical School District	Joseph P. Keefe Technical High School	1973	9-12
Whittier Regional Vocational Technical School District	Whittier Regional Vocational Technical High School	1973	9-12

[1]Exhibit A

2024 SOI Core Program Invitations to Eligibility Period

District	School	Age of Existing Building	Existing Square Footage	Current Grade Configuration	2023-2024 DESE Enrollment	Eligibility Period Commencement Date
Athol-Royalston Regional School District	Athol High School	1957	89,440	9-12	414	May 1, 2025
Boston	John W. McCormack School	1967	234,625	7-12	569	July 1, 2025
Dennis-Yarmouth Regional School District	Marguerite E. Small Elementary School	1963	49,000	PK-3	275	April 1, 2025
Duxbury	Alden School	1949	160,000	3-5	621	June 2, 2025
Ipswich	Paul F. Doyon Memorial School	1965	51,500	PK-5	371	July 1, 2025
Lenox	Lenox Memorial High School	1966	113,000	6-12	446	May 1, 2025
Medfield	Dale Street Elementary School	1941	53,029	4-5	404	April 1, 2025
Milton	Cunningham School	1938	75,000	PK-5	611	May 1, 2025
Natick	Memorial Elementary School	1968	60,000	K-4	444	February 3, 2025
Norwell	Norwell High School	1973	151,000	9-12	596	April 1, 2025
Pioneer Valley Regional School District	Northfield Elementary School	1910	42,000	PK-6	168	June 2, 2025
Pittsfield	Crosby Elementary School	1962	69,826	PK-5	247	February 3, 2025
Plymouth	Hedge Elementary School	1910	34,541	K-5	218	March 3, 2025
Shawsheen Valley Regional Vocational Technical High School	Shawsheen Valley Regional Vocational Technical High School	1970	275,000	9-12	1,306	August 1, 2025
Shrewsbury	Shrewsbury Senior High School	2002	269,000	9-12	1,879	March 3, 2025
South Middlesex Regional Vocational Technical School District	Joseph P. Keefe Technical High School	1973	258,000	9-12	871	August 1, 2025
Springfield	White Street Elementary School	1905	45,328	PK-5	392	June 2, 2025
Triton Regional School District	Triton Regional High School	1971	212,064	9-12	567	February 3, 2025
Upper Cape Cod Regional Vocational Technical School District	Upper Cape Cod Regional Vocational Technical High School	1969	174,550	9-12	826	April 1, 2025
West Boylston	West Boylston Junior/Senior High School	1958	102,425	6-12	448	June 2, 2025
West Springfield	John Ashley Elementary School	1949	29,140	PK-K	204	March 3, 2025
Whittier Regional Vocational Technical School District	Whittier Regional Vocational Technical High School	1973	362,000	9-12	1,279	August 1, 2025

[1]Any approval of a potential grant for a scope of work as identified herein will not be made before July 1, 2027.

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 cohort 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 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, each

superintendent receives email communications in advance of the SOI opening, on the day of and throughout the filing period until the closure of the filing period.

The SOI Filing Period

The MSBA opens its Statement of Interest 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 construction project in the next two years. The SOI system has opened in early January and has closed for the Core Program in early April, however, this timeline may vary as needed.

The MSBA has typically received approximately 100 to 125 SOIs 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 cohort 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 Commonwealth's Fiscal Year 2024 Budget increased the MSBA's Annual Cap to $1.2 billion. The Annual Cap is adjusted each year by an amount that is equal to the lesser of the rate of growth, by percentage, of dedicated sales tax revenue or 6.5 percent.

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 are 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:

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 the 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 submissions for completeness:

Once the SOI system has closed, MSBA staff review each submission to confirm that all 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 will need to sign;
- An electronic version of the Closed Schools Certification with the required electronic signatures;
- All required vote documentation, which 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; and,
    - **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).

- Any supporting materials required to be submitted with the SOI and/or any supplemental material a district will want to submit with the SOI.
    - If applicable, districts are expected to submit material specific to certain Statutory Priorities selected by the district in hard copy format via US mail:
        - 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 are 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 a summary of the accreditation report(s) focusing on the deficiencies as stated in the SOI.

The supplemental materials noted above must be post-marked on or before the 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:**

Attachment A – 2024 Core Program SOI Overview

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 SOIs filed in that calendar year that 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 identifies a Priority SOI for consideration when filing more than one in a given year. This enables the district and the MSBA to focus financial and staff resources on completing a project and ensures an opportunity for a grant for as many districts as possible. Additionally, this narrows down the cohort of potential projects if districts have submitted multiple schools within the district for consideration.

With their focus on each district's identified Priority SOI, MSBA staff then look at this smaller cohort 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 Core Program 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 facility has already received a senior study visit within the previous two or three years, a senior study visit may not be needed for the 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 determine that a Senior Study visit is needed to complete the due diligence process, MSBA staff, accompanied by a 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 request that the district have someone familiar with the facility and systems present, someone familiar with the financial readiness of the district, as well as someone who is familiar with the curriculum as it relates to the programs 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 and 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 eight to ten weeks, with visits typically scheduled from August through October. This timeframe may vary.

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 compare 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. Recommendations are then presented to the MSBA Board of Directors and the Board of Directors vote to invite districts into the Eligibility Period.

Attachment B - 2024 Statement of Interest Core Program Board Memorandum

District	School Name	Year Built	Building Gross SF	School Type	Current Grade Configuration	2023-2024 DESE Enrollment	*MSBA Check Section 8 Priorities
Athol-Royalston Regional Shool District	Athol High School	1957	89,440	HS	9-12	414	4,5,7
Boston	John W. McCormack School	1967	234,625	HS	7-12	569	5,7
Dennis-Yarmouth Regional School District	Marguerite E. Small Elementary School	1963	49,000	ES	PK-3	275	5,7
Duxbury	Alden School	1949	160,000	ES	3-5	621	5,7
Ipswich	Paul F. Doyon Memorial School	1965	51,500	ES	PK-5	371	4,5,7
Lenox	Lenox Memorial High School	1966	113,000	MS/HS	6-12	446	3,5,7
Medfield	Dale Street Elementary School	1941	53,029	ES	4-5	404	2,4,5,7
Milton	Cunningham School	1938	75,000	ES	PK-5	611	2,4,7
Natick	Memorial Elementary School	1968	60,000	ES	K-4	444	5,7
Norwell	Norwell High School	1973	151,000	HS	9-12	596	5,7
Pioneer Valley Regional School District	Northfield Elementary School	1910	42,000	ES	PK-6	168	5,7
Pittsfield	Crosby Elementary School	1962	69,826	ES	PK-5	247	5,7
Plymouth	Hedge Elementary School	1910	34,541	ES	K-5	218	4,5,7
Shawsheen Valley Regional Vocational Technical School District	Shawsheen Valley Regional Vocational Technical High School	1970	275,000	V-HS	9-12	1,306	5,7
Shrewsbury	Shrewsbury Senior High School	2002	269,000	HS	9-12	1,879	2,5,7
South Middlesex Regional Vocational Technical School District	Joseph P. Keefe Technical High School	1973	258,000	V-HS	9-12	871	5,7
Springfield	White Street Elementary School	1905	45,328	ES	PK-5	392	5,7
Triton Regional School District	Triton Regional High School	1971	212,064	HS	9-12	567	5,7
Upper Cape Cod Regional Vocational Technical School District	Upper Cape Cod Regional Vocational Technical High School	1969	174,550	V-HS	9-12	826	5,7
West Boylston	West Boylston Junior/Senior High School	1958	102,425	MS/HS	6-12	448	4,5,7
West Springfield	John Ashley Elementary School	1949	29,140	PK-K	PK-K	204	5,7
Whittier Regional Vocational Technical School District	Whittier Regional Vocational Technical High School	1973	362,000	V-HS	9-12	1,279	5,7

*Red font denotes MSBA added Section 8 Priority

Attachment C - 2024 Statement of Interest Core Program Board Memorandum

District	School Name	*MSBA Check Section 8 Priorities	MSBA Due Diligence Findings
Avon	Ralph D. Butler School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Braintree	Braintree High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Burlington	Burlington High School	5,7	Not district priority, active MSBA Core project, high School Survey scores
Cohasset	Cohasset High School	5,7	High School Survey scores
Cohasset	Cohasset Middle School	5,7	Not district priority, high School Survey scores
Dracut	Greenmont Avenue Elementary School	5,7	Not district priority, active Core project, SOI under consideration by district for consolidation
Essex North Shore Agricultural and Technical Regional School District	Essex Technical High School	5,7	MSBA's historic district involvement sufficient at this time, high School Survey scores
Foxborough	Charles Taylor Elementary School	4,5,7	Deficiencies not among highest within cohort of most urgent/needy
Gill-Montague Regional School District	Sheffield Elementary School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Granby	Granby Junior/Senior High School	5,7	MSBA's historic district involvement sufficient at this time, district not ready to proceed, high School Survey score
Haverhill	Tilton Elementary School	5,7	Not district priority, active MSBA Core Project, SOI under consideration by district for consolidation, high School Survey score
Holliston	Holliston High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Ipswich	Winthrop Elementary School	4,5,7	Not district priority, other district SOI in FRR category, high School Survey score
Pioneer Valley Regional School District	Bernardston Elementary School	5,7	Not district priority, other district SOI in FRR category, high School Survey scores
Pioneer Valley Regional School District	Pioneer Valley Regional School	5,7	Not district priority, other district SOI in FRR category, high School Survey scores
Pittsfield	Silvio O. Conte Community School	5,7	Not district priority, other district SOI in FRR category, high School Survey score
Plymouth	Cold Spring Elementary School	4,5,7	Not district priority, other district SOI in FRR category, high School Survey score
Springfield	Chestnut Accelerated Middle School	5	Not district priority, active MSBA Core projects, other district SOI in FRR category, high School Survey scores
Springfield	Washington Street Elementary School	5,7	Not district priority, active MSBA Core projects, other district SOI in FRR category, high School Survey score
Triton Regional School District	Triton Regional Middle School	5,7	Not district priority, other district SOI in FRR category, high School Survey scores
West Springfield	John R. Fausey Elementary School	2,5,7	Not district priority, other district SOI in FRR category, high School Survey scores
Westford	Abbot Elementary School	5,7	Not district priority, active MSBA Core project, SOI under consideration by district for consolidation, high School Survey scores
Weston	Weston High School	5,7	Deficiencies not among highest within cohort of most urgent/needy
Weston	Weston Middle School	5,7	Not district priority, high School Survey scores
Worcester	Burncoat Middle School	5,7	Not district priority, active MSBA Core project, SOI under consideration by district for consolidation, high School Survey score

*Red font denotes MSBA added Section 8 Priority