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 22, 2025
RE: Recommendation for 2025 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, one-year pause in 2023, the MSBA Board of Directors voted to reopen the ARP in 2024 for the partial or full replacement of roofs and windows/doors only, 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, 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.

On January 13, 2025, the ARP commenced its biennial (every two years) SOI opening for roofs and windows/doors based on a budget of $300 million (representing two years' worth of projects) as well as for heat pump conversion projects based on a budget of $250 million (representing two years' worth of projects). The deadline to file for consideration in the ARP was March 21, 2025.

Following the receipt of 99 SOIs from 47 districts filed in 2025 for the ARP, the MSBA performed a review of the information provided by the districts based on the non-qualifying conditions noted below and for conformance with the ARP. The initial review resulted in 96 of the 99 schools from 46 districts qualifying for consideration for participation in the ARP.

Non-Qualifying Accelerated Repair Program Conditions, Regardless of Scope*	
Proposed Project Cost	Proposed total project cost is projected as less than $250,000.
Overcrowding	School is judged by the district to be overcrowded or underutilized.
School Consolidation	District is considering the facility for potential consolidation.
Building Usage	Primary use of the building is for non-educational purposes.
Pre-Kindergarten Only	School provides for pre-kindergarten students only.
Outside Scope	SOI itself identifies construction beyond roofs, windows/doors, or heat pump conversions.

Non-Qualifying Accelerated Repair Program Conditions, Regardless of Scope*	
School SOI History	Facility conditions not identified in the SOI remain 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.

Non-Qualifying Accelerated Repair Program Conditions, Roof and Windows/Doors*	
Roof Age <20	System is less than 20 years of age as of 2026 (installed in or after 2007).
Window Age <30	System is less than 30 years of age as of 2026 (installed in or after 1997).

Non-Qualifying Accelerated Repair Program Conditions, Heat Pump Conversions*	
Window Age >30	System is older than 30 years of age as of 2026 (installed in or before 1996).
Facility Renovated or Opened after 2010	School opened or fully renovated, including replacement of the HVAC system after 2010.
Heating Distribution Type	Mechanical heating distribution is supported by steam distribution piping.

*Conditions as described in the 2025 SOI Process Overview for the ARP were shared with all Superintendents.

Prior to 2023, the MSBA had 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 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. Beginning in 2024, following the approval of the Commonwealth's FY 24 budget, grant amounts related to the ARP shall not be calculated as part of the MSBA's Annual Cap limit. This increased the ARP's budget, allowing the MSBA to invite 70 of the 72 SOIs filed in 2024.

Since the Board's approval of the 2024 ARP SOI invitations at its October 30, 2024, meeting, staff have continued to analyze and assess the budget and scope for the ARP, resulting in the following additions for projects invited in 2024 and continued in 2025:

- For roof projects, Designers will continue to complete an analysis at Schematic Design to determine the viability of roof restoration as a possible solution.
- For roof projects, Designers will continue to 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 continue to participate in the costs of ADA accessibility upgrades and fire protection upgrades required by code.

In June 2024, the MSBA began a study to further understand scope, schedule, and cost factors that could impact the conversion of existing public school facilities to heat pumps for heating and cooling. The report, completed and released in summer 2025, recommends technical and programmatic approaches to further inform the ARP. With this analysis, the MSBA will apply the following to the heat pump conversion projects invited in 2025:

- The MSBA will require each heat pump conversion project to result in mechanical heating, cooling, and ventilation in all classrooms at a minimum. The MSBA will also participate in spaces beyond the classrooms.
- The MSBA will participate in electrical system upgrades required to support the heat pump solution.

In the 2025 SOI Process Overview for the ARP, the qualifying system age requirement to submit an SOI for a roof was 20 years, and the qualifying age requirement for windows/doors remained at 30 years from 2024. For heat pump conversion projects, the following was applied to SOIs that filed for the 2025 ARP:

- If the windows are more than thirty years old as of 2026 (installed in or before 1996), then the district cannot file for a heat pump conversion project and instead must file for a window/door project to improve the building envelope ahead of an MSBA-funded heat pump project. Consequently, a heat pump conversion project and a window/door replacement project cannot be paired within a filed SOI.
- If the district wishes to file an SOI for a heat pump conversion project and the roof is more than fifteen years as of 2026 (installed in or before 2011), then the district must select both a heat pump conversion project and a roof project when filing the SOI so that the roof is addressed by replacement or restoration in combination with the heat pump project.

It was noted that, depending on 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 16, 2025 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 2025 for the following reasons:

- 2025 is the second year that the budget for ARP invitations will not apply against the Annual Cap.
- 2025 is the first year of the ARP's biennial SOI opening, which will represent two years' worth of projects.
- Biennial openings provide more predictability and flexibility for district officials who are administering facilities improvements in their districts. Furthermore, pacing the start dates for invited districts will help mitigate the impact of introducing so many projects into the construction market and help support districts that may need longer preparatory time than the former iteration of the ARP allowed.
- The MSBA launched a heat pump conversion grant program in 2025 within the ARP to facilitate schools moving toward Massachusetts' goal for net-zero carbon emissions by 2050.

For the qualifying SOIs, the MSBA conducted a pre-site visit call with 46 districts, followed by an in-person site visit for roof, window/door, and heat pump conversion projects at 95 qualifying schools from 45 districts, beginning July 29, 2025 through August 29, 2025. During the pre-site visit calls, site visits, and post-site visit due diligence, three districts requested a SOI to be removed from further consideration. MSBA staff provided an update for the 2025 ARP at the October 1, 2025 Facilities Assessment Subcommittee meeting.

Upon collecting and reviewing additional information during and after the site visits, staff recommend invitations to 93 schools from 45 districts for the recommended project scope listed in Attachment A. The age of the systems is based on the information received from the district. If during the Feasibility Study, it is determined that the age of the roofs and/or windows/doors and/or other published requirements for heat pump conversions do 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.

Upon approval by the Board, each district and school are invited into the 120-day Initial Document Period with a specified effective date for commencement, with any potential authorization to execute a Project Funding Agreement by the Board to be approved within 16 months of the district's commencement. As part of its due diligence, MSBA staff discussed the Initial Document Period requirements and the specific funding timelines with the 45 districts. The districts are aware of the effective dates for commencement of the Initial Document Period, as found within Attachment A.

Attached to this memorandum are three Attachments:

- Attachment A identifies the schools recommended for invitation at the October 29, 2025 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 2025 SOI Process Overview for the Accelerated Repair Program.

October 29, 2025 Board Meeting Attachment A: 2025 Accelerated Repair Program Statements of Interest Recommendations for Invitation											
District Name	School Name	Initial Document Commencement Date	Age of Existing Building	Grade	2024/2025 Enrollment	Existing Square Footage	Scope Requested by District	Invited Scope Recommendation	Partial Scope Description	Declined Scope Recommendation	Reasons for Declined Invitation
Agawam	Benjamin J. Phelps Elementary School	July 1, 2026	1938	K-4	304	57,425	Roof	Partial Roof	Section A	Modular Sub-Section of Section A	Modular Structure
Agawam	Clifford M. Granger School	July 1, 2026	1950	K-4	361	49,750	Roof	Partial Roof	Section A	Modular Sub-Section of Section A	Modular Structure
Agawam	James Clark School	July 1, 2026	1957	K-4	297	48,480	Roof	Roof			
Agawam	William P. Sapelli Elementary School	July 1, 2026	1960	K-4	290	50,300	Roof	Partial Roof	Section A	Modular Sub-Section of Section A	Modular Structure
Arlington	Hardy Elementary School	July 1, 2026	1960	K-5	382	63,180	Heat Pump	Heat Pump			
Barnstable	Barnstable High School	November 3, 2025	1957	8-12	1,652	440,000	Roof	Roof			
Barnstable	Barnstable Intermediate School	November 3, 2025	1976	6-7	642	164,993	Roof	Roof			
Belmont	Winthrop L. Chenery Upper Elementary School	November 3, 2025	1997	4-6	1,023	182,000	Roof	Roof			
Boston	Boston Adult Academy	July 1, 2026	1998	11-12	227	32,706	Roof	Roof			
Boston	Ellis Mendell Elementary School	July 1, 2026	1904	PK-6	391	31,820	Windows/Doors	Windows/Doors			
Boston	Joseph J. Hurley School	July 1, 2026	1961	PK-8	335	41,479	Roof	Roof			
Boston	Joyce Kilmer K-8 School	July 1, 2026	1935	PK-8	401	25,068	Windows/Doors	Windows/Doors			
Boston	Lyon Upper 9-12 School	July 1, 2026	1923	9-12	95	47,314	Windows/Doors	Windows/Doors			
Boston	Margarita Muniz Academy	March 2, 2026	1972	7-12	428	115,400	Heat Pump	Heat Pump			
Boston	Mildred Avenue K-8 School	March 2, 2026	2002	PK-8	601	214,093	Roof	Roof			
Boston	Orchard Gardens K-8 School	March 2, 2026	2002	PK-8	689	144,000	Roof, Heat Pump	Roof, Heat Pump			
Bourne	Bourne Middle School	November 3, 2025	2000	6-8	394	135,000	Roof	Partial Roof	Sections A-B	Gym Entrance Sub-Section of Section B	Roof <20
Cambridge	Cambridgeport School	November 3, 2025	1903	PK-5	263	60,112	Roof	Roof			
Canton	Dean S. Luce Elementary School	July 1, 2026	1954	K-5	509	67,225	Roof	Roof			
Dartmouth	Dartmouth High School	March 2, 2026	2002	9-12	902	265,000	Roof, Windows/Doors	Partial Roof	Roof Section A	Auditorium Sub-Section of Roof Section A; Windows/Doors	Roof <20, Windows <30
Douglas	Douglas Primary School	July 1, 2026	1979	PK-1	222	38,700	Roof, Windows/Doors	Partial Roof, Windows/Doors	Roof Section A	2017 Sub-Section of Roof Section A	Roof <20
Erving	Erving Elementary School	March 2, 2026	1974	PK-6	113	46,643	Roof, Heat Pump	Roof, Heat Pump			
Framingham	Brophy Elementary School	November 3, 2025	1968	K-5	504	68,000	Roof	Roof			
Framingham	Potter Road Elementary School	November 3, 2025	1966	K-5	540	63,600	Roof	Roof			
Groton-Dunstable Regional School District	Swallow/Union Elementary School	March 2, 2026	1962	K-4	210	52,002	Partial Roof	Partial Roof	Section A and 1995 EPDM Roof Section		
Hampden-Wilbraham Regional School District	Mile Tree Elementary School	March 2, 2026	1963	PK-1	355	43,645	Roof, Windows/Doors	Roof		Windows/Doors	Windows <30
Hampden-Wilbraham Regional School District	Stony Hill Elementary School	March 2, 2026	1953	2-3	317	36,361	Roof, Windows/Doors	Roof		Windows/Doors	Windows <30
Hampden-Wilbraham Regional School District	Wilbraham Middle School	March 2, 2026	1968	6-8	613	99,750	Windows/Doors	Windows/Doors			
Harvard	The Bromfield Middle/High School	November 3, 2025	1962	6-12	572	181,000	Roof, Heat Pump	Roof, Heat Pump			

October 29, 2025 Board Meeting Attachment A: 2025 Accelerated Repair Program Statements of Interest Recommendations for Invitation											
District Name	School Name	Initial Document Commencement Date	Age of Existing Building	Grade	2024/2025 Enrollment	Existing Square Footage	Scope Requested by District	Invited Scope Recommendation	Partial Scope Description	Declined Scope Recommendation	Reasons for Declined Invitation
Haverhill	Golden Hill Elementary School	November 3, 2025	1993	K-4	502	73,875	Roof	Roof			
Hingham	Hingham High School	November 3, 2025	1954	9-12	1,066	217,994	Roof, Heat Pump	Roof, Heat Pump			
Hingham	Plymouth River Elementary School	November 3, 2025	1968	K-5	352	65,900	Roof	Roof			
Hingham	South Elementary School	November 3, 2025	1948	K-5	496	80,500	Roof	Roof			
Holliston	Miller Elementary School	July 1, 2026	1999	3-5	649	155,000	Roof	Partial Roof	Sections A-D, G-H	Sections E-F	Roof <20
Holliston	Placentino Elementary School	July 1, 2026	1998	PK-2	605	155,000	Roof	Partial Roof	Sections A-D, G-H	Sections E-F	Roof <20
Holyoke	Lt. Elmer J. McMahon Elementary	July 1, 2026	1961	PK-5	317	35,201	Partial Windows/Doors	Partial Windows/Doors	Section A		
Holyoke	Maurice A. Donahue Elementary	July 1, 2026	1973	PK-5	388	70,550	Partial Windows/Doors	Partial Windows/Doors	Section A		
King Philip Regional School District	King Philip Middle School	March 2, 2026	1965	7-8	706	166,000	Roof, Heat Pump	Roof, Heat Pump			
King Philip Regional School District	King Philip Regional High School	March 2, 2026	1954	9-12	1,114	253,000	Roof, Heat Pump	Roof, Heat Pump			
Lawrence	Arlington Elementary School	November 3, 2025	1985	K-8	558	154,000	Windows/Doors	Windows/Doors			
Lawrence	Frost Middle School	November 3, 2025	1986	5-8	508	147,000	Roof	Roof			
Lawrence	South Lawrence East Elementary School	November 3, 2025	1994	1-5	666	143,333	Roof	Roof			
Lee	Lee Elementary School	March 2, 2026	2002	PK-6	331	94,500	Roof	Roof			
Lee	Lee Middle/High School	March 2, 2026	1961	7-12	328	145,124	Roof	Partial Roof	Section A	Section B	Roof <20
Longmeadow	Center School	November 3, 2025	1928	K-5	412	83,400	Windows/Doors	Windows/Doors			
Lowell	B.F. Butler Middle School	July 1, 2026	1992	5-8	516	70,578	Roof, Windows/Doors	Roof, Windows/Doors			
Lowell	Bartlett Community Partnership School	July 1, 2026	1954	PK-8	408	120,000	Roof, Windows/Doors	Roof, Windows/Doors			
Lowell	Dr. Gertrude Bailey Elementary School	March 2, 2026	1991	PK-4	454	60,000	Windows/Doors	Windows/Doors			
Lowell	Greenhalge Elementary School	July 1, 2026	1994	PK-4	480	78,000	Roof, Windows/Doors	Roof, Windows/Doors			
Lowell	James S. Daley Middle School	July 1, 2026	1956	5-8	669	120,000	Roof, Windows/Doors	Roof, Windows/Doors			
Lowell	John J. Shaughnessy Elementary School	March 2, 2026	1991	PK-4	485	65,000	Windows/Doors	Windows/Doors			
Lowell	Joseph McAvinnue Elementary School	March 2, 2026	1993	PK-4	447	60,000	Windows/Doors	Windows/Doors			
Lowell	Rogers STEM Academy	July 1, 2026	1962	K-8	892	117,500	Partial Roof, Windows/Doors	Partial Roof, Windows/Doors	Roof Section A	2022 and 2023 Sub-Sections of Roof Section A	Roof <20
Lynn	Classical High School	November 3, 2025	1999	9-12	1,795	207,000	Roof	Partial Roof	Sections A-D	Section E	Roof <20
Lynn	Lynn Vocational Technical Institute	March 2, 2026	1971	9-12	1,584	227,855	Heat Pump	Heat Pump			
Lynn	Robert L. Ford Elementary School	November 3, 2025	1936	1-5	410	48,000	Windows/Doors	Windows/Doors			
Mansfield	Jordan/Jackson Elementary School	July 1, 2026	1992	3-5	760	152,880	Roof	Roof			
Masconomet Regional School District	Masconomet Regional High School	March 2, 2026	2002	9-12	924	149,000	Roof, Heat Pump	Roof, Heat Pump			

October 29, 2025 Board Meeting Attachment A: 2025 Accelerated Repair Program Statements of Interest Recommendations for Invitation											
District Name	School Name	Initial Document Commencement Date	Age of Existing Building	Grade	2024/2025 Enrollment	Existing Square Footage	Scope Requested by District	Invited Scope Recommendation	Partial Scope Description	Declined Scope Recommendation	Reasons for Declined Invitation
Masconomet Regional School District	Masconomet Regional Middle School	March 2, 2026	1958	7-8	553	222,000	Roof, Heat Pump	Roof, Heat Pump			
Medford	Brooks Elementary School	July 1, 2026	2003	PK-5	556	95,000	Roof, Heat Pump	Roof, Heat Pump			
Medford	Milton Fuller Roberts Elementary School	November 3, 2025	2003	PK-5	586	92,000	Roof, Heat Pump	Roof, Heat Pump			
Medford	Missituk Elementary School	March 2, 2026	2003	PK-5	418	92,000	Roof, Heat Pump	Roof, Heat Pump			
Melrose	Early Childhood Center	November 3, 2025	2008	PK-K	246	41,440	Partial Roof, Partial Windows/Doors	Partial Roof, Partial Windows/Doors	Roof Sections A-D, Window Section A		
Melrose	Melrose High School	November 3, 2025	1975	9-12	967	260,000	Partial Roof	Partial Roof	Sections A-B		
Middleborough	John T. Nichols Middle School	November 3, 2025	1999	6-8	688	148,000	Roof	Roof			
Monomoy Regional School District	Harwich Elementary School	July 1, 2026	1940	PK-4	449	144,600	Roof, Heat Pump	Roof, Heat Pump			
Nashoba Valley Regional Vocational Technical School District	Nashoba Valley Technical High School	November 3, 2025	1968	9-12	767	205,000	Partial Roof, Heat Pump	Partial Roof, Heat Pump	Roof Section A		
Natick	Lilja Elementary School	July 1, 2026	1955	K-4	445	55,000	Heat Pump	Heat Pump			
New Bedford	Trinity Day Academy	November 3, 2025	1933	6-12	93	65,000	Roof, Windows/Doors	Roof, Windows/Doors			
Northampton	John F. Kennedy Middle School	March 2, 2026	1964	6-8	577	142,455	Roof, Heat Pump	Roof		Heat Pump	Windows >30
Plainville	Anna Ware Jackson Elementary School	July 1, 2026	1965	PK-2	324	77,000	Roof	Roof			
Plainville	Beatrice H. Wood Elementary School	July 1, 2026	2004	3-6	331	68,380	Roof	Roof			
Quabbin Regional School District	Hardwick Elementary School	July 1, 2026	1992	PK-2	169	40,284	Roof	Roof			
Quaboag Regional School District	West Brookfield Elementary School	March 2, 2026	1953	K-6	227	62,700	Windows/Doors	Windows/Doors			
Quincy	Atlantic Middle School	March 2, 2026	1959	6-8	601	92,343	Partial Roof	Partial Roof	Section A		
Quincy	Broad Meadows Middle School	March 2, 2026	1957	6-8	318	93,760	Roof	Partial Roof	Section A	2013 Sub-Section of Section A	Roof Age <20
Quincy	Francis W. Parker Elementary School	March 2, 2026	1917	K-5	323	51,092	Roof	Roof			
Quincy	Point Webster Middle School	March 2, 2026	1917	5-8	377	89,300	Roof, Windows/Doors	Roof, Windows/Doors			
Salem	Carlton Innovation School	March 2, 2026	2002	K-5	247	51,784	Roof, Heat Pump	Roof, Heat Pump			
Salem	Horace Mann Laboratory	March 2, 2026	2001	PK-5	293	99,500	Roof, Heat Pump	Roof, Heat Pump			
Springfield	Alfred G. Zanetti Elementary School	November 3, 2025	1964	PK-8	432	51,219	Heat Pump	Heat Pump			
Springfield	Arthur T. Talmadge Elementary School	November 3, 2025	1954	PK-5	196	37,055	Heat Pump	Heat Pump			
Springfield	Daniel B. Brunton School	March 2, 2026	1959	PK-5	314	49,032	Roof	Roof			
Springfield	Edward P. Boland Elementary School	March 2, 2026	2002	PK-5	587	130,441	Roof	Roof			
Springfield	Liberty Elementary School	November 3, 2025	1918	PK-5	238	31,899	Heat Pump	Heat Pump			
Springfield	Mary M. Lynch Elementary School	November 3, 2025	1961	PK-5	216	36,669	Heat Pump	Heat Pump			
Springfield	South End Middle School	November 3, 2025	1955	6-8	163	41,250	Heat Pump	Heat Pump			
Springfield	Van Sickle Middle School	March 2, 2026	1933	6-8	206	286,495	Roof	Roof			

October 29, 2025 Board Meeting Attachment A: 2025 Accelerated Repair Program Statements of Interest Recommendations for Invitation											
District Name	**School Name**	**Initial Document Commencement Date**	**Age of Existing Building**	**Grade**	**2024/2025 Enrollment**	**Existing Square Footage**	**Scope Requested by District**	**Invited Scope Recommendation**	**Partial Scope Description**	**Declined Scope Recommendation**	**Reasons for Declined Invitation**
Sutton	Sutton Early Learning Center	July 1, 2026	1973	PK-2	324	51,581	Roof, Heat Pump	Roof, Heat Pump			
Taunton	John F. Parker Middle School	November 3, 2025	1975	5-7	517	106,132	Windows/Doors	Windows/Doors			
Waltham	Northeast Elementary School	March 2, 2026	2004	PK-5	527	92,170	Roof	Roof			
Worcester	Belmont Street Community School	November 3, 2025	1970	PK-6	615	92,988	Roof	Roof			
Worcester	Rice Square Elementary School	November 3, 2025	1914	K-6	502	35,631	Roof, Windows/Doors	Roof, Windows/Doors			

October 29, 2025 Board Meeting Attachment B: 2025 Accelerated Repair Program Statements of Interest Not Recommended for Invitation								
District Name	**School Name**	**Age of Existing Building**	**Grade**	**2024/2025 Enrollment**	**Existing Square Footage**	**Scope Requested by District**	**Declined Scope Recommendation**	**Reasons for Declined Invitation**
Bedford	Lt. Eleazer Davis Elementary School	1990	PK-2	501	80,287	Roof	Roof	District proceeding without ARP participation
Boston	William Monroe Trotter Elementary School	1968	PK-6	352	76,000	Heat Pump	Heat Pump	Windows >30
Georgetown	Georgetown Middle/High School	1960	7-12	455	120,000	Heat Pump	Heat Pump	Windows >30
Holliston	Robert H. Adams Middle School	1955	6-8	626	135,000	Roof	Roof	District proceeding without ARP participation
Monomoy Regional School District	Monomoy Regional Middle School	1960	5-7	395	125,000	Windows/Doors	Windows/Doors	Windows <30
Springfield	Hiram L. Dorman Elementary School	1932	PK-5	279	34,309	Roof	Roof	District proceeding without ARP participation

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. The 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 Core Program is intended for new construction, addition, and/or renovation projects while the Accelerated Repair Program ("ARP") is intended for roofs, windows/doors, and heat pump conversions in existing school facilities. The MSBA completes an extensive review of available information for all submitted Statement of Interest ("SOI") for the ARP.

The MSBA encourages all interested districts to submit an SOI to the MSBA, but the ARP is not appropriate for all potential projects. With each ARP project, the MSBA intends to prolong the longevity of the existing building and improve the environment of the school.

After a temporary, one-year pause to 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 .

Commencing in January 2025, the ARP 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 two years' worth of projects) and for heat pump conversion projects based on a budget of $250 million (representing two years' worth of projects). The MSBA believes that a biennial opening will provide more predictability and flexibility for district officials who are administering facilities improvements in their districts. Furthermore, the MSBA believes 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 support districts who may need longer preparatory time than the former iteration of the ARP allowed.

The following information provides an overview of the SOI process from initial opening of the SOI period, which is typically during the month of January, through the Board of Directors vote to authorize invitations to the MSBA's grant program at a subsequent fall Board meeting; this timeline may vary as needed. The MSBA reviews these dates for the Core Program and ARP annually and may adjust the opening and closing dates as 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.

Project Scope

The ARP reopened in 2024 for the partial or full replacement of roofs and windows/doors. With the reopening, 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 of how to make the building solar ready.

To facilitate schools moving toward Massachusetts' goal for net-zero carbon emissions by 2050, the MSBA is introducing heat pump conversion projects in 2025. Beginning in June 2024, the MSBA began a study to further understand scope, schedule, and cost factors that could impact the conversion of existing public school facilities to heat pumps for heating and cooling. The report, which will recommend technical and programmatic approaches to inform the MSBA's grant program to best support heat pump conversion within the ARP, will be complete by summer 2025.

While the report will further guide the direction of the ARP, including heat pump conversion projects, the MSBA will apply the following to SOIs filed for the 2025 Program:

- If the windows are more than thirty years as of 2026 (installed in or before 1996), then the district cannot file for a heat pump conversion project and instead must file for a window/door project to improve the building envelope ahead of an MSBA-funded heat pump project. Consequently, a heat pump conversion project and a window/door replacement project cannot be paired in a filed SOI.
- If the district wishes to file an SOI for a heat pump conversion project and the roof is more than fifteen years as of 2026 (installed in or before 2011), then the district must select both a heat pump conversion project and a roof project when filing the SOI so that the roof is addressed by replacement or restoration in combination with the heat pump project.
- The MSBA will require each heat pump conversion project to result in mechanical heating, cooling, and ventilation in all classrooms at minimum. The MSBA will participate in spaces beyond the classrooms as well.

For any invited ARP project in 2025, the MSBA will participate in ADA accessibility upgrades and fire protection upgrades required by code. Furthermore, for invited heat pump conversion projects, the MSBA will participate in electrical system upgrades required to support the heat pump solution. For all ARP projects submitting an SOI for consideration in 2025, construction should be substantially completed no later than summer 2029.

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. While the MSBA will continue to open the SOI System annually for consideration in the Core Program, beginning in 2025, the MSBA will open the System for consideration in the ARP biennially. 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 can fund a schematic design within 90 days of invitation and a total project budget within 12 months of invitation. The SOI System will typically open in mid-January and for ARP close in mid-March; however, this timeline is subject to change.

The number of invitations that the Board authorizes each SOI submission period varies. Should the MSBA be required to limit the number of invitations due to its program budget, the MSBA will re-evaluate the advertised qualifying age criteria. For potential heat pump conversion projects in 2025, the MSBA may also consider other factors including, but not limited to, the number of qualifying heat pump conversion SOIs filed by a district, the reported or estimated Energy Use Intensity ("EUI") for each school, and/or the reported or estimated greenhouse gas emissions for each school.

The MSBA reviews these advertised qualifying ages for systems as well as the grant budget biennially and may adjust one or both as may be needed, either on a biennial basis or based on the number of SOI submissions received in any given SOI submission period. 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. A table illustrating the number of SOIs which have resulted in Project Funding Agreements for the ARP can be found here.

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

- the proposed total project cost is projected as less than $250,000;
- the school is judged by the district to be over-crowded or underutilized;
- 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;
- 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.

When considering the potential scope to be selected in an SOI, based on the qualifications for the ARP, a district should not select the identified scope within an SOI, if:

Roof (Roof only or Roof and Windows/Doors)

Based on the qualifications for the ARP, a district should not select roof in an SOI if:

- the roof is less than twenty years old as of 2026 (installed in or after 2007) unless combined with a heat pump conversion project;

Windows/Doors (Windows/Doors only or Roof and Windows/Doors)

Based on the qualifications for the ARP, a district should not select windows/doors in an SOI if:

- the windows are less than thirty years as of 2026 (installed in or after 1997).

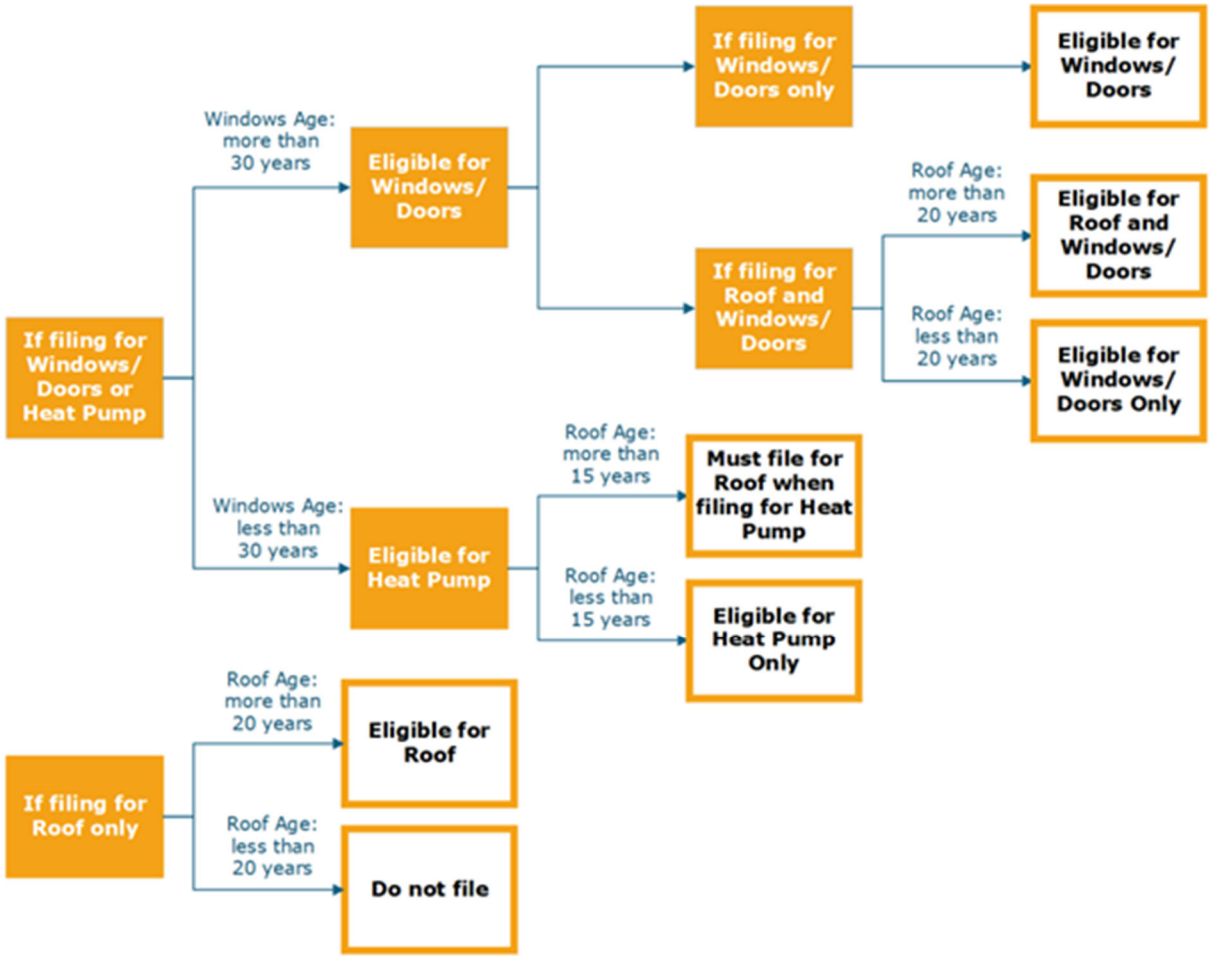
Heat Pump Conversion (Heat Pump Conversion only or Roof and Heat Pump Conversion)

Based on the qualifications for the ARP, a district should not select heat pump conversion in an SOI if:

- the windows are more than thirty years as of 2026 (installed in or before 1996),
- the school was opened or fully renovated including replacement of the HVAC system after 2010;
- the mechanical heating distribution is supported by steam distribution piping.

Scope Summary

Accounting for roof and window age, the following chart presents the applicability of project scope based on the qualifications for the ARP:



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.

Section 36, approved as part of the Commonwealth's FY 24 Budget, provides that grant amounts related to the MSBA's ARP shall no longer count against the Annual Cap limit. For 2025, MSBA staff will review invitations for roofs and windows/doors based on a budget of $300 million (representing two years' worth of projects) and for heat pump conversion projects based on a budget of $250 million (representing two years' worth of projects). The anticipated budget for future ARP SOI Openings will be informed by sales tax collections and assessed to determine the budget for future Openings.

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:

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 electronically 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 (meeting minutes are NOT required).
    - 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, and information from the Department of Elementary and Secondary Education ("DESE"). The MSBA may also use the 2025 School Survey, which is currently underway, as an additional data source. Many factors can impact the assessment of an SOI, such as overcrowding or underutilization, 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 biennial 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, potentially accompanied by a technical consultant, will visit the facility identified in the SOI. The MSBA may conduct staff study 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, or more for potential heat pump conversion projects, 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 staff study visit.

One component of the staff study visit is a meeting to review the SOI and the MSBA process, discuss the district's community and financial readiness to proceed with an ARP project 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. If the district's SOI includes the replacement of the roof and/or the conversion to heat pumps, 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 eight to ten weeks in total, 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.