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, 2025
RE: Statement of Interests for Core Program – 2025 Recommendations for Invitations to Eligibility Period

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The Massachusetts School Building Authority (the "MSBA") opened the 2025 Statement of Interest (the "SOI") filing period on January 13, 2025. The filing deadline for the Core Program was April 13, 2025, with 27 SOIs submitted by 21 districts for consideration.[1] Of the 27 SOIs submitted, 16 were designated by the district as their priority school. Beginning on April 13, 2025, the MSBA began the due diligence on the SOIs that were submitted for the Core Program, as outlined in **Attachment A**, "Core Program Statement of Interest Process Overview" issued December 16, 2024, 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.
- Conduct Senior Study visits, if necessary.

As discussed with the Board during the 2025 SOI process and most recently at the November 12, 2025, Facilities Assessment Subcommittee meeting, the MSBA has now concluded the due diligence for the 2025 SOIs. MSBA staff are recommending that the Board vote to invite the 15 districts and schools listed in the following tables 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, 2028. As part of its due diligence, MSBA staff discussed the Eligibility Period requirements and the specific funding timelines with the 15 districts. The districts are aware of their effective dates for commencement of Eligibility Period and the earliest date for potential Project Scope and Budget approval.

Attachment C to this memorandum lists the names of the remaining 12 schools from nine districts that are not being considered for an invitation into the MSBA's grant program in 2025. The nine districts include three districts with schools included for invitation in Attachment B, resulting in six districts without a school being considered for an invitation. Three of the six districts informed staff that they were not ready to proceed prior to MSBA concluding its due diligence. One of the remaining six districts has an active Core Program project and the SOI school is under consideration for consolidation by the respective district.

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[1]The filing deadline for the Accelerated Repair Program (the "ARP") was March 21, 2025, with 99 SOIs submitted by 47 districts. Invitations into the ARP concluded at the October 29, 2025, Board of Directors meeting, with 45 districts, representing 93 projects invited into the ARP.

Recommended Invitation for Commencement of Eligibility Period on March 2, 2026

District	School	Age of Existing Building	Current Grade Configuration
Arlington	Ottoson Middle School	1921	7-8
Falmouth	Lawrence School	1953	7-8
Winchester	Francis J. Muraco Elementary School	1962	K-5

Recommended Invitation for Commencement of Eligibility Period on April 1, 2026

District	School	Age of Existing Building	Current Grade Configuration
Cohasset	Cohasset High School	1953	9-12
Norfolk	Freeman-Kennedy School	2013	3-6
Weston	Weston High School	1962	9-12

Recommended Invitation for Commencement of Eligibility Period on May 1, 2026

District	School	Age of Existing Building	Current Grade Configuration
Avon	Ralph D. Butler Elementary School	1963	PK-5
Foxborough	Charles Taylor Elementary School	1964	K-4
Gill-Montague Regional School District	Sheffield Elementary School	1922	2-5

Recommended Invitation for Commencement of Eligibility Period on June 1, 2026

District	School	Age of Existing Building	Current Grade Configuration
Holliston	Holliston High School	1969	9-12
North Reading	J. Turner Hood Elementary School	1959	PK-5
Springfield	Washington Elementary School	1917	PK-5

Recommended Invitation for Commencement of Eligibility Period on July 1, 2026

District	School	Age of Existing Building	Current Grade Configuration
Boston	Madison Park High School	1977	9-12
Mohawk Trail Regional School District	Mohawk Trail Regional Middle/High School	1967	7-12
Seekonk	Dr. Kevin M. Hurley Middle School	1956	6-8

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. 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 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 building systems, the general environment of the building and the appropriateness of the building to meet 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 educational facilities district-wide.

The following information provides an overview of the SOI process from the 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 winter 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 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 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 has the ability to fund a construction project in the next two years. The

SOI System typically opens in mid-January and for Core Program closes in mid-April; however, this timeline may vary as needed.

The number of invitations that the Board is able to authorize for invitation each year varies and is contingent on a number of factors. By statute, the MSBA has to operate within its annual program funding 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, the potential enrollments, the 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, accompanying vote(s), and supplemental material 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 submitted 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 submitted, it will determine the appropriate level of due diligence that will be required for each SOI and will notify districts of the 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 that 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 (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).
- Any supporting materials required and/or any supplemental material a district elects to submit with the SOI must be uploaded in the SOI system in order to submit an SOI. Hard copies will no longer be accepted.
    - If applicable, districts are required to provide material specific to certain Statutory Priorities selected by the district, which must be uploaded in the SOI system in order to submit an SOI:
        - If the district selects Statutory Priority 1, an electronic version 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 electronically. Hard copies will no longer be accepted.
        - If the district selects Statutory Priority 3, an electronic summary of the accreditation report(s) focusing on the deficiencies as stated in the SOI must be uploaded in the SOI system in order to submit an SOI. Hard copies will no longer be accepted.

The supplemental materials noted above must be uploaded in the SOI system as part of the SOI submission, 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 material.

2. Review each SOI submission and accompanying documents for content:

Once an SOI is determined to be complete, MSBA staff review the information, and any additional documents submitted electronically with the SOI. MSBA staff then compile the data necessary to assess SOIs filed in that 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"). The MSBA may also use the

2025 School Survey, which is currently underway, as an additional data source. There are many factors that can impact the assessment of urgency and need in an SOI, such as increasing enrollment, overcrowding, building conditions, general environment, and program deficiencies. As such, it is important to assemble as much data as possible so that staff may gain as complete 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.

With a 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 the building condition;
- The 2016 School Survey rating of the 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 by other means. Depending 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 represents 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 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 visit.

The Senior Study visit starts with a meeting to review the SOI and the MSBA process, discuss the district's community and financial readiness to proceed with a potential building 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.

Depending upon the number of senior study visits that are required in a certain year, this phase can take approximately eight to ten weeks in total, 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 who vote to invite districts into the Eligibility Period.

Attachment B - 2025 Statement of Interest Core Program Board Memorandum

District	School Name	Eligibility Period Commencement Date	Age of Existing Building	Existing Square Footage	Current Grade Configuration	2024-2025 DESE Enrollment	Proposed Configuration (for study)[1]	MSBA Check Section 8 Priorities[2]
Arlington	Ottoson Middle School	March 2, 2026	1921	173,500	7-8	963	7-8 6-8	2,5,7
Avon	Ralph D. Butler Elementary School	May 1, 2026	1963	48,000	PK-5	323	PK-5 PK-6	4,5,7
Boston	Madison Park High School	July 1, 2026	1977	918,102	9-12	1,121	9-12 7-12	5,7
Cohasset	Cohasset High School	April 1, 2026	1953	220,000	9-12	381	9-12 6-12	5,7
Falmouth	Lawrence School	March 2, 2026	1953	145,000	7-8	474	5-7 6-8 7-8	5,7
Foxborough	Charles Taylor Elementary School	May 1, 2026	1964	38,720	K-4	278	K-4	4,5,7
Gill-Montague Regional School District	Sheffield Elementary School	May 1, 2026	1922	110,163	2-5	199	PK-5 2-5	5,7
Holliston	Holliston High School	June 1, 2026	1969	221,461	9-12	809	8-12 9-12	5,7
Mohawk Trail Regional School District	Mohawk Trail Regional Middle/High School	July 1, 2026	1967	147,717	7-12	316	PK-12 7-12	5,7
Norfolk	Freeman-Kennedy School	April 1, 2026	2013	80,328	3-6	579	PK, 3-6 3-6	2,4,7
North Reading	J. Turner Hood Elementary School	June 1, 2026	1959	60,600	PK-5	390	PK-5	2,5,7
Seekonk	Dr. Kevin M. Hurley Middle School	July 1, 2026	1956	98,000	6-8	500	5-8 6-8 6-12	2,4,5,7
Springfield	Washington Elementary School	June 1, 2026	1917	69,997	PK-5	430	PK-5	5,7
Weston	Weston High School	April 1, 2026	1961	174,980	9-12	658	6-12 9-12	4,5,7
Winchester	Francis J. Muraco Elementary School	March 2, 2026	1962	54,000	K-5	352	PK-5 K-5	5,7

[1]Red font denotes proposed consolidation and/or grade reconfiguration as part of project intention.

[2]Red font denotes MSBA added Section 8 Priority.

Attachment C - 2025 Statement of Interest Core Program Board Memorandum

District	School Name	MSBA Check Section 8 Priorities[1]	MSBA Due Diligence Findings
Cohasset	Cohasset Middle School	5,7	Not District Priority SOI, other District SOI in Post Senior Study FRR category, high School Survey scores.
Dedham	Greenlodge Elementary School	5,7	District not ready to proceed, not District Priority SOI, other District SOI in Pre-Senior Study FRR category, high School Survey score.
Dedham	Oakdale Elementary School	5,7	District not ready to proceed.
Dedham	Riverdale Elementary School	5,7	District not ready to proceed, not District Priority SOI, other District SOI in Pre-Senior Study FRR category, high School Survey score.
Dennis-Yarmouth Regional School District	Station Avenue Elementary School	5,7	Not District Priority SOI, SOI under consideration by District for consolidation, active MSBA Core Program project, high School Survey score.
Essex North Shore Agricultural and Technical Regional School District	Essex Technical High School	5,7	Deficiencies not among highest within cohort of most urgent and need, MSBA historic district involvement sufficient at this time.
Granby	Granby Junior/Senior High School	5,7	District not ready to proceed, high School Survey score.
Littleton	Littleton High School	5	Not District Priority SOI, active MSBA Core Program project, high School Survey scores.
Springfield	Alice B. Beal Elementary School	5,7	Not District Priority SOI, active MSBA Core Program projects, other District SOI in Post-Senior Study FRR category, high School Survey scores.
Springfield	Kensington International School	5,7	Not District Priority SOI, SOI under consideration by District for consolidation, active MSBA Core Program projects, other District SOI in Post-Senior Study FRR category, high School Survey scores.
Ware	Ware Middle School	5	District not ready to proceed, high School Survey score.
Weston	Weston Middle School	4,5,7	Not District Priority SOI, other District SOI in Post Senior Study FRR category, high School Survey scores.

[1]Red font denotes MSBA added Section 8 Priority

Exhibit A[1]

2025 SOI Core Program Invitations to Eligibility Period

District	School	Age of Existing Building	Existing Square Footage	Current Grade Configuration	2024-2025 DESE Enrollment	Proposed Configuration (for study)[2]	Eligibility Period Commencement Date
Arlington	Ottoson Middle School	1921	173,500	7-8	963	7-8 6-8	March 2, 2026
Avon	Ralph D. Butler Elementary School	1963	48,000	PK-5	323	PK-5 PK-6	May 1, 2026
Boston	Madison Park High School	1977	918,102	9-12	1,121	9-12 7-12	July 1, 2026
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Foxborough	Charles Taylor Elementary School	1964	38,720	K-4	278	K-4	May 1, 2026
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North Reading	J. Turner Hood Elementary School	1959	60,600	PK-5	390	PK-5	June 1, 2026
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Weston	Weston High School	1961	174,980	9-12	658	6-12 9-12	April 1, 2026
Winchester	Francis J. Muraco Elementary School	1962	54,000	K-5	352	PK-5 K-5	March 2, 2026

[1]Any approval of a potential grant for a scope of work as identified herein will not be made before July 1, 2028.

[2]Red font denotes proposed consolidation and/or grade reconfiguration as part of project intention.