Massachusetts School Building Authority

Deborah B. Goldberg, State Treasurer and Receiver-General

Chair

James A. MacDonald

Chief Executive Officer

Mary L. Pichetti

Executive Director/Deputy CEO



Superintendent Roundtable

2025 Statement of Interest Overview

January 21, 2025

Agenda

Welcome and Opening Remarks

Mary L. Pichetti, Executive Director/Deputy CEO

2025 Statement of Interest ("SOI") Filing Period Dates and Due Diligence Schedule

Katie DeCristofaro, Senior Capital Program Manager

Accelerated Repair Program ("ARP") Update

Katie DeCristofaro, Senior Capital Program Manager

Top Ten Tips for SOI Filers

Jennifer Flynn, Program Manager and Allison Sullivan, Program Manager

Question and Answer Session



Welcome/Opening Remarks



2025 SOI Filing Period Dates

SOI Filing Period Dates for 2025

Opening for Accelerated Repair Program and Core Program

- Monday, January 13, 2025

Closing Date for Accelerated Repair Program

- Friday, March 21, 2025

Closing Date for Core Program

- Friday, April 11, 2025



2025 Core Program Potential Due Diligence Schedule

Core Program: Potential Due Diligence Schedule

Staff Review

- April 2025 through July 2025

Staff Senior Studies

- August 2025 through October 2025

Staff Invitation Recommendations

- December 12, 2025 Board Meeting



2025 ARP Potential Due Diligence Schedule

ARP: Potential Due Diligence Schedule

Staff Review

- March 2025 through May 2025

Staff Site Visits

- July 2025 through September 2025

Staff Invitation Recommendations

- October 29, 2025 Board Meeting



2025 ARP Update

ARP: 2025 Program Overview

2025 Dates, Scope and Program Details	Considerations and Qualifications
Opened January 13, 2025 Biennial Opening Commencement	• Windows, roof replacement or restoration, and heat pump conversion projects[1]
Estimated Budgets (two years' worth of projects)	• Windows, roof replacement or restoration: $300,000,000 • Heat pump conversions: $250,000,000
Qualifying System Ages and SOI Filing Considerations **for Roofs and/or Windows ONLY**	• Windows: 30 years as of 2026 (installed in or before 1996) • Roof: 20 years as of 2026 (installed in or before 2006)

[1]Like prior years, projects may consist of partial replacements for roofs and windows/doors if the entire system does not meet the qualifying system ages.

ARP: 2025 Program Implementation Overview

2025 Dates and Program Details	Scope, Considerations and Qualifications
Program Qualifications	• Proposed total project cost projected to be >$250,000 • Fund a schematic design within 90-days of commencement and a total project budget within 12 months of invitation • Construction substantially complete by summer 2029
Roof Replacement, Restoration and Solar Ready Evaluation	• Schematic Design to consider replacement, restoration and evaluation of solar readiness • Restoration may be a more economical/affordable option but not right fit for each school
Heat Pump Conversions	• Facilitate schools moving toward MA goal for net-zero carbon emissions by 2050 • Report by MSBA recommending technical and programmatic approaches to inform and support heat pump conversion anticipated summer 2025
Additional Scope Information	• MSBA participation in ADA and Fire Protection upgrades required by code for any invited project • MSBA participation in electrical upgrades required to support the heat pump solution

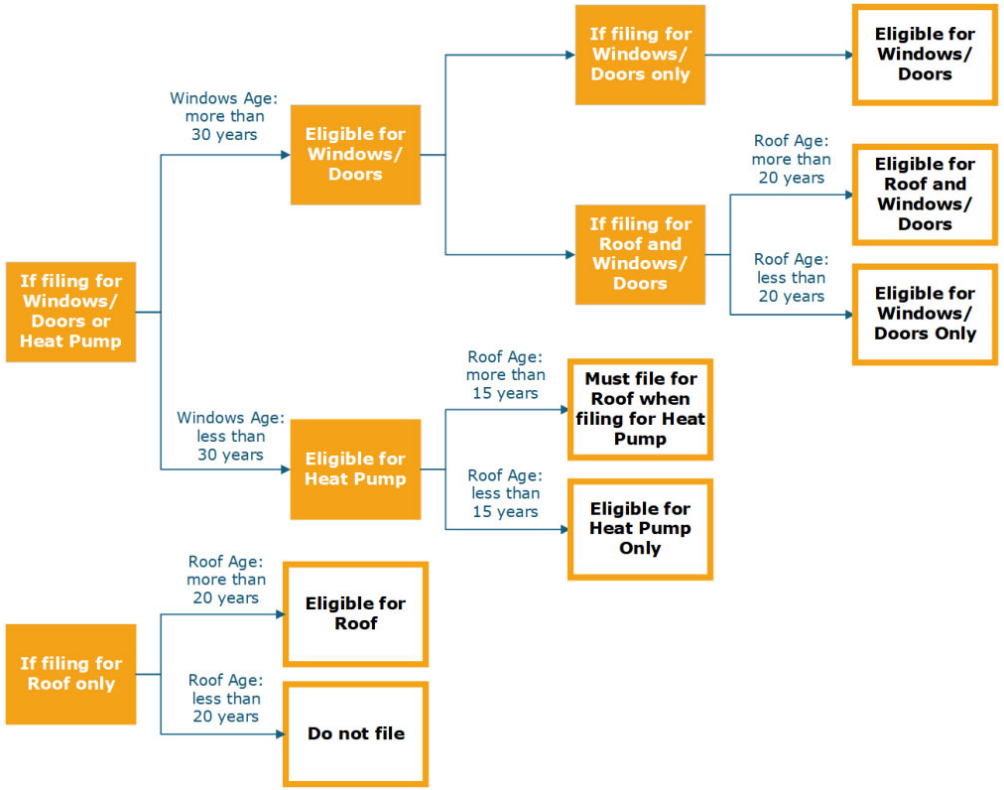
ARP: 2025 Program Overview

2025 Dates, Scope and Program Details	Considerations and Qualifications

Heat Pump or Heat Pump and Roof Qualifying System Ages and SOI Filing Considerations	• **Heat Pump Only Qualifications:**
	  • Windows are less than 30 years as of 2026 (installed after 1996)
	  • Roof is **less than 15 years old** (installed in or after 2011)
	  • School opened or renovated, including HVAC replacement, before 2010
	  • Mechanical heating distribution is not supported by steam distribution piping
	• **Heat Pump and Roof Qualifications:**
	  • Windows are less than 30 years old as of 2026 (installed after 1996)
	  • Roof is **more than 15 years old** as of 2026 (installed in or before 2011)
	  • School opened or renovated, including HVAC replacement, before 2010
	  • Mechanical heating distribution is not supported by steam distribution piping

ARP: 2025 Scope Summary Chart

- **Applicability of project scope based on the qualifications for the ARP**





2025 SOI Template Updates

2025 SOI Template Updates

- Please note there are changes to the MSBA SOI template in effect for the 2025 SOI filing period:
  - If a district submitted a **Core Program** or **ARP** SOI in 2024 and intends to pre-populate the SOI(s) in 2025, changes to this year's SOI template may impact responses to certain questions.

- Any supporting materials required for the selection of Statutory Priority 1, Priority 3, and/or any supplemental material a district elects to submit with the SOI must be uploaded in the SOI system as a condition of submitting an SOI. Hard copies will no longer be accepted.



Top Ten Tips for SOI Filers

Top Ten Tips for Filers

1. Program Options:
   - The **Core Program** considers all school building deficiencies including enrollment and program deficiencies.
   - The **ARP** considers roofs, windows/doors, and, new this year, heat pump conversions in existing school buildings.

2. Obtaining Access to **ARP and Core Program** SOI System:
   - Roundtable live demonstration: obtaining access
   - Roundtable live demonstration: pre-populating

Top Ten Tips for Filers

3. Project Type can be:
   - New Construction **(Core Program)**
   - Addition/Renovation **(Core Program)**
   - Major Repair **(Core Program)**
   - Repairs: windows/doors; roof; heat pump conversions **(ARP)**

4. Avoiding Redundancy within the template SOI for **ARP and Core Program**:
   - Review prior answers to similar questions.

Top Ten Tips for Filers

5. For **ARP and Core Program** SOI Vote Requirements:
   - Vote documentation must be uploaded to the system application to finalize and submit an SOI.
   - Understand municipal and school vote requirements.
   - Understand regional school district vote requirements.
   - Schedule local votes early
     - The “Form of Vote” is available on the website and within the SOI application.

Top Ten Tips for Filers

6. For **ARP and Core Program** SOI Signatures:
   - Chief elected official, school committee chair, and superintendent sign the SOI form and the Closed School form.
   - Emails prompting signatures are system-generated.
   - In some cases, a mayor or superintendent might sign twice (The mayor is also the school committee chair, or the superintendent is also the chief executive officer).

Top Ten Tips for Filers

7. **Core Program** planning for PreK needs might include expanding or establishing programs:
    - Career and Technical Programs
    - Early Intervention Programs
    - District-wide or Neighborhood Programs

8. **Core Program** project intentions might include:
    - Grade reconfiguration
    - Facility consolidation
    - Reassignment of Catchment Areas

Top Ten Tips for Filers

9. Supplemental Information for **Core Program** submissions required for Statutory Priority 1 and Statutory Priority 3:
    - Supporting materials required for the selection of Statutory Priority 1 and Priority 3 must be uploaded in the SOI system as a condition of submitting an SOI.
    - Supplemental material a district elects to submit with the SOI must be uploaded in the SOI system as a condition of submitting an SOI.
    - The MSBA requires districts to upload material to the SOI system rather than providing in hard copy or via email.

Top Ten Tips for Filers

10. Sharing Critical Information within the **ARP and Core Program SOIs**:
    - What should the MSBA know about the proposed project and its relationship to the district's long-term plans.
    - What should the MSBA know about community engagement and community support for a proposed project.



SOI Resources and Support

Communications and Resources

Outreach to superintendents will continue and is scheduled to occur periodically throughout the filing period.

- MSBA Website (www.massschoolbuildings.org)
  - SOI System User Guide
  - ARP SOI Process Overview
  - Core Program SOI Process Overview
- Sample SOI Form
- MSBA Staff



Questions?