District:	City of Lowell
School Name:	Dr. Gertrude Bailey Elementary School John J. Shaughnessy Elementary School Joseph McAvinnue Elementary School
Recommended Category:	Project Funding Agreement
Date:	October 21, 2026

Recommendation

That the Executive Director be authorized to enter into a Project Funding Agreement with the City of Lowell (the "District") for a potential window and door replacement project at the Dr. Gertrude Bailey Elementary School, a potential window and door replacement project at the John J. Shaughnessy Elementary School, and a potential window and door replacement project at the Joseph McAvinnue Elementary School.

District Information	
District Name	City of Lowell
Elementary School(s)	Abraham Lincoln Elementary School (PK-4) Charles W. Morey Elementary School (PK-4) Charlotte M. Murkland Elementary School (PK-4) Greenhalge Elementary School (PK-4) John J. Shaughnessy Elementary School (PK-4) Joseph McAvinnue Elementary School (PK-4) Moody Elementary School (PK-4) Pawtucketville Memorial Elementary School (PK-4) Peter W. Rilley Elementary School (PK-4) S. Christa McAuliffe Elementary School (PK-4) Washington Elementary School (PK-4) Pyne Arts Elementary School (PK-7) Rogers STEM Academy (PK-7) Bartlett Community Partnership School (PK-8) Dr. Janice Adie Day School (K-12)
Middle School(s)	B.F. Butler Middle School (5-8) Dr. An Wang Middle School (5-8) Henry J. Robinson Middle School (5-8) James S. Daley Middle School (5-8) James Sullivan Middle School (5-8) Kathryn P. Stoklosa Middle School (5-8) Laura Lee Therapeutic Day School (5-8)
High School(s)	Leblanc Therapeutic Day School (9-12) Lowell High School (9-12) The Career Academy (9-12)

School Information			
School Name	Dr. Gertrude Bailey Elementary School	John J. Shaughnessy Elementary School	Joseph McAvinnue Elementary School
Type of School	Elementary School	Elementary School	Elementary School
Grades Served	PK-4	PK-4	PK-4
Year Opened	1992	1991	1993
Total Building Square Footage	60,000	63,918	66,000
Additions	N/A	N/A	N/A
Building Issues	Windows/Doors	Windows/Doors	Windows/Doors
2025-2026 Enrollment	472	467	468

MSBA Votes	
Invitation to Participate in the Accelerated Repair Program	October 29, 2025
Project Funding Agreement Authorization	On October 28, 2026 Board agenda
Reimbursement Rate	79.58%

Consultants	
Owner's Project Manager (the "OPM")	GreenerU, Inc.
Designer	SOCOTEC AE Consulting, LLC

Discussion

The Owner's Project Manager ("OPM") and Designer conducted a feasibility analysis of the facilities and developed Schematic Designs, including proposed scopes of work, schedules, and estimated budgets. The District's Designer, SOCOTEC AE Consulting, LLC, recommends a window and door replacement project at the Dr. Gertrude Bailey Elementary School, a window and door replacement project at the John J. Shaughnessy Elementary School, and a window and door replacement project at the Joseph McAvinnue Elementary School. The Designer has confirmed that the window and door replacement projects will comply with the MSBA's sustainability requirements.

MSBA staff reviewed the existing conditions analyses provided by the District's consultants as well as the District's proposed schedules. MSBA staff also discussed the proposed scopes and budgets with the District and its consultants.

At the Dr. Gertrude Bailey Elementary School, the District has provided a Total Project Budget of $2,505,345, which includes a construction cost of $1,710,674. Construction costs include the following components:

- $1,710,674 for full window and door replacement.

At the John J. Shaughnessy Elementary School, the District has provided a Total Project Budget of $2,514,245, which includes a construction cost of $1,719,769. Construction costs include the following components:

- $1,719,769 for full window and door replacement.

At the Joseph McAvinnue Elementary School, the District has provided a Total Project Budget of $2,604,555, which includes a construction cost of $1,799,199. Construction costs include the following components:

- $1,799,199 for full window and door replacement.

MSBA staff recommends the Estimated Total Facilities Grants and the Maximum Total Facilities Grants as set forth in the table below subject to MSBA approval and audit:

Project Funding Agreement	Dr. Gertrude Bailey Elementary School	John J. Shaughnessy Elementary School	Joseph McAvinnue Elementary School
Enrollment	472	467	468
Existing Square Footage	60,000	63,918	66,000
Project Budget[1]	$2,416,756	$2,425,852	$2,513,283
Scope Exclusions/Ineligible Costs[2]	$363,947	$362,129	$354,244
Estimated Basis of Total Facilities Grant	$2,052,809	$2,063,723	$2,159,039
Reimbursement Rate	79.58%	79.58%	79.58%
Estimated Maximum Total Facilities Grant[3]	$1,633,625	$1,642,311	$1,718,163
Project Contingencies[4]	$88,589	$88,393	$91,272
Potentially Eligible Owner's and Construction Contingencies	$80,443	$80,204	$82,704
Potential Additional Grant Funds for Eligible Owner's and Construction Contingency Expenditures[5]	$64,017	$63,826	$65,816
Total Project Budget	$2,505,345	$2,514,245	$2,604,555
Maximum Total Facilities Grant[6]	$1,697,642	$1,706,137	$1,783,979

[1] *Does not include Owner's or Construction Contingencies.*
[2] *Scope exclusions/ineligible costs include soft costs that exceed 20% of the construction budget cap.*
[3] *The "Estimated Maximum Total Facilities Grant" is calculated by applying the reimbursement rate to the "Estimated Basis of Total Facilities Grant". It does not include any grant funds for potentially eligible Owner's or Construction Contingency Expenditures and is subject to MSBA review and audit.*
[4] *Includes eligible and ineligible Owner's and Construction Contingency.*

[5] *The "Potential Additional Grant Funds for Eligible Owner's and Construction Contingency Expenditures" is calculated by applying the reimbursement rate to the "Potentially Eligible Owner's and Construction Contingencies."*

[6] *Includes maximum possible Owner's and Construction Contingency grant funds, the final amount of which, if any, shall be determined by the MSBA in accordance with its policies for the determination of eligibility. The MSBA does not anticipate that the District will expend all of its contingency funds on expenses that are eligible for MSBA reimbursement.*