District: City of Medford
School Name: Milton Fuller Roberts 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 Medford (the "District") for a heat pump conversion and roof replacement project at the Milton Fuller Roberts Elementary School.

District Information	
District Name	City of Medford
Elementary Schools	Brooks School (PK-5) John J. McGlynn Elementary School (K-5) Milton Fuller Roberts (PK-5) Missituk Elementary School (PK-5)
Middle Schools	John J. McGlynn Middle School (6-8) Madeleine Dugger Andrews (6-8)
High Schools	Curtis-Tufts (9-12) Medford High School (9-12)
Priority School Name	Milton Fuller Roberts Elementary School
Type of School	Elementary School
Grades Served	PK-5
Year Opened	2003
Existing Square Footage	92,000
Additions	N/A
Building Issues	Heat Pump Conversion and Roof
2025-2026 Enrollment	534

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	53.32%

Consultants	
Owner's Project Manager (the "OPM")	PCA 360, LLC
Designer	Rist-Frost-Shumway Engineering, Inc.

Discussion

The Owner's Project Manager ("OPM") and Designer conducted a feasibility analysis of the facility and developed a Schematic Design, including a proposed scope of work, schedule, and estimated budget. The District's Designer, Rist-Frost-Shumway Engineering, P.C., recommends an air to water heat pump system conversion and full

roof replacement at the Milton Fuller Roberts Elementary School. The Designer has confirmed that the proposed air to water heat pump system conversion and full roof replacement will comply with the MSBA's sustainability requirements.

MSBA staff reviewed the existing conditions analysis provided by the District's consultants as well as the proposed schedule. MSBA staff also discussed the proposed scope and budget with the District and its consultants. The District has provided a Total Project Budget of $23,847,692, which includes a construction cost of $19,309,131. Construction costs include the following components:

- $14,499,768 for the installation of an air source heat pump system;
- $2,822,164 for the full roof replacement;
- $339,517 for solar readiness upgrades;
- $641,857 for accessibility upgrades; and
- $1,005,825 is ineligible for reimbursement for new photovoltaic panels.

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

Project Funding Agreement	
Enrollment: 534 Existing Square Footage: 92,000	District's Proposed Project Budget
Project Budget[1]	$22,785,689
Scope Exclusions/Ineligible Costs[2]	$1,123,680
Estimated Basis of Total Facilities Grant	$21,662,009
Reimbursement Rate	53.32%
Estimated Maximum Total Facilities Grant[3]	$11,550,183
Project Contingencies[4]	$1,062,003
Potentially Eligible Owner's and Construction Contingencies	$1,006,682
Potential Additional Grant Funds for Eligible Owner's and Construction Contingency Expenditures[5]	$536,763
Total Project Budget	$23,847,692
Maximum Total Facilities Grant[6]	$12,086,946

[1] Does not include Owner's or Construction Contingencies.
[2] Scope exclusions/ineligible costs include costs related to photovoltaic panel installation and associated work.
[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.*