District: Town of Swansea
School Name: Joseph Case Junior High School
Recommended Category: Project Scope and Budget
Date: October 21, 2026

Recommendation

That the Executive Director be authorized to enter into a Project Scope and Budget Agreement and a Project Funding Agreement with the Town of Swansea (the "District") to replace the existing Joseph Case Junior High School with a new facility serving grades 6-8 on the site of the Joseph Case High School.

District Information	
District Name	Town of Swansea
Elementary Schools	Mark G. Hoyle Elementary School (PK-2) Gardner School (K-2) Elizabeth S. Brown Elementary School (3-5) Joseph G. Luther Elementary School (3-5)
Middle School	Joseph Case Junior High School (6-8)
High School	Joseph Case High School (9-12)
Priority School Name	Joseph Case Junior High School
Type of School	Middle School
Grades Served	6-8
Year Opened	1927
Existing Square Footage	76,027
Additions	1952 – Addition
Acreage of Site	16.25 acres
Building Issues	The District identified deficiencies in the following areas: – Mechanical systems – Electrical systems – Plumbing systems – Building envelope – Windows – Roof – Accessibility In addition to the physical plant issues, the District reported that the existing facility does not support the delivery of its educational program as well as existing and projected overcrowding issues.
Original Design Capacity	Unknown
2025-2026 Enrollment	488 students
Agreed Upon Enrollment	510 students
Enrollment Specifics	The District and MSBA have mutually agreed upon a design enrollment of 510 students serving grades 6-8.
Total Project Budget – Debt Exclusion Anticipated	Yes

MSBA Board Votes	
Invitation to Eligibility Period	December 21, 2022
Invitation to Feasibility Study	February 28, 2024
Preferred Schematic Authorization	December 12, 2025
Project Scope & Budget Authorization	On October 28, 2026 Board agenda
Reimbursement Rate Before Incentives	56.26%
Incentive Points	1.56 – Maintenance 3.00 – Energy Efficiency – "Green Schools" [1] 1.00 – Indoor Air Quality – "Green Schools" [1]
Total Reimbursement Rate[1]	61.82%

[1] *The MSBA has provisionally included three (3) incentive points for energy efficiency, and one (1) incentive point for indoor air quality, subject to the District meeting certain sustainability requirements for the project. If the District does not meet the requirements of the Green Schools Program, the District will not qualify for some or all of these incentive points, and the MSBA will adjust the reimbursement rate accordingly.*

Consultants	
Owner's Project Manager (the "OPM")	PMA Consultants, LLC
Designer	Finegold Alexander Architects, Inc.

Discussion

MSBA staff reviewed the documents provided by the District and met with the District and its consultants to discuss scope and budget. The District has provided a Total Project Budget of $149,723,734, which includes an estimated construction cost of $117,030,279 ($1,020/sq. ft.). The Estimated Basis of Total Facilities Grant would be $89,946,489 which excludes the following: legal fees; OPM and Designer fees associated with excluded scope; OPM and Designer fees beyond MSBA funding limits; construction costs for building and site work beyond MSBA funding limits, which includes scope associated with ineligible building area; and costs associated with mailing and moving. The Total Project Budget also excludes costs associated with the commissioning of ineligible building area as well as construction contingency costs.

Project Scope and Budget Agreement	
Enrollment: 510 students Proposed Total Square Feet: 114,707	District's Proposed Project Budget
Project Budget[1]	$142,116,766
Scope Exclusions/Ineligible Costs	-$52,170,277
Third Party Funding	-$0
Estimated Basis of Total Facilities Grant	$89,946,489
Reimbursement Rate	61.82%
Estimated Maximum Total Facilities Grant before Cost Recovery[2]	$55,604,919
Commissioning Costs Associated with Ineligible Building Area	-$12,766
Cost Recovery Associated with Prior Projects	-$0
Estimated Maximum Total Facilities Grant[2]	$55,592,153
Owner's and Construction Contingencies	$7,606,968
Ineligible Owner's and Construction Contingencies	-$5,851,514
Potentially Eligible Owner's and Construction Contingencies	$1,755,454

Potential Additional Grant Funds for Eligible Owner's and Construction Contingency Expenditures	$1,085,222
Total Project Budget	$149,723,734
Maximum Total Facilities Grant[3,4]	$56,677,375

[1]*Does not include Owner's or Construction Contingencies.*
[2]*Does not include any grant funds for potentially eligible Owner's or Construction Contingency Expenditures; subject to MSBA review and audit.*
[3]*Includes maximum possible Owner's and Construction Contingency grant funds, the final amount of which, if any, shall be determined by the MSBA in its sole discretion. The MSBA does not anticipate that the District will expend all of its contingency funds on expenses that are eligible for MSBA reimbursement.*
[4]*Maximum Total Facilities Grant will be allocated in part to the current Grant Cap, and in part to future available Grant Cap space.*

MSBA staff recommends an Estimated Maximum Total Facilities Grant of $55,592,153; however, the District may be eligible for up to an additional $1,085,222 in grant funds, subject to the MSBA's review and audit of the District's owner's and construction contingency expenditures. Accordingly, staff recommends a Maximum Total Facilities Grant of $56,677,375 for the Project Scope and Budget Agreement and Project Funding Agreement to replace the existing Joseph Case Junior High School and construct a new facility serving grades 6-8 on the Joseph Case High School site.