

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



2023 MASC MASS Joint Conference – 11/10/23

Our Mission

Partner with Massachusetts communities to support the design and construction of educationally-appropriate, flexible, sustainable, and cost-effective public school facilities.

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MSBA Updates

- 2023 Statements of Interest
- Recent Policy and Legislative Changes
- Accelerated Repair Program
- Green Schools Program
- Third-Party Funding Policies
- Model School Program
- Post-Occupancy Evaluation Program



Looking to Update or Build a School with the MSBA?

2023 

Statement of Interest
Submittal Period

Submitting an SOI is the first critical step in the MSBA's program to partially fund the construction, renovation, addition or repair of municipally or regionally owned school facilities located in cities, towns and regional school districts. The SOI allows districts to inform the MSBA about deficiencies that may exist in school facilities and how those deficiencies inhibit the delivery of the educational program.

- **Accelerated Repair Program:** The SOI opening date for districts submitting for consideration in the Accelerated Repair Program (“ARP”), which is primarily for the repair and/or replacement of roofs, windows/doors, and/or boilers in an otherwise structurally sound facility. *This program was paused for 2023 but will be restarted for 2024.*
- **Core Program:** The SOI opening date for districts submitting for consideration in the Core Program, which is primarily for projects beyond the scope of the Accelerated Repair Program, including extensive repairs, renovations, addition/renovations, and new school construction. The closing date was on **Friday, April 14, 2023 and the MSBA received 63 SOI applications from 52 Districts.** **Announcement of the 2023 SOI invitations is anticipated by the end of the year.**



Recent Policy and Legislative Changes

- Adjust the current policy of funding from up to \$393/sf for building costs plus eligible demolition and abatement (exclusive of eligible sitework costs) to \$550/sf for building costs plus eligible demolition and abatement (exclusive of eligible sitework costs);
- Apply MSBA's sitework cost allowance guidelines to include up to \$55/sf in addition to the proposed building costs increase of \$550/sf for a total construction cost funding limit of \$605/sf plus eligible demolition and abatement; and
- Make the policy effective for districts receiving Board approval of a Project Scope and Budget on or after October 1, 2023.
- MSBA's annual cap increased to \$1.2 billion, removal of ARP grants from the Annual Cap, increased the allowable rate of growth from 4.5% to 6.5% all providing the MSBA with additional resources and flexibility.



Accelerated Repair Program (ARP) History

Repair Program	Districts	Projects	Total Project Budgets	Maximum Facility Grants	Number of Projects Final Audit Approved
2022 Accelerated *	12	27	\$45,798,434	\$32,584,855	0
2021 Accelerated	15	26	\$109,602,763	\$59,925,011	0
2020 Accelerated	16	22	\$82,419,849	\$43,679,026	1
2019 Accelerated	24	38	\$85,180,989	\$52,047,959	9
2018 Accelerated	20	30	\$83,172,480	\$47,018,557	15
2017 Accelerated	19	34	\$117,020,597	\$73,280,673	19
2016 Accelerated	28	48	\$156,598,234	\$83,007,586	39
2015 Accelerated	24	43	\$136,680,652	\$91,974,052	42
2014 Accelerated	34	47	\$108,410,084	\$65,388,035	44
2013 Accelerated	25	45	\$94,650,790	\$54,662,551	45
2012 Accelerated	24	36	\$63,009,653	\$38,267,952	36
Green	93	189	\$366,647,226	\$222,889,218	189
Total	334	585	\$1,449,191,751	\$864,725,475	439

* Financial totals reflect Project Funding Agreement approvals through the August 30, 2023 Board of Directors Meeting (13 projects).



Accelerated Repair Program (ARP) History

At the October 25, 2023 MSBA Board of Directors meeting, the ARP program was approved as follows:

Description	Recommendation
Open ARP January 2024	Open for windows over the age of 30 years and roofs over 25 years, with an estimated budget of \$150 million
Roof Restoration	Include this provision in the feasibility study for roof invitations to determine fit
Heat Pump Conversion	Procure a consultant in 2024 with goal to offer in January 2025 SOI opening
Open biennially (every two years)	Commence biennial opening in January 2025 for window and roof projects, representing two years' worth of projects



Green Schools Program Policy Update

- Advocate of “green” sustainable building design for all MSBA-funded public K-12 school buildings
- Regular adjustments to its Green Schools Program Policy to promote increasing levels of energy efficiency in school design in alignment with the state’s goals to move toward net-zero buildings.
- Since 2010, the MSBA has required all projects to exceed base code in energy efficiency by 10% and, in 2017, the MSBA updated its incentive points for projects to exceed base code in energy efficiency by 20%
- 20 buildings built, in construction or designed as all electric, approximately 4 million square feet.



All-Electric Schools



SMMA

Memorial HS, Wakefield



HMFH

Fales ES, Westborough



HMFH

Arlington HS, Arlington



Perkins + Will

Belmont MS/HS, Belmont



MDS

Pierce School, Brookline



Arrowstreet

Douglas ES, Acton-Boxborough



DRA

NE Metro RVTHS



HMFH

Josiah Quincy Upper HS, Boston



Perkins + Will

Carter School, Boston



DINisco

Welch Elementary, Peabody



All-Electric Schools



Hastings ES, Lexington



Coakley MS, Norwood



Foster ES, Hingham



Peck MS, Holyoke



Upham ES, Wellesley



Watertown HS, Watertown



Fort River ES, Amherst



Lynch ES, Winchester



Bristol Plymouth Regional Tech



Stoneham HS, Stoneham



Green Schools Program Policy Update

- In 2022, added required indoor air quality points for all projects
- In 2023, added an incentive point for indoor air quality
- In 2023, increased to 3 incentive points for use of the "Opt-in" specialized energy code
- In addition to an emphasis on increased energy efficiency and improved indoor air quality, the MSBA's Green Schools Program encourages sustainable site development, efficient transportation costs, reduced water consumption, sustainable use of materials, and a higher quality educational environment.



Green Schools Program – Recent Change

Additional Reimbursement	
2022 Policy	2023 Policy
<p>For an additional reimbursement of 2% of the Estimated Basis of Total Facilities Grant, and in addition to the minimum requirements described above, projects must exceed the level of energy efficiency required in the current Massachusetts (base) energy code by 20%, using the LEED-S EA “Optimize Energy Performance” credit submittal or the NE-CHPS “Energy Efficiency” credit submittal to demonstrate that performance.</p>	<p>For an additional reimbursement of 3% of the Estimated Basis of Total Facilities Grant, and in addition to the minimum requirements described above, projects must meet the minimum energy efficiency requirements described in the MA DOER “Opt-in Specialized Code” standards.</p> <p>For an additional reimbursement of 1% of the Estimated Basis of Total Facilities Grant, and in addition to the minimum requirements described above, projects must achieve a minimum total of five points (from seven points available) in the LEED indoor air quality points noted above, or a minimum total of eight points (from ten points available) in the NE-CHPS indoor air quality points noted above.</p>



Geo-Thermal Schools



Hastings ES, Lexington



Fales ES, Westborough



Nelson Place ES, Worcester



Pierce School, Brookline



Douglas ES, Acton-Boxborough



Chapman MS, Weymouth



Auburn MS, Auburn



Belmont MS/HS, Belmont



Wellington ES, Belmont



Geo-Thermal Schools



Diman RVTHS, Greater Fall River



Foster ES, Hingham



Stoneham HS, Stoneham



Hadley ES, Swampscott



Watertown HS, Watertown



Fort River ES, Amherst



Hanlon ES, Westwood



Mindess ES, Ashland



Green Meadow ES, Maynard



Third Party Funding Policy Change

- Given the rising cost of school construction in the Commonwealth and the increasing availability of federal and state grants, rebates, and other sources of funding that districts could use for their school projects, the MSBA has changed its policy effective June 2023 to **allow districts to use and fully benefit from many available third-party funding sources.**
- Rebates, grants, state or federal funding, donations, or other sources of project income that MSBA program participants may receive will not lower the project cost basis or reduce the amount of grant funding for Districts.
- A district will not receive more than its share of project costs from a third-party source or the district will not be reimbursed or paid more than once through an MSBA grant for any cost incurred in connection with the school project for which a participant has received funding from a third-party.
- For more information please visit our website:
 - https://www.massschoolbuildings.org/building/advisories/Project_Advisory_83



Model School Program

- MSBA's Model School program offers tried and true designs that may be the right solution for your new school.
- Ability to see firsthand what the building will look like, and its demonstrated functionality is helpful.
- Compressed project schedules and accelerated construction start times serve to reduce the uncertainty of inflation in construction and project cost.
- The MSBA added six new elementary schools to the options available to school districts.
- For more information please visit our website:
 - https://www.massschoolbuildings.org/programs/model_school



Post-Occupancy Evaluation Program

MSBA POE Program - Historic Timeline & Ongoing Efforts

- Internal Kick-off ✓
- Establish Pilot Scope ✓
- Identify Participants ✓
- Pilot Recommendation ✓

FY17

- Pilot Test ✓
- District Outreach ✓
- Develop Application ✓
- Initial Building Visits ✓
- Analyze Data ✓
- Designer Roundtable ✓
- Pilot Extension ✓

FY18

- Establish Scope ✓
- District Outreach ✓
- Consultant Procurement ✓
- Bldg. Visits to Observe Operation/Perf ✓
- Review of the MSBA Process, Guidelines, Data Col. Opps ✓
- Consultant Collaboration ✓

FY19

- Consultant Collaboration ✓
- Final Reporting (Pilot) ✓
- Implementation Approval ✓
- IT Development ✓
- MSBA Recruitment ✓
- Application Testing ✓
- District Outreach ✓

FY20

FY21

- POE Commencement ✓
- Memorialize Mod 9 ✓
- Est. Consultant W.O.'s ✓
- Provide Consultant Training ✓
- Coordinate Bldg. Visits ✓
- Prepare/Distribute Reports

FY22

- Continue Bldg. Visits
- Process/Distribute Reports
- Apply Lessons from Year 1
- Consider Adjustments
- Coordinate Bldg. Visits
- Secure Consulting Services
- Prepare/Distribute Reports

FY23

- Continue Bldg. Visits
- Apply Lessons from Year 1-2
- Consider Adjustments
- Coordinate Bldg. Visits
- Prepare/Distribute Reports
- Create Interactive Dashboard
- Communicate Findings

FY24

FY24

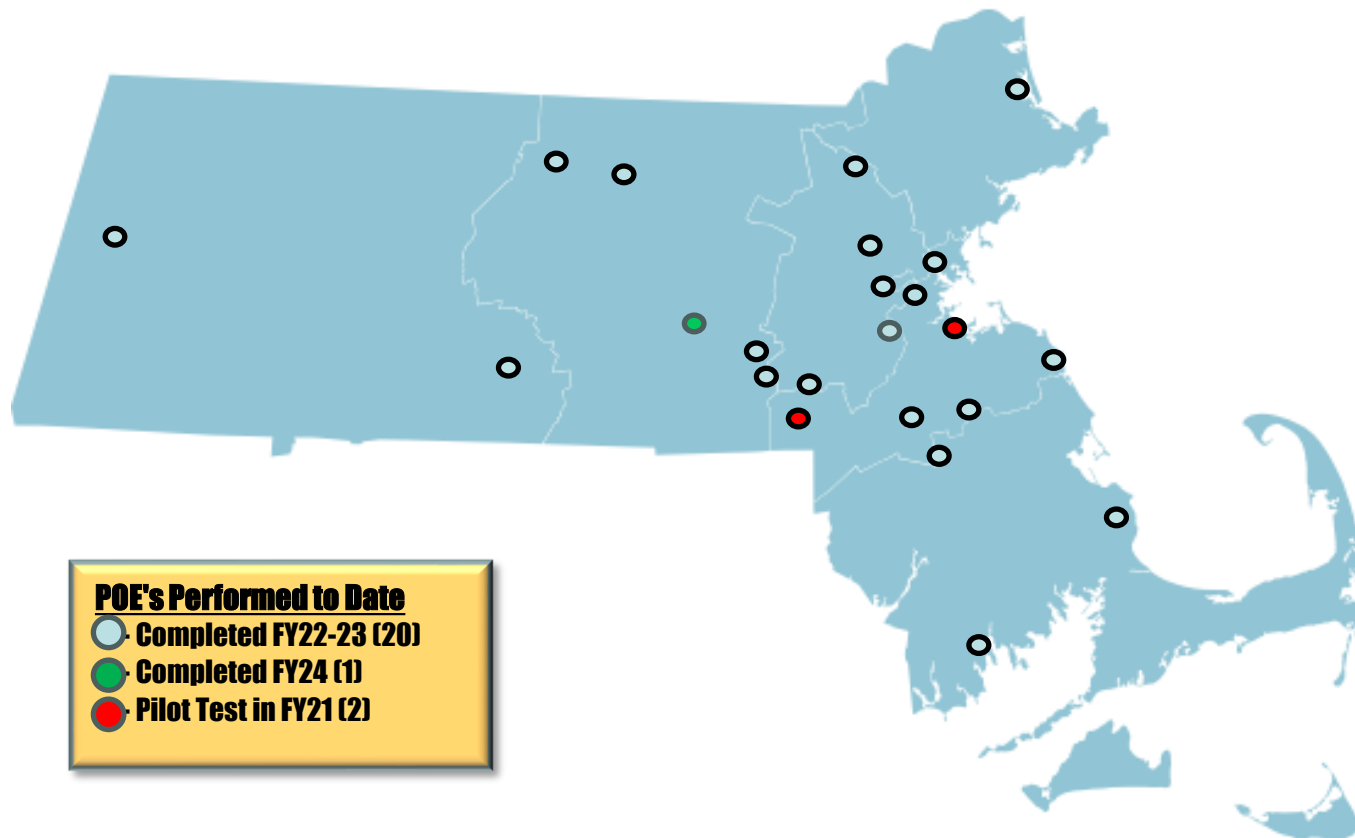
- Continue Bldg. Visits
- Apply Lessons from Year 1-3
- Consider Adjustments
- Coordinate Bldg. Visits
- Prepare/Distribute Reports
- Maintain Dashboard
- Communicate Findings

FY25



Post-Occupancy Evaluation Program

POE Program Participants (through 10/23)



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Questions
