

MSBA Next Steps

The MSBA would like to take this opportunity to update you on the reformed program for school construction and renovation grants, including Statements of Interest (SOI's) submitted for schools in your district, and to describe our Five Year Capital Pipeline development process.

The 4 year moratorium on school construction grants ended on July 1, 2007, and from January 2006 to the July 31, 2007 deadline, the MSBA received 422 SOIs from 162 districts for the new program—over 200 of which arrived at the MSBA in July, 2007. The SOI is the first step in the MSBA's dialogue with school districts where we request that a school district identify a problematic school facility according to the priorities established in the laws that govern school building grants. The MSBA then reviews these SOI and contacts the district to gather more information, usually including conducting a site visit, to determine which school facility problems pose the most need and urgency out of the entire statewide pool of SOI's received by MSBA. Priorities for MSBA funding will be determined only as a result of partnership and collaboration between the districts and the MSBA. Our goal is to have the most problematic and urgent facility issues move to the next step in our process of getting a Feasibility Study in December, 2007, while continuing to plan with the remaining SOI districts for possible resolution of their facilities issues in the next round(s) of available funding.

The 422 SOIs received by the MSBA describe a variety of facility problems, ranging from leaky roofs, to overcrowded classrooms, to structural concerns. M.G.L. c. 70B, § 3 (o) requires the MSBA to "... develop a long term capital plan in accordance with needs and projected funding." The MSBA review of SOIs, and the information gathered subsequently, will comprise the MSBA Capital Pipeline. New grants for new project approvals by the MSBA cannot exceed \$500 Million annually (or \$500 Million plus/minus the rate of growth/decline of the sales tax, capped at 4.5%), depending upon estimated sales tax revenue receipts.

Many school districts submitted multiple SOIs, and the MSBA requested school superintendents to select one priority facility that they believe has the most urgent needs. This will allow the MSBA to better understand the problems that are most urgent in the District's judgment, while allowing the MSBA to continue working with the Districts on their longer term priorities. The MSBA's request to prioritize the needs of a District does not guarantee funding; nor does it negate the other SOIs submitted by that District which will also receive attention from the MSBA. Our experience has shown that it is difficult for most districts to fund and manage multiple construction projects within any 12-month period, and that requesting a priority project is a pragmatic way of allowing both the District and the MSBA to focus on immediate needs first while continuing to work with Districts to resolve other facility issues. Our experience has also shown that prematurely "locking up" scarce MSBA resources for projects that are not thoroughly planned comes at the expense of other Districts that then lose an opportunity to improve their school facilities in the near term.

In addition to this request for local prioritization, the MSBA is implementing other measures to triage the 422 SOIs received, including convening diagnostic teams comprised of MSBA staff, senior architects and engineers with experience in school facility planning to review overcrowding or emergent health or safety conditions in buildings, review of the educational program goals in conjunction with the availability of local resources to support the operations and maintenance of any improved facility, and a review of a District's capital repair and renewal maintenance policies, budgets, and practices to affirm that any investment of state tax dollars will be maintained in the future.

To view a list of Statements of Interest designated by districts as their most urgent and needy, please [click here](#)

CAPITAL PIPELINE STRUCTURE

Our commitment, within reason, is to communicate clearly over the next several months with every District which has filed an SOI about the status of their proposed facility problem in the MSBA's pipeline— visits to Districts by our contracted architectural and engineering firm, Authority staff, or other consultants or evaluators as deemed suitable shall occur over the next several months. Our goal is to focus on the prioritized project in each District and submit to the Board a standard report on the conditions evaluated for each potential project so that the neediest projects will be given first priority for funding, pursuant to the Authority's statute. The 8 statutory priorities can be boiled down to a few areas of concern established by the legislature:

- Is the facility structurally unsound or otherwise in a condition seriously jeopardizing the health and safety of school children, where no alternative exists?
- Is there severe existing overcrowding when all District facilities are used to their fullest potential?
- Is there future projected overcrowding that will be unsustainable when all District facilities are used to their fullest potential?
- How is the provision of education impacted by the condition of the facility specifically?

The MSBA website will be updated frequently so that the Board and the public will be able to transparently follow any potential project's status. Many of the SOI's as filed do not clearly address the policy questions in the above paragraph, and therefore there will be a need for staff to engage in clarifying discussions with Districts in order to be able to fit any potential projects into a capital pipeline.

Phases in which the SOI's will be categorized:

A. REPAIRS: Where SOI's describe facility issues that are limited to problems with discrete building systems or components, potential repair projects will be separately categorized where the need for a repair is obvious, the scope is reasonably narrow and specific and the school is in otherwise sound condition and performing well. (NB: Many SOI's are unclear as to whether a repair is the obvious solution to a potential problem.)

B. DIAGNOSTIC PHASE: In order to make a determination of need and urgency of a potential project in comparison with the full compliment of SOI's received, each SOI may receive one or more of the following diagnostic analyses from the Authority: The goal of this phase is to determine which potential projects are the most urgent and thus should proceed further to feasibility study, or determine which facility issues require further definition, analysis and/or review.

1. Senior Study: A study of current conditions conducted by a team of MSBA staff and contracted school facilities planners, programmers and designers to assess current conditions and to observe any conditions highlighted in an SOI. The senior study is conducted by senior school facility design professionals who will provide their expert opinion of the level of need and the conditions of the building.

2. Core Facilities Assessments: A facility and maintenance assessment conducted by contracted architects and engineers that assesses 18 building and 7 site systems for a school that is the subject of an SOI. The Core Assessment will ascertain whether the District has been maintaining the facility in accordance with generally accepted facility maintenance practices, and, where overcrowding is identified as a priority, verifies square footages and other available space in all local school building facilities in order to ascertain space utilization efficiency.

3. Full Facilities Assessment: A facility and maintenance assessment conducted by contracted architects and engineers designed to analyze a building's condition in great detail, particularly with regard to the structural integrity of a building where such is in question. The District's maintenance of the facility also will be assessed. This assessment, which can require several days to complete for a large school, generates an analysis of the facility comparing the cost of a detailed listing of a building's deficiencies against the replacement cost of the facility.

4. Clarification of the SOI: A process where the District is requested by the Authority to further clarify, document, refine and/or demonstrate issues/priorities that are unclear as identified in their SOI. The Authority will work with districts and provide guidance and/or standard questions which will help guide the Districts. Mainly, a District will be asked to describe in categorized detail where the building doesn't specifically allow the delivery of certain educational programs to occur particularly with regards to (a) core academics, (b) education support activities, and (c) other desired educational programs than are not being offered due to facility constraints.

5. MSBA Enrollment Site Visit and Review: A site visit by trained teams of Authority staff, working with contracted former educators, to observe overcrowded conditions along with a thorough review to analyze projected enrollment trends.

6. MSBA Condition Site Visit: A site visit by trained teams of Authority staff to observe current deficient conditions as identified in an SOI.

7. MSBA Education Program Impact Site Visit: A site visit by trained teams of Authority staff to observe the impact of current deficient conditions as identified in an SOI on the current Education Program.

C. FURTHER REVIEW: A cohort of potential projects may not quite be ready to progress to the Feasibility Study stage immediately after the Diagnostic Phase since further questions about the educational plan may exist and may require the following treatment by the Authority:

- 1. Educational Facilities Master Plan Review:** A process where the District uses the Authority standardized web-form to submit their Educational Facilities Master Plan. Once submitted the Plan is reviewed at the Authority and follow-up questions, meetings or visits may occur.
- 2. Educational Program Review:** A process where the Educational Program of the District is reviewed at the Authority and follow-up questions, meetings or visits may occur.
- 3. Space Planning Review:** A process where the District's current space use and allocation is reviewed by the Authority and/or an Authority contracted space planning expert. Once reviewed, follow-up questions, meetings or visits may occur.
- 4. District Budget and Resource Review:** To ascertain whether the District has the current budgetary resources to support a proposed education plan, this process includes the review and analysis of the District's and the city/town historic, current and projected budgets by the Authority. Once reviewed, follow-up questions, meetings or visits may occur.

When there is enough information and data gathered from the Diagnostic Phase and any Further Review has been completed, the Board will be presented with the data to make decisions about which SOIs look like good candidates to move forward and which may be deferred for further review in future fiscal years:

PRIORITY FOR ACTION: Status of a project once an SOI has been recommended for a Feasibility Study. (If after DIAGNOSTIC REVIEW it is determined that a project is not ready for funding in the next 2 fiscal years, such project will be placed in the "LONG RANGE" designation for continuing consideration and discussion.)

LONG RANGE PROJECTS: Status of projects where the District wishes the Authority to review a project as part of a comprehensive local master plan, but is not an immediate priority of either the District or the Authority. This could also apply to projects which are determined affirmatively by the Board for review in a future fiscal year when resources are projected to be available at the Authority.