

# Massachusetts School Building Authority

Deborah B. Goldberg

State Treasurer and Receiver-General

*Chairperson*

James A. McDonald

*Chief Executive Officer*

Jack McCarthy

*Executive Director*



## MSBA Overview

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## 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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## About Us, Leadership & Organization





# Board of Directors - Membership



**Deborah Goldberg**

Chairperson of the MSBA, Treasurer and Receiver General of the Commonwealth



**Anne Brockelman**  
Appointed Member, Senior Associate, Perry Dean Rogers Partners Architects (PDR)



**Sean Cronin**  
Designee of the Secretary of Administration and Finance



**Sheila Vanderhoef**  
Appointed Member, Town Administrator, Town of Eastham



**Matt Deninger**  
Designee of the Commissioner of Education



**Terry Kwan**  
Appointed Member, Former teacher/School Committee member



**Greg Sullivan**  
Appointed Member, Former MA Inspector General



# Board of Directors - Duties

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- Oversee the general administration and operations of the MSBA
- Vote at Board Meetings
- Oversee progress of MSBA-funded school projects and other activities in Subcommittees of the Board
- Review and approve proposed projects and determine the amounts of any grants to be awarded
- Review and approve the MSBA's annual operating and capital budgets
- Review and approve debt financings
- Review and approve MSBA regulations and policies



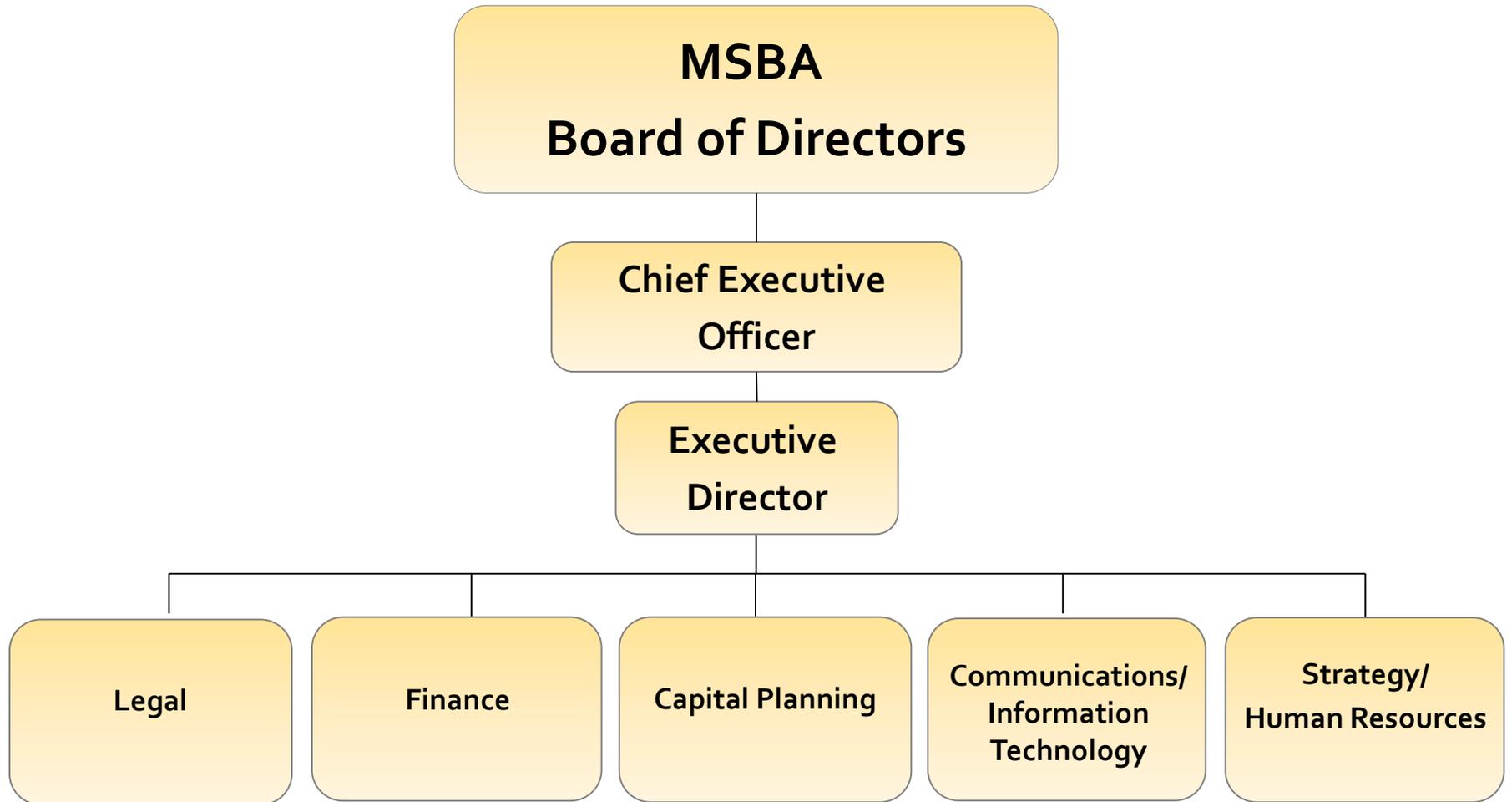
# Board of Directors - Subcommittees

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- **Facilities Assessment Subcommittee**
  - Reviews district presentations regarding proposed projects and provides feedback to districts before a project is presented to the full Board for approval
- **Administration, Operations and Finance**
  - Reviews and evaluates the MSBA's annual budget, operations, investments, bond deals, and other finance related business
  - Serves as the formal human resource policy and personnel compensation committee for the MSBA
- **Project Management Subcommittee**
  - Reviews final audit appeals by districts for MSBA projects
  - Met frequently when the MSBA was clearing the audit backlog that existed under the former program



# MSBA Organizational Structure



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## 2016 School Survey

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# 2016 School Survey - What is it?

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- The school survey is a general facility assessment meant to establish a baseline for all of the Commonwealth's schools and to help the MSBA understand how the needs of individual districts fit within the statewide spectrum of need.
- It is essential that the MSBA successfully performs these periodic surveys in order to meet our enabling legislation.
- Previously completed in 2005 and 2010.
- The 2016 assessment occurred from September 2016 through January 2017.



# 2016 School Survey - Key Findings

## Size of Schools

- **Review of 1,419 assessed schools shows little evidence of widespread overcrowding** with most of space needs being met through the use of permanent space. A small percentage (~**1.2%**) of assessed classrooms are in **temporary spaces**.
- Of the more than **48,348 classrooms** assessed, only **605** are located in **temporary spaces**.
- **98 schools (7%)** have more than **10%** of their **classroom space** in **temporary spaces**.



# 2016 School Survey - Key Findings

## Enrollment Trends

- During the 2010 survey report period, there was a **3.3%** statewide **decline** in K-12 public school **enrollment** from 2004-2005 school year (approximately **900,500** students). Since then, enrollment **declined** roughly **1.6%** statewide to approximately **886,000 students** in 2015-2016.



# 2016 School Survey - Key Findings

## School Rating Summary

**Massachusetts school buildings performed well in**  
primary scoring matrices, which **rated:**

- **Building Conditions:** An overall rating for the general conditions of a school facility's major systems.
- **General Environment:** An overall rating that reflects the school building's environment.
- **Capacity Utilization:** An overall rating that reflects the school building's utilization.



# 2016 School Survey - Key Findings

## Number of Schools & Total Square Footage

- **1,859** public schools
- **1,695** schools evaluated
- **886,074** students
- **330** school districts
- **1,773** school-related permanent buildings
- **173,508,438** gross square feet

## Age of Schools

- Since 2000, **58.8%** of approximately **173 million** existing **square feet** of school facility space has been **newly built or renovated**.
- **131 schools** (approximately 8%) are **over 100 years old**. **16** are in the **MSBA grant program**.

For more information, please visit our website at [http://www.massschoolbuildings.org/programs/needs\\_survey](http://www.massschoolbuildings.org/programs/needs_survey)

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## The Current Program Process & Our Capital Pipeline

- **Statements of Interest Overview**
- **A Look Ahead - 2017**



# 2017 Statements of Interest

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**2017** 

**Statement of Interest  
Submittal Period**

## **CLOSING DATES:**

- **Accelerated Repair Program:** The SOI closing 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 closed on **Friday, February 17, 2017**.
  - 36 projects from 20 districts were invited into the program at our May and June 2017 Board Meetings.
- **Core Program:** The SOI closing date for districts submitting for consideration in the Core Program was **Friday, April 7, 2017**. The Core Program is primarily for projects beyond the scope of the Accelerated Repair Program, including extensive repairs, renovations, addition/renovations, and new school construction.
  - Invitations to our Core Program will be voted on at our December 13, 2017 Board Meeting.



# Priorities in Statute

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- The Authority approves projects and in accordance with the following order of priorities:
  - (1) priority shall be given to school projects needed in the judgment of said board to replace or renovate a building which is structurally unsound or otherwise in a condition seriously jeopardizing the health and safety of school children, where no alternative exists;
  - (2) priority shall be given to school projects to eliminate existing severe overcrowding;
  - (3) priority shall be given to school projects needed in the judgment of said authority to prevent loss of accreditation;
  - (4) priority shall be given to school projects needed in the judgment of said authority to prevent severe overcrowding expected to result from increased enrollments which must be substantiated;



## Priorities – cont'd

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- (5) priority shall be given to projects needed in the judgment of said authority for the replacement, renovation or modernization of the heating system in any schoolhouse to increase energy conservation and decrease energy related costs in said schoolhouse;
- (6) priority shall be given to any school project needed in the judgment of said authority for short term enrollment growth;
- (7) priority shall be given to school projects needed in the judgment of said authority to replace or add to obsolete buildings in order to provide for a full range of programs consistent with state and approved local requirements; and
- (8) priority shall be given to projects needed in the judgment of said authority to transition from court ordered and authority approved racial balance school districts to walk-to, so-called, or other school districts.



# Reimbursement Rates (M.G.L. c. 70B)

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- Base rate for each district of 31 percentage points up to a maximum of 80 percent
- Three Ability-to-Pay Factors can increase the reimbursement rate from the base before addition of any applicable incentives:
  - Community Income Factor (0-12 percentage points)
    - Per capita income
    - Source: MA DOR
  - Community Property Wealth Factor (0-28 percentage points)
    - Per capita equalized property valuation
    - Source: MA DOR
  - Community Poverty Factor (0-17 percentage points)
    - Eligibility for Federal Free/Reduced Lunch
    - Source: MA DESE
- Maximum rate, including incentives, not to exceed 80%

Learn more: <http://www.massschoolbuildings.org/guidelines/statutes>



# Reimbursement Rates – C. 70B

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- Regional school district reimbursement rates are calculated using the same data and factors, but each factor is weighted to reflect each municipality's representation of the total regional district enrollment.
- The last step in the reimbursement rate calculation process is for the MSBA, in its sole discretion, to review if a district is eligible for Incentive Points. Statute dictates that no district shall be eligible for more than 18 Incentive Points in total, and that no one category of Incentive Points can be more than 6 points.
- By statute, 80% is the maximum allowable reimbursement rate, including incentive points.
- The reimbursement rate is applied to eligible costs.

Learn more: <http://www.massschoolbuildings.org/guidelines/statutes>



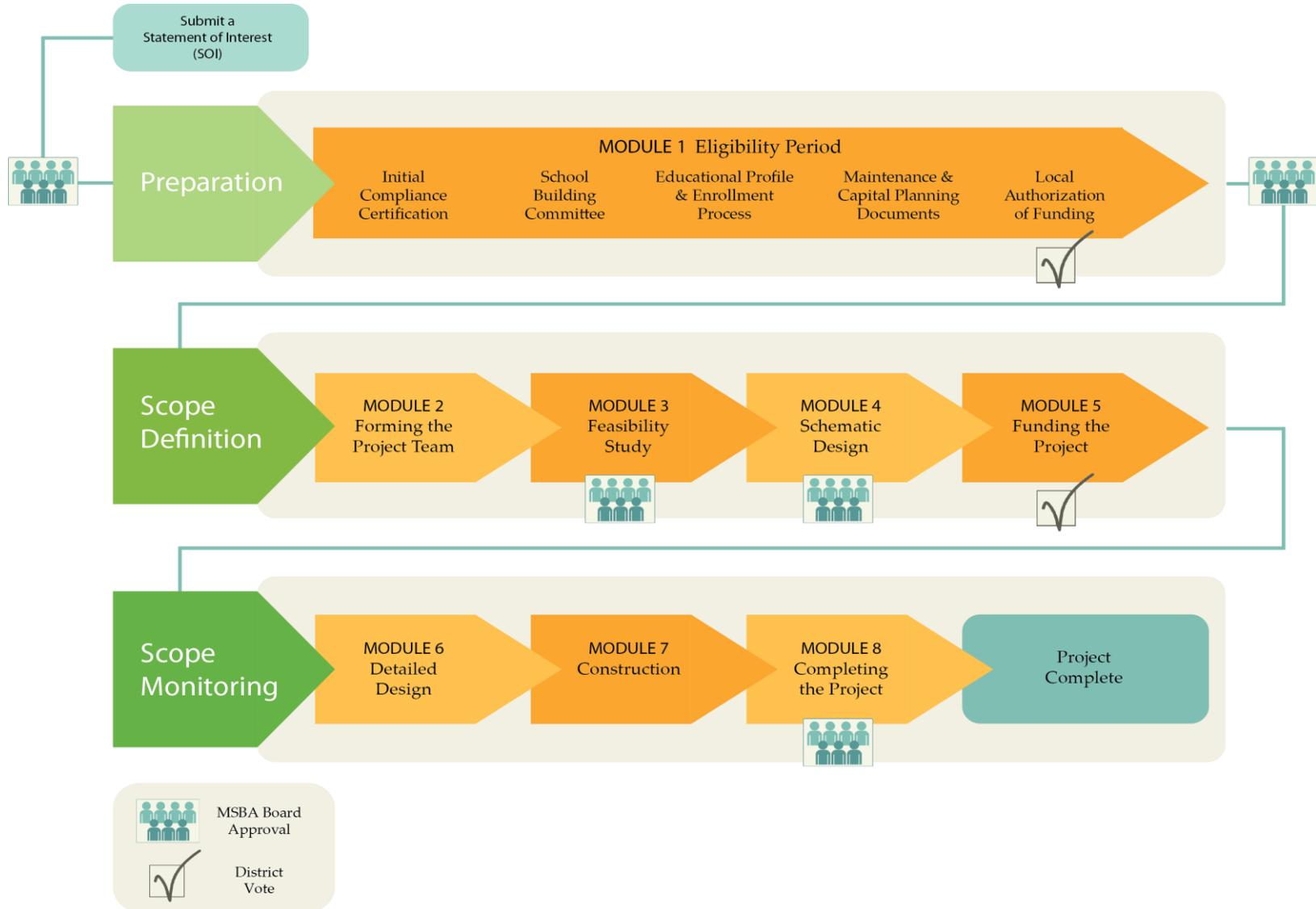
# Reimbursement Rates - Incentives

- Energy Efficiency/Green Schools: 0-2 percentage points
- Routine and Capital Maintenance: 0-2 percentage points
- Newly Formed Regional School Districts: 0-6 percentage points
  - Maximum of 6 incentive points for establishment of new regional district, or amendment of existing agreement to add a new member
  - Maximum of 3 incentive points for inclusion of additional grades into existing regional agreement (one percentage point per additional grade)
- Construction Management At Risk delivery method: 1 percentage point for projects invited to the pipeline prior to 1/1/17.
- Model School: 5 percentage points for projects invited to the pipeline prior to 1/1/16.
- M.G.L. c.40R/c.40S Overlay Zoning District: 0-1.5 percentage points
- Renovation/Reuse of an Existing Facility: 0-5 percentage points

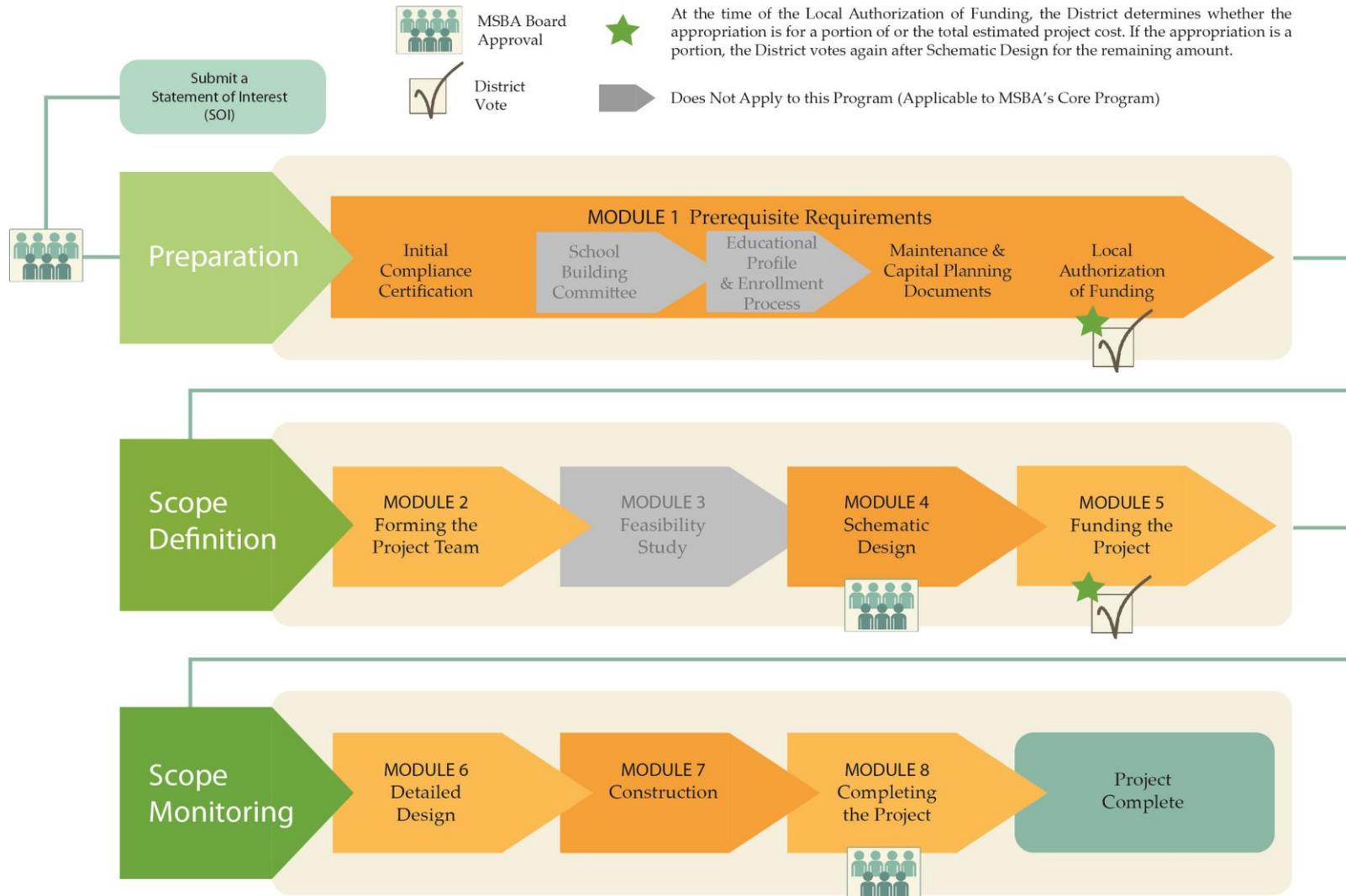
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# Core Program Process Overview



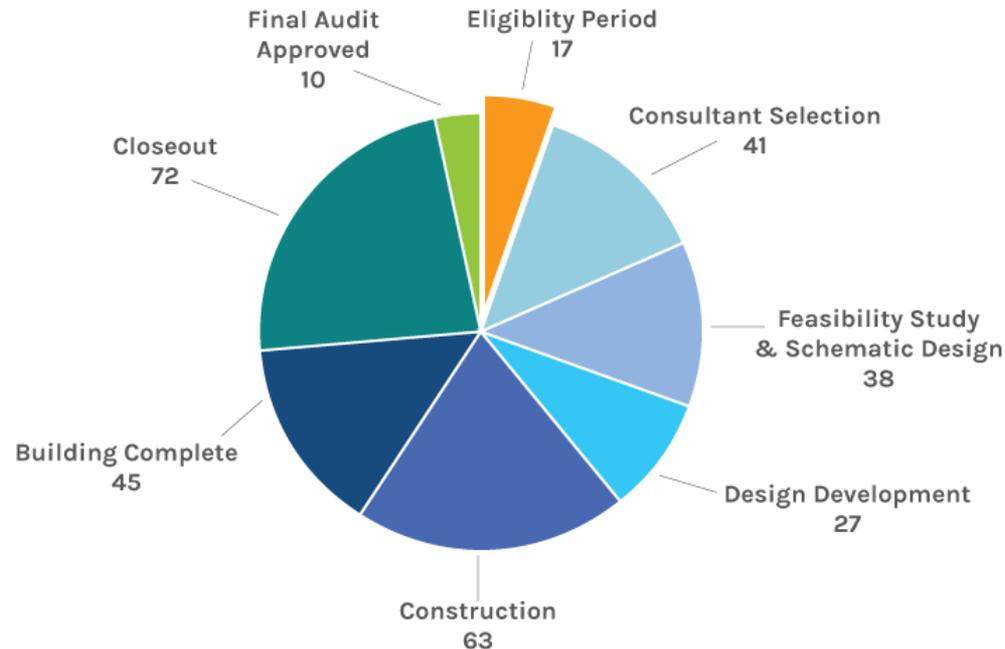
# Accelerated Repair Program Process Overview





# Current Project Status

A total of 313 projects that have received invitations from the Board of Directors (“Board”) to collaborate with the Massachusetts School Building Authority (“MSBA”) are currently in the MSBA’s Eligibility Period and Capital Pipeline. The summary chart provides the number of projects in Eligibility Period and each phase of the Capital Pipeline. For a detailed look at the Capital Pipeline projects, please go to [www.massschoolbuildings.org/building](http://www.massschoolbuildings.org/building) and select “Capital Pipeline Status Chart”.





# A Few Achievements

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- \$12.9 billion in payments to cities, towns and regional school districts
- The MSBA's fully-funded Commissioning process, has a total value of over \$29.3 million in work orders
- We have completed final audits of 1,167 projects, totaling over \$18.7 billion in submitted costs
- Since our inception, the MSBA has participated in, or is currently working on, over 600 projects state-wide
- Currently there are a total of 96 districts, representing 220 projects, either active or completed in the Accelerated Repair Program





## A Few More Achievements

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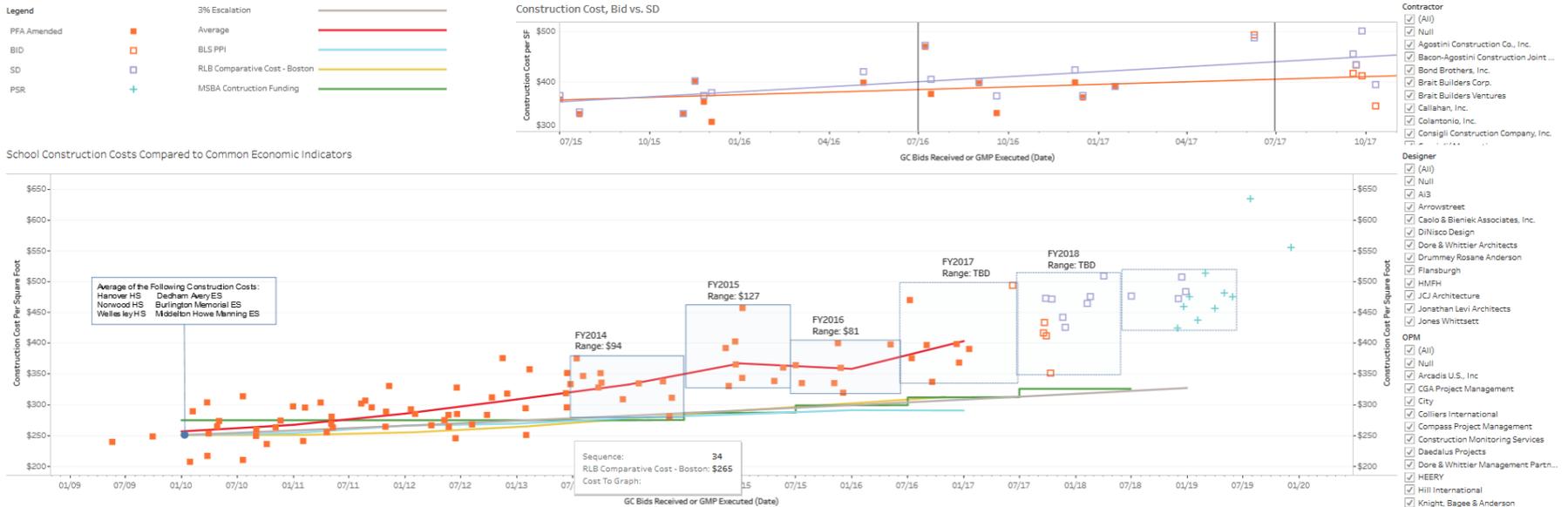
- Through partnering with districts, we have improved learning facilities for over 600,000 students across the Commonwealth
- We developed a data based enrollment projection methodology in order to build right-size schools
- We have completed Needs Surveys in 2005 and 2010 and are finalizing data for 2016. Need Surveys are conducted to assess the condition of all of the elementary and secondary public schools across the Commonwealth





# School Construction Costs

The MSBA staff has published an interactive tool with bid data starting in fiscal year 2009, as well as projected estimates, for new construction projects.



For more information, please visit our website at

<http://info.massschoolbuildings.org/TabPub/TableauCostData.aspx>



# Stay Updated on the MSBA



- Visit us online at [www.MassSchoolBuildings.org](http://www.MassSchoolBuildings.org)



-  Like us on Facebook



- Follow us on Twitter (@MASS\_sba)

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## Questions?

**Contact: Matt Donovan**

**Director of Administration and Operations**

**[Matt.Donovan@massschoolbuildings.org](mailto:Matt.Donovan@massschoolbuildings.org)**