

Massachusetts School Building Authority

CAPITAL PLANNING PROJECT OVERVIEW REPORT

November 18, 2024

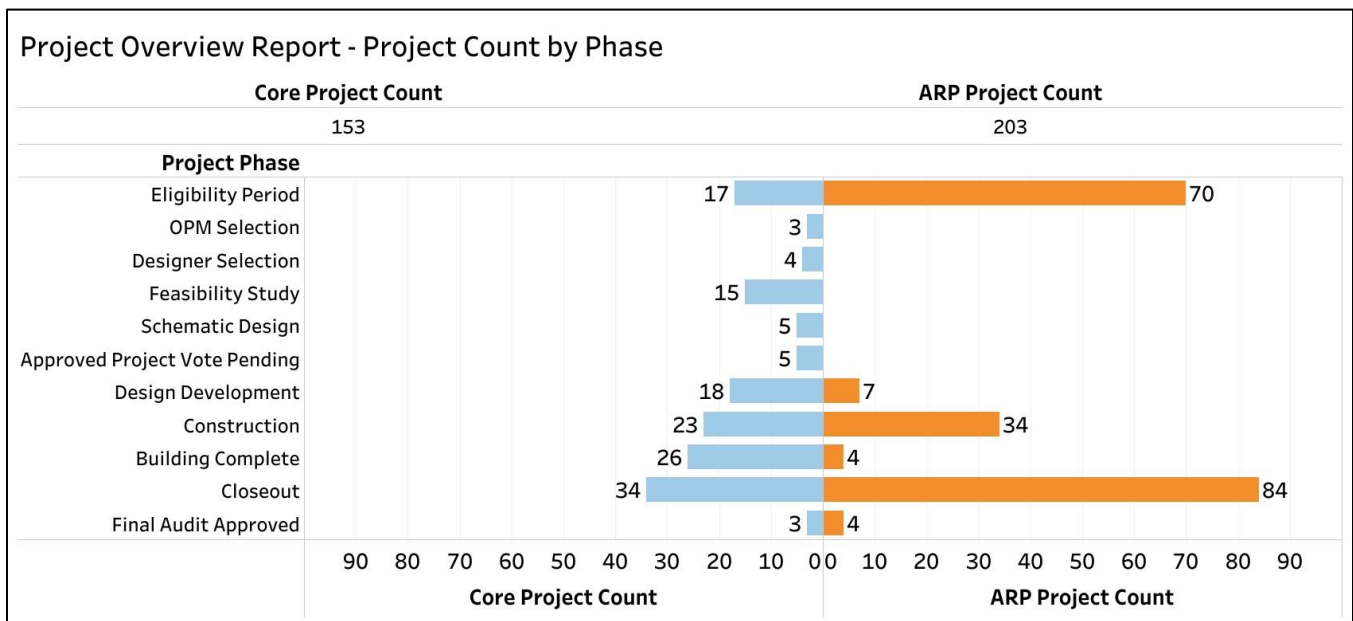
TABLE OF CONTENTS

Capital Pipeline Overview	2-4
Statements of Interest (SOIs)	5
Core Program	6-22
Eligibility Period	6-7
Consultant Selection	8-9
Feasibility Study	10
Schematic Design	11
Commissioning	12
Design Development	13
Summary of Bid Data	14-15
Construction	16-19
Closeout	20
Post Occupancy Evaluation	21
Accelerated Repair Program	22-28
Project Variances	29-31
<i>Appendices</i>	
(A) <i>Project Status List</i>	
(B) <i>2024-26 Estimated Bid Dates</i>	
(C) <i>School Construction Costs compared to Common Economic Indicators</i>	
(D) <i>Construction Status Report</i>	

CAPITAL PIPELINE OVERVIEW

Status of Current Projects

A total of 356 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 356 projects include 153 projects in the Core Program and 203 projects in the Accelerated Repair Program (“ARP”). The summary chart provides the number of projects in Eligibility Period and each phase of the Capital Pipeline. Compared to the prior Project Overview Report, the project total has increased by 70 projects to reflect the 2024 Accelerated Repair Program (“ARP”) invitations at the October 30, 2024, Board of Directors meeting. For a detailed look at the Capital Pipeline projects, please go to www.massschoolbuildings.org/building and select “Capital Pipeline Status Chart”.



Capital Planning Updates:

The following activities are scheduled for FY 2025:

- The 2025 School Survey continues following the launch of school assessments beginning in November 2024. The MSBA has once again partnered with STV Inc., who will visit approximately 1,580 public elementary and secondary schools in the Commonwealth to assess the general condition of each building. Site visits will not be conducted at schools in the MSBA’s Core Program pipeline unless construction has been completed. Each assessment will evaluate several key factors, including: condition, capacity, maintenance, and educational environment. Assessments are scheduled to be completed by April 2025 with the final report presented at the December 2025 Board of Directors meeting.

- The MSBA has partnered with BVH Integrated Services, Inc., a Salas O’Brien Company (“BVH/Salas O’Brien”) to evaluate existing public K-12 schools to determine scope, schedule, and cost factors to convert existing buildings to heat pumps for heating and cooling within the Accelerated Repair Program (“ARP”). Throughout October 2024, BVH/Salas O’Brien conducted 18 site visits at schools of different typologies. BVH/Salas O’Brien also proposed recommendations for 2025 Statement of Interest heat pump questions. A report providing technical and programmatic recommendations to support heat pump conversion projects within ARP will be presented at the June 2025 Board of Directors meeting.
- MSBA Roundtables – Upcoming information for FY 2025 is listed below:
 - Superintendent Roundtable occurred on October 24, 2024 – Topic: Get the Word Out: The Communication Ground Rules of Local Ballot Questions
 - Designer Roundtable scheduled for November 21, 2024 – Topic: Site & Landscape Design & Operations: Lessons Learned from the MSBA’s Post Occupancy Evaluations Program
 - Superintendent Roundtable information sessions anticipated for January 2025 – Topics: 2025 Statement of Interest Process.
 - OPM Roundtable anticipated for the Spring 2025 – Topic: Pending.
 - Commissioning Roundtable anticipated for the Spring 2025 – Topic: Pending.
 - Contractor Roundtable anticipated for the Spring 2025 – Topic: Pending.

2024 Progress Report

- * Statements of Interest (“SOIs”) 2024
 - 2024 SOI submittal period opened on Friday, January 12, 2024. The deadline to file for consideration under the Accelerated Repair Program (“ARP”) was Friday, March 1, 2024, and the deadline to file for consideration under the Core Program was Friday, April 12, 2024.
 - MSBA received 72 ARP SOIs from 39 districts for consideration.
 - Recommendations for invitation into the ARP were approved for 70 schools from 37 districts at the October 30, 2024 Board of Directors meeting.
 - MSBA received 47 Core Program SOIs from 36 districts for consideration.
 - Recommendations for invitation into Eligibility Period are anticipated at the December 13, 2024, Board of Directors meeting.
- * Eligibility Period – Core Program
 - 17 of the 19 2023 SOIs are currently in the Eligibility Period following their invitations at the December 13, 2023, Board of Directors meeting.
 - Four of the 19 SOIs anticipate an invitation to Feasibility Study at the December 13, 2024 Board of Directors meeting.
- * Consultant Selection – Core Program
 - One district completed its Owner’s Project Manager (“OPM”) selection since the last report and three districts are tentatively scheduled to receive MSBA approval for selection of their OPM.
 - Three districts completed Designer selection since the last report while four districts are in the process of procuring a Designer.
- * Feasibility Study/Schematic Design – Core Program
 - Nine districts are anticipating submittals for their Preferred Schematic Solutions between December 2024 and April 2025.
 - Four districts are anticipating submittals for their Project Scope and Budget Agreement authorizations between December 2024 and April 2025.
- * Accelerated Repair Program
 - After a temporary pause in ARP in 2023, the MSBA Board of Directors voted to reopen the Program in 2024 with an increased estimated budget following the approval of the Commonwealth’s FY 24 Budget. The ARP reopening in 2024 is for the partial or full replacement of roofs and windows/doors. Beginning in 2024, the feasibility study for each invited roof project will consider roof replacement as well as roof restoration. To facilitate schools moving

toward Massachusetts' goal for net-zero carbon emissions by 2050, the ARP Heat Pump Pilot Study will help the MSBA advance the Program to offer heat pump conversions for existing buildings in lieu of boiler replacement.

- The 37 districts from the 2024 invitations are in the process of completing initial documents before proceeding to consultant assignments.
- * Construction Costs – Core Program
 - In 2024, six projects are scheduled to receive sub bids. Compared to the prior Project Overview Report which reported eight projects in 2024, two projects scheduled to receive final sub bids in December 2024 revised their sub bids to January 2025. MSBA staff anticipate DBB bids or GMP executions for all six remaining projects by the end of 2024.
- * Substantial Completion – Core Program
 - 14 projects are scheduled to reach substantial completion in 2024. The MSBA has received executed certificates for 10 of the 14 projects.
- * Post Occupancy Evaluations
 - Staff anticipate completing 6-10 post occupancy evaluations in FY 2025. Individual reports will be prepared for and shared with each evaluated school and the corresponding districts and consultants.

STATEMENTS OF INTEREST (SOIs)

2024 SOI Process

The 2024 SOI submittal period opened on January 12, 2024. The deadline to file SOIs for consideration under the Accelerated Repair Program (“ARP”), which is primarily for the partial or full replacement of roofs and windows/doors in an otherwise structurally sound facility, was Friday, March 1, 2024. The deadline to file for consideration under the Core Program, which is primarily for projects beyond the scope of the ARP, including extensive repairs, renovations, additions/renovations, and new school construction, was Friday, April 12, 2024.

The table below lists the number of SOIs received and Invitations granted for the calendar years 2008 through 2024.

Year	Total Number of SOIs Submitted	Number of Core Program SOIs Submitted	Number of Core Program Invitations	Number of Green Repair or Accelerated Repair Program SOIs Submitted	Number of Green Repair or Accelerated Program Repair Invitations	Number of SCILAB SOIs Submitted	Number of SCILAB Program Invitations
2008	431	425	104	6	6		
2009	237	206	41	31	31		
2010	224	202	19	22	22		
2011	371	184	18	187	149		
2012	280	198	11	69	36	13	11
2013	201	123	17	78	47		
2014	229	110	18	119	51		
2015	158	97	26	61	44		
2016	156	89	17	67	49		
2017	156	83	15	73	36		
2018	130	70	12	60	34		
2019	144	61	11	83	42		
2020	161	71	15	90	25		
2021	118	58	17	60	28		
2022	121	54	10	67	33		
2023	63	63	19	N/A	N/A		
2024	119	47	TBD	72	70		

2008: MSBA launched the annual filing period.

2011: MSBA opened the annual filing period twice, which included a dedicated opening for interest in the Green Repair Program and the annual opening.

2012: MSBA’s annual filing period captures interest in the newly created Accelerated Repair Program, the 2012 Science Laboratory Initiative and the Core Program.

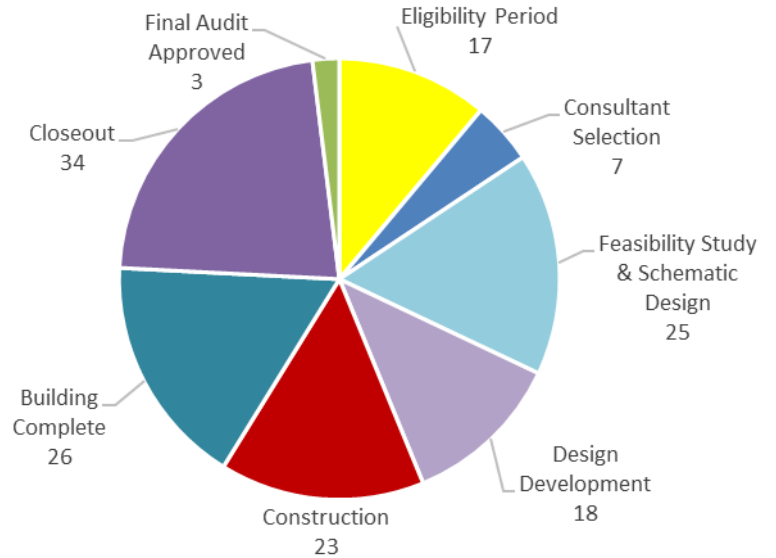
2023: MSBA’s annual filing period opened for Core Program only. Please refer to the October 26, 2022, Board of Directors Memorandum, which outlined the recommendation to temporarily pause the Accelerated Repair Program and not accept new SOIs in 2023.

CORE PROGRAM

Status of Core Program Projects

Currently, there are 153 Core Program projects in the MSBA’s Eligibility Period and Capital Pipeline. Compared to the prior Project Overview Report, the project total has remained the same as reported ahead of the October 30, 2024, Board of Directors meeting.

- 49 projects are in the early phase of the grant program and have not yet secured funding authorizations for the full project.
- 41 projects have secured full project funding and are in Design Development or Construction.
- 63 projects are in Building Complete, Closeout, or Final Audit Approved phases.



ELIGIBILITY PERIOD

There are 17 districts in Eligibility Period (table below) and ten of those districts have secured their local funding.

An agreed-upon enrollment is a key pre-requisite for the MSBA to commence a Feasibility Study with a district.

To begin the enrollment projection process, a district must file enrollment information utilizing the MSBA’s online enrollment projection tool.

SOI Year	District	School	Eligibility Period Commencement Date	30 days	60 days	90 days			180 days		270 days	Date of Invitation to Feasibility Study (Estimated)
				ICC	SBC	Online Enrollment Projection Info	Ed Profile Questionnaire	Ch. 74 Viability Submission	Maintenance Documents	Enrollment Certification	Local Authorization	
2023	Boston	Shaw ES	July 1, 2024	X	X	X	X	N/A			X	TBD
2023	Chelmsford	Parker MS	April 1, 2024	X	X	X	X	N/A	X	X	X	December 2024
2023	Dighton-Rehoboth RSD	Dighton ES	May 1, 2024	X	X	X	X	N/A	X		X	TBD
2023	Everett	Everett HS	July 1, 2024	X	X	X	X	X			X	TBD

SOI Year	District	School	Eligibility Period Commencement Date	30 days	60 days	90 days			180 days		270 days	Date of Invitation to Feasibility Study (Estimated)
				ICC	SBC	Online Enrollment Projection Info	Ed Profile Questionnaire	Ch. 74 Viability Submission	Maintenance Documents	Enrollment Certification	Local Authorization	
2023	Framingham	Hemenway ES	June 3, 2024	X	X	X	X	N/A				TBD
2023	Haverhill	Whittier MS	June 3, 2024	X	X	X	X	N/A	X			TBD
2023	Leicester	Leicester HS	April 1, 2024	X	X	X	X	X	X			TBD
2023	Manchester-Essex RSD	Essex ES	March 4, 2024	X	X	X	X	N/A	X	X	X	December 2024
2023	Medford	Medford HS	May 1, 2024	X	X	X	X	X	X		X	TBD
2023	Milford	Milford HS	August 1, 2024	X	X	X	X	X			X	TBD
2023	New Bedford	Ashley ES	June 3, 2024	X	X	X	X	N/A				TBD
2023	Northborough	Peaslee ES	April 1, 2024	X	X	X	X	N/A	X		X	TBD
2023	Peabody	Veterans Memorial HS	August 1, 2024	X	X	X	X	X				TBD
2023	Somerville	Winter Hill Community	March 4, 2024	X	X	X	X	N/A	X		X	December 2024
2023	Springfield	Gerena ES	April 1, 2024	X	X	X	X	N/A	X	X	X	December 2024
2023	Westford	Robinson ES	August 1, 2024	X	X	X	X	N/A				TBD
2023	Worcester	Burncoat Senior HS	July 1, 2024	X	X	X	X	X	X			TBD

CONSULTANT SELECTION

Owner's Project Manager Selection

After the district has completed all Eligibility Period requirements and has received a Board Invitation to Feasibility Study, the district procures an OPM. Since the last report, one district has completed Owner's Project Manager ("OPM") selection (shaded in the table below). Currently, there are three districts in the Capital Pipeline in the process of procuring an OPM.

District	School	Anticipated Selection
Marlborough	Marlborough Elementary School	October 2024
Brockton	Brockton High School	December 2024
Needham	Pollard Middle School	February 2025
South Hadley	Mosier Elementary School	March 2025

Designer Selection

After a district has selected and executed a contract with an OPM, the district selects a Designer by utilizing either a local designer selection process for projects under \$5 million or the MSBA’s Designer Selection Panel (“DSP”) for projects over \$5 million. Since the last report, three districts completed Designer selection (shaded in the table below). There are currently four districts in the Capital Pipeline that are in the process of procuring a Designer.

District	School	Anticipated Selection
Salem	Salem High School	October 2024
Franklin County RVTSD	Franklin County THS	October 2024
Chicopee	Barry Elementary School	November 2024
Wrentham	Charles E. Roderick School	November 2024
Blackstone-Millville RSD	Blackstone-Millville Regional High School	December 2024
Swansea	Joseph Case Junior High School	January 2025
Marlborough	Richer Elementary School	February 2025

For additional information on the selected consultant teams, see Appendix A.

FEASIBILITY STUDY

Once a district has procured an OPM and a Designer, the district and the district’s consultants must complete two Feasibility Study submittals, the Preliminary Design Program, and the Preferred Schematic Report, prior to Board consideration to proceed into Schematic Design. Based on the most recent data and schedules provided to the MSBA by districts, the MSBA anticipates that nine districts will appear before the Board for their Preferred Schematic Design authorizations at the December 2024, February 2025, and April 2025 Board meetings. An additional six districts are in Feasibility Study.

District	School	Anticipated PS Board Date
North Attleborough	North Attleborough High School	December 2024
Wilmington	Wildwood Elementary School	December 2024
Berkshire Hills RSD	Monument Mountain RHS	February 2025
Lexington	Lexington High School	February 2025
Littleton	Shaker Lane Elementary School	February 2025
Millis	Millis High School	February 2025
Old Colony RVTSD	Old Colony RVTHS	February 2025
Dracut	Joseph A. Cambell Elementary School	April 2025
North Andover	Kittredge Elementary School	April 2025

SCHEMATIC DESIGN

Prior to consideration by the Board for Project Scope and Budget Agreement authorization, a district must submit a Schematic Design to the MSBA for review. Based on the most recent data and schedules provided to the MSBA by districts, the MSBA anticipates that four districts will appear before the Board for Project Scope and Budget Agreement authorizations at the December 2024, February 2025, and April 2025 Board Meetings. There is one additional district in Schematic Design.

District	School	Anticipated PS&B Board Date
Hamilton-Wenham RSD	Cutler Elementary School	February 2025
Leominster	Fall Brook Elementary School	April 2025
Reading	J. Warren Killam Elementary School	April 2025
Southborough	Margaret A. Neary Elementary School	April 2025

COMMISSIONING

The MSBA assigns a Commissioning Consultant after a district has secured local funding for the Board approved project. Since the last report, there have been no new Commissioning Consultant assignments.

To date, the MSBA has executed 640 commissioning consultant contracts, totaling \$50.9 million in commissioning fees, for 857 projects at 708 schools, many of whom have been invited to the Capital Pipeline multiple times. Construction budgets for projects being commissioned total \$18.14 billion. To date, 479 work orders have been completed.

The table below represents the status of commissioning assignments sorted by the fiscal year in which the commissioning work orders were issued.

Fiscal Year	No. Work Orders Issued	Value of Work Orders Issued	Total Invoiced*	Percent Complete
FY2010	31	\$4,231,376	\$4,273,277	100%
FY2011	95	\$6,132,890	\$6,058,460	99%
FY2012	52	\$4,373,944	\$4,386,520	100%
FY2013	55	\$3,364,697	\$3,408,897	100%
FY2014	47	\$2,604,062	\$2,541,165	98%
FY2015	44	\$2,277,711	\$2,273,711	100%
FY2016	44	\$3,385,137	\$3,333,748	99%
FY2017	37	\$2,290,661	\$2,248,851	98%
FY2018	44	\$4,138,550	\$4,135,011	100%
FY2019	39	\$3,604,720	\$3,337,026	93%
FY2020	42	\$3,080,166	\$2,843,755	92%
FY2021	12	\$1,524,360	\$1,020,646	67%
FY2022	36	\$3,969,566	\$1,979,102	50%
FY2023	29	\$2,537,001	\$959,504	38%
FY2024	29	\$2,633,366	\$511,680	19%
FY2025	4	\$761,212	\$3,122	0%
Total	640	\$50,909,419	\$43,314,477	

*Includes approved additional services over value of Work Order

DESIGN DEVELOPMENT

After a district has secured local funding and has entered into a Project Funding Agreement (“PFA”) with the MSBA, the district enters the Design Development Phase. Currently, there are 25 projects in the Design Development Phase with a total estimated construction cost of approximately \$2.47 billion. Of those 25 projects, seven are ARP Projects and 18 are Core Program Projects. The 18 Core Program Projects in Design Development have a total estimated construction cost of approximately \$2.44 billion and are listed below.

Elementary School Districts	Middle and Middle/High School Districts	High School Districts	Other Grade Configurations
Amherst (K-5) Berkley (PK-4) Burlington (K-5) Hopkinton (2-4) Maynard (PK-3) New Bedford (K-5) Newton (K-5) North Adams (PK-6) Scituate (PK-5)	Clinton (5-8) Lynn (6-8)	Agawam (9-12) East Longmeadow (9-12) Nashoba (9-12) Revere (9-12) Tri County (9-12)	Brookline (PK-8) Whitman-Hanson (5-8)

District Design Submittals

During the Design Development phase, districts will submit three design submittals (Design Development, 60% Construction Documents, and 90% Construction Documents) for the MSBA to review. MSBA staff reviews the documents to ensure the project is still in compliance with the PFA. The chart below indicates the number of submittals received and reviewed by the MSBA in each fiscal year.

Fiscal Year	DD Reviews	60% Reviews	90% Reviews	Total Reviews
FY2010	5	0	0	5
FY2011	21	24	20	65
FY2012	12	24	28	64
FY2013	20	20	19	59
FY2014	15	13	14	42
FY2015	6	12	13	31
FY2016	10	10	8	28
FY2017	11	10	12	33
FY2018	10	11	9	30
FY2019	17	16	10	43
FY2020	12	16	18	46
FY2021	6	11	19	36
FY2022	15	9	10	34
FY2023	12	19	13	44
FY2024	11	5	6	22
FY2025	0	10	1	11
Totals	183	210	200	593

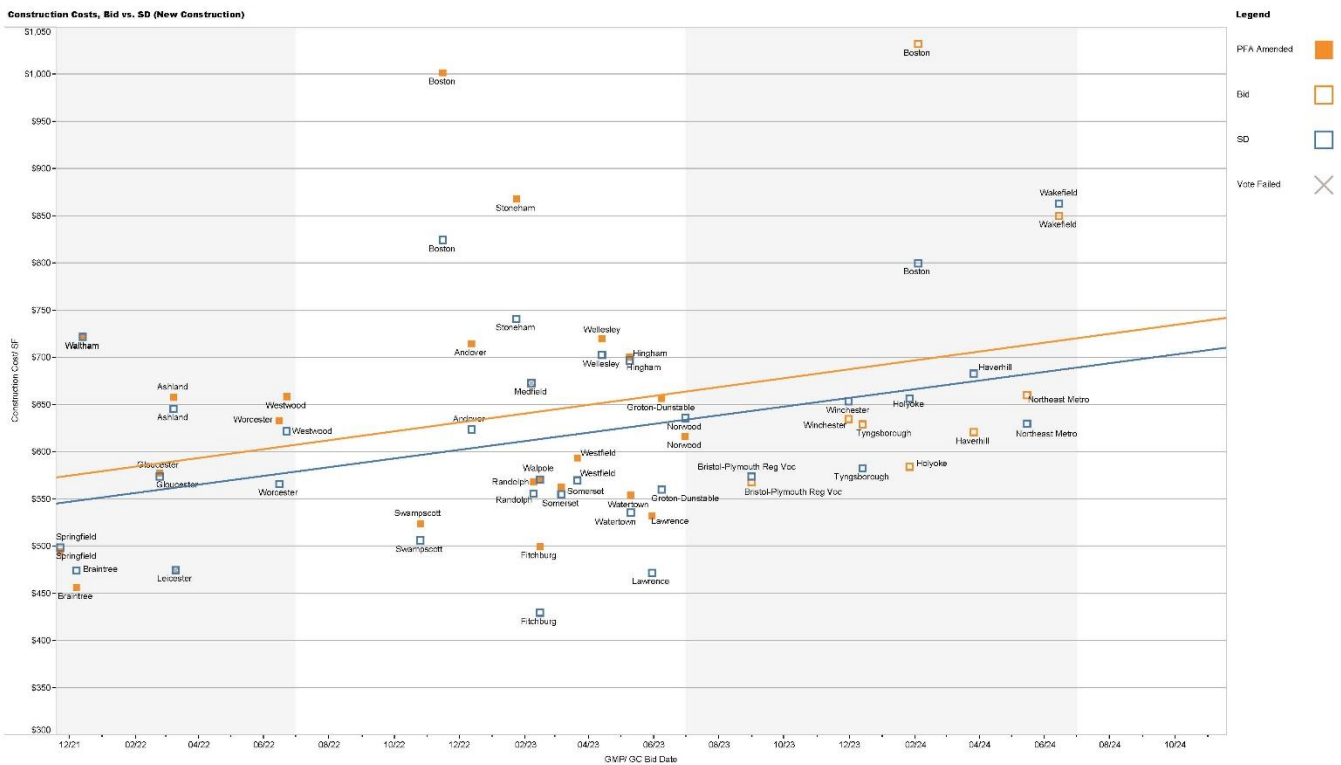
SUMMARY OF BID DATA

Based on the most recent data and schedules provided by districts, six projects are scheduled to receive sub-bids in 2024 while 16 projects are scheduled to receive sub-bids in 2025 and six in 2026. The total number of projects has increased by three projects since the last report following Project Scope and Budget Agreement approval by the Board.

Year	Number of Projects	Design Basis for Enrollment	Project Budget	Construction Budget	Construction Range
2024	6	5,150	\$1.01 billion	\$0.82 billion	\$484 - \$863
2025	16	11,100	\$2.42 billion	\$1.95 billion	\$684 - \$1,020
2026	6	5,820	\$1.32 billion	\$1.08 billion	\$701 - \$958
Grand Total	28	22,070	\$4.76 billion	\$3.85 billion	

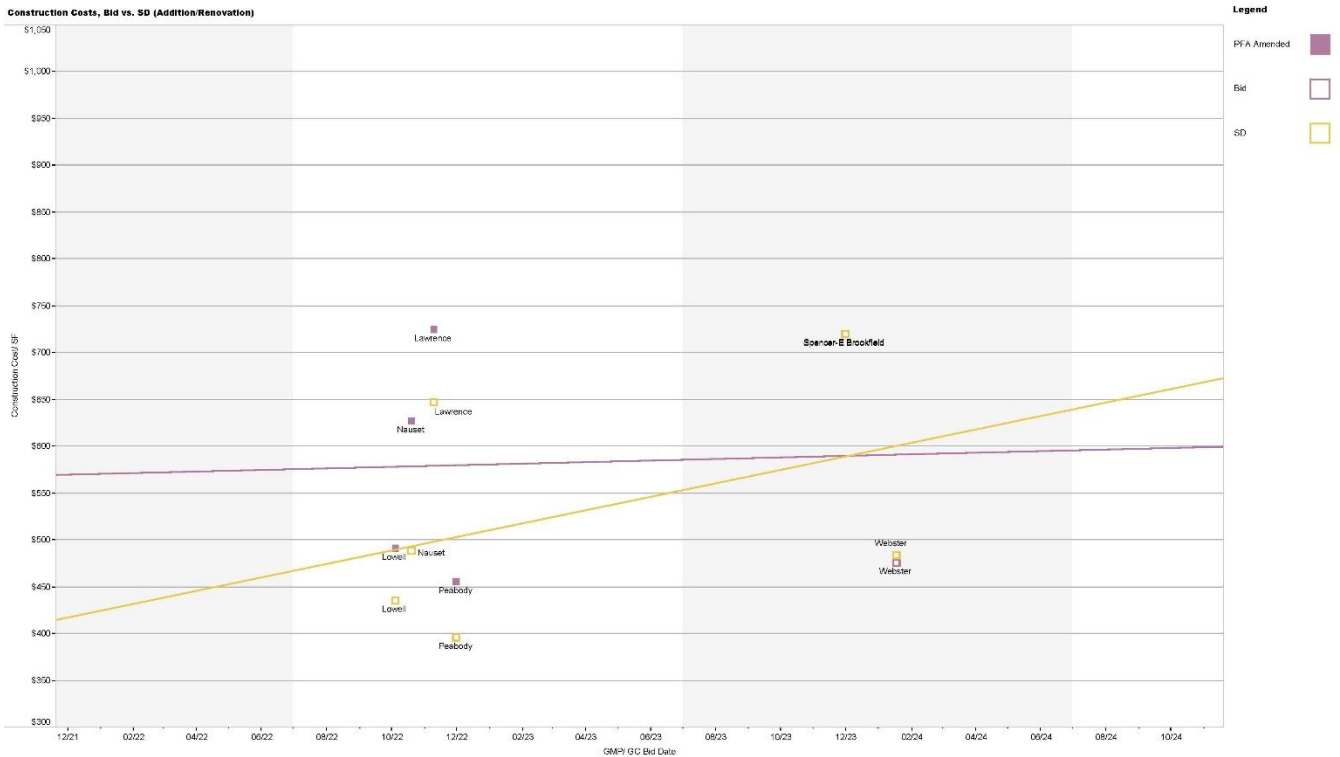
Note: These numbers are based on preliminary information received from the District and are subject to further review and calculation. Data is shown only for projects which have Project Scope and Budget Agreement approval by the Board. For additional information on the bid schedules of these projects, please see Appendix B.

The graph below plots Schematic Design Construction Estimates and Construction Bid Results for new construction projects from July 2021 to present. The projects are presented based on their dates of DBB bids or GMP executions. The graph includes seven new construction projects in FY 2022, 15 new construction projects in FY 2023, eight new construction projects in FY 2024, and zero new construction projects in FY 2025. The Orange Line is a trend line for Bid Costs and the Blue Line is a trend line for Schematic Design Construction Estimates. No projects have been added since the last report prepared for the October 30, 2024, Board of Directors meeting.



A fully interactive version of the New Construction graph is available on the MSBA website, here: <http://info.massschoolbuildings.org/TabPub/TableauCostData.aspx>.

The graph below plots Schematic Design Construction Estimates and Construction Bid Results for addition/renovation projects from July 2021 to present. The projects are presented based on their dates of DBB bids or GMP executions. The graph includes zero addition/renovation projects in FY 2022, four addition/renovation projects in FY 2023, two addition/renovation projects in FY 2024, and zero addition/renovation projects in FY 2025. The Purple Line is a trend line for Bid Costs and the Yellow Line is a trend line for Schematic Design Estimates. *No projects have been added since the last Project Overview Report for the October 30, 2024, Board of Directors meeting.*



A fully interactive version of the Addition/Renovation graph is available on the MSBA website, here: <http://info.massschoolbuildings.org/TabPub/TableauCostData.aspx>.

CONSTRUCTION

When a district with a Design-Bid-Build Construction project issues a Notice to Proceed, or when a Construction Manager At-Risk project has received bids for the concrete foundation package, the project is advanced to the Construction Phase. Currently, there are 57 projects in the Construction Phase with a total estimated construction cost of \$3.31 billion. Of those 57 projects, 34 are ARP Projects and 23 are Core Program Projects; however, this does not include the 30 projects that have reached substantial completion and are currently in the Building Complete Phase. The 23 Core Program Projects have a total estimated construction cost of \$3.23 billion and are listed below.

Elementary School Districts	Middle and Middle/High School Districts	High School Districts	Other Grade Configurations
Andover (PK-5) Fitchburg (1-5) Hingham (PK-5) Westfield (K-4) Winchester (PK-5)	Holyoke (6-8) Tyngsborough (6-8) Webster (6-12)	Arlington (9-12) Bristol-Plymouth (9-12) Greater Fall River VT (9-12) Lowell (9-12) Nauset RSD (9-12) Northeast Metro (9-12) Spencer-East Brookfield (9-12) Stoneham (9-12) Wakefield (9-12) Watertown (9-12)	Boston Carter (PK-12) Haverhill (5-8) Lawrence Leahy (K-8) Lawrence Oliver (K-8) Norwood (5-8)

Amendment to the Project Funding Agreement (PFA)

Upon receipt of construction bids or the execution of a GMP, a district submits the Contractor's Schedule of Values to the MSBA. MSBA staff will collaborate with the district to reconcile the construction costs from the schedule of values against the estimated construction budget. Afterwards, an amendment to the PFA is executed to reflect the bids received for those projects. The chart, shown below, provides the number of amendments to PFAs listed by fiscal year.

Fiscal Year	Total Amendments
FY2012	30
FY2013	31
FY2014	31
FY2015	17
FY2016	22
FY2017	8
FY2018	15
FY2019	13
FY2020	10
FY2021	17
FY2022	20
FY2023	7
FY2024	32
FY2025	9

Substantial Completion

Fourteen projects are scheduled to reach Substantial Completion in 2024. They are listed in the table below. The MSBA has received ten executed certificates of substantial completion. Staff will continue to monitor these projects for updates.

Project	Enrollment	Contractor	OPM	Designer	Substantial Completion Date*	Building Construction Completion Date**	Variance (days)
Westwood Paul Hanlon Elementary School	560	Brait Builders Corp.	Vertex (Compass)	Dore & Whittier Architects, Inc.	5-Jan-24	26-Feb-24	52 behind
Waltham Senior High School	1,830	Consigli Construction Company	Leftfield, LLC	SMMA, Inc.	24-May-24	16-Aug-24	84 behind
Boston Quincy Upper School	650	Turner Construction	Skanska USA Building, Inc.	HFMH Architects, Inc.	18-Jun-24	30-Aug-24	73 behind
Walpole Bird Middle School	905	Fontaine Brothers, Inc.	Vertex (Compass)	Tappe Architects, Inc.	16-Jul-24	16-Jul-24	-
Andover West Elementary School	925	Gilbane Building Company	PMA Consultants, LLC	SMMA, Inc.	26-Jul-24		
Worcester Doherty Memorial High School	1,670	Fontaine Brothers, Inc.	Tishman Construction Corporation of MA	Lamoureux Pagano Associates Architects, Inc.	26-Jul-24	26-Jul-24	-
Randolph Lyons Elementary School	315	Agostini Construction Co.	CHA Consulting, Inc.	TSKP Studio, LLC	28-Jul-24	29-Jul-24	1 behind
Wellesley John D. Hardy Elementary School	365	Shawmut Design and Construction	Vertex (Compass)	SMMA, Inc.	29-Jul-24	29-Jul-24	-
Stoneham High School	695	Consigli Construction Company	SMMA, Inc.	Perkins+Will	31-Jul-24		

Project	Enrollment	Contractor	OPM	Designer	Substantial Completion Date*	Building Construction Completion Date**	Variance (days)
Groton-Dunstable Florence Roche Elementary School	645	Gilbane Building Company	Leftfield, LLC	Studio G Architects, Inc.	9-Aug-24	2-Aug-24	7 ahead
Swampscott Hadley Elementary School	900	CTA Construction Co., Inc.	Hill International Company	LaVallee Brensinger Architects	9-Aug-24	9-Aug-24	-
Somerset Middle School	590	Brait Builders Corp.	CGA Project Management	Ai3 Architects LLC	16-Aug-24	16-Aug-24	-
Hingham Foster Elementary School	605	Bacon Construction Co, Inc.	PMA Consultants, LLC	Raymond Design Associates	22-Aug-24		
Westfield Franklin Avenue Elementary School	395	Fontaine Brothers, Inc.	P3 Inc.	Caolo & Bieniek	1-Nov-24		

*As defined in the executed Construction Contract, once provided to the MSBA

**Date on the Certificate of Substantial Completion, once provided to the MSBA

CLOSEOUT

After the district's contractor finishes all project work including demolishing the old building, completing site work, and finalizing commissioning, the project proceeds to the Closeout Phase. Once all the project costs have been paid by the District, the District submits its Final Request for Payment Reimbursement via the MSBA's Pro-Pay system. After the District submits all the items identified on the MSBA's Index of Final Closeout, including the Final Request for Payment Reimbursement, the MSBA initiates the Draft Audit Report and sends it to the District for its consideration. The MSBA performs the final audit to determine final total grant amounts. Final payment to the District requires the MSBA Board's approval of the final Total Facilities Grant for the project.

Currently, there are 118 projects in the Closeout Phase, including 84 ARP projects and 34 Core Program projects. The chart, shown below, lists the Core Program projects by year of achieved Substantial Completion:

Year	All Project Phases	Final Audit Approved	Closeout	Building Complete
2012	22	22	0	0
2013	24	24	0	0
2014	19	19	0	0
2015	27	26	1	0
2016	12	12	0	0
2017	8	6	2	0
2018	11	11	0	0
2019	13	11	2	0
2020	7	2	5	0
2021	18	1	15	2
2022	15	1	8	6
2023	8	0	1	7
2024	11	0	0	11
Total	195	135	34	26

POST OCCUPANCY EVALUATION

Approximately three years after an MSBA-funded school building reaches substantial completion, the MSBA coordinates with districts to distribute post occupancy surveys and pre-visit questionnaires, and to schedule building visits with district representatives to complete a Post Occupancy Evaluation (“POE”). The MSBA’s POE process was developed in part to assist the MSBA in understanding that MSBA-funded school building projects are operating as intended and performing as designed. In addition, the collection of technical data, accompanied by school district and occupant feedback, enables the MSBA, school districts, and the consultant community to apply lessons learned to future school building projects as well as to the ongoing maintenance and operations of MSBA-funded school buildings.

A preliminary list of the districts that may participate in POEs in FY 2025 is shown below; note that this list will evolve for the remainder of the fiscal year as districts agree or decline to participate. The MSBA will provide a POE report to each participating district.

<u>Project</u>	<u>Enrollment</u>	<u>Contractor</u>	<u>OPM</u>	<u>Designer</u>	<u>Building Construction Completion Date*</u>	<u>POE Visit Date</u>
<u>Danvers</u> <u>Ivan G. Smith ES</u>	<u>465</u>	<u>W.T. Rich</u>	<u>Colliers</u>	<u>Tappe</u>	<u>11-Jun-21</u>	<u>TBD</u>
<u>Foxborough</u> <u>Mabelle M Burrell ES</u>	<u>270</u>	<u>CTA Construction</u>	<u>Colliers</u>	<u>Kaestle Boos Associates</u>	<u>26-Aug-21</u>	<u>8-Oct-24</u>
<u>Georgetown</u> <u>Penn Brook ES</u>	<u>770</u>	<u>Brait Builders</u>	<u>Municipal Building Consultants</u>	<u>Drummey Rosane Anderson</u>	<u>1-Jun-15</u>	<u>TBD</u>
<u>Hanover</u> <u>Sylvester ES</u>	<u>560</u>	<u>Brait Builders</u>	<u>P3</u>	<u>Mount Vernon Group</u>	<u>12-Dec-18</u>	<u>5-Dec-24</u>
<u>Ludlow</u> <u>Chapin Street ES</u>	<u>630</u>	<u>Fontaine Brothers</u>	<u>STV DPM</u>	<u>Mount Vernon Group</u>	<u>2-Jul-21</u>	<u>21-Oct-24</u>
<u>Somerville</u> <u>Somerville HS</u>	<u>1,590</u>	<u>Suffolk</u>	<u>PMA</u>	<u>SMMA</u>	<u>22-Feb-21</u>	<u>TBD</u>

*Date on the Certificate of Substantial Completion, once provided to the MSBA

ACCELERATED REPAIR PROGRAM



The photos above depict the roof replacement at Worcester’s Tatnuck Magnet School, serving 380 students. The project replaced the built-up roofing system (consisting of gravel, felt, and tar) on the original building and the EPDM membrane roofing on the 1953 addition with a new fully-adhered EPDM membrane roofing system, thus extending the useful life of the 115-year-old building. The project reached Substantial Completion in August 2021 and anticipates receiving Final Audit Approval at the December 13, 2024 Board of Directors meeting.

Currently, there are **203** ARP projects in the MSBA’s Eligibility Period and Capital Pipeline. The **203** projects include **four** projects approved for Final Audit in FY 2025. Prior to FY 2025, 262 projects received Final Audit approval. The combined **465** projects are located in **150** districts, many of whom have been invited to the ARP multiple times. All the new information that has been updated since the last report is ***italicized and bolded***.

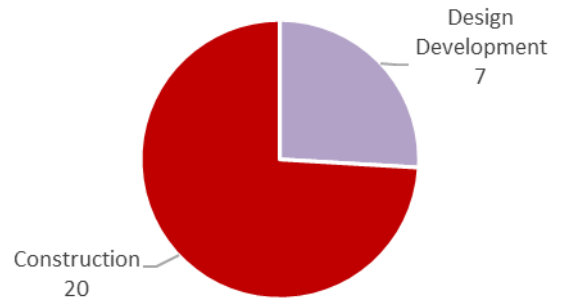
Repair Program	Number of Districts	Number of Projects	Total Project Budgets	Maximum Facilities Grants	Number of Projects Final Audit Approved
<i>2024 Accelerated</i>	<i>37</i>	<i>70</i>	-	-	-
2022 Accelerated	12	27	\$86,949,136	\$55,301,436	-
2021 Accelerated	15	26	\$109,602,763	\$59,925,011	<i>1</i>
2020 Accelerated	15	21	\$81,731,451	\$43,329,550	2
2019 Accelerated	24	38	\$85,180,989	\$52,047,959	<i>17</i>
2018 Accelerated	20	30	\$83,172,480	\$47,018,557	<i>19</i>
2017 Accelerated	19	34	\$117,020,597	\$73,280,673	20
2016 Accelerated	28	48	\$156,598,234	\$83,007,586	40
2015 Accelerated	24	43	\$136,680,652	\$91,974,052	42
2014 Accelerated	34	47	\$108,410,084	\$65,388,035	44

2024 Accelerated Repair Program

- Invitations – 37 districts, 70 projects.
 - Scope includes 57 roofs, and 17 windows/doors

2022 Accelerated Repair Program

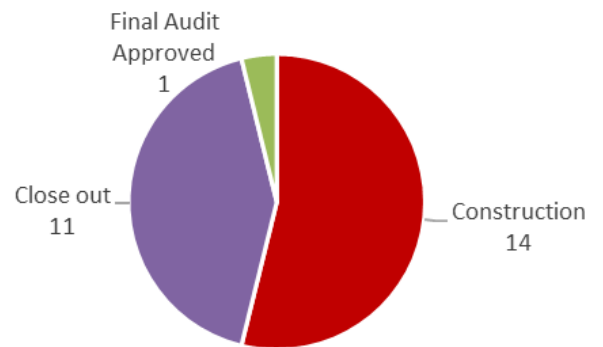
- Invitations – 16 districts, 33 projects.
 - Scope includes 10 roofs, 7 windows/doors, and 16 boilers.
- SOI Removal – four districts; six projects (four roofs, two boilers).
- Approved for Project Funding Agreement – 12 districts, representing 27 projects.
- Total Project Budgets - \$86,949,136
- MSBA Total Facilities Grant - \$55,301,436
- 19 of 20 projects reported bids are within the estimated budget.



2022 ARP Status Chart

2021 Accelerated Repair Program

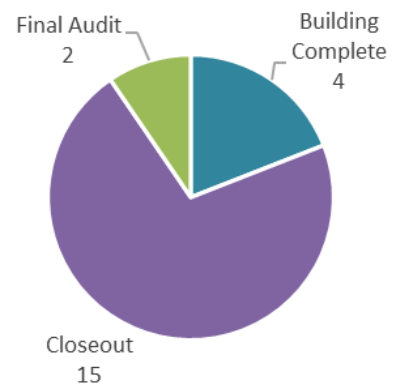
- Invitations – 16 districts, 28 projects.
 - Scope includes 13 roofs, 11 windows/doors, and eight boilers.
- SOI Removal – one district; two projects (two roofs, two windows/doors).
- Approved for Project Funding Agreement – 15 districts, representing 26 projects.
- Total Project Budgets - \$109,602,763
- MSBA Total Facilities Grant - \$59,925,011
- 81% of projects bid are within the estimated budget.
- **One project has completed Final Audit.**



2021 ARP Status Chart

2020 Accelerated Repair Program

- Invitations – 18 districts, representing 25 projects.
 - Scope includes 14 roofs, nine windows/doors, and four boilers.
- SOI Removal – three districts; four projects (two roofs, one windows/doors, one boiler).
- Approved for Project Funding Agreement – 15 districts, representing 21 projects.
- Total Project Budgets - \$81,731,451
- MSBA Total Facilities Grant - \$43,329,550
- 71% of projects bid are within the estimated budget while one district removed its SOI (one roof) following receipt of bids which exceeded the estimated budget.
- Two projects have completed Final Audit.



2020 ARP Status Chart

2019 Accelerated Repair Program

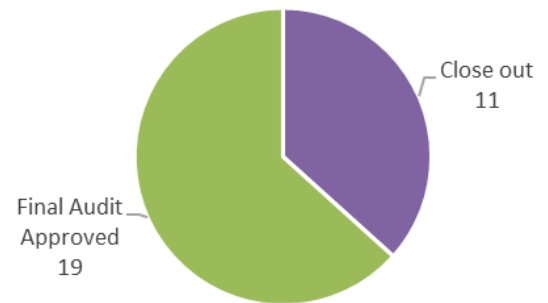
- Invitations – 27 districts, representing 42 projects.
 - Scope includes 24 roofs and 21 boilers.
- SOI Removal – three districts; four projects (one roof, three boilers).
- Approved for Project Funding Agreement – 24 districts, representing 38 projects.
- Total Project Budgets - \$85,180,989
- MSBA Total Facilities Grant - \$52,047,959
- Three districts, representing three projects, required a schedule extension following PFA approval.
- 97% of projects bid are within the estimated budget.
- **17 projects, or 45%, have completed Final Audit.**



2019 ARP Status Chart

2018 Accelerated Repair Program

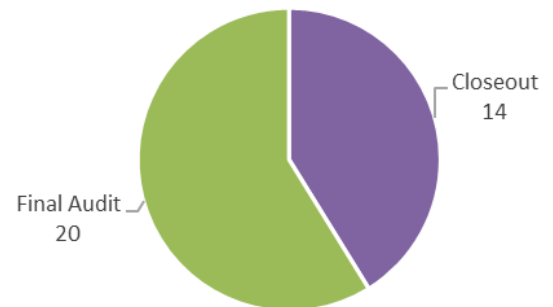
- Invitations – 23 districts, representing 34 projects.
 - Scope includes 17 roofs, 11 windows/doors, and 14 boilers.
- SOI Removal – three districts; four projects (two roofs, two windows/doors, one boiler).
- Approved for Project Funding Agreement – 20 districts, representing 30 projects.
- Total Project Budgets - \$83,172,480
- MSBA Total Facilities Grant - \$47,018,557
- Two districts, representing two projects, required a schedule extension following PFA approval.
- 90% of projects bid are within the estimated budget.
- **19 projects, or 63%, have completed Final Audit.**



2018 ARP Status Chart

2017 Accelerated Repair Program

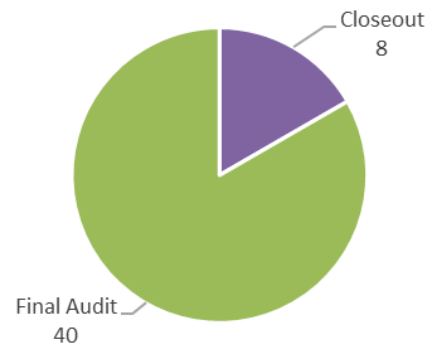
- Invitations – 20 districts, representing 36 projects.
 - Scope includes nine roofs, 23 windows/doors, and 15 boilers.
- SOI Removal - one district; two projects (one boiler; one windows/doors).
- Approved for Project Funding Agreement - 19 districts, representing 34 projects.
- Total Project Budgets - \$117,020,597
- MSBA Total Facilities Grant - \$73,280,673
- Three districts, representing six projects, required a schedule extension following PFA approval.
- 79% of projects bid are within the estimated budget.
- 20 projects, or 59%, have completed Final Audit.



2017 ARP Status Chart

2016 Accelerated Repair Program

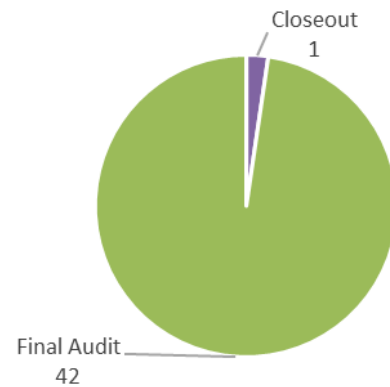
- Invitations – 28 districts, representing 49 projects.
 - Scope includes 25 roofs, 19 windows/doors, and 13 boilers.
- SOI Removal - one project (one boiler).
- Approved for Project Funding Agreements - 28 districts, representing 48 projects.
- Total Project Budgets - \$156,598,234
- MSBA Total Facilities Grant - \$83,007,586
- Four districts, representing four projects, required a schedule extension following PFA approval.
- 73% of projects bid are within the estimated budget.
- 40 projects, or 83%, have completed Final Audit.



2016 ARP Status Chart

2015 Accelerated Repair Program

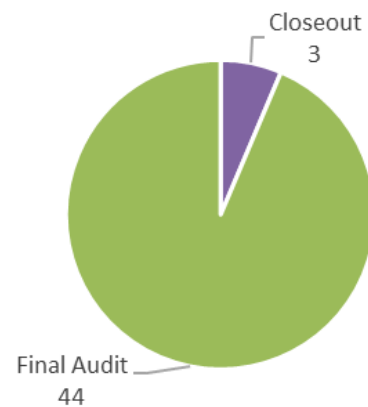
- Invitations – 24 districts, representing 44 projects.
 - Scope includes 22 roofs, 26 windows/doors, and nine boilers.
- SOI Removal – one project.
- Approved for Project Funding Agreements – 24 districts, representing 43 projects.
- Total Project Budgets - \$136,680,652
- MSBA Total Facilities Grants - \$91,974,052
- One district, representing one project, required two schedule extensions following PFA Approval.
- 81% of projects bid are within the estimated budget.
- 42 projects, or 98%, have completed Final Audit.



2015 ARP Status Chart

2014 Accelerated Repair Program

- Invitations – 36 districts, representing 51 projects.
- SOI Removal – two districts, representing four projects.
- Current 2014 ARP projects – 34 districts, representing 47 projects.
 - Scope includes 20 roofs, 25 windows/doors, and 13 boilers.
- Approved for Project Funding Agreements – 34 districts, representing 47 projects.
- Total Project Budgets - \$108,410,084
- MSBA Total Facilities Grants - \$65,388,035
- Four districts, representing six projects, required schedule extensions following PFA approval.
- 85% of projects bid are within the estimated budget.
- 44 projects, or 94%, have completed Final Audit.



2014 ARP Status Chart

Closed Accelerated Repair Programs

Repair Program	Number of Districts	Number of Projects	Number of Roofs	Number of Windows/ Doors	Number of Boilers	Final Costs Submitted	Final Total Facilities Grants
2013 Accelerated	25	45	30	13	7	\$70,489,512	\$37,769,944
2012 Accelerated	24	36	21	11	7	\$47,748,996	\$28,518,764

Status of Green Repair Program

The Green Repair Program resulted in PFA authorizations totaling \$366,647,226 in Total Project Costs and \$222,889,218 in MSBA grants. All 189 projects from 93 districts have been approved for final grant payments.

2022 Accelerated Repair Projects – Construction Estimate vs. 2023-2024

- 19 of 20 projects reported bids within estimated budget.
- *Four additional projects are anticipated to be reported by the February 2025 Board of Directors meeting.*

District	School	Scope	Project Type	Bid Date	Construction Estimate*	Bid Amount*	Variance from Construction Estimate	Reimbursement Rate	Potential Grant Variance**
New Bedford	Ellen R Hathaway	Windows / Doors	DBB	Nov-23	\$3,038,097	\$2,276,700	\$761,397	80.00%	\$609,118
Mansfield	Harold L Qualters Middle	Boiler	DBB	Dec-23	\$3,180,377	\$2,805,000	\$375,377	52.89%	\$198,537
Holyoke	H.B. Lawrence School	Windows / Doors	DBB	Jan-24	\$3,468,923	\$2,930,745	\$538,178	80.00%	\$430,542
Holyoke	Lt Elmer J McMahon Elementary	Windows / Doors	DBB	Jan-24	\$2,744,673	\$2,683,604	\$61,069	80.00%	\$48,855
Holyoke	Maurice A Donahue Elementary	Partial Windows / Doors	DBB	Jan-24	\$2,605,878	\$2,324,345	\$281,533	80.00%	\$225,226
Holyoke	Wm J Dean Voc Tech High	Boiler	DBB	Jan-24	\$1,182,674	\$947,000	\$235,674	80.00%	\$188,539
New Bedford	Elizabeth Carter Brooks	Roof	DBB	Jan-24	\$2,791,123	\$1,721,200	\$1,069,923	80.00%	\$855,938
Springfield	Milton Bradley School	Boiler	DBB	Mar-24	\$1,685,642	\$932,800	\$752,842	80.00%	\$602,274
Springfield	Rebecca M Johnson	Boiler	DBB	Mar-24	\$1,307,167	\$886,000	\$421,167	80.00%	\$336,934
Cambridge	Amigos School	Roof	DBB	Mar-24	\$1,429,125	\$1,380,770	\$48,355	34.16%	\$16,518
Boston	Dr. William Henderson Upper	Roof	DBB	Mar-24	\$2,814,313	\$1,924,000	\$890,313	60.42%	\$537,927
Lowell	B.F. Butler Middle	Boiler	DBB	Apr-24	\$1,116,448	\$827,370	\$289,078	79.58%	\$230,048
Lowell	Bartlett Community Partnership	Boiler	DBB	Apr-24	\$1,841,561	\$1,633,000	\$208,561	79.58%	\$165,973
Lowell	Henry J Robinson Middle	Boiler	DBB	Apr-24	\$1,650,462	\$1,519,187	\$131,275	79.58%	\$104,469
Lowell	John J Shaughnessy	Roof	DBB	Apr-24	\$4,524,525	\$1,895,900	\$2,628,625	79.58%	\$2,091,860
Lowell	Joseph McAvinnue	Boiler	DBB	Apr-24	\$1,123,694	\$888,424	\$235,270	79.58%	\$187,228
Fitchburg	Arthur M. Longsjo Middle School	Boiler	DBB	Feb-24	\$1,748,501	\$1,470,000	\$278,501	80.00%	\$222,801
Quincy	Wollaston School	Partial Roof	DBB	May-24	\$1,016,703	\$721,800	\$294,903	57.57%	\$169,776
Quincy	Montclair	Partial Roof	DBB	May-24	\$1,524,009	\$1,844,000	-\$319,991	57.57%	\$0
Quincy	Francis W Parker	Boiler	DBB	Jul-24	\$1,139,430	\$785,339	\$354,091	57.57%	\$203,850
				Total	\$41,933,325	\$32,397,184	\$9,536,141		\$7,426,413

Accelerated Repair Projects – Schedule Extension Update

The MSBA has granted districts conditional extensions to their PFAs pending compliance with the following stipulations:

- The district must submit a detailed, revised, construction timeline that explains how the work will be completed at each school; and
- Any costs that are related to a district requesting an extension to the construction schedule will be the sole responsibility of the district, and those costs are categorically ineligible for reimbursement by the MSBA.

Schedule delays for these districts can be attributed to local funding issues, lead time for materials, and construction delays on site. In no event have the extended schedules resulted in an increase to the Estimated Maximum Total Facilities Grant, as authorized by the Board.

Seven of the 21 2020 ARP Projects revised their construction schedule to reflect substantial completion in 2023 or 2024. Staff has reported previously on the shaded projects listed below, which were in Construction. Each project has exited the Construction phase; consequently, this will be the final Schedule Extension Update.

District	School	Scope	Original Construction Completion Date	Updated Construction Completion Date	Reason for Schedule Extension
New Bedford	Elwyn G Campbell	Windows / Doors, Boiler	28-Oct-22	25-Aug-23	The District has agreed to revise its construction schedule with its consultants and contractor to complete construction in 2023.
Plymouth	Federal Furnace Sch	Roof	16-Sep-22	19-Aug-23	The District has agreed to revise its construction schedule with its consultants and contractor to complete construction in 2023.
Plymouth	Indian Brook	Roof	16-Sep-22	19-Aug-23	The District has agreed to revise its construction schedule with its consultants and contractor to complete construction in 2023.
Plymouth	West Elementary	Roof	16-Sep-22	19-Aug-23	The District has agreed to revise its construction schedule with its consultants and contractor to complete construction in 2023.
Revere	Abraham Lincoln	Windows / Doors	30-Aug-23	23-Aug-24	The District has agreed to revise its construction schedule with its consultants and contractor to complete construction in 2024.

PROJECT VARIANCES

Core Program – Total Project Budget Update

Upon receiving the Board’s approval of the Project Scope and Budget, the MSBA and participating districts enter into a Project Funding Agreement, which establishes the Total Project Budget and the Estimated Maximum Total Facilities Grant for an approved project. Staff has reported on budget increases for the 49 projects below at previous Board meetings. No shading appears where project information is new or updated since the previous Board meeting. In no event has the increase in a budget resulted in an increase to the Maximum Total Facilities Grant, as authorized by the Board.

District	School	Scope	Project Funding Agreement		PFA Bid Amendment/ Final Audit		Reason for Increase to Total Project Budget
			Total Project Budget	Maximum Total Facilities Grant	Total Project Budget	Maximum Total Facilities Grant	
Andover	Bancroft ES	New	\$44,659,837	\$16,773,753	\$50,299,859	\$16,575,965	The District has appropriated additional funds to cover the costs associated with increased construction costs and additional contingencies for litigation/settlement costs and other ineligible costs.
Andover	West ES	New	\$151,661,968	\$38,442,820	\$168,066,623	\$38,007,178	The District has appropriated additional funds to cover the costs associated with the construction bid overage.
Ashland	David Mindess ES	New	\$84,387,000	\$27,008,753	\$84,637,000	\$26,371,101	The District has transferred additional funds to cover the costs associated with increased construction costs.
Berlin-Boylston	Tahanto Regional HS	New	\$43,954,901	\$21,148,751	\$43,519,302	\$18,972,041	The District submitted final project costs that exceeded the total project budget established at bid. Final Costs did not exceed the original total project budget established at Project Funding Agreement.
Blue Hills	Blue Hills Regional Technical School	Add/ Reno	\$84,862,768	\$44,210,180	\$88,071,616	\$43,708,007	The District has appropriated additional funds to cover the costs associated with increased construction costs.
Boston	Boston Arts Academy	New	\$124,755,412	\$48,890,620	\$137,370,916	\$48,186,575	The District appropriated additional funds to cover costs associated with increased construction costs and additional contingency for change order costs.
Boston	Josiah Quincy Upper School	New	\$193,591,467	\$54,075,966	\$223,891,467	\$54,042,995	The District has appropriated additional funds to cover the costs associated with increased construction costs.
Bristol County Agricultural	Bristol County Agricultural HS	Add/ Reno	\$103,750,000	\$53,286,797	\$103,947,718	\$53,095,156	The District received additional funding through the CARES Act for Municipal Government. The federal Coronavirus Aid, Relief, and Economic Security Act (the "CARES Act") includes funds for Massachusetts governments to use to pay costs incurred in responding to the COVID-19 pandemic.
			\$103,750,000	\$53,286,797	\$106,547,718	\$52,987,521	The District appropriated additional funds to cover the Closeout and Settlement Agreement with the General Contractor and Architect and Owner's Project Manager for additional construction management fees incurred.
Burlington	Marshall Simonds MS	Add/ Reno	\$32,865,272	\$17,143,365	\$34,221,929	\$15,362,127	The District appropriated at its May 2012 annual town meeting through Articles 18: 19, additional funds for the costs associated with the construction of the new field complex and field lighting replacement.
Chicopee	Dupont Middle School	Reno	\$37,999,940	\$30,100,581	\$39,849,940	\$29,750,043	The District appropriated additional funds to cover the costs associated with increased construction costs.
Essex North Shore Agricultural & Technical School District	Essex North Shore Agricultural & Technical HS	New	\$125,000,000	\$77,500,000	\$133,770,000	\$77,500,000	The Board was informed at the March 30, 2011 meeting that the Total Project Budget had increased due to additional ineligible scope that would be funded by DCAMM.
			\$125,000,000	\$77,500,000	\$134,501,368	\$77,500,000	The District has appropriated additional funds to cover the costs associated with increased construction costs for horse tack barn renovations.
Fitchburg	Crocker ES	New	\$65,032,984	\$47,339,378	\$76,650,000	\$47,302,225	The District appropriated additional funds to cover costs associated with increased construction costs and to increase contingency budget.
Framingham	Fuller Middle School	New	\$98,276,878	\$39,453,932	\$101,141,939	\$38,698,964	The District appropriated additional funds to cover the costs associated with the installation of new turf fields.
Greater New Bedford	Greater New Bedford Vocational and Technical High School	Add/ Reno	\$17,099,808	\$13,543,920	\$16,396,429	\$12,258,642	The District submitted final project costs that exceeded the total project budget established at bid. Final Costs did not exceed the original total project budget established at Project Funding Agreement.
Groton-Dunstable Regional School District	Florence Roche ES	New	\$78,650,734	\$32,309,508	\$89,150,734	\$32,253,445	The District appropriated additional funds to cover costs associated with increased construction costs and to increase contingency.
Haverhill	Caleb Dustin Hunking School	New	61,500,000	40,363,276	61,677,024	39,933,953	The District has appropriated additional funds to cover additional costs associated with Furnishings and Equipment.

District	School	Scope	Project Funding Agreement		PFA Bid Amendment/ Final Audit		Reason for Increase to Total Project Budget
			Total Project Budget	Maximum Total Facilities Grant	Total Project Budget	Maximum Total Facilities Grant	
Hopkinton	Center ES	New	\$45,629,373	\$14,058,455	\$47,129,373	\$14,058,455	The District has appropriated \$1,500,000 of additional funds to cover the costs associated with the construction of a building addition due to an unanticipated increase in enrollment.
Lawrence	Francis M. Leahy ES	New	\$103,740,911	\$66,732,018	\$115,795,797	\$66,243,007	The District appropriated additional funds to cover costs associated with increased construction costs and to increase contingency.
Lawrence	Oliver Partnership School	Add/ Reno	\$132,300,000	\$61,647,551	\$147,800,000	\$61,359,903	The District appropriated additional funds to cover costs associated with increased construction costs and to increase contingency.
Lexington	Joseph Estabrook ES	New	\$40,792,248	\$12,250,739	\$43,392,248	\$12,148,491	The District has executed a GMP that exceeds the Construction Budget of the PFA. The District has appropriated additional funds to cover the costs associated with increased construction costs and additional contingencies.
Lowell	High School	Add/ Reno	\$343,399,220	\$215,992,406	\$381,967,231	\$215,992,406	The District has appropriated additional funds to cover the costs associated with the construction bid overage and an increase to construction contingency budget.
Minuteman	Minuteman RVTHS	New	\$144,922,480	\$45,206,061	\$148,072,480	\$44,117,021	The District appropriated additional funds to cover the costs associated with new athletic fields.
Nauset	Nauset Regional HS	Add/ Reno	\$131,825,665	\$44,739,207	\$169,925,665	\$44,739,207	The District appropriated additional funds to cover costs associated with increased construction costs and to increase contingency budget.
New Bedford	Irwin Jacobs (Hannigan) ES	New	\$36,747,197	\$22,726,582	\$34,925,392	\$22,372,846	The District submitted final project costs that exceeded the total project budget established at bid. Final Costs did not exceed the original total project budget established at Project Funding Agreement.
Newburyport	Nock/Molin MS	Add/ Reno	\$26,997,326	\$13,697,934	\$28,170,749	\$12,520,326	The District has received additional funding to cover additional construction change order costs.
North Reading	North Reading MS/HS	Add/ Reno	\$107,727,074	\$49,323,123	\$123,227,074	\$49,323,123	This is a CMR project. The estimated, reconciled construction costs tracked over budget at DD (\$9,746,655 over), 60% (\$4,655,965 over), and 90% (\$15,136,846 over). A Town override vote in March 2013 obtained an additional \$15,500,000 in local funding to proceed.
Norfolk County Agricultural	Norfolk County Agricultural HS	Add/ Reno	\$28,552,385	\$15,369,712	\$30,589,078	\$13,867,050	The District has executed a Tender Agreement and Completion Agreement Contract, increasing its Total Project Budget, following the termination of its original construction contract.
Northborough	Lincoln Street ES	Add/ Reno	\$25,530,553	\$10,407,408	\$25,530,553	\$10,407,408	The MSBA Board Approved Total Project Budget increased by \$60,400 from \$25,470,153 to \$25,530,553 due to the addition of an alternate, for a new ball field added at the District's request.
Oxford	Oxford MS	Add/ Reno	\$6,128,870	\$3,483,589	\$7,340,000	\$3,359,171	The District received additional funding to cover additional construction costs including accessibility upgrades. District submitted final project costs that exceeded the total project budget established at bid. Final Costs did not exceed the original total project budget established at Project Funding Agreement.
Peabody	William A. Welch ES	Add/ Reno	\$29,973,821	\$17,628,004	\$33,432,013	\$17,628,004	The District has appropriated additional funds to cover the costs associated with the construction bid overage.
Plymouth	South HS	New	\$107,800,000	\$46,867,514	\$111,063,271	\$46,328,160	The District appropriated \$3,263,371 of additional funding to fund change order work to incorporate scope previously identified in the construction bid documents as Alternate 4 (synthetic turf field) and a portion of Alternate 5 (electrical infrastructure to support future lights at synthetic turf field). Note that the increased Total Project Budget will not increase the Maximum Facilities Grant.
Quincy	Reay E Sterling MS	New	\$58,314,910	\$29,285,563	\$58,825,659	\$28,482,446	The District increased its Total Project Budget due to additional construction change orders for a turf field and for delay costs associated with a utility company work stoppage.
Revere	Staff Sergeant James J. Hill ES	New	\$45,402,396	\$29,551,048	\$45,402,396	\$29,551,048	At Project Scope and Budget, the Total Project Budget was approved at \$44,382,396. The City of Revere has increased the land acquisition budget. Therefore, the projected total project budget at PFA has increased to \$45,402,396. Note that the MSBA grant has not changed since the Project Scope and Budget Agreement.
Salem	Saltonstall ES	Repair	\$15,503,406	\$11,794,492	\$15,752,033	\$10,709,091	The District has executed a GMP that exceeds the Construction Budget of the PFA. The District has appropriated additional funds to cover the costs associated with increased construction costs and additional contingencies.
Somerville	East Somerville Community School	Add/ Reno	\$33,185,258	\$15,237,996	\$38,006,621	\$15,237,996	At the March 28, 2012 Board Meeting, the Board approved an amendment to the PFA and a \$6.25M District loan.
Stoneham	High School	New	\$189,593,594	\$56,574,750	\$214,583,851	\$56,574,750	The District appropriated additional funds to cover costs associated with increased construction costs and to increase contingency budget.
Sutton	Sutton MS	Add/ Reno	\$59,945,474	\$29,843,511	\$60,130,536	\$27,002,506	The District has executed a Tender Agreement and Completion Agreement Contract, increasing its Total Project Budget, following the termination of its original construction contract.
Swampscott	Hadley ES	New	\$98,316,523	\$34,390,610	\$101,226,506	\$34,254,224	The District has appropriated additional funds to cover the costs associated with the construction bid overage and an increase to construction contingency budget.

District	School	Scope	Project Funding Agreement		PFA Bid Amendment/ Final Audit		Reason for Increase to Total Project Budget
			Total Project Budget	Maximum Total Facilities Grant	Total Project Budget	Maximum Total Facilities Grant	
Tewksbury	Tewksbury HS	New	\$84,173,174	\$44,194,627	\$67,710,158	\$36,219,487	The District submitted final project costs that exceeded the total project budget established at bid. Final Costs did not exceed the original total project budget established at Project Funding Agreement.
Uxbridge	Uxbridge HS	New	\$43,000,000	\$22,362,328	\$44,986,479	\$22,362,328	The District has appropriated additional funds to cover the costs associated with the construction of athletic fields originally included in the PFA but which were not included in the bid as the District's construction contract would have exceeded the budget.
Watertown	High School	New	\$201,461,673	\$51,564,214	\$210,771,438	\$51,232,933	The District has appropriated additional funds to cover the costs associated with the construction bid overage.
Wellesley	John D. Hardy ES	New	\$72,500,000	\$15,585,802	\$72,848,074	\$15,320,270	The District has appropriated additional funds to cover the costs associated with the construction bid overage.
Weston	Field ES	New	\$31,504,146	\$8,310,510	\$32,654,146	\$8,105,549	District-approved Construction Change Orders exceeded available contingency amount.
Westwood	Paul R. Hanlon ES	New	\$87,820,386	\$18,235,725	\$89,856,899	\$18,087,808	The District has appropriated additional funds to cover the costs associated with the construction bid overage.
Winchester	Lynch ES	New	\$94,525,933	\$25,273,822	\$94,825,933	\$25,242,972	The District has appropriated additional funds to cover the costs associated with the construction bid overage.
Winchester	Winchester HS	Add/ Reno	\$129,923,146	\$44,493,270	\$131,513,741	\$43,100,458	The MSBA Board Approved Total Project Budget increased due to a construction change order for additional soil abatements at Skillings Field. Note that the increased Total Project Budget will not increase the Maximum Total Facilities Grant.
Winthrop	Winthrop MS/HS	New	\$81,818,740	\$42,582,841	\$81,432,986	\$41,249,005	The MSBA Board Approved Total Project Budget increased due to revised FEMA flood plain requirements which necessitated the elevation of the new building to be raised. Note that the increased Total Project Budget will not increase the Maximum Total Facilities Grant.
Woburn	Wyman-Hurld ES	New	\$33,705,396	\$14,387,427	\$39,647,723	\$14,387,427	The District had completed a project review with its Conservation Commission and an Order of Conditions was issued on June 12, 2015. A neighborhood group appealed this Order and was reviewed by The DEP. The District experienced delays in completing its City Council vote for its appropriation and incurred additional costs.
Worcester	Doherty HS	New	\$293,384,178	\$135,241,024	\$314,351,858	\$127,118,217	The District has appropriated additional funds to cover the costs associated with the construction bid overage.

Core Program – Additional Funding Update

Staff has received information provided by districts and their consultants reporting additional funding increases for the four projects below. Upon execution of an amendment to the Project Funding Agreement to incorporate the additional funding, a project will be removed from this table and reflected in the prior table. No shading appears where project information is new or updated since the previous Board meeting. In no event has the increase in a budget resulted in an increase to the Maximum Total Facilities Grant, as authorized by the Board. Since the last report, no district has been added.

District	School	Scope	Project Funding Agreement		PFA Bid Amendment/ Final Audit		Reason for Increase to Total Project Budget
			Total Project Budget	Maximum Total Facilities Grant	Total Project Budget	Maximum Total Facilities Grant	
Boston	Carter School	New	\$91,966,532	\$61,290,298	-	-	The District has appropriated an additional \$19.61M to fund increased construction costs.
Randolph	Elizabeth G. Lyons ES	New	\$50,384,511	\$27,558,249	-	-	The District has appropriated an additional \$4.00M to fund increased construction costs.
Spencer-East Brookfield	David Prouty HS	Add/ Reno	\$111,587,059	\$46,820,302	-	-	The District has appropriated an additional \$4.50M to fund increased construction costs.
Tyngsborough	Tyngsborough MS	New	\$83,480,000	\$28,637,072	-	-	The District has appropriated an additional \$4.63M to fund increased construction costs.