



Overview of MSBA Building Process

Select Board, March 22, 2023



WHO IS THE MSBA?

- Massachusetts School Building Authority
- Established by the legislature in 2004
- Funds capital improvement projects for public schools
- Revenue comes from one penny of state 6.25% sales tax
- Mission Statement: *“Partner with Massachusetts communities to support the design and construction of educationally appropriate, flexible, sustainable, and cost-effective public school facilities*



Massachusetts School Building Authority
Funding Affordable, Sustainable, and Efficient Schools in Partnership with Local Communities



STATEMENT OF INTEREST

- Informs MSBA about deficiencies that inhibit delivery of District's educational program
 - Submitted by School Superintendent
 - Requires School Committee vote
 - Requires Select Board vote
- Core Program SOI submissions will be accepted now to April 14, 2023.
- Requires additional support from the citizens of Natick
- One Statement Of Interest per School



BUILDING WITH THE MSBA

- **Time To Complete Building Projects-** it usually takes a community invited into the building program between 5-7 years to complete a project from the time of invitation to “ribbon cutting”, or when the doors open for students.
- **Enrollment -** MSBA will use a ten (10) year forecast of student enrollment to help shape the appropriate size of the school facility associated with the project.
- **School Consolidation -** MSBA looks very favorably on school consolidation of facilities understanding the many benefits of reducing the total number of schools operating in a district.
- **Funding Pre-Kindergarten -** MSBA will support the building costs for a PreK Program if a district is either trying to add a program to an elementary school (i.e. K-5) OR if a district is trying to keep a program that they already have. The MSBA will not reimburse a community for a stand-alone PreK program.



MSBA PROCESS

MSBA Process: Eight Stages or “Modules”

Module 1	• Eligibility Period
Module 2	• Forming the Project Team
Module 3	• Feasibility Study
Module 4	• Schematic Design
Module 5	• Funding the Project
Module 6	• Detailed Design
Module 7	• Construction
Module 8	• Completing the Project

MSBA Project: Feasibility & Schematic Design • 2018 STM



MODULE 1:ELIGIBILITY PERIOD

- Invited into Eligibility Period after review and **approval of Statement of Interest by MSBA**
- Eligibility Period is up to 270 days long
 - Initial Compliance Certification
 - Form a School Building Committee
 - Maintenance documents and enrollment certification
 - Local Authorization of Funding
 - Vote to authorize full amount of Feasibility Study



MODULE 2: FORMING THE PROJECT TEAM

Select an OPM

- Identify MCPPO certified employee to oversee procurement
- Identify Selection Committee
- Draft RFP
- Advertise
- Evaluate Respondents
- Select OPM
- Submit to MSBA for Approval

Select a Designer

- Complete RFS template
- Advertise
- MSBA Designer Selection Panel reviews applications
- District is represented on DSP (3 of 13 members)
- Applicants are ranked by DSP
- Interview may be held with 3 top-ranked firms
- District negotiates agreement with top ranked firm



MODULE 3: PERFORM FEASIBILITY STUDY

Start after Project Team is Selected

- Document Educational Program
- Document Existing Conditions
- Develop and Evaluate Alternatives (new/renovate/other sites)
- Recommend Preferred Solution to MSBA Board of Directors
- MSBA Board of Directors Preferred Solution Approval
- Prepare Schematic Design Documents



MODULE 4: SCHEMATIC DESIGN

- Preparation of Bid Documents
- Independent Estimates of design as project progresses
- Quality of Bid Documents influences quality of Project
- Contractor & Subcontractor pre-qualification during this phase



MODULE 5: FUNDING THE PROJECT

- 120 Days to secure local funding
 - Requires Town appropriation for full cost of Project
- Negotiate Project Funding Agreement
 - Establish basis of grant
 - Project Scope
 - Project Schedule
 - Project Site
 - Furniture, Fixtures & Equipment
- Execute Project Funding Agreement



MODULE 6: DETAILED DESIGN

- Design is completed
- Generate construction documentation
- Procure bids
- Award a construction contract



MODULE 7: CONSTRUCTION

- Construction begins
- MSBA continues to monitor all phases of construction and meets frequently with all parties to ensure project remains on schedule



MODULE 8: COMPLETING THE PROJECT

- The MSBA performs final audit to determine final total grant amounts and make final payment.



PROJECTED TIMELINES

What is the Project Timeline for a new school?

The earliest the new school would be built and open would be the Fall 2028 if Natick's Statement of Interest is approved in the Summer 2022. This project timeline is a best guess estimate:

- **September 2023:** Begin Design Feasibility Phase
- **November 2023:** Cost Estimates and Preferred Design Finalized and shared with Town Boards and Community Members
- **December 2023:** Town Meeting Approves Schematic Design Funding
- **January 2024:** Began Schematic Design Phase
- **March 2024:** Schematic Design Phase Completed
- **November 2024:** Town Meeting Approved Cost of Construction
- **December 2024:** Town of Natick voters Approve Debt Override to Fund Construction
- **January 2025:** Design Development Phase Begins
- **February 2026:** Technical Drawings Complete
- **May 2026:** Construction Commences
- **Fall 2028:** Complete Occupancy for Students and Staff

The timeline for a renovation of an existing school is dependent upon several factors but may follow a similar timeline.



WHAT DOES MSBA PROCESS IMPLY?

- MSBA schedule is independent of which site becomes new school or renovation
- MSBA process must be followed
- Existing buildings must make do until 2028 at the earliest
- Choices abound
 - Existing site(s) or new site(s)
 - Renovate
 - New school



NEXT STEPS

- Submit Statement of Interest before April 2023
- MSBA Board of Directors will decide which districts are invited into the eligibility phase (usually during the summer)
- Continue to develop support from the citizens of the Town of Natick
- Continue Update of District Capital Plan
- Continue to Update Long-range Major Capital Plan



FREQUENTLY ASKED QUESTIONS

Q: WHAT HAPPENS AFTER THE MSBA RECEIVES THE SOI?

The information provided in the SOI will play an important role in helping the MSBA understand the needs at a particular school facility and to decide whether to move forward with The district for further assessment of a facility. Once an SOI has been submitted and reviewed, the MSBA will work with districts to validate the deficiencies identified in the SOI and, if appropriate, collaborate on potential solutions. The MSBA will notify districts of any actions necessary during the due diligence period; after all SOIs are on file and the filing period has closed.

Q: HOW LONG WILL THE PROCESS TAKE ONCE IN THE MSBA GRANT PROCESS?

A: The length of time depends on several factors, including but not limited to: the extent and urgency of the problems described in the SOI; the extent and urgency of the problems relative to other SOIs that have been filed; the number of potential solutions that may need to be explored with the district; the amount of time required for the MSBA and the district to agree upon an educationally appropriate and financially sound solution; the ability of the district to fund its portion of the agreed-upon solution.

The MSBA remains committed to working as diligently as possible to review all SOI submissions and to collaborating with districts that are invited to move forward in the process through all phases of project approval, design, and construction.



FREQUENTLY ASKED QUESTIONS

Q: SHOULD THE SOI PROPOSE A SOLUTION TO THE DEFICIENCIES CITED?

A: The purpose of the SOI is for the district to identify perceived deficiencies within a school facility. The MSBA and the district would then work in partnership to identify possible solutions if/when the district is invited by the MSBA Board of Directors into the capital pipeline (core program or accelerated repair program). If the district is invited into the capital pipeline, the MSBA and the district will begin collaboration to determine the most educationally appropriate and cost-effective solution to the deficiencies in a building. The district should indicate in the program type drop-down menu if the project is a core project or accelerated repair. Based on their selection of program type, the district should then indicate using the potential project scope drop-down menu the project scope. If the district chose core as a program type then the options for project scope are potential new school, addition/renovation, or repair project (major repair to a facility). The district then must indicate if a potential consolidation is being considered.

In the SOI section titled "district goal for school," the district should also provide information about what the district feels is a potential solution to the issues that have been identified in the SOI; past facility master plans can be referenced in this section and throughout the SOI to best explain perceived deficiencies and potential solutions.



FREQUENTLY ASKED QUESTIONS

Q: DOES THE DISTRICT NEED TO USE THE MSBA TOOL TO SUBMIT STUDENT ENROLLMENT INFORMATION ALONG WITH ITS SOI?

A: No. In the past, districts were required to provide limited enrollment-related information when submitting an SOI based on enrollment factors (statutory priorities 2, 4, and 6). Due to the MSBA's redesigned enrollment projection system, districts are no longer required to submit enrollment information at the time of filing an SOI. However, districts will engage in enrollment discussions with the MSBA upon invitation to the capital pipeline for the MSBA's core program. Specifically, the enrollment projection collaboration now occurs when the district is invited into the eligibility period.

Q: DOES THE MSBA WORK WITH DISTRICTS ON A "FIRST COME, FIRST SERVED" BASIS?

A: No. The grant program is based on comprehensive due diligence that considers the urgency and need of all SOIs, consistent with the statutory funding criteria set forth in the MSBA's statute, and not according to the time of the SOI submission.

(Source: Frequently Asked Questions – https://massschoolbuildings.org/building/SOIs/SOI_FAQs)



QUESTIONS?

Brian Lynch, NPS Assistant Director of Finance, is a former employee of the MSBA who was involved in the statement of interest process. He has contacted his former colleagues who have suggested that after our statement of interest is submitted, we should invite the senior MSBA staff for a site visit since they have not been to Natick since 2016 to review and discuss our proposal. We will invite them once our statement of interest is submitted.

If the Natick Statement of Interest is not included in the next round of projects, it does not mean that the Natick Statement of Interest is not eligible for future funding.