



LINCOLN PUBLIC SCHOOLS

MICHAEL F. BRANDMEYER
SUPERINTENDENT

October 1, 2009

To: School Committee
From: Mickey Brandmeyer
Re: Massachusetts School Building Authority's Invitation to Accept Lincoln School
for Feasibility Study

The Massachusetts School Building Authority (MSBA) met on September 30, 2009 and their agenda included votes on proposed school building projects. As a result of the meeting, the Lincoln School was invited to participate in a Feasibility Study in collaboration with the MSBA. This is a critical first step in a lengthy process to seek approval for a building program to address the facility needs of the Lincoln School. I would like to recognize the efforts of the Facilities Planning Committee, which worked diligently to develop and submit the required Statement of Interest (SOI) to begin this process. Members of the Facilities Master Planning Committee included Julie Dobrow and Al Schmertzler of the School Committee, Bob Zakarian, Parent, and Buckner Creel and Mickey Brandmeyer from the Administration.

This memo is intended to outline at a high level, the background and what is known about the MSBA process and feasibility planning. MSBA information on their website was used liberally in the development of this memo.

Prior to the submission of the SOI the School Committee convened a multi-board meeting with Selectmen, Finance Committee and Town Officials to review the MSBA process, the major issues with the school facility and to seek support and approval for the submission of the SOI.

In November 2008, the School Committee, having gained the official endorsement of the Board of Selectmen, submitted a Statement of Interest for the Lincoln School to the Massachusetts School Building Authority.

The SOI was prepared using information developed by the School Department through its Master Planning Study conducted by Symmes, Maini and McKee Associates (SMMA) and presented to the district in October 2007.

As of November 15, 2008, the MSBA received 47 new SOIs and 178 refreshed FY2008 SOIs for a total of 225 SOIs in FY2009.

The MSBA program is a non-entitlement competitive grant program. Grants are distributed by the MSBA's Board of Directors based on need and urgency, as expressed by the district and validated by the MSBA. Submitting a SOI is the critical first step in the MSBA's program for school building construction and renovation grants.

The MSBA uses a rolling capital pipeline for project approvals. This means that the determination of status made by the MSBA's Board of Directors at its board meetings is based on the MSBA's understanding of how a school facility's need and urgency fit within the statewide spectrum of need.

In determining which school facilities across the Commonwealth are in most need of capital investment, the MSBA considers the following assessment criteria:

- Building Condition – whether the building exhibits signs of moderate to severe deficiencies in multiple building systems, such as roofing system, windows and doors, heating and ventilation systems
- Building Capacity – whether the building exhibits signs of moderate to severe overcrowding including excessive class sizes, inadequate number of classrooms, conversion of non-educational space to educational uses
- Educational Program – whether the ability to support the required educational program is adversely affected by the building's condition and/or capacity
- Structural Deficiency – whether the building has clearly documented structural deficiencies that pose an immediate risk to the health and safety of building occupants

In June 2009, the MSBA conducted a "Senior Study" at the Lincoln School in response to the SOI submission. Conducting a Senior Study is part of the due diligence phase of the MSBA's school renovation and construction grant program. During the due diligence phase, the MSBA may perform several different types of assessments depending on the school building deficiencies that the district has identified in its SOI. The MSBA assessments typically include review of the SOI and documents submitted in support of the SOI, review of historical enrollment trends, review of educational programs, and/or site visits to the school facility.

A Senior Study is a site visit to the school facility. During the Senior Study, a team from the MSBA, which includes architects and engineers with many years of school facility and educational programming experience, tour the school. The Senior Study seeks to examine both the physical condition of the facility as well as programmatic issues that affect the delivery of the required educational program. Before touring the facility, the MSBA team interviews the superintendent, principal, facilities manager, and other school personnel to:

- ❑ Identify goals for and concerns about the school facility
- ❑ Confirm information about school building deficiencies that were stated in the SOI
- ❑ Understand how any physical condition issues adversely impact the delivery of the educational program
- ❑ Learn about the school district's routine and capital maintenance programs and practices

While touring the facility, the MSBA team:

- ❑ Evaluates the physical condition of the facility, including major building systems (e.g., building envelope, HVAC, electrical distribution, interior finishes)
- ❑ Assesses overcrowding or capacity issues
- ❑ Assesses the ability of the facility to support the required educational program
- ❑ Assesses design factors such as availability of natural light which make a school's environment conducive to learning
- ❑ Examines site considerations
- ❑ Evaluates the school district's maintenance of the facility

The information acquired during the Senior Study is used to help the MSBA to determine the next steps in the process. The MSBA's goal is to collaborate with the district to find the right-sized, most fiscally responsible and educationally appropriate solution to the facility's problems. The Senior Study is not approval of a project.

The MSBA's new program is a non-entitlement competitive grant program, and grants are distributed by the MSBA Board of Directors based on need and urgency, as expressed by the community and validated by the MSBA. Funding for the program is capped at \$500M per year, with up to \$2.5 billion available for school construction and renovation projects over the next five years.

We look forward to beginning the next phase of this work which will included seeking and gaining the support of the Lincoln community and working closely with the MSBA to realize the goal of an improved school house designed to support the delivery of the 21st Century education for the children in our charge.

Attachments:

- ☐ MSBA Agenda for September 30th
- ☐ MSBA Press Release
- ☐ Listing of Schools Recommended for Feasibility Study
- ☐ Flow Chart of MSBA Process

Massachusetts School Building Authority
10:00 am, Wednesday September 30, 2009
Boston, MA
Agenda

Minutes

1. Approval of July 29, 2009 Minutes – *Vote*

Executive Director Report

Project

2. Renovation Incentive Points Update
3. Technical Services Vendors - *Vote*
4. Project Status Report

A. Invitation to Project Scope and Budget – *Vote*

5. Billerica: Parker Elementary School
6. Brookline: John D. Runkle Elementary School
7. Chelmsford: McCarthy/Parker School
8. Danvers: Danvers High School
9. Dedham: Avery Elementary School
10. Hamilton-Wenham: Cutler Elementary School
11. Nashoba: Pompositticut Elementary School
12. Needham: Newman Elementary School
13. Norfolk: Freeman-Centennial Elementary School
14. Plymouth: Plymouth North High School
15. Rochester: Memorial Elementary School
16. Rockland: John W Rogers Middle School
17. Sharon: Sharon Middle School
18. Sturbridge: Burgess Elementary School
19. Wayland: Wayland High School

B. Invitation to Feasibility Study– *Vote*

20. Exhibit B
 - East Bridgewater: East Bridgewater High School
 - Leominster: Leominster High School
 - Lincoln: Lincoln K-8
 - Lynnfield: Lynnfield High School
 - Norton: Norton High School
 - Orange: Dexter Park Intermediate School
 - Scituate: Wampatuck Elementary School
 - South Hadley: Plains Elementary School
 - Wachusett: Mountview Middle School
 - Webster: Park Avenue Elementary School
 - West Springfield: West Springfield High School
 - Westfield: Abner Gibbs Elementary School
 - Weston: Field Elementary School
 - Wilmington: Wilmington High School

C. Invitation to Feasibility Study for Repair –**Vote**

21. Exhibit C

Athol-Royalston: Riverbend Elementary School
Concord –Carlisle: Concord-Carlisle High School
Greenfield: Greenfield High School
Mount Greylock: Mount Greylock Regional High School
Salem: Collins Middle School
Spencer- East Brookfield: David Prouty High School
Stoneham: Stoneham Middle School
Westborough: Sarah W Gibbons Middle School

D. Recommendation for Preferred Schematic Design – **Vote**

22. Carver: Governor John Carver Elementary School
23. Grafton: Memorial Senior High School
24. Shrewsbury: Sherwood Middle School
25. Southbridge: Southbridge High School

Finance

26. Sales Tax and Finance Plan Update
27. Grants to Communities Update
28. RFQ for Investment Banking Services
29. Declaration of Official Intent -**Vote**
30. Draft Reimbursement Regulations Update

Audits

31. Audit Program Progress and Status Update
32. Audit Program Financial Savings Analysis
33. Approval of Final Audits with no appeals – **Vote**
34. Approval of Final Audits with appeals – **Vote**



Massachusetts School Building Authority

Timothy P. Cahill
Chairman, State Treasurer

Katherine P. Craven
Executive Director

FOR IMMEDIATE RELEASE
September 30, 2009

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**TREASURER CAHILL AND THE MSBA ANNOUNCE THAT THE LINCOLN
ELEMENTARY SCHOOL WILL ENTER FEASIBILITY STUDY PHASE**
Feasibility Study phase is a step closer for the Town of Lincoln

BOSTON, MA – State Treasurer Tim Cahill, Chair of the Massachusetts School Building Authority (“MSBA”) and Katherine Craven, MSBA Executive Director, announced today that the MSBA Board voted to move the Lincoln Elementary School into the next phase for potential funding. The project will move into the Feasibility Study phase where the Town of Lincoln and the MSBA will work in collaboration to study potential solutions to the problems identified in the District’s Statement of Interest.

"We offer a fiscally responsible blueprint for future school construction that will help local communities, like Lincoln, provide a strong educational foundation for the children of the Commonwealth," said Treasurer Cahill.

"We still have to work out exactly what cost items will be reimbursable but this is a good indicator of the partnership that the MSBA has with municipalities," stated Katherine Craven, MSBA Executive Director.

During the next five years, the MSBA will collaborate with municipalities to equitably invest up to \$2.5 billion in schools across the Commonwealth by finding the right-sized, most fiscally responsible and educationally appropriate solutions to create safe and sound learning environments. The MSBA is committed to protecting the taxpayer’s dollar by improving the school building grant process and avoiding the mistakes of the past in the funding and construction of school facilities.

To date, the MSBA has made approximately \$6.3 billion in reimbursements to cities and towns for school construction projects inherited from the former program -- \$4.1 billion of which are accelerated payments to districts which had been waiting years for a partial payment from the state prior to the creation of the MSBA. Those payments have saved municipalities millions of dollars in interest costs and reinvigorated a system that once had \$11 billion in outstanding obligations. In its three year history, the MSBA has successfully contained the Commonwealth’s formerly rampant and unsustainable financial liability for the costs of 1,150 local school construction projects and last year was able to reopen a sustainable, reformed grant program as a result of programmatic reforms and sound fiscal management.

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Exhibit B

Recommended Board Action for FY2008/FY2009 SOIs

Reg	District Name	School Name	Grades Served	SOI Year	Status	Recommendation
6	East Bridgewater PS	East Bridgewater HS	09 - 12	FY2008	Hold	Feasibility Study
4	Leominster PS	Leominster HS	09-12	FY2008	Repair	Feasibility Study
4	Lincoln PS	Lincoln K-8	PK - 08	FY2009	NEW SOI FY2009	Feasibility Study
3	Lynnfield PS	Lynnfield HS	09 - 12	FY2009	NEW SOI FY2009	Feasibility Study
6	Norton PS	Norton HS	09 - 12	FY2008	Hold	Feasibility Study
1	Orange PS	Dexter Park IS	PK - 04	FY2008	Regionalization Assessment	Feasibility Study
5	Scituate PS	Wampatuck ES	K - 06	FY2009	NEW SOI FY2009	Feasibility Study
1	South Hadley PS	Plains ES	PK - 01	FY2008	Planning	Feasibility Study
2	Wachusett PS	Mountview MS	06 - 08	FY2009	NEW SOI FY2009	Feasibility Study
2	Webster PS	Park Avenue ES	K - 02	FY2008	Hold	Feasibility Study
1	West Springfield PS	West Springfield HS	09 - 12	FY2008	Hold	Feasibility Study
1	Westfield PS	Abner Gibbs ES	K - 05	FY2008	Planning	Feasibility Study
4	Weston PS	Field ES	04 - 05	FY2009	NEW SOI FY2009	Feasibility Study
3	Wilmington PS	Wilmington HS	09 - 12	FY2009	NEW SOI FY2009	Feasibility Study

MSBA Process Flow

