



September 10, 2020

Mr. Matt Torti
 Director of Buildings and Grounds
 Framingham Public Schools
 31 Flagg Drive
 Framingham, MA 01702

Mr. Torti,

At your request I am providing a summary of the initial stages of the Massachusetts School Building Authority (MSBA) Core Program process for the Framingham Public School's consideration in submitting the Hemenway School project.

We have prepared a Prefeasibility Study for the Hemenway School, dated May 6, 2020. In that we describe the existing conditions of the Hemenway School, analyze the existing site and a potential new site, provide program data for the existing and potential new school, and provide multiple options and scenarios for the replacement of the school and potential for added preschool facilities.

Framingham Public School's next step is to submit a Statement of Interest to the MSBA via an online portal with supporting documentation. Presumably the prefeasibility documentation will form part of the SOI package. The SOI is submitted during their next submission period (see the presumptive timeline below) and then if they accept you into the eligibility period you need to secure funding as part of several tasks over a maximum period of 270 days. The authorization to fund a feasibility study is part of the Eligibility Period (Module 1 of MSBA) process. They are explicit about voting on funding for feasibility to be done during the eligibility period because they require specific language to be put into the vote. Their bulletin is attached.

| | "Up to" Days | 2021 | | | | | | | | | | | | 2022 | | | | | | | | | | | |
|---|--------------|------|---|---|---|---|---|---|---|---|---|---|---|------|---|---|---|---|---|---|---|---|---|---|---|
| | | J | F | M | A | M | J | J | A | S | O | N | D | J | F | M | A | M | J | J | A | S | O | N | D |
| SOI Due Diligence Process | 365 | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ | | | | | | | | | | | |
| SOI submission | | █ | █ | █ | █ | █ | | | | | | | | | | | | | | | | | | | |
| MSBA Review | | | | | | █ | █ | █ | █ | █ | █ | █ | | | | | | | | | | | | | |
| MSBA Site Visits | | | | | | | | | | █ | █ | | | | | | | | | | | | | | |
| Selection for Invitation | | | | | | | | | | | | | █ | | | | | | | | | | | | |
| Module 1 - Eligibility Period | 270 | | | | | | | | | | | | | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ | |
| Initial Compliance Certification (ICC) | 30 | | | | | | | | | | | | | █ | █ | | | | | | | | | | |
| School Building Committee (SBC) | 60 | | | | | | | | | | | | | █ | █ | | | | | | | | | | |
| Education Profile Questionnaire | 90 | | | | | | | | | | | | | █ | █ | █ | | | | | | | | | |
| Maintenance Documents | 180 | | | | | | | | | | | | | █ | █ | █ | █ | █ | | | | | | | |
| Enrollment Certification | 180 | | | | | | | | | | | | | █ | █ | █ | █ | █ | █ | | | | | | |
| Local Authorization of Funding | 270 | | | | | | | | | | | | | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ | █ | |
| Invitation to Feasibility Study Agreement | | | | | | | | | | | | | | | | | | | | | | | | █ | |

Hemenway School Prefeasibility
September 10, 2020

The MSBA's website contains a vast amount of information that both describes their process and provides timelines, sample documents and preparatory information. I've attached a couple of the documents to be considered in the Eligibility period.

Summarized from the MSBA website <https://www.massschoolbuildings.org/building/prerequisites>:

A vote of the MSBA Board of Directors to invite a District into the Eligibility Period is based on a review of the District's Statement of Interest ("SOI") and staff due diligence and recommendation. The vote initiates a 270-day period for the District to complete certain preliminary requirements that include:

- 1) a certification of the District's understanding of the grant program rules by executing an Initial Compliance Certification;
- 2) forming a School Building Committee and submitting the membership to the MSBA for acceptance;
- 3) completing an Educational Profile Questionnaire to further inform the MSBA's understanding of the District's current and proposed educational facilities, teaching methodology, grade configurations and program offerings;
- 4) a summary of the District's existing maintenance practices;
- 5) certification of a design enrollment for the proposed project agreed upon with the MSBA;
- 6) confirmation of community authorization and funding to proceed;**
- 7) execution of the MSBA's standard Feasibility Study Agreement, which establishes a process for the District to be reimbursed for eligible expenses.

I have also found the following update on the website about the 2020 SOI process. It is unclear as to whether the delays in this year's process due to COVID-19 will impact 2021. I have prepared the timeline for Framingham based on their typical timespans. No date is currently posted for the 2021 SOI period.

The 2020 SOI submittal period opened on January 8, 2020. The deadline to file SOIs for consideration into the Core Program... was Wednesday, May 6, 2020. The MSBA received 71 Core Program SOIs for consideration.

Due to ongoing public health issues, the MSBA's due diligence for the Core Program, which includes senior study visits to select schools has been postponed. Unlike prior years in which project invitations were approved at the December Board meeting, a schedule for invitations into Eligibility Period is still under consideration.

TBA is happy to provide further information and guidance regarding the Hemenway School study should you need it.

Sincerely,

TBA ARCHITECTS



Justin Humphreys, AIA, NCARB, MCPPO
Principal

TBA ARCHITECTS, INC

MSBA Core Program Process Overview



MSBA Board Approval (with group icon)

District Vote (with checkmark icon)

Bulletin 11-01

Local Votes related to feasibility studies by cities and towns that have been invited to collaborate with the Massachusetts School Building Authority on conducting and/or reviewing a feasibility study

Requirements for Warrant Articles, Motions, Orders and Votes

Pursuant to G.L. c. 70B and 963 CMR 2.10, the Massachusetts School Building Authority (MSBA) issues this Bulletin to inform cities and towns who have been invited by the MSBA to collaborate with the MSBA to conduct and/or review a Feasibility Study of the requirements for warrant articles, motions, orders, and votes related to authorization of a feasibility study. This Bulletin shall be applicable to all cities and towns that have been invited by the MSBA to collaborate on conducting and/or reviewing a feasibility study. ***Regional School districts should consult Bulletin 11-03, which addresses the vote requirements for regional school districts and their member communities that have been invited to conduct a feasibility study with the MSBA.***

**** Please note that only those cities and towns that have been invited by the MSBA to collaborate on a feasibility study should be voting to authorize a feasibility study at this time. Communities are urged to contact the MSBA before finalizing an article, motion, resolution, ballot question or other vote because there may be additional requirements depending on the particulars of a feasibility study. If a city or town already has voted to authorize a feasibility study, please contact the MSBA immediately. The MSBA may require clarification of the vote or a new vote that meets the MSBA's requirements.**

Please also note that an invitation to collaborate with the MSBA on a feasibility study is not approval of a project, and there are no guarantees that the MSBA will approve a project. Cities and towns that proceed with studying, planning, designing, renovating or constructing a school facility without the collaboration and approval of the MSBA will not be eligible for MSBA funding.

****Cities and towns should consult with their local counsel and bond counsel to ensure that all warrant articles, motions, orders, and votes otherwise comply with municipal finance law and all other applicable laws, regulations, local bylaws, and ordinances.**

All articles, motions, resolutions, orders, Proposition two and one-half ballot questions, and any other votes of a city or town related to the approval, funding, and/or debt authorization for a feasibility study shall be a **separate, stand-alone vote, solely for purposes of the feasibility study**. The article, motion, resolution, order, vote and/or ballot question related to the feasibility study must not pertain to or be bundled with any other school or municipal project. The article, motion, resolution, order, vote must be specific to the feasibility study and must include specific information about the school that is the subject of the feasibility study.

A city or town must vote to appropriate and authorize the **full amount** of a feasibility study's cost, including both the local share and the MSBA's share, if any. The total budget amount must be authorized and approved.

All warrant articles, motions, resolutions, orders and votes, with the exception of a Proposition two and one-half ballot question (see below), must include the following provisions:

- A description of the site of the school that is the subject of the feasibility study, including the address of the school building and a description of the parcel.
- “The MSBA’s grant program is a non-entitlement, discretionary program based on need, as determined by the MSBA, and any project costs that the [City/Town] incurs in excess of any grant that may be received from the MSBA shall be the sole responsibility of the [City/Town].”
- For the debt authorization provision, the following language must be included: “and that the amount of borrowing authorized pursuant to this vote shall be reduced by any grant amount set forth in the Feasibility Study Agreement that may be executed between the [City/Town] and the MSBA.”

A form of article, motion, order, vote is attached as “Attachment A,” and cities and towns must use this form to qualify for MSBA funding.

Proposition Two and One-Half Ballot Questions

- All ballot questions for a feasibility study must be solely related to that feasibility study. The ballot question related to the feasibility study must not pertain to or be bundled with any other school or municipal projects.

A form of ballot question is attached as “Attachment B,” and cities and towns must use this form to qualify for MSBA funding.

Attachment A

ARTICLE

To see if the Town will vote to appropriate, borrow or transfer from available funds, an amount of money to be expended under the direction of [*the School Building Committee*] for [*Insert description of feasibility study, including name of school, description of location, address*], for which feasibility study the Town may be eligible for a grant from the Massachusetts School Building Authority. The MSBA's grant program is a non-entitlement, discretionary program based on need, as determined by the MSBA, and any costs the Town incurs in connection with the feasibility study in excess of any grant approved by and received from the MSBA shall be the sole responsibility of the Town.

MOTION/VOTE/ORDER

That the [*City/Town*] appropriate the amount of _____ (\$ _____) Dollars for the purpose of paying costs of [*Insert description of feasibility study, including name of school, description of location, address*], including the payment of all costs incidental or related thereto, and for which [*the City/Town*] may be eligible for a grant from the Massachusetts School Building Authority ("MSBA"), said amount to be expended under the direction of [*the School Building Committee*]. To meet this appropriation the [*Insert the appropriate local official or Board*], with the approval of the [*Selectmen /[Mayor/City Manager]*] is authorized to borrow said amount under and pursuant to M.G.L. Chapter 44, or pursuant to any other enabling authority. The [*City/Town*] acknowledges that the MSBA's grant program is a non-entitlement, discretionary program based on need, as determined by the MSBA, and any costs the [*City/Town*] incurs in excess of any grant approved by and received from the MSBA shall be the sole responsibility of the [*City/Town*], [and further provided that the appropriation hereunder shall be subject to and contingent upon an affirmative vote of the Town to exempt the amounts required for the payment of interest and principal on said borrowing from the limitations on taxes imposed by M.G.L. 59, Section 21C (Proposition 2½)], and that the amount of borrowing authorized pursuant to this vote shall be reduced by any grant amount set forth in the Feasibility Study Agreement that may be executed between the [*City/Town*] and the MSBA.

Attachment B

BALLOT QUESTION

Shall the [City/Town] of _____ be allowed to exempt from the provisions of Proposition two-and-one-half, so called, the amounts required to pay for the bonds issued in order to [*Insert description of the feasibility study*]?