

MSBA Program Overview

The Massachusetts School Building Authority's ("MSBA") grant program for school building construction and renovation projects is a non-entitlement competitive program based on need. The MSBA's Board of Directors (the "Board") approves grants based on need and urgency, as expressed by the City, Town, Regional School District, or independent agricultural and technical school ("District") and validated by the MSBA. Once the MSBA Board of Directors invites a District to participate in the MSBA's grant program, the collaborative process includes the following eight Modules:

Module 1 – Eligibility Period: The MSBA Board of Directors votes to invite a District into the Eligibility Period which initiates a 270-day period for the District to complete preliminary requirements including a certification of the District's understanding of the grant program rules, the formation of a School Building Committee, a summary of the District's existing maintenance practices; determination of a design enrollment; development of an educational profile, community authorization and funding to proceed, and execution of the MSBA's standard Feasibility Study Agreement. Districts that are able to complete these requirements may receive an invitation to collaborate with the MSBA to Conduct a Feasibility Study.

Module 2 – Forming the Project Team: Upon receipt of an invitation to collaborate with the MSBA to Conduct a Feasibility Study the District procures the team of professionals utilizing MSBA specific procurement processes, standard Request for Services ("RFS") templates, and standard Contracts to work with the District as the proposed project advances through the MSBA's grant process.

Module 3 – Feasibility Study: Upon successful conclusion of procurement of Owner's Project Management ("OPM") and Designer services a Kick-Off meeting is held to begin collaboration with the MSBA to document their educational program, generate an initial space summary, document existing conditions, establish design parameters, develop and

evaluate alternatives, and recommend the most cost effective and educationally appropriate preferred solution to the MSBA Board of Directors for its consideration. During this phase, the Owner's Project Manager will submit on behalf of the District and its Designer a Preliminary Design Program and a Preferred Schematic Report. Approval by the MSBA Board of Directors is required for all projects to proceed into schematic design.

Module 4 – Schematic Design: The District and its team develop a robust schematic design of sufficient detail to establish the scope, budget and schedule for the proposed project. The MSBA generates a Project Scope and Budget Agreement that documents the project scope, budget, schedule and MSBA financial participation to forward to the MSBA Board of Directors for their approval.

Module 5 – Funding the Project: Once the MSBA Board of Directors has authorized the MSBA Executive Director to enter into a Project Scope and Budget Agreement and a Project Funding Agreement with the District, the District completes steps necessary to secure community authorization and financial support for the proposed project and enters into a Project Funding Agreement with the MSBA. With an executed Project Funding Agreement the District engages OPM and Designer services, and updates project budgets in Pro - Pay.

Module 6 – Detailed Design: Design Development, Construction Documentation & Bidding: The District and its team advance the design, generate construction documentation, procure bids and award a construction contract in accordance with the agreed upon project scope, budget and schedule as documented in the Project Funding Agreement, and the requirements contained in the MSBA's standard contracts for Owner's Project Management and Designer Services. The MSBA continues to monitor the project to ensure it remains on track and meets the expectation of both the District and the MSBA as defined in the Project Funding Agreement

Module 7 – Construction Administration: The MSBA continues to monitor progress of the project to confirm that it remains on track and meets the expectation of both the District and the MSBA as defined in the Project Funding Agreement.

Module 8 – Project Closeout: The MSBA performs a final audit to determine final total grant amounts and release final payment.

Module 9 – Post Occupancy Evaluation

Module 9 begins soon after a Core Program project is completed, with MSBA staff compiling information provided during the feasibility study, detailed design, and construction phases to form the basis of a POE. Approximately three years after a project reaches substantial completion, the MSBA will reach back out to a district, and coordinate with the district and MSBA consultants to collect building performance data remotely and in person. The data collected will inform a summary report produced by the MSBA and shared with the district.

MSBA Terminology Glossary

MSBA – Massachusetts School Building Authority

RFS – Request for Services

SOI – Statement of Interest

OPM – Owners Project Manager

DSP – Designer Selection Panel

MBE – Minority owned Business Enterprises

WBE – Women Owned Businesses

MCPPO – Massachusetts Certified Public Purchasing Official

PDP – Preliminary Design Program

PSR – Preferred Schematic Report

SBC – School Building Committee

SC – School Committee

PSBA – Project Scope and Budget Agreement

PFA – Project Funding Agreement

GMP – Guaranteed Maximum Price

BRR – Budget Revision Request

CO – Change Order

SOV – Schedule of Values

DCAMM – Division of Capital Asset Management & Maintenance

LEED – Leadership in Energy and Environmental Design