

MEMO: MSBA / Somerville Next Steps

Dec 15, 2023

Following Wednesday's vote by the MSBA, City and SPS staff attended a virtual orientation with the MSBA on Thursday. Below is a summary of what was shared during the orientation, and next steps we as a community will need to take through the Eligibility Period in 2024.

MSBA Module 1 Orientation

Today's virtual meeting was a high level overview of what to expect, plan for, and accomplish during the Eligibility Period.

Somerville has been assigned a Project Coordinator from the MSBA. This Coordinator will be with us through the life of the project. Our Project Coordinator is:

Sarah Przybylowicz
Senior Project Coordinator
Massachusetts School Building Authority
40 Broad Street, Suite 500
Boston, MA 02109
617-960-3009 (Direct Line)
Sarah.Przybylowicz@massschoolbuildings.org

Sarah is also the Project Coordinator for Manchester-Essex, Needham, and Springfield.

We received an initial communication from the MSBA that outlines next steps for us, but Sarah will be contacting us with further information, and will set up a more in-depth call with our team in February.

Because there are 19 communities in this Eligibility Phase (over \$1 Billion in estimated project costs among this group), start dates will be phased over the next 6 months. Somerville's start date is earlier; our Eligibility Period begins on March 4, 2024, and concludes on November 29, 2024. Within that timeframe we need to meet specific requirements by specific dates. A quick table is here, followed by further details below.

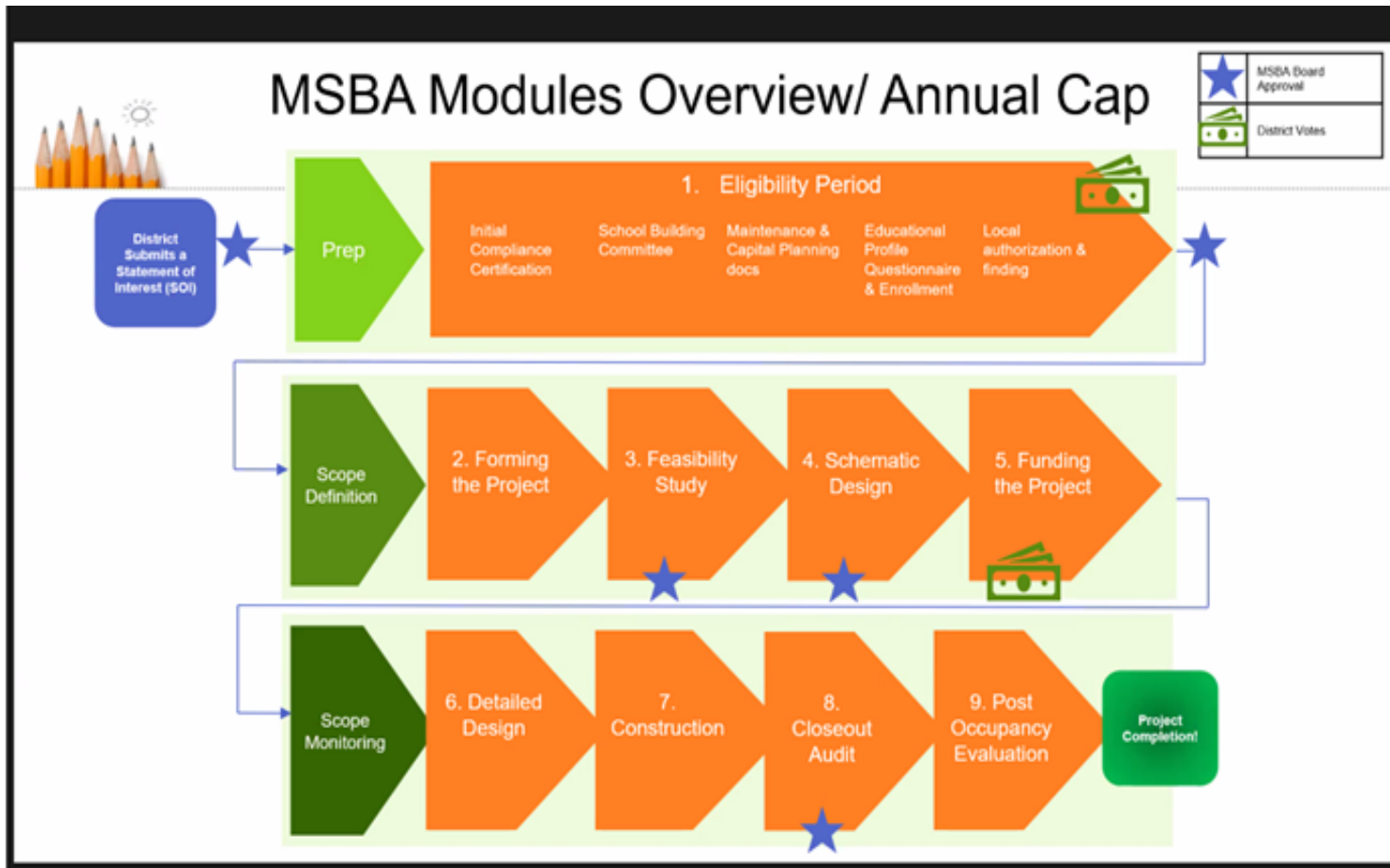
**Eligibility Period
Schedule of Deliverables**

**City of Somerville
Winter Hill Community School**

MSBA Board of Director Meeting – December 13, 2023

Eligibility Period Commences –March 4, 2024		
MODULE ONE - Eligibility Period		
Deliverable	Days	Due Date and Status
Initial Compliance Certification	30	April 4, 2024 Required
School Building Committee	60	May 3, 2024 Required
Educational Profile Questionnaire	90	June 3, 2024 Required
Online Enrollment Projection	90	June 3, 2024 Required
Enrollment Meeting Held	180	August 30, 2024 Required
Maintenance and Capital Planning Information	180	August 30, 2024 Required
Local Vote Authorization	270	November 29, 2024 Required
Feasibility Study Agreement	270	November 29, 2024 Required
Eligibility Period Concludes – November 29, 2024		

And here is a graphic that depicts the phases of an MSBA process (*see next page*):



For reference, we are in Module 1, on the top line. There is one local vote required in the Eligibility Phase - to allocate funds for a feasibility study. While we need to clarify with the City, I believe this vote already occurred in July 2023, so we would not need to pursue this vote locally within our 270 days. There are other requirements we need to fulfill, but none would require votes .

At the end of the Eligibility Phase (270 days), the MSBA Board will vote to invite Somerville into Module 2 (#2 on line 2 above), which is the Feasibility Study period. That is approximately a 7-9 month process. The Feasibility Study phase has a term of 913 days - or a little over 30 months once signed by both Somerville and the MSBA.

DELIVERABLES

Here is a deeper explanation of the requirements we will need to meet before November 2024.

Within 30 days (by April 4, 2024):

- **Initial Compliance Certification.** This is a document that will require three signatures (not votes): the Mayor, the Superintendent, and the Chair of the School Committee. We will receive a formatted document from our Project Coordinator in 2024.

Within 60 days (by May 4, 2024):

- **Formation of School Building Committee.** We must complete and submit a standard membership form, with the MSBA's minimum designations, signed by the Mayor. It will be reviewed and ultimately approved by the MSBA's legal team. Any membership changes that occur after this approval must be resubmitted to the MSBA within 20 days of a change in membership.

Within 90 days (by June 4, 2023):

- **Submit Educational Profile Questionnaire (EPQ).** This document is "pretty robust," and MSBA impressed upon us that it is an important document, and that they encourage Superintendents and project teams to start working on this ASAP. There are 5 sections. This will provide context to our project, inform our enrollment process for the school, and help inform current facility challenges/needs and how the district envisions a future facility.
- **Online Enrollment Submissions (2).** In conjunction with the EPQ we will need to submit enrollment data, housing data, and information about private schools within Somerville. We will also need to provide operational information, and consolidation information (if applicable).

Within 180 days (by August 30, 2024):

- **Agreement on enrollment certification.** There will be an enrollment meeting scheduled where the MSBA will share projections, we will discuss project particulars, and come to an agreement on enrollment numbers. This will result in a letter and certification. 3 signatures will be required on our part (not a vote): the Mayor, the Superintendent, and the School Committee Chair.
- **Provide Maintenance and Capital Planning Information.** This is where we will report on historical maintenance practices.

Prior to 270 days (November 29, 2024):

- **Appropriation of Funds:** A local vote is required for the Feasibility Study through Schematic Design. The MSBA will provide standard vote language. Funds are typically for hiring an OPM, Designer, conducting environmental and site testing, and contingencies and related expenses. While the MSBA cannot tell districts how much to appropriate, they can provide data and specs from surrounding communities for similar project size and scope.