



Recommended Actions for Statements of Interests Prioritized by School Districts

Board of Directors Meeting
November 28, 2007

Treasurer Tim Cahill, Chair
Katherine Craven, Executive Director

Process Overview

- 423 statements submitted
- 162 different districts represented
- 91 of the SOI's are related to buildings that were rated 1 or 2 in MSBA Needs Survey (pretty good shape to brand new schools)
- Over half the requests relate to Elementary Schools
- Many requests are for roofs, boiler renovations, and other moderate repairs
- Include everything from overcrowding to educational obsolescence

Process Overview

- Based on lessons learned with Wait List projects, each district was required to choose one priority on which the MSBA would focus the diagnostic process.
- Diagnostic analysis by the MSBA includes:
 - Review of the SOI
 - Overcrowding site visits
 - Facility assessments
 - Senior studies
 - Review of historical enrollment trends and forecasts
 - Review of educational programs

Senior Studies

- Efficient, cost effective diagnostic tool used to evaluate SOI.
- Each study team composed of an MSBA staff member and two senior consulting architects knowledgeable of building systems and educational programs
- Studies examine both facility condition and programmatic issues
 - Identify goals and concerns of the school district
 - Evaluate physical condition of the facility, including major building systems (building envelope, HVAC, electrical distribution, interior finishes)
 - Assess overcrowding or capacity issues
 - Determine ability of the facility to support the required educational program
- Results summarized in concise report format permitting review and comparison of numerous SOI

Senior Studies

- Since July, Senior Studies have been conducted on 134 schools.
- Provides MSBA with a comparative tool for classifying priority SOI
- Created a practical knowledge base
 - Many schools are functional but “tired”
 - Worn interior finishes
 - Aging mechanical systems
 - Lack technology
 - Some schools are overcrowded or cannot support the required educational program
 - SPED in storage closets
 - Math class on auditorium stage
 - Modulars used for 10+ years to capacity
 - 5-6 seatings for lunch
 - Gym in corridors
 - Wide disparity in level of locally supported capital improvements (roofs, windows and mechanical systems)

Process Overview

Based on the MSBA diagnostic analysis to date and input from the Facilities Assessment Subcommittee, the following chart summarizes the recommended board actions:

– Feasibility Invitation	49
– Repair Assessment	27
– Project Scope Invitation	7
– Planning	13
– Regionalization Assessment	12
– Regional Vocational/Technical HS	9
– Hold	45
Total	162

Process Overview

- Invitation to Collaborate on a Feasibility Study, Repair Assessment or Invitation to Collaborate on a Project Scope and Budget Conference is **not approval of a project.**
- Moving forward in the process requires collaboration with MSBA.
- Moratorium ended June 30, 2007. After this date, school districts moving forward without prior MSBA approval do so at their own risk. To qualify for funding districts must follow MSBA statute and regulations which require MSBA collaboration and approval at each step of the process.
- Statements of interest placed in the hold category need the District to clarify issues identified in the SOI and the MSBA may need to perform further due diligence.

Assessment Criteria

- **Building Condition**
 - Building exhibits signs of moderate to severe deficiencies in multiple building systems such as: roofing system, façade, windows and doors, heating and ventilation systems, and electrical distribution system.
 - These deficiencies adversely impact the school facility's ability to support the delivery of the educational program.
- **Building Capacity**
 - Building exhibits signs of moderate to severe overcrowding including excessive class sizes, inadequate number of classrooms, high number of cafeteria seatings, and conversion of non-educational space to educational uses.
 - These conditions adversely impact the school facility's ability to support the delivery of the educational program.
- **Educational Program**
 - The ability to support the required educational program is adversely impacted by building condition and/or capacity, including use of inadequate spaces for the delivery of educational programs.
- **Structural Deficiency**
 - Building has clearly documented structural deficiencies that pose an immediate risk to health and safety of building occupants.

Invitation to Collaborate on Feasibility Study

- Not approval of a project - “Proceed with Caution”
- Collaborate with MSBA to begin exploring potential solutions for identified problems.
- Solutions to be explored may include non-construction options such as re-districting, regionalization, re-programming of existing spaces.
- For SOIs invited to this phase the following will need to occur:
 - Approval by the MSBA of an Owner’s Project Manager which will include a review by the MSBA Owner’s Project Manager Advisory Panel
 - Selection of Feasibility Designer through the MSBA’s Designer Selection Panel
 - Submission by the District of the Initial Compliance Certification (ICC)
 - Execution of a Feasibility Study Agreement with the MSBA detailing scope, schedule, milestones and cost-sharing parameters of the Feasibility Study

Repair Assessment

- Initial review of SOI and evaluation of facility indicate scope of a potential project is limited to replacement or repair of one or a limited number of building systems.
- Repair would materially extend the useful life of the school and preserve an asset that otherwise is capable of supporting the required educational program.

Invitation to Collaborate on Project Scope and Budget Conference

- Applies to Statements of Interest in which the community has made significant progress during the moratorium (i.e. new facilities were constructed, are under construction, or detailed design is complete and ready for bid).
- Initial review by MSBA confirms that some action was required to correct significant deficiencies in the existing facility.
- Scope review is required to obtain MSBA concurrence that the scope and cost of the project are appropriate and consistent with MSBA statutes, regulations and guidelines.

Planning

- Statement of interest submitted by school district identified issues that may warrant further action by MSBA, but were not clearly stated in the SOI or evident upon MSBA diagnostic investigations.
- Additional investigations are required to establish the extent of the problem and identify potential solution path, if needed.

Regionalization Assessments

- In reviewing certain statements of interest, MSBA identified potential opportunities to address issues raised by the school district through the exploration of solutions combining regional resources.
- May result in capital projects which address the educational needs of multiple school districts in a cost effective manner.

Regional Vocational Technical High Schools

- Regional vocational technical high schools are complex, high cost institutions that require special consideration.
- They typically serve geographically large regional districts which are overlaid on existing school districts containing academic high schools that may have other priorities which must be coordinated.
- Separate evaluation of regional vocation technical high schools will be undertaken by a review panel to be formed by the MSBA.

Hold

- Issues identified in statement of interest may require long range planning.
- Statement of interest did not clearly identify issues warranting MSBA action.
- In some instances the issues identified in the SOI were not verified during MSBA diagnostic investigations.
- Issues identified in the statement of interest were clearly stated and confirmed by diagnostic investigations but were not of sufficient severity or urgency to require further MSBA action at this time.