

Town of Mattapoissett / Mattapoissett Public Schools



School Consolidation Study – April 2023



EDWARD J. COLLINS, JR. CENTER FOR PUBLIC MANAGEMENT

JOHN W. McCORMACK GRADUATE SCHOOL OF POLICY AND GLOBAL STUDIES

UNIVERSITY OF MASSACHUSETTS BOSTON



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Introduction



Introduction

Executive Summary

The Town of Mattapoisett, in close collaboration with the Mattapoisett Public Schools (MPS), has begun planning for the future of the Town given the various impacting factors presenting themselves including capital investments, population trends, and environmental considerations. One component of this review highlights the two school facilities presently operating within Mattapoisett, Center School and Old Hammondtown School. The Town sought assistance from the Collins Center to analyze potential school facility consolidation scenarios which may provide helpful information in which to base further decisions and strategic actions to benefit Mattapoisett as a whole.

The following study is an independent analysis to determine the financial and educational benefits and challenges of various facilities use options. The Project Team has instituted a broad approach to data analysis, which includes not only local information, but comparisons to similar school districts. Further, additional information was collected via public engagement activities which provided an underlying community opinion of the school district and its importance to the Town. The report does not include recommendations, but instead offers five alternative facilities use options from both an education and cost perspective. The analysis resulted in the subsequent high-level summary points, which will be discussed later and which shaped the five school facilities alternatives.

Key data that helped shape the assessment and development of options included:

- Mattapoisett's historic population trend depicts an aging pattern, with 27.4% of residents being 65 or older.
- Historic school enrollment has declined since a peak in FY2014, however, between FY2017 and FY2023, the enrollment has held relatively steady.
- Enrollment projections estimate a continually fluctuating enrollment over the next ten years, with a low in FY2026 and a high in FY2024. The end of the ten-year period in FY2033 denotes an anticipated rebound calculating just 6 students short of the highest school population.
- Comparative analysis with 8 similar districts found Mattapoisett's expenditure trends, particularly those on facilities and operations, to fall at the mid-point of the cohort consistently.
- The overall condition of both school facilities is outstanding and supported by the MSBA condition assessment.
- Given the present and projected student enrollment, neither school facility can accommodate a full consolidation without significant construction.
- School Committee policies detail the process to adjust the use of current school facilities alongside a notification process to the MSBA regarding closure of a school building.



Methodology for Study

The Project Team gathered data from various sources, including the Town of Mattapoisett, the Mattapoisett Public Schools (MPS), Old Rochester Regional School District (ORRS), the Massachusetts Department of Elementary and Secondary Education (DESE), the Massachusetts Department of Revenue (DOR), the United States Census Bureau, and the United States Bureau of Labor Statistics. Each of these data points served to frame the current operating conditions of the Mattapoisett Public Schools. In addition, and to balance quantitative considerations, the study also instituted a public outreach and engagement campaign, which elicited and collected stakeholder feedback via two in-person sessions and an online survey.

Alongside data collection and public engagement efforts, a Mattapoisett Project Oversight Team (oversight team) consisting of several key individuals including the Town Administrator, the Superintendent of Schools, a Board of Selectmen Representative, and a School Committee Representative, was formed. The oversight team was charged with reviewing the project's task structure and timeline as well as providing vital input on the formulation of the public engagement plan, including targeted stakeholders and methods of communication. Members of the oversight team also provided updates to various elected groups regarding project status to ensure consistent messaging to constituents. Finally, the oversight team participated in a facilities walkthrough, where various individuals led guided tours of the school facilities, discussed current use patterns, including educational programming, facilities conditions and maintenance, and future plans.

The Project Team focused solely on the review of data to generate conservative projections where applicable, as well as compiled options surrounding school consolidation. No recommendations were included as they fell outside the scope of work.

This report includes:

- Assembly and analysis of enrollment and financial information from the Town of Mattapoisett, DOR, DESE, and NESDEC.
- Review of facilities data, including previous assessments, floor plans, capital expenditure trends, and other information, supplied by facilities staff.
- Review of educational space utilization and needs based upon current program offerings.
- Cohort school analysis discussion.
- Documentation of public outreach trends.
- Overview of potential school consolidation alternatives.



School District Profile



Mattapoissett School District Profile

Overview

Mattapoissett is a member of Superintendency Union #55, which was established in 1957, to share certain central office staff resources under M.G.L., Chapter 71. Two local schools are operated under this organizational structure, Center School, serving grades preschool through 3, and Old Hammondtown School, serving grades 4 through 6. The Town is also an affiliate of the Old Rochester Regional School District



alongside Marion and Rochester for student educational services of grades 7 through 12.

Because two layers of school district governance are present, Mattapoissett is served by a five-member elected local School Committee who retain jurisdiction of Center School and Old Hammondtown School. In addition, the Superintendency Union has a nine-member committee, consisting of three representatives from each local School Committee who meet at least twice annually. Further, the regional school district has a governing body comprised of two elected members from each member town as well

as a third member appointed by the local school committees for a total of nine individuals. Consistent with Massachusetts General Laws Chapter 71, both the local and regional school committees are charged with developing and appraising educational, financial, and operational goals, policies, and procedures for the local and regional districts, as well as employing a Superintendent to implement and administer the same.¹



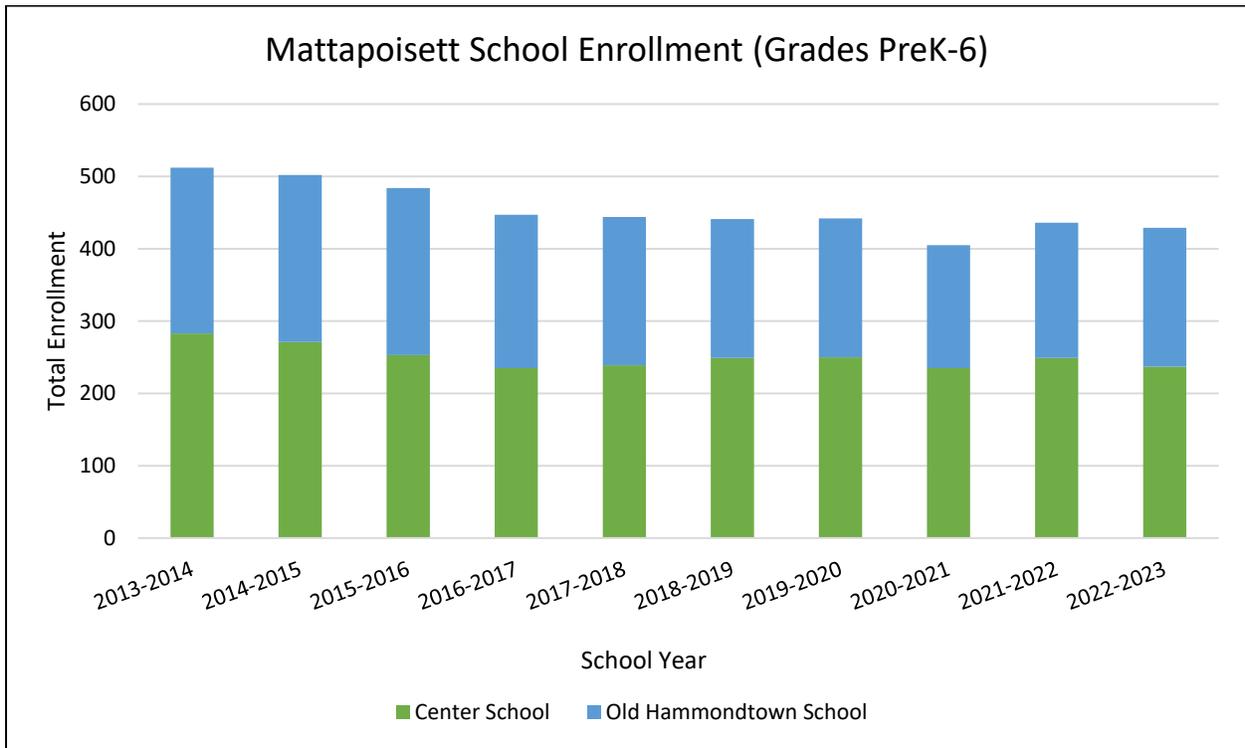
Historical Enrollment

The Mattapoissett School District has seen a decline in enrollment for grades PreK through 6 over the last 10 years. The annual average decrease beginning in FY2013-2014 has been -7.4 students, for an overall reduction of 74 pupils. While this trend warrants consideration, it is important to also note that a more stable enrollment environment occurred between FY2017-2018 and FY2022-2023. When analyzing this

¹Old Rochester Online Policy Manual, <https://z2policy.ctspublish.com/masc/browse/oldrochesterset/rochester/SECTIONA>, Accessed February 2023



select six-year period, an average annual decrease amounted to -3.0 students, which symbolized a steady student population.



Information provided by the District noted Mattapoissett has maintained three sections per grade, and a single PreK classroom. Based upon the FY2023 enrollment totals, this distribution averages 18 students per classroom between Kindergarten and Grade 3, and 21 students per classroom in grades 4 through 6. PreK maintains a steady average of 25 students annually, though the Project Grow program (PreK) has a documented waiting list year over year which merits consideration. Further, the School Committee has presently approved 12 School Choice seats available between grades K and 6, of which all slots are filled in FY2023.

The Project Team felt the impact of the COVID-19 pandemic on enrollments in FY2021, and more so in FY2022, warranted mention in the report. As evidenced by the enrollment figures during these years, a significant decline occurred in FY2020-2021, a loss of 37 students in the District. However, the schools realized a rebound in the following year totaling 31 students. To ameliorate this FY2020-2021 enrollment anomaly, the timeframe investigated included years prior to the pandemic impact to form a more accurate pattern.

Historical Expenditures

Expenditure data gathered from DESE over a five-year period, FY2017 through FY2021, displayed Mattapoissett's financial support for education being consistently higher than the state average. The review focused on the in-district per pupil expenditure standard compiled by DESE as detailed in the following graphics. The DESE per pupil expenditure calculation method is calculated by dividing a district's



operating costs by its average pupil membership (FTEs), including in-district expenditures per pupil and total expenditures per pupil, which includes in-district and out-of-district spending and enrollment.²

The chart below tracks Mattapoissett’s historical in-district per pupil expenditures against the state averages. Because each community is different and sets individual standards for local education, the Project Team felt this comparison was not the most helpful for determining educational expenditure appropriateness. For example, Mattapoissett’s student performance far outpaces the state average. One can reasonably draw a correlation between local support for education, in terms of funding, and the student performance outcomes. An additional consideration was noted when isolating Mattapoissett’s annual per pupil increases. Excluding FY2021, which is discussed in the Cohort School Analysis section, out of the four years calculated, only FY2019 had a higher increase of 1.31% compared to the state average. FY2018 realized 3.11% less than the state and FY2020 was 1.02% less than average.

School Year	In-District Expenditures per Pupil	Mattapoissett Annual % Increase	State Average	State Annual % Increase
2016-2017	\$18,149.09		\$15,349.97	
2017-2018	\$18,297.54	0.82%	\$15,952.76	3.93%
2018-2019	\$19,253.55	5.22%	\$16,576.90	3.91%
2019-2020	\$19,509.07	1.33%	\$16,966.79	2.35%
2020-2021	\$22,675.67	16.23%	\$18,521.88	9.17%

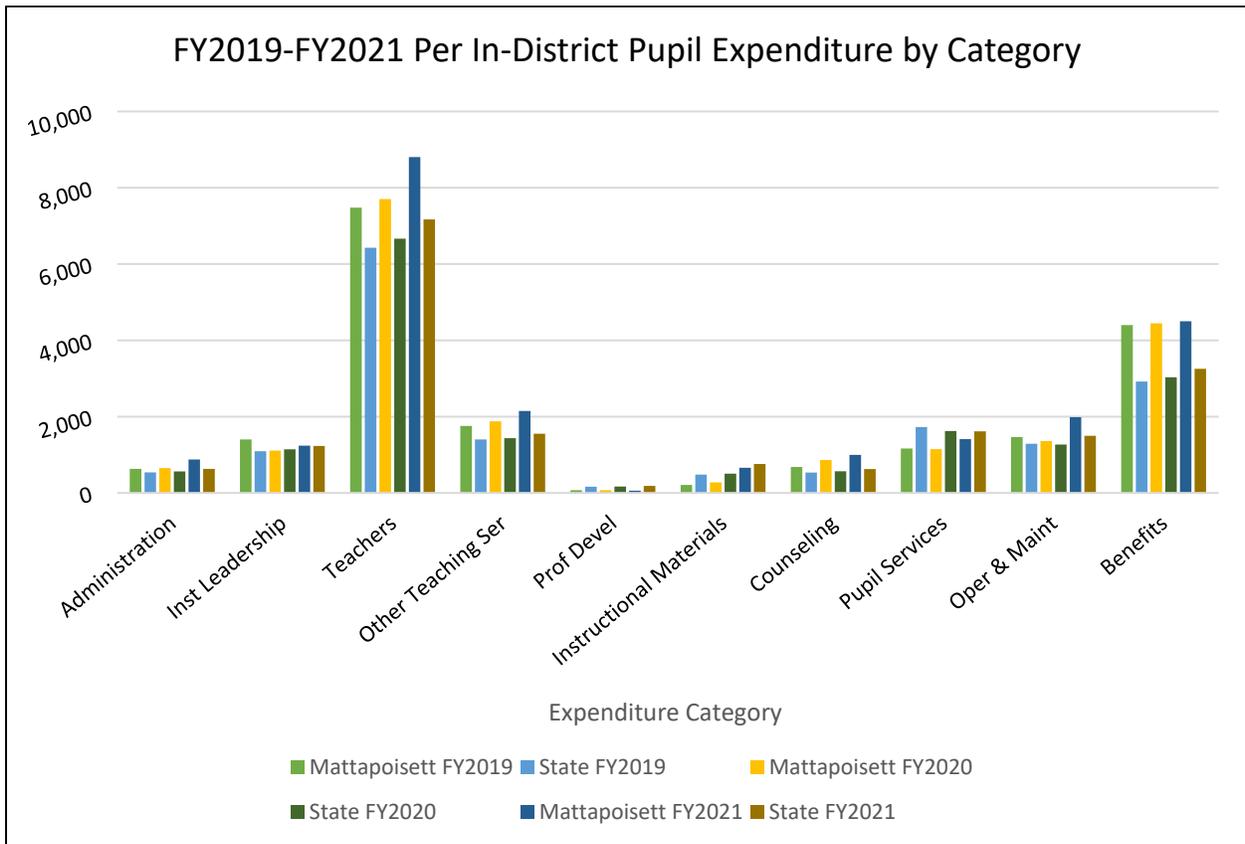
To provide context surrounding this finding, the following bar graph portrays where Mattapoissett dedicates its educational funding from an expenditure category sorting perspective between FY2019 and FY2021. The state average expenditures have also been disaggregated to offer further consideration of the differences and similarities between Mattapoissett’s financial priorities and the overall state compilations. One item of note, the Project Team did not attempt to calculate any Operations and Maintenance expenditures reported by the District but relating to Town department building use overhead for the associated spaces within Center School.

The disaggregation includes ten categories: Administration, Instructional Leadership, Teachers, Other Teaching Services, Professional Development, Instructional Materials, Technology and Equipment, Guidance, Counseling and Testing, Pupil Services, Operations and Maintenance, and Insurance and Benefits. Both the state average and Mattapoissett spend the vast majority of expenses on Teachers and Benefits, though this pattern is befitting of any service industry. Other differences in categories are more subtle such as Administration, which expenses around 3.5% of the total per pupil sum annually. Operations and Maintenance expenditures trend very closely between the state and Mattapoissett. 7.0% of in-district per pupil expenditures were dedicated to Operations and Maintenance in FY2020 versus 7.5% within the state, growing to 8.7% in FY2021 for the District and 8.1% for the state average. One category where Mattapoissett has a much lower than average expenditure is Pupil Services. The state average

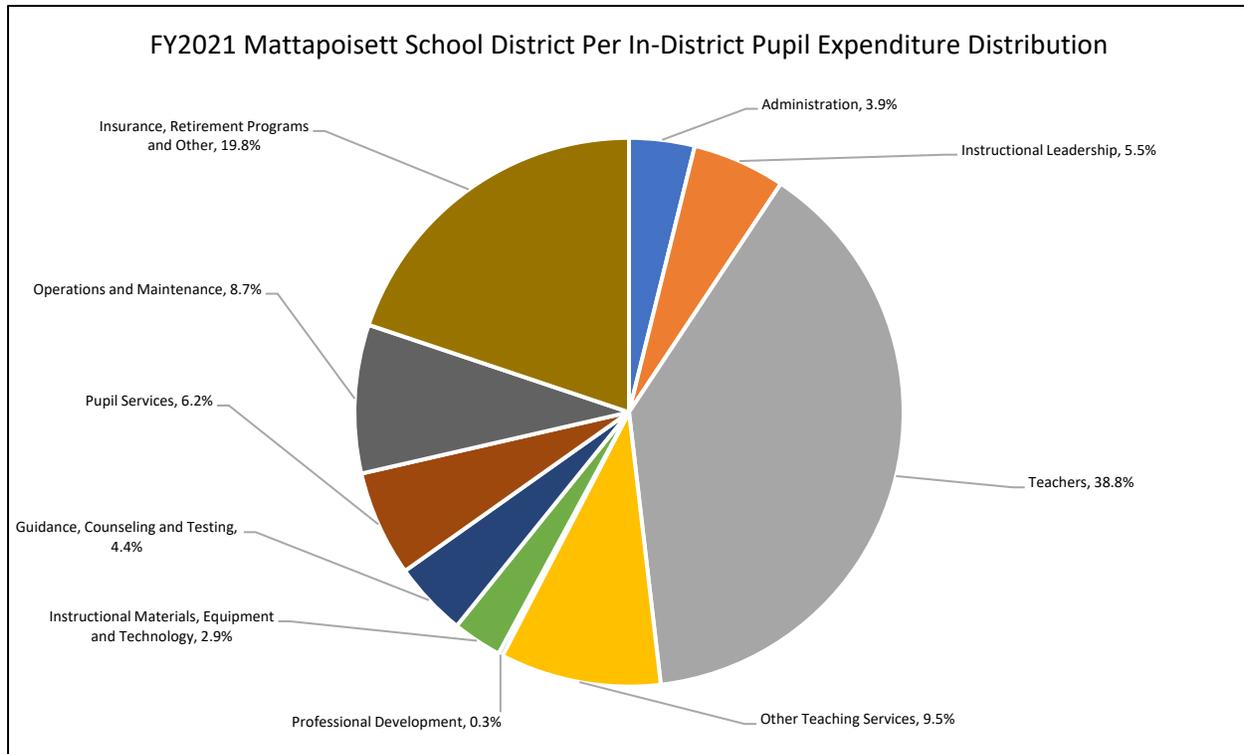
² Massachusetts Department of Education Profiles, <https://profiles.doe.mass.edu/statereport/ppx.aspx>, Accessed February 2023.



expenditure was 10.4% in FY2019 and dropped to 8.7% in FY2021. Mattapoissett in comparison only spends an average of 6.0% annually on Pupil Services needs. Based on this phenomenon, and the information collected about a fully inclusive educational program throughout the district, the Project Team concluded Mattapoissett’s unique support structures likely reduce the impact of out of district special education placements which is a main driver within this category. Further, Mattapoissett appears to reallocate pupil services costs to necessary supports such as Guidance and Counselling services as well as Other Teaching Services increasing spending in these areas in support of student needs. Overall, maintaining appropriate supports to service special education students in district has many benefits, one being a reduced number of costly out of district special education student placements.



Another way to review annual per pupil expenditure distribution is in a disaggregated manner using a pie graph. The FY2021 Mattapoissett per in-district pupil expenditures have been distributed by percentage on the next page. The graphic shows Teachers and Benefits being the largest portions of the pie, totaling 58.6%, followed by Other Teaching Services at 9.5%, Operations and Maintenance at 8.7%, and Pupil Services expenditures at 6.2%.



It is important to note, the FY2021 year displays persistent increases in certain categories for the vast majority of school districts and the state as a whole. The historical expenditure analysis makes the assumption that the impact of COVID-19 protocols, specifically targeting Operations and Maintenance and Pupil Services, drove a higher-than-average increase in these categories statewide. Between FY2020 and FY2021 the state per in-district pupil expenditure for Operations and Maintenance grew by 18.2% as compared to the Mattapoissett increase of 31.4%. Given this variance between the state and District average expenditure, a further assumption can be made that Mattapoissett schools implemented more elaborate methods of cleaning and maintaining school facilities during the pandemic. Interestingly, expenditures between FY2019 and FY2020 in Mattapoissett for Operations and Maintenance dropped by 7%, whereas the state average continued to increase. The Project Team felt this variance in trend demanded further analysis, which is discussed in the Cohort School Analysis section.

Separately, and while not an expenditure, the Mattapoissett School Committee leases space to the Southeastern Massachusetts Educational Collaborative annually. The Collaborative occupies four classrooms and an office in the Old Hammondtown building generating a yearly revenue of approximately \$40,000. The lease is renewed by mutual agreement on an annual basis and the relationship provides a unique benefit to the District, not only from a revenue generation standpoint, but also to provide expanded special education services to Mattapoissett students within their neighborhood school.



Strategic Plan

Superintendency Union #55, of which Mattapoissett is a member, and the Old Rochester Regional School District share a well-defined *Vision, Theory of Action, and Strategic Plan* last approved by the Joint School Committee in September 2018. The Mission of the District, as indicated in the Vision 2023 Strategic Plan, “is to inspire all students to think, to learn, and to care”.

A Joint School Council represents and supports the work of both elementary schools in the District through development and review of the Mattapoissett Elementary Schools Improvement Plan. The Improvement Plan is developed within the framework of the *District Strategic Plan* and focuses on the District’s three Strategic Initiatives. The District’s three Strategic Initiatives as delineated in the Vision 2023 document are:



1. 21st Century Learning for all Students
2. Social Emotional Learning
3. Global Citizenship

The expected outcome of the District’s Theory of Action is that the District will “have provided our Tri-Town students with 21st century academic skills, strengthened their social and emotional competencies, and prepared them to be engaged global citizens.”

To operationalize the Theory of Action, the District leverages professional development, technology, and community partnerships to provide learning experiences for students in pursuit of the Strategic Plan Initiatives as evidenced by data presented in their annual reviews of the Strategic Plan.

Educational Programming

Instructional programming at both Mattapoissett elementary schools includes academics as well as social emotional learning. In addition to general education programming, Mattapoissett offers a full range of student services and special education programming at Center and Old Hammondtown schools for students in grades PreK through grade 6. More specifically, Mattapoissett operates a fully inclusive educational environment, striving to retain all students within their neighborhood school, including those with special education needs. This model serves to reduce out of district placement costs while creating a well-rounded learning space for all Mattapoissett students.

Each school provides services and designates learning space for the following: Special Education classes, Speech and Language Pathology, Occupational and Physical Therapy, School Psychology, School Adjustment Counseling, English Language Learning, Mathematics and Reading Specialist Instruction. Each



All Students:

Average SGP	2019	2021	2022
ELA	62.5	53	60.8
Math	60.3	49	63.6

High Needs Subgroups - *Students with Disabilities (SWD), Students from Low Income homes (LI), and English Language Learners (ELL):*

Average SGP	2019	2021	2022
ELA	58.4	36	50.3
Math	53.2	38.6	53.2

While this study concentrated on only the Mattapoisett School District, it is worth mentioning the vast majority of Mattapoisett students continue onto the Old Rochester Regional School District for grades 7 through 12. Old Rochester also represents a high performing student body from a testing, graduation rate, and college admissions perspective. A reported 79.3% of 11 and 12th grade students completed an advanced course in FY2022, with 419 AP tests taken, and an overall score of 3 or higher for 68% of the assessments. Students excelled in the areas of English Language Arts, Spanish, History, Human Geography, Calculus, Computer Science, and Biology AP tests, each subject area earning at least 70% of test takers scoring a 3 or higher. Further, Old Rochester students outpace the state average for SAT scores, earning an average of 572 on the Reading / Writing and 564 on the Math assessments, whereas the State tracks lower at 558 for Reading / Writing and 553 in Math. Old Rochester Regional School District also achieved a 4-year cohort graduation rate in FY2022 of 96.2% documented by DESE. Finally, and according to the FY2022 DESE Graduates Attending Institutions of Higher Education chart⁴, 81.7% of Old Rochester graduates were accepted and planned to attend a 2- or 4-year college or university. These performance measures in later grades are a testament to the middle and high school readiness produced by the Mattapoisett School District and depict a clear trend of support for education throughout the student life cycle.

⁴ Massachusetts Department of Education Profiles, <https://profiles.doe.mass.edu/statereport/ppx.aspx>, Accessed April 2023.



Community Profile



Mattapoissett Community Profile

Overview

The area known today as Mattapoissett was purchased by Governor William Brenton from the Wampanoag people in 1664 and is a Wampanoag word for “a place of resting.” Originally a part of Rochester, it was settled in 1750 and incorporated as a Massachusetts town in 1857. In the years prior to its incorporation, the settlement became known for its shipbuilding and as an important site supporting not only shipping and whaling, but also logging, farming, and eventually salt harvested from the sea water.¹ Approximately 400 ships were built in Mattapoissett’s shipyards from the time of its settlement until the last ship *Wanderer* was launched in 1878. After the decline of the whaling industry, Mattapoissett became a popular summering destination for affluent residents of Boston, New York, and other places.²



Today, Mattapoissett is a suburban community with residents who work in area hubs like New Bedford, Boston, or Providence. Others operate or work in businesses targeting summer visitors.

Government

Mattapoissett employs the Open Town Meeting form of government and is led by a Board of Selectmen.



The Town Administrator works under the Board and provides general administration of daily affairs. There are 24 municipal departments and 28 boards and committees. Mattapoissett provides a suite of services to its residents ranging from public safety, a harbormaster, an animal control and shellfish department, a highway department, a council on aging, health and recreation departments, a housing authority, a public library, and the Town’s Transfer Station. The Town is also party to a regional school district.

Demographics

According to US Census 2020 data, Mattapoissett has approximately 2,895 total households. Approximately 58% of all households were family households and 15% of households were seniors living alone. The population has grown 2.7% since 2019. Median household income is \$90,747, with 16% of household incomes above \$200,000 and 4% of household incomes below \$25,000. The homeownership

¹ *The Early History of Narragansett*. Elisha R. Potter, Jr. Marshall, Brown and Company. Providence, RI. 1835, https://archive.org/details/earlyhistoryofna00pott_0/page/n3/mode/2up., Accessed February 2023.

² *Historical Overview, Town of Mattapoissett*. Mattapoissett Historical Society, https://web.archive.org/web/20071010145939/http://www.mattapoissetthistoricalsociety.org/Mattapoissett_history.htm., Accessed June 2022.



rate in Mattapoisett outpaces the state average, with 77% of Mattapoisett residents owning their own home versus 62% of Massachusetts residents. The 2020 median home value in Mattapoisett was \$481,400.³ Population trends are further discussed in Section 3.1.

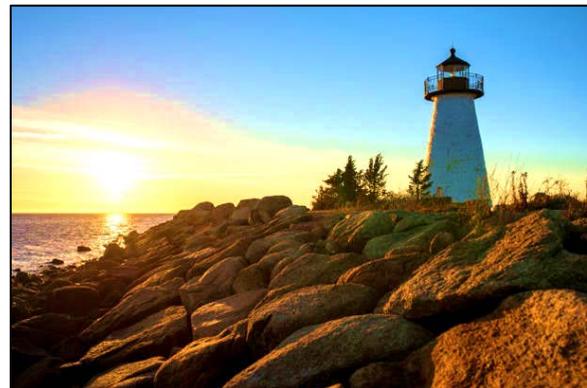
Economy

Mattapoisett is notable for its residential character. Between FY2018 and FY2022, residential properties made up somewhere between 92.69% and 93.61% of all land assessments. As a result, the Town's finances are dependent on residential taxpayers. In FY2021, the tax levy in total represented approximately 87.7% of all municipal revenue dollars – and virtually all of that tax levy was residential. The heavy reliance on residential tax levy, coupled with Mattapoisett's small commercial and industrial base, is significant. The Town's flexibility in responding to an economic downturn, particularly one which impacts housing prices, is limited.⁴

In FY2021, Mattapoisett employed approximately 382 full and part-time employees, with total salaries and wages amounting to approximately \$10.7 million. Financial indicators suggest the Town has strong creditworthiness. Moody's and Standard & Poor's, two of the major rating agencies in the United States, rate Mattapoisett as Aa2 (as of 2014) and AAA (as of 2021), respectively. Mattapoisett has maintained an Aa2 from Moody's since at least 2010. Certified free cash as of FY2022 amounted to about \$2 million, or approximately 6.28% of the budget.⁵

Geography

Mattapoisett, Massachusetts is a town of 6,508 people located in Plymouth County, approximately 60 miles south of Boston and approximately 37 miles east of Providence, Rhode Island, on the South Coast.⁶ It is surrounded by Fairhaven, Acushnet, Rochester, Marion, and Buzzards Bay on its south shore. The Town enjoys ready access to Greater Boston, Cape Cod, and Providence via Interstate 195. Mattapoisett is 24.2 square miles total, which nearly a third of is water.⁷



³ *Mattapoisett, Massachusetts*, ClearGov Profile, <https://cleargov.com/massachusetts/plymouth/town/mattapoisett>, Accessed June 2022.

⁴ *Mattapoisett, MA*. DLS Municipal Databank, <https://www.mass.gov/municipal-databank-data-analytics-including-cherry-sheets>, Accessed June 2022.

⁵ *Mattapoisett, MA*. DLS Municipal Databank, <https://www.mass.gov/municipal-databank-data-analytics-including-cherry-sheets>, Accessed June 2022.

⁶ *Mattapoisett, MA*. DLS Municipal Databank, <https://www.mass.gov/municipal-databank-data-analytics-including-cherry-sheets>, Accessed June 2022.

⁷ *Geographic Identifiers: 2010 Demographic Profile Data (G001): Mattapoisett town, Plymouth County, Massachusetts*. [United States Census Bureau](https://www.census.gov), Accessed January 2023.

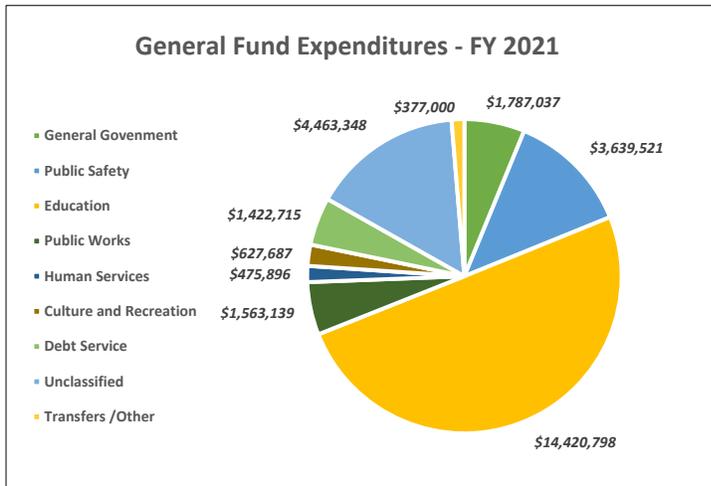


Transportation

Interstate I-195, an auxiliary interstate highway beginning in Providence, Rhode Island, runs east to west and dissects Mattapoissett. I-195 provides a direct route to Cape Code. Exit 31 is for North Street in Mattapoissett. The Town belongs to the Southeastern Regional Transit Authority (SRTA). The Wareham-New Bedford Connection line has routes that pass-through Mattapoissett. Th Council on Aging also offers a van service, by appointment, for residents with disabilities and seniors in the local service area.

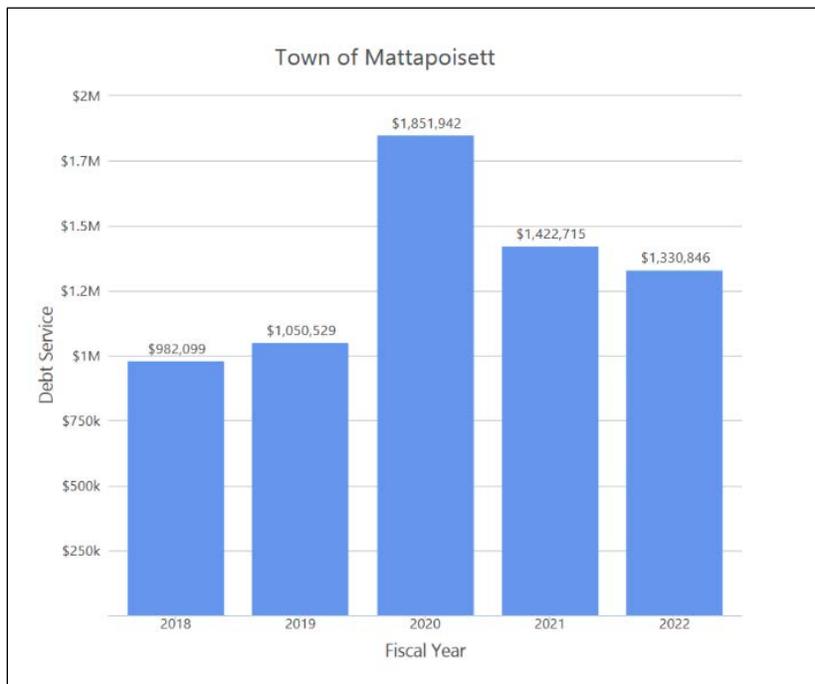
Historical Expenditures

When reviewing Mattapoissett’s expenditure data as compiled by the DLS, over the past five years,



between FY2017 and FY2021, the average annual expenditure increase was 5.51%, with FY2021 being the outlier, calculating a -4.1% decrease in expenditures. Throughout the reviewed period, it is clear Mattapoissett spends an average of 48.9% on education. Public Safety and Human Services round out the top expenditure categories for the municipality translating to a general community support of quality education and services for residents.

Mattapoissett is experiencing a steady reduction in its debt obligations. Final payments for school construction projects will conclude in FY2025 and FY2026 alongside the library construction, fire truck acquisition, and engineering and drainage projects. Based on the debt schedule provided by the Town of Mattapoissett the gained capacity will be partially reduced with full principal and interest payments coming due for the fire station construction in FY2027.⁸



⁸ Massachusetts Division of Local Services (DLS), https://dls.gateway.dor.state.ma.us/reports/rdPage.aspx?rdReport=Dashboard.Category_6_Debt, Accessed February 2023.



Economic Development & Growth

Data obtained from the Mattapoissett Building Department provides a local perspective of residential and commercial growth in terms of building activity. Note this data does not account for demolitions of existing homes thus the net effect is unknown.

Mattapoissett Permits													
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Totals
Building Permits	139	*	*	*	378	300	324	435	488	491	483	648	3,686
New Single-Family Homes	14	17	22	25	23	20	15	25	16	16	39	51	283
New Commercial	2	*	*	*	*	1	0	1	2	0	1	0	7

*Data unavailable.

Still, given the ramifications of potentially consolidating schools, it is recommended that the Town consider a growth potential study to further understand this impacting factor, as this study did not deeply review available property, real estate trends, or maximum buildout potential. As noted in the Master Plan, a high-immediate priority is supporting the public school system to continually attract families. One potential strategy to bolster enrollment is to implement recommendations noted in the Housing Production Plan including more affordable and subsidized homes⁹. The possibility of a 40B affordable housing project also fell outside the scope of this study and should be reviewed to determine the impact on school populations.

Historical Population Trends

Following the compilation of the latest U.S. Census in 2020, the population of Mattapoissett rose 7.66%, approximately 0.41% more than Plymouth County, and 0.29% more than the State as a whole over the 10-year span. While this historical accounting may not appear impactful given the overall small amount of growth, it is the age distribution of residents that has emerged as a pattern to consider.

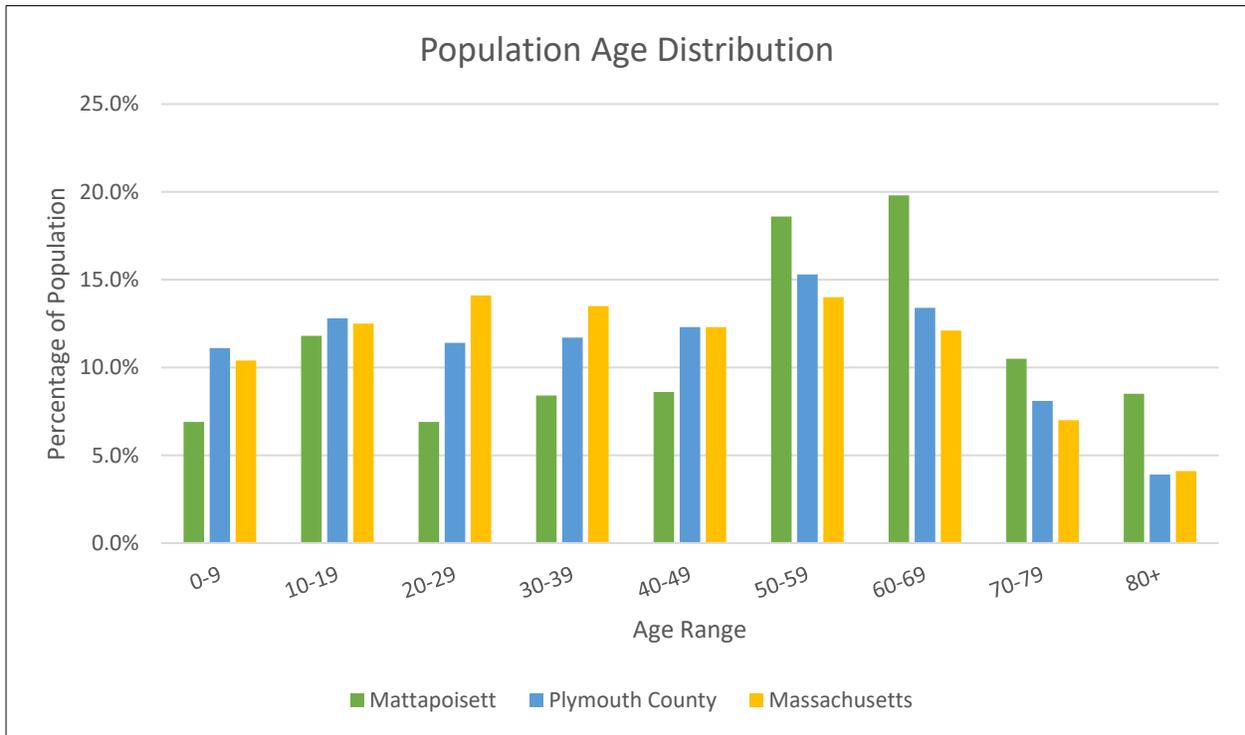
Location Description	Census 2010	Census 2020	# Change	% Change
Mattapoissett	6,045	6,508	463	7.66%
Plymouth County	494,919	518,508	35,900	7.25%
State	6,547,629	7,029,917	482,288	7.37%

Age group factors play a role in current and potential school enrollment. Data collected by the Donahue Institute and the U.S. Census displays the age distribution of Mattapoissett residents exceeding the age of 65 being 10% higher than the state. Massachusetts has 17.4% of its population falling within the 65 and older category, as compared to Mattapoissett reporting 27.4%. Additionally, when reviewing the school age population, 15.9% of Mattapoissett residents are between 0 and 19 years, which is below the state total population by 3.6%. Further, the median age in Mattapoissett is 56.6 years. Plymouth Country reports

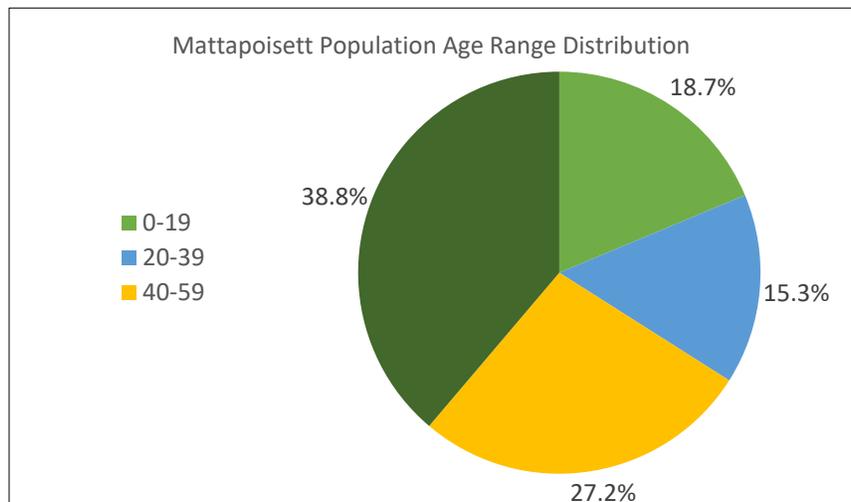
⁹ Town of Mattapoissett Master Plan, <http://www.housing.ma/mattapoissett/report>, Accessed February 2023.



an average residential age of 42.6 years; and Massachusetts in total is 39.6 years, making Mattapoissett's resident population significantly older than both the county and the state.

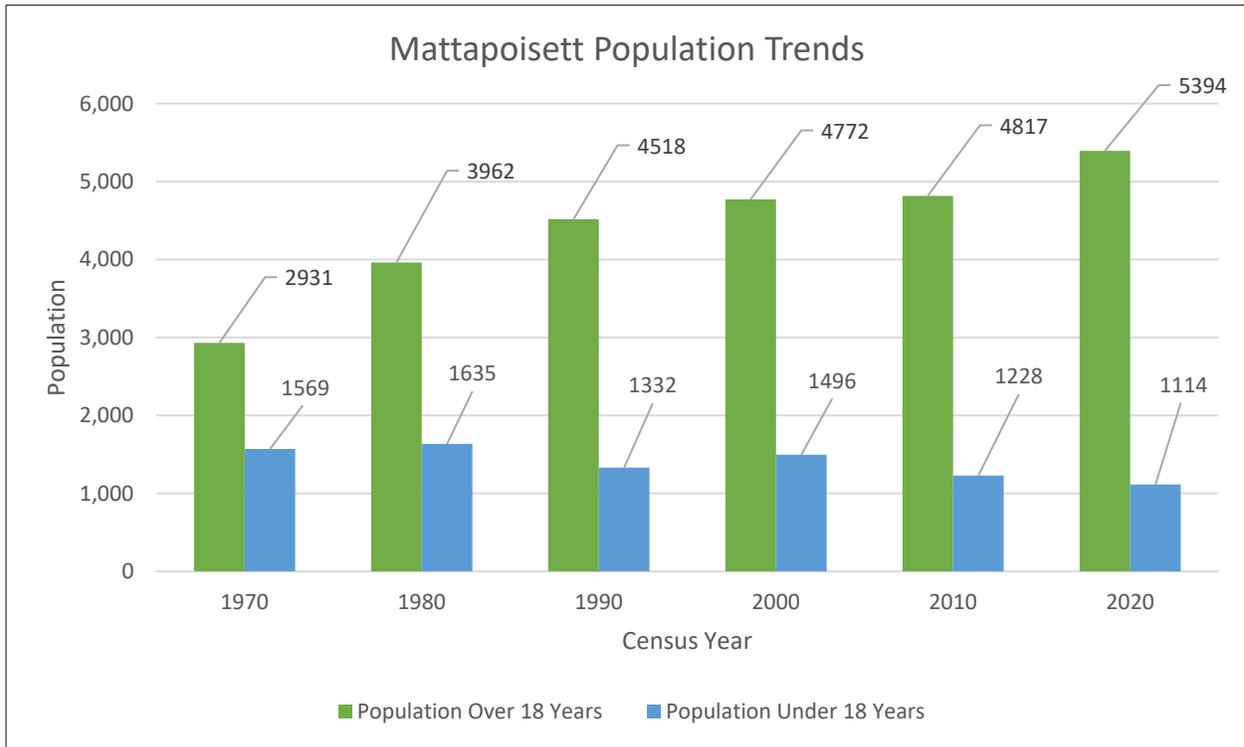


The pie chart to the right displays Mattapoissett's age range distribution according to the 2020 U.S. Census. The smallest portion of the Town's residents fall into ages 20-39 at 15.3%, followed by ages 0-19 at 18.7%, and ages 40-59 at 27.2%. The largest portion of the resident population is over the age of 60 years totaling 38.8% in Mattapoissett.





To further illustrate historic trends, the graph below charts the Mattapoisett population, disaggregated by age group, beginning in 1970, as documented by the U.S. Census. The over 18 population has grown steadily throughout the 50-year period, totaling approximately 68% whereas the under 18 age group has been reduced by an estimated 29% overall. These historical trends depict an aging Town population, which exceeds birthrates and therefore school-aged children.



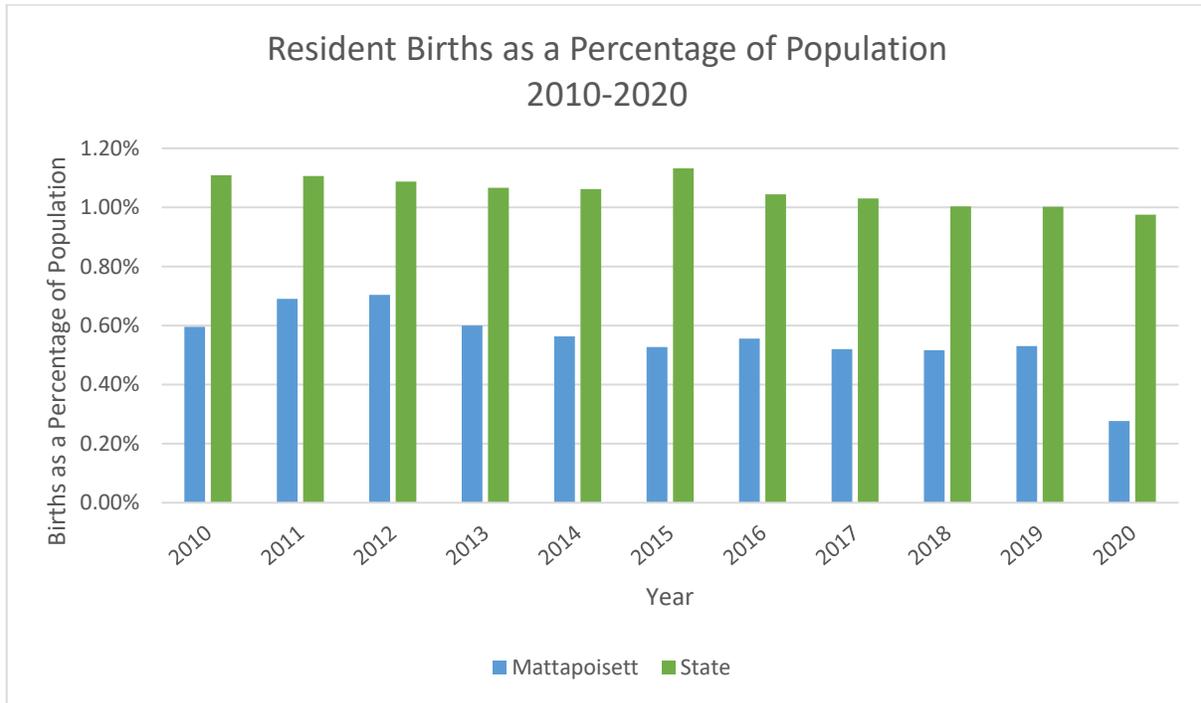
While future population projections will be discussed in Section 06, identifying historical movements in these areas is worthy of consideration given the potential impacts on school enrollment.¹⁰

Alongside population age-range distribution comes annual resident new births as a potential contributing factor for school enrollment. The birth rate in Mattapoisett over the past decade has seen a low in 2020 of 18 or 0.28% and a high of 43 or 0.70% in 2012. The average number of resident annual births is 34 or 0.55% of the Mattapoisett population during the ten-year span. For comparison purposes, the state of Massachusetts has an average annual birth rate of 71,603 or 1.06% of the estimated population according to *Annual Massachusetts Birth Reports*. While Mattapoisett's rate is significantly lower than the state

¹⁰ U.S. Census Bureau (2021), *American Community Survey 5-year estimates*, Retrieved from *Census Reporter Profile page for Mattapoisett town, Plymouth County, MA*, <http://censusreporter.org/profiles/06000US2502339450-mattapoisett-town-plymouth-county-ma/>, Accessed February 2023.



average, the Town has maintained a steady number of resident births between 2013 and 2019, though there was a substantial reduction in reported births during 2020.¹¹



Mattapoissett Master Plan

The Mattapoissett Master Plan addresses all planning elements and considers the future of Mattapoissett from the lens of a coastal community. High-level priorities and recommendations on capital planning impacts are summarized below.

A priority in the master plan is to support a school system that continues to attract families to Mattapoissett. One strategy is to accept proposals and select a developer to create more affordable housing, enabling families to live in town long-term. More affordable and subsidized homes ensure greater participation of families in the Mattapoissett housing market. Currently, only 2.67% of Mattapoissett's housing units (68 units) are income-restricted; this is below the state 10% recommended threshold.¹²

Additionally, the Town's Master Plan acknowledges that Mattapoissett should find a new facility for Town Hall at an alternate location due to threatened flooding and sea-level rise. A proposed alternative is relocating the building to Center School while balancing the needs of multiple stakeholders.

¹¹Town of Mattapoissett Town Clerk (Years 2018 – 2020), https://dls.gateway.dor.state.ma.us/reports/rdPage.aspx?rdReport=Number_of_Resident_Births&rdScrollX=0&rdScrollY=0, Accessed February 2023.

¹² Town of Mattapoissett Master Plan, <http://www.housing.ma/mattapoissett/report>, Accessed February 2023.



Enrollment Projections & Population Trends



Mattapoisett Enrollment Projections & Population Trends

Overview

In prior sections, historical enrollment and population trends were discussed using data compiled by both DESE and the U.S. Census. While certain trends based upon the selected lookback period were identified, including the aging population and reduction in Mattapoisett birth rates, many unknown, potentially impacting factors were also mentioned. More specifically, the Project Team encourages further analysis targeting population growth potential as inclusion of 40B affordable housing, available property, maximum buildout, and real estate trends fell outside the scope of work for this study. Each of these elements poses a possible influence on student enrollment and related consolidation scenarios and should be explored in depth as a part of any decision-making process.

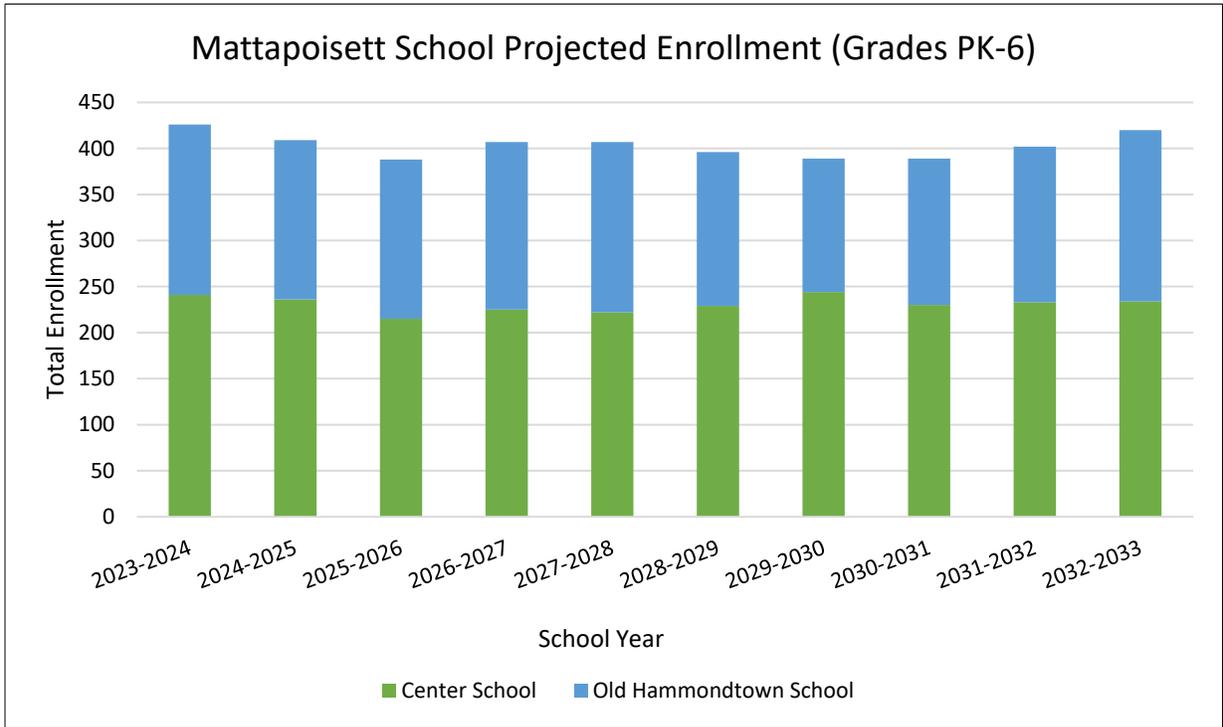
The following discussion leverages data collected and presented by the New England School Development Council (NESDEC) and the UMASS Donahue Institute. The Mattapoisett School District engaged with NESDEC to generate a 10-year enrollment projection detailing estimates per grade beginning in PreK through Grade 6. NESDEC is a not-for-profit, membership-based organization offering school districts a variety of services such as executive searches, professional development, and other studies including enrollment projections¹. Separately, the Donahue Institute administers the Massachusetts Population Estimates Program, which researches aspects of population growth as a matter of supporting data driven public policy. Each data set offers modeled projections which do not claim to predict the future, but rather may serve as points of reference to consider.²

Enrollment Projections

According to the February 2023 NESDEC enrollment projection report, the Mattapoisett School District is predicted to experience a low enrollment of 388 students in FY2025-2026 and a high in FY2023-2024 totaling 426. The graph below, as well as the details included in the appendix, depict a decline beginning in FY2024-2025, then a gain in FY2026-2027, another decline period, closing out with a final gain in FY2032-2033 reaching just six students short of the 426 high. This type of movement produces a challenge for decision-making as while certain years may see a reduction of one grade section, the following year will likely require the section be returned to maintain the School Committee's desired student-teacher ratio, particularly in the younger grade levels.

¹ New England School Development Council (NESDEC), <https://nesdec.org/default.aspx>, Accessed April 2023.

² Donahue Institute at UMASS Economic Public Policy Research, <https://donahue.umass.edu/business-groups/economic-public-policy-research/massachusetts-population-estimates-program>, Accessed February 2023.



To further illustrate NESDEC’s findings, the table summarizes the projected changes to the Mattapoissett student population, less PreK, as that grade level is anticipated to remain steady at 25 or 26 students. This depiction visualizes the up and down trend of total enrollment movement with an ending overall loss of 11 students between grades Kindergarten and 6. While this information is helpful for a macro view of the estimates, further analysis is necessary to truly pinpoint potential section reduction. Additionally, NESDEC notes years 6 through 10 are “less reliable” and districts are encouraged to perform annual updates to the projections.

Year	K-6	Variance	% Variance
2022-2023	405		
2023-2024	401	-4	-1.00%
2024-2025	384	-17	-4.20%
2025-2026	363	-21	-5.50%
2026-2027	382	19	5.20%
2027-2028	382	0	0%
2028-2029	371	-11	-2.90%
2029-2030	364	-7	-1.90%
2030-2031	363	-1	-0.30%
2031-2032	376	13	3.60%
2032-2033	394	18	4.80%
Total		-11	-2.70%



As noted by the District, traditionally Mattapoisett has maintained three sections of each grade level outside PreK, which has a single classroom. This has resulted in a historical average class size of 17.7 in grades K through 3, and 23.0 in grades 4 through 6. If this same configuration is applied to the NESDEC enrollment projections, the smallest enrollment year beginning in FY2025-2026 could employ a section reduction, which follows this cohort of students throughout their Kindergarten through 6 experience as shown below.

NESDEC Projected Enrollment 2025/2026			
Grade	Enrollment	Number of Classes	Average Class Size
Pre-K	25	1	25
KD	36	2	18
Grade 1	43	3	14
Grade 2	53	3	18
Grade 3	58	3	19
Grade 4	63	3	21
Grade 5	55	3	18
Grade 6	55	3	18

The only other class that may be considered for a section reduction is the incoming FY2024-2025 cohort; however, the sections would be much larger at 21 students, which exceeds Mattapoisett’s traditional student teacher ratio by 3.3 students.

To put this discussion into a facilities perspective, while the enrollment is projected to decrease overall, the distribution of students may only result in a two-section reduction. Removing two classrooms from the consolidation alternatives offered in the last section of this report is not enough to skirt major construction on either building. It is also important to mention, if further section reductions were contemplated, the current agreement between the Mattapoisett School Committee and the Mattapoisett Educators Association stipulates a class size cap of 25 in Article XXIV with the understanding that all final decisions rest with the School Committee.

Population Projections

The table below shows projections for Mattapoisett based on 2018 data produced by the Donahue Institute at UMass with assistance from the Massachusetts Department of Transportation and in collaboration with Massachusetts Regional Planning Associations. Typically, projections for small geographies, such as Mattapoisett, and distant outlooks will be less predictive than projections for larger populations and nearer terms.

The 2018 Donahue Institute analysis falls well outside the growth calculated between the 2010 and 2020 census discussed in depth in the Community Profile section, which reported a 7.7% population climb. This activity exceeded the state’s population growth in the same period by .3%. Still, the predictions proposed by the Donahue Institute do portray a declining trend, which may yet come to fruition. The amount of



enrollment decline presented may be largely attributable to the growth of 55 and over residents, which is a group unlikely to contribute to future student enrollment.³

Donahue Institute at UMass Population Projections											
Description	Census 2010	Census 2020	Projection 2020	2025	2030	2035	2040	5 year	10 year	15 year	20 year
Mattapoisett	6,045	6,508	5,624	5,377	5,118	4,799	4,438	-4.4%	-9.0%	-14.7%	-21.1%
Plymouth County	494,919	518,508	518,508	527,813	534,464	537,977	539,424	1.79%	3.08%	3.75%	4.03%
State	6,547,629	7,029,917	6,933,887	7,094,087	7,225,472	7,313,149	7,380,399	2.31%	4.21%	5.47%	6.44%

³ Donahue Institute at UMASS Population Projections, <http://www.pep.donahue-institute.org/>, Accessed February 2023.



Cohort School Analysis



Cohort School Analysis

Overview

Due to the uncertainty surrounding the NESDEC enrollment projections and their relatively stable outcome, the Project Team implemented an additional analysis to include a cohort of like school districts. The methodology used targeted both student enrollment and relative wealth measures to balance the approach between students served and the Town's ability to pay, referred to as Relative District Wealth. Relative District Wealth is defined as "an indicator of community wealth (personal income and property value) calculated for the Chapter 70 Aid Program. A district at 100% has the capacity to fully fund its foundation budget. Districts at less than 100% are less wealthy, with less personal income and property value, and districts at more than 100% are more wealthy." ¹

The following discussion should be contemplated as yet another perspective when considering major physical and programmatic adjustments to the educational environment. This comparison, simply put, is another contextual data set, which provides an array of information covering enrollments, expenditures, and facilities. It should be noted, the information presented is high level and does not pretend to ponder factors such as building architecture.

Cohort Determination Discussion

A cohort of nine districts was developed based upon student enrollment and relative wealth measures. The in-district student enrollment, as documented by the static DESE Dart and Radar reports (which could vary slightly from the October 1st enrollment figures), in Mattapoisett for FY2020 was 439; therefore, only districts with enrollments varying by 175 students (+/-) were considered for the cohort. Carlisle exceeded the 175 maximum by three students; yet the Project Team opted to incorporate the data into the pool as this variance was considered immaterial. Separately, and given Mattapoisett's 123% Relative District Wealth calculation, districts exceeding 100% relative wealth met the second level of criteria. Rochester, however, fell below 100% Relative District Wealth; but because of its affiliation with the Old Rochester School Union, the Project Team felt it was valid to include within the cohort. The chart below shares the defining data for each of the cohort districts.

District	County	Type of District	Grades Served	Number of Schools	In District Enrollment FY2020	Relative District Wealth FY2020
Brewster	Barnstable	Regional / Superintendency	PK - 05	2	469	157%
Carlisle	Middlesex	Regional	PK - 08	1	602	148%
Dover	Norfolk	Regional / Superintendency	PK - 05	1	494	242%

¹ DESE RADAR Reports, <https://www.doe.mass.edu/research/radar/>, Accessed February 2023.



District	County	Type of District	Grades Served	Number of Schools	In District Enrollment FY2020	Relative District Wealth FY2020
Edgartown	Dukes	Regional / Superintendency	PK - 08	1	403	447%
Marion	Plymouth	Regional / Superintendency	PK - 06	1	435	120%
Mattapoissett	Plymouth	Regional / Superintendency	PK - 06	2	442	123%
Oak Bluffs	Dukes	Regional / Superintendency	PK - 08	1	428	170%
Rochester	Plymouth	Regional / Superintendency	PK - 06	1	506	63%
Sherborn	Middlesex	Regional / Superintendency	PK - 05	1	414	164%

To further strengthen the similarities and indicate a reasonable comparative base between the cohort districts, the Project Team also compiled basic town data from the Division of Local Services. The chart below depicts FY2020 single family tax bill averages, residential tax rates, budgets, and education spending as well as each municipalities bond rating. Mattapoissett falls in the middle of all averages from a high-level municipal perspective.

Town	FY 2020 Single Family Tax Bill	FY 2020 Residential Tax Rate	FY 2020 Total Budget	FY 2020 Education Expenditures	Education % of Total Budget	FY 2018 Moody's Bond Rating	FY 2018 S&P Bond Rating
Brewster	4,736	8.62	56,336,792	19,852,016	35.24%		AAA
Carlisle	15,423	18.36	32,552,469	19,489,763	59.87%	Aa1	
Dover	15,679	12.84	41,746,455	21,950,865	52.58%	Aaa	
Edgartown	5,378	3.35	45,846,284	13,800,077	30.10%	Aa2	
Marion	7,371	11.70	32,253,667	11,225,054	34.80%		AAA
Mattapoissett	6,628	13.49	35,814,505	13,787,655	38.50%		AAA
Oak Bluffs	5,629	7.44	35,292,416	13,407,597	37.99%		AA+
Rochester	5,573	13.48	22,843,390	12,605,254	55.18%	Aa3	AA+
Sherborn	16,259	19.46	28,815,980	16,878,098	58.57%		AAA
Average	9,186	12	36,833,551	15,009,217	44.76%		

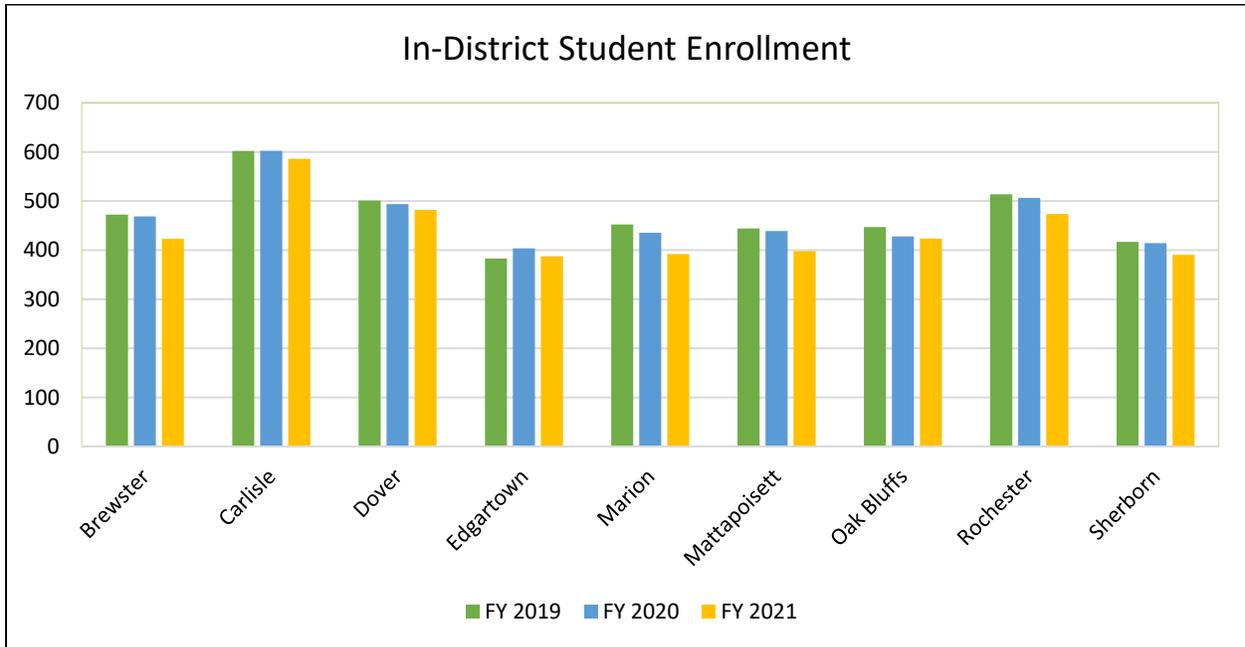
<https://www.mass.gov/service-details/municipal-finance-trend-dashboard>

Cohort School Analysis Discussion

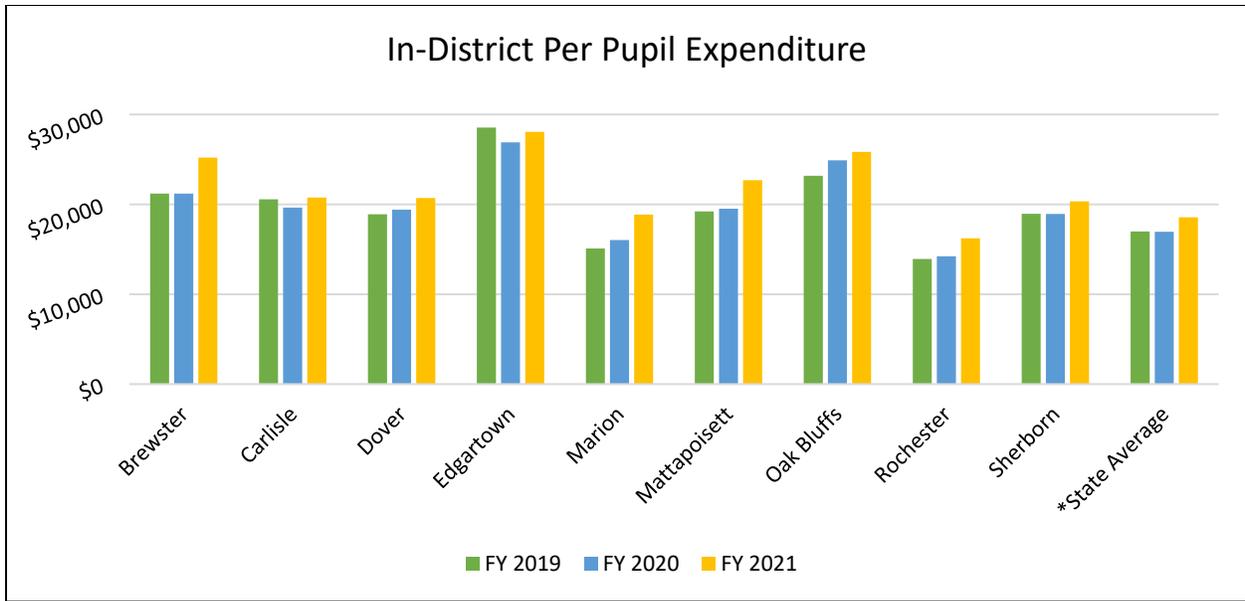
Of the nine cohort districts, all served elementary grade levels; though, the upper end varied between schools. Six supported PreK through grade 5 or 6; while three districts had expanded programming through grade 8. Additionally, the governance organization of the districts was primarily regional and superintendency unions, with only a single fully regionalized structure in Carlisle. Representation from Barnstable, Dukes, Middlesex, and Plymouth counties also improved the mix of comparative data based upon student enrollment and relative district wealth parameters.



To provide further context on the cohort, the bar graph summarizes in-district student enrollment over a three-year period beginning in FY2019. As stated previously, the Project Team has documented a disturbance in student enrollment during the FY2021 school year, which has been linked to the COVID-19 pandemic. The pattern is clear in all nine districts and a reduction in student enrollment was felt, even in the slightest of terms, for Oak Bluffs. Due to this phenomenon, the FY2020 school year was selected as the base period to provide a more stable and accurate accounting of normalized trends in which to analyze both likenesses and differences.



In terms of per pupil expenditure trends, according to the FY2021 in-district figures presented by DESE, Mattapoissett falls in the upper-middle of the cohort district trend at \$22,676, with three districts higher and five districts lower. This pattern was similar for both FY2019 and FY2020. The graph below charts the in-district per pupil expenditure data over the three-year period between FY2019 and FY2021. It should be noted that between FY2020 and FY2021 the entire cohort experienced an average increase of 10.52%, with the state average being 9.43%. Because of this rather high escalation, and the origins likely being tied to COVID-19 operating protocols, the Project Team opted to further analyze the Operations and Maintenance spending per in-district pupil.

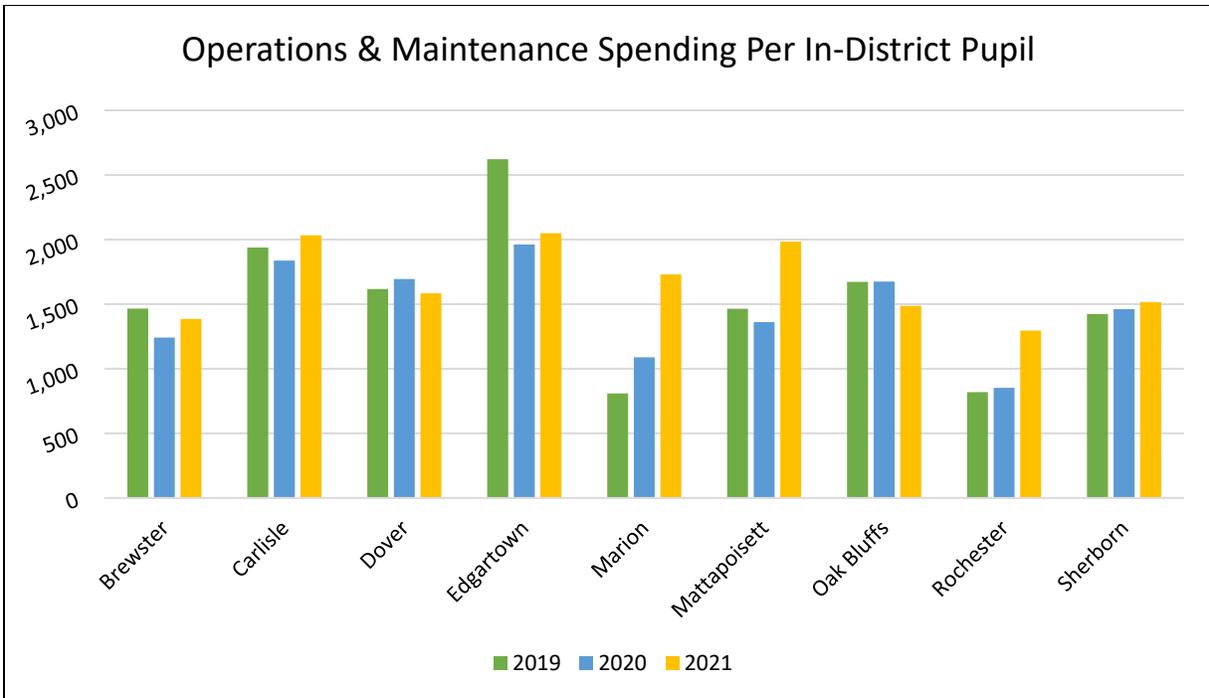


In consideration of this study focusing on potential school consolidation, not only was the overall per pupil increase driving additional examination, but the comparison of Mattapoissett’s spending directly on facilities operations and maintenance warranted further investigation. To maintain a focus on per in-district pupil expenditures, DESE offers a disaggregated data set to isolate expenditure categories. The following bar graph charts each of the cohort districts Operations and Maintenance spending between FY2019 and FY2021. Mattapoissett’s spending within this category continued its position at the middle point of the cohort until FY2021, when a steep increase in spending occurred. Interestingly, a very similar phenomenon was calculated within the Union #55 districts of Marion and Rochester for the same time period. Because of this close connection, the Project Team surmised Union #55 implemented heightened COVID-19 protocols, including increased custodial and cleaning standards. Only Dover and Oak Bluffs reported a decrease in Operations and Maintenance spending between FY2020 and FY2021. All other districts increased expenditures; a trend that has been noted during the height of the COVID-19 pandemic in schools. Given this fluctuation, and the assumptions corresponding to the pandemic, further analysis using the FY2022 and FY2023 expenditure data from DESE is encouraged to determine a normalized expenditure state for the Operations and Maintenance category. Using only historic information provided, Mattapoissett falls at the mid-range of spending for facilities making its current operations and maintenance program reasonable at face value.²

² Source(s): DESE School and District Profiles, <https://profiles.doe.mass.edu/statereport/ppx.aspx> DESE DART Trends, Accessed February 2023.

DESE School and District Profiles, <https://profiles.doe.mass.edu/analysis/default.aspx?orgcode=06550000&orgtypecode=5&>, Accessed February 2023.

DESE RADAR Reports, <https://www.doe.mass.edu/research/radar/>, Accessed February 2023.



One final review was conducted using the data available from the 2016 MSBA School Survey. This compilation of data targeted physical facilities information and included MSBA’s school building condition rating as well as their capacity rating. In depth details on the MSBA calculation methods can be found within the 2016 report. The following chart details certain elements for each school within the nine cohort districts including; grades served, FY2020 enrollment, year founded, most recent renovation, gross square footage, gross square footage per student, classroom count, building condition rating, and finally capacity rating. As stated in the opening remarks of this section, the data is simply a compilation of sources providing different perspectives to consider. The Project Team did not perform a deep dive into the DESE or MSBA methodology, as these sources are widely used and accepted as credible. It should be noted, that because the Project Team was aware space was utilized for purposes other than education in both Center School and Old Hammondtown school, the square footage figures were adjusted to include only educational area.

Within this data set, Mattapoissett falls at the upper end of the gross square footage per student using FY2020 enrollment; however, the MSBA capacity rating identifies both buildings at an average capacity. Carlisle, Marion, and Oak Bluffs all had buildings labeled under capacity by MSBA with the remaining cohort facilities being average. Additionally, both Mattapoissett facilities were deemed a “1” building condition rating, meaning they received the highest standard next to all other cohort facilities less Oak Bluffs Elementary and Pine Hill in Sherborn which were rated a “2”.



Placing the high MSBA rating against the operations and maintenance annual expenditures the Project Team concluded Mattapoissett, and the majority of other cohort districts, continuously invest in their school facilities. This practice of preventative maintenance and normalizing the support of primary assets is considered a best practice, which will drastically reduce the potential of unplanned facilities emergencies as well as smooth annual expenditures.³

District	School	Grades Served	In District Enrollment FY2020	Founded	Renovation	Square Footage (GSF)	GSF per Student	Classroom Count	School Building Condition Rating	Capacity Rating
Brewster	Stony Brook	PK - 02	224	1976	2015	91,044	406	19	1	Average
Brewster	Eddy	03 - 05	246	1996	2014	57,915	235	17	1	Average
Carlisle	Carlisle School	PK - 08	597	1848	2012	139,337	233	47	1	Under
Dover	Chickering	PK - 05	490	2001		93,000	190	*	*	*
Edgartown	Edgartown ES	PK - 08	391	2003		78,055	200	*	*	*
Marion	Sippican	PK - 06	433	1937	2000	117,907	272	37	1	Under
Mattapoissett	Center	PK - 03	250	1898	2001	79,840	319	18	1	Average
Mattapoissett	Old Hammondtown	04 - 06	192	1966	2001	69,520	362	20	1	Average
Oak Bluffs	Oak Bluffs Elem	PK - 08	426	1996		177,000	415	31	2	Under
Rochester	Rochester Memorial	PK - 06	509	1954	2010	105,966	208	31	1	Average
Sherborn	Pine Hill	PK - 05	413	1957	1998	70,359	170	28	2	Average
Average							274			

³MSBA 2016 School Survey Report, https://www.massschoolbuildings.org/sites/default/files/edit-contentfiles/Programs/School_Survey/2016/MSBA%202016%20Survey%20Report_102417-FINAL.pdf, Accessed February 2023.



School Facilities



Mattapoissett School Facilities

Overview

As a part of the assessment to explore the potential for possible consolidation between the Center School and Old Hammondtown elementary schools, the existing facilities were examined during a site visit in November 2022. The assessment looked at the two schools from the following perspectives:

- The history of the buildings covering initial construction and subsequent renovations;
- The current use of the buildings for classrooms, administrative and support services as well as for community activities;
- The condition of the buildings and the building sites and an assessment of ongoing maintenance;
- Historic and proposed capital improvement efforts;
- A review of the five proposed options in relation to the two current facilities as far as their use and condition.

Center School

The Center School is located in the downtown core of Mattapoissett in a densely developed residential neighborhood. Between the existing school building, a parking area on the school grounds, and the built-up surrounding neighborhood, there is minimal space for additional development on the 5.6-acre school site. Along with school focused activities, the original portion of the building is occupied by the Town's Council on Aging, the Recreation Department, and the Town nurse. The public accesses the school to both conduct business with those departments as well as to engage in programs run by the departments. The school is also used for summer camp programs. It should be noted, the Project Team was unable to locate a formal agreement between the District and Town formally codifying the shared space arrangement, thus no separation of expenses and overhead has been considered or calculated in this report.

The multi-story building had an enrollment of 235 students (2021) in grades PreK-3. There are 21 classrooms in the building along with a computer lab, six special education spaces, a combined gym-auditorium, a cafeteria, and an administrative area. The building currently has several rooms that are used for storage and other purposes. At the time of the site visit, the rooms were being used for the storage of additional desks that were purchased during the COVID pandemic to meet social distancing requirements that were in place.

The Town completed a *Municipal Vulnerability Preparedness Plan (MVP)* in 2018 that identified potential climate caused hazards throughout Mattapoissett. Based on the location of the Center School, the MVP noted that with a category 2 or 3 hurricane, the 84,500 square foot facility would suffer flood damage.

Extensive renovations were made to the Center School in 2002. Work included renovations to the original section of the school that is occupied currently by Town departments. Work covered the building shell (roofing and windows) as well as upgrades to building systems including electrical, heating-cooling, energy management, sprinkler system, fire detection, plumbing, and building security.



The following chart summarizes general information about Center School.

Center School	
Date Constructed	1898
Renovations / Additions	2002
Total Interior Square Footage	84,500
Number of Stories	02/2+
Number of Classrooms	13 total: 1-Pre-K (900 sf); 3-K (2,700 sf); 3-First (2,700 sf); 3-Second (2,700 sf); 3-Third (2,700 sf)
Total Number of Rooms	10 (sped, gym, café, computer, offices, special classrooms); multiple town departments operating at the facility (5,160 sf)
Site Acres of Land	5.6
Playgrounds	1
Number of Parking Stalls	54 and 5 ADA
Elevators / Handicap Chair Lifts (Y/N and How Many)	1 elevator; 1 chairlift
Age of Roof (Years)	2002
Fire Suppression System (Y/N)	Y
Solar (Y/N)	N
Design Capacity	Unknown
Current Enrollment (Oct. 1, 2021)	235

Old Hammondtown School

The Old Hammondtown school is located a mile-plus northwest from the Center School across Route 6. The school was built in 1966, was renovated in 1997, and was expanded in 2002. The 75,520 square foot school has 17 classrooms, a science lab, a computer lab, six special education areas, a gym, a cafeteria-auditorium, and administrative offices. The school is located on a 12-acre site in a rural-residential area. There is a playground and playing fields on the site along with parking areas. Old Hammondtown school is used for voting as well as town recreation programs.

The school had an enrollment of 170 students in grades 4-6 in 2021. The District has leased four classrooms and an office to the Southeastern Massachusetts Educational Collaborative for the last five years. Similar to the Center School, the 2018 MVP noted that while the school is north of the Town center, a category 2 or 3 hurricane would cause flooding at the Old Hammondtown campus.



The following chart summarizes general information about Old Hammondtown School.

Old Hammondtown School	
Date Constructed	1966
Renovations / Additions	1997; 2002
Total Interior Square Footage	75,520
Number of Stories	1
Number of Classrooms	12 total: 4- Fourth (3,600 sf); 4- Fifth (3,600 sf); 4- Sixth (3,600 sf)
Total Number of Rooms	12 (offices, computer-science lab, sped, gym, auditorium,); no Pre-K level bathrooms
Site Acres of Land	12 total
Playgrounds	1
Number of Parking Stalls	84 and 4 ADA
Elevators / Handicap Chair Lifts (Y/N and How Many)	No elevator; 1 chairlift
Age of Roof (Years)	2002
Fire Suppression System (Y/N)	Unknown
Solar (Y/N)	N
Design Capacity	Unknown
Current Enrollment (Oct. 1, 2021)	170

Facilities Condition Assessment

The on-site assessment revealed that both the Center School and Old Hammondtown schools are in excellent condition and are well maintained. The District facilities director noted that there is a strong focus on ongoing maintenance as well as for capital improvement projects; and that was borne out during the walk through.

Systems in each building (generator, sprinkler system, boilers, and chillers, plumbing, electrical, etc.) appeared to be in good condition and it was noted that they are inspected and maintained annually by outside vendors. On a cosmetic level, flooring, lockers, doors, walls, ceiling tile, and furniture were clean and in good condition. A few instances were noted of drywall or wood trim that had water staining; but overall, the roughly 160,000 square feet of space in the two schools was in excellent condition. Extensive renovations were made at both schools in the early 2000s. As part of that work, asbestos was abated at both schools. Lighting has been upgraded to LED equipment at both schools. Gym floors are refinished



every three years. The majority of the roofs at both schools are EPDM rubber membrane systems; and they are inspected every year under an inspection-repair service contract with Tremco.

The District uses a private contractor for building maintenance and custodial operations at the Center School and Old Hammondtown facilities, as well as the other two District elementary schools. Under this program, the District facilities director is able to move staff around the four schools as needed to address problems and complete tasks. A maintenance-custodian person works during the day at each elementary school and is supplemented by custodial staff that come to work later in the day.

The site assessment revealed no significant issues concerning the surrounding grounds and parking areas at both schools. The kitchens, including prep, storage and serving areas, appeared to be in excellent condition. To the School District's credit, security access vestibules were installed at Center School and Old Hammondtown School some years back. Along with the security access vestibules, a total of 46 interior and exterior cameras assist with monitoring the facilities. No apparent ADA-related issues were observed at either school. Proper stair rails and door hardware were visible as was proper door access and egress from the exterior. Bathrooms met ADA requirements and an elevator and chairlift were operational at the Center School as was a chairlift at Old Hammondtown.

While the condition of the Center School and Old Hammondtown facilities appears to be excellent due to ongoing maintenance and robust capital improvement projects, systems do age and their replacement and upgrading needs to be planned for. Roofs, generators, boilers, chillers, energy management systems, plumbing, and furnishings all age due to use and operation and will need to be replaced over time. While some of these components were addressed when both schools were extensively renovated in the early 2000s the systems are now 20-plus years old and calculating replacement costs and time frames through capital improvement planning should occur. The costs for these items must be reviewed in relation to the overall Town capital improvement process to ensure that a comprehensive, multi-year Town buildings-school facilities-Town infrastructure schedule can be developed. That capital improvement plan can then be utilized as part of the discussion concerning the potential consolidation of elementary schools in Mattapoisett.

Historic Capital Improvement Projects

On top of the extensive building renovations conducted at both schools in the early 2000s, information supplied by the director of facilities indicates that the District operates a robust capital improvement planning program.

Per information supplied by the District, the following capital projects were completed in the last 10 years at the Center School and Old Hammondtown facilities:

Center School

- Security vestibule installed
- Building energy management system upgrades
- Technology upgrade including infrastructure



- Grounds support equipment-phased upgrades
- Upgraded playground
- Interior-exterior lighting upgrades to LED
- Security camera/access upgrades
- Phone system upgrades
- Flooring replacement
- Preserved-repaired-painted exterior 1898 section of school
- Upgraded video-audio equipment in classrooms
- Upgraded-replaced food service equipment

Old Hammondtown School

- Security vestibule installed
- Building energy management system upgrades
- Technology upgrade including infrastructure
- Grounds support equipment- phased upgrades
- Playground resurfacing with rubber
- Interior-exterior lighting upgrades to LED
- Replaced entire roof over the kitchen
- Replaced main circulator pumps for HVAC
- Security cameras/access upgrades
- Phone system upgrade
- Flooring replacement
- Sewer-septic pumps-controller replacements
- Upgraded video-audio equipment in classrooms
- Upgraded-replaced food service equipment
- Rehabilitated baseball fields

Planned Capital Improvement Projects

The following capital improvement planning project list for the Center School and Old Hammondtown facilities notes projects scheduled between FY2023 and FY2031. The majority of the proposed projects focus on infrastructure and utilities (generators, energy management controls, ventilators, chillers, phone system). Accompanying this work are smaller projects covering upgrades for school kitchen equipment (steamer, warmers) and for ongoing replacement of vinyl flooring in the schools. A total of \$566,151 in work is proposed for the schools between fiscal years 2023-2031. The Project Team wished to disclose, the planned capital improvement list was compiled during the data collection phase of this engagement, occurring prior to January 2023, therefore, any subsequent adjustments to the details resulting from the annual budget process or other activities have not been captured in the report.



Project	FY23	FY24	FY25	FY26	FY27	FY28	FY29	FY30	FY31
CENTER SCHOOL									
Clock system upgrades	12,500								
Chiller system overhaul					41,000				
Overhaul-update generator								18,000	
Replace kitchen steamer		18,000							
Update ventilator energy controls	96,651		13,000						
Replace kitchen warmers (2)									
Flooring replacement		25,000		25,000		25,000			
OLD HAMMONDTOWN SCHOOL									
Replace vinyl flooring	25,000		25,000		25,000		25,000		
Clock system upgrades		12,000							
Chiller overhaul								38,000	
Replace generator									42,000
Roof top ventilator unit upgrades		100,000							
TOTAL	134,151	155,000	38,000	25,000	66,000	25,000	25,000	56,000	42,000



Public Engagement



Public Engagement

Overview

A significant part of the study entailed creating and implementing a public engagement strategy. The Project Team’s immediate task was to identify stakeholder groups, a communications plan, marketing materials, and finally implement the strategy. Beginning in September 2022, the Project Team met regularly to establish the projects timeline, focusing on public engagement, as well as approve the associated materials to support the plan. The Team decided upon a mixed data collection strategy, which employed both qualitative and quantitative means. An online survey was developed to capture quantifiable data in conjunction with two in-person focus group sessions. A variety of means were utilized to communicate with stakeholders surrounding these input opportunities including; school notifications systems, newsletters, paper-based media, website and social media postings, automated call messaging, public meeting announcements, and newspaper announcements between mid-October and late November.

Public Engagement Sessions - Major Trends Observed/Documented

Both public engagement sessions were held on Wednesday, November 2. The first gathering was at the Knights of Columbus and began at 10:00 AM followed by a second session at 6:00 PM in the Old Rochester Regional High School cafeteria. These conversations were based on the “World Café” model of community engagement (<http://www.theworldcafe.com/>) in which participants are encouraged to share their ideas, concerns, and priorities in multiple small-group settings to maximize the level of comfort and willingness to connect with neighbors and friends in a non-judgmental and flexible environment.



The community engagement session’s goal was to understand the priorities and educational values of the Mattapoissett community through large and small group guided break-out sessions. The morning gathering logged 42 participants while the evening session documented a total of 32 individuals during the two-hour period. Following several high-level data elements including population trends, enrollment trends, historical expenditures, and future capital project considerations participants were asked to organize into small groups. Using a series of three different prompts, and consistently shuffling the small group configurations, the following themes emerged.



1. Why residents love living in Mattapoissett:
 - **THEME:** *small-town feel on the ocean that values and invests in education and community*
 - Priority values:
 - **THEME:** *high-quality, safe, stable educational experience is top priority*
 - Presentation take-aways:
 - **THEME:** *student-teacher ratio is important and currently adequate*
 - **THEME:** *lack of transparency/confusion with provided data*
2. Current attributes of Mattapoissett Public Schools:
 - **THEME:** *satisfaction with the quality of schools, their location, safety, partnerships, and student-teacher ratio*
3. Balance needs of school and Town:
 - **THEME:** *school needs should take priority over Town needs*
 - **THEME:** *Town should provide better financial transparency to residents*
 - **THEME:** *mixed opinions about what entities should be consolidated or separated*
4. Future opportunities:
 - **THEME:** *general desire to consolidate to allow for improved educational opportunities*
 - **THEME:** *desire to preserve Center School or employ single-use school buildings (minority opinion)*
5. Questions for the future:
 - **THEME:** *concerns about how adjacent developments may affect schools, such as commuter rail, affordable housing, train service*
 - **THEME:** *concerns about data transparency from the Town*
6. Additional notes:
 - **THEME:** *concerns over attracting/retaining young families with ageing population*
 - **THEME:** *satisfaction with student-teacher ratio, teacher quality, architecture, student success, reputation, and relationships*

The Project Team's takeaways surrounding the overarching themes, which emerged from the in-person public engagement sessions were:

- Lack of transparency with the data and the Town's agenda;



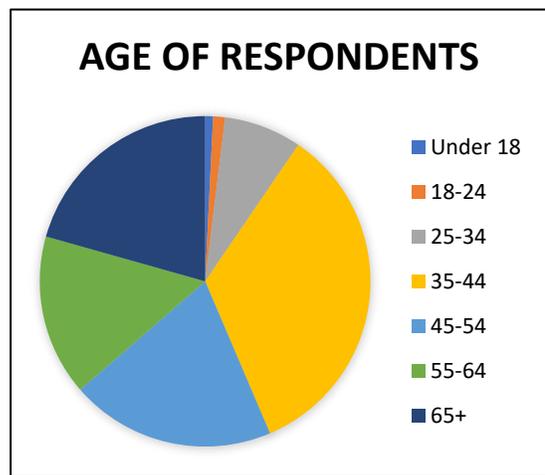
- Satisfaction with the quality of schools as is;
- General belief that consolidation may be for the better; however there remains disagreement over consolidation and a deep desire to preserve Center School as a functioning school.

Detailed information gathered from both sessions is available in the appendix.

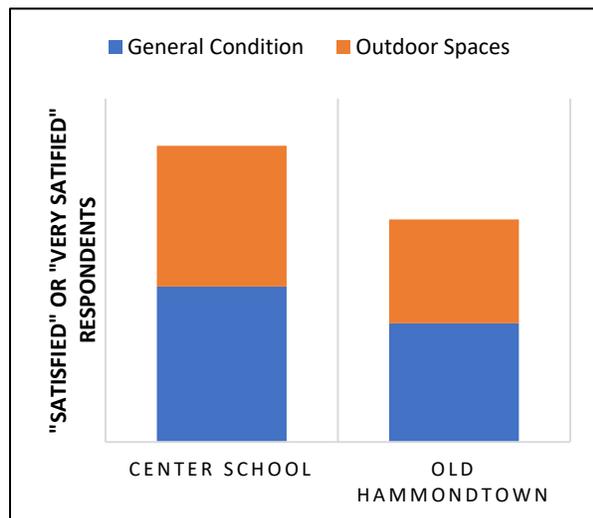
Online Survey Discussion

The survey included opportunities to respond over an approximate six-week period throughout October and November 2022. It was available and publicized through Mattapoissett emails and mailings. Additionally, a notice of the survey was posted to the website and sent home with students in a flyer format. The survey was conducted via SurveyMonkey and took approximately eight minutes for respondents to complete.

There were 515 participants, 87% of whom reside in the Town of Mattapoissett. Of the residents who live in Mattapoissett, almost half (48%) have been rooted there for more than 20 years. 54% of the respondents are between the ages of 35 – 54; and there was strong representation from survey participants who are 65+ (21% of respondents). Half of the survey-takers were from school-aged families. Of those respondents, there was nearly equal representation between families with a student at Center School (56%) and Old Hammondtown School (44%). See Appendix B for full survey results.



In addition to demographic information, the rest of the survey findings yielded valuable sentiments and opinions with respect to levels of satisfaction with current program quality and offerings, attitudes towards condition of facilities, and use of capital spending.



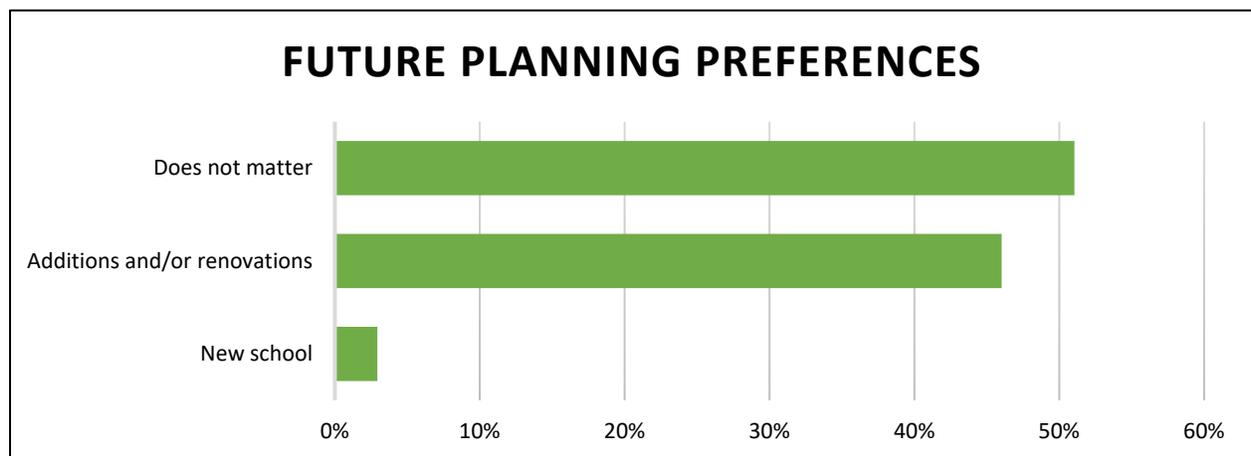
A remarkable 86% and 65% of participants demonstrated they are satisfied or very satisfied with the general condition of Center School and Old Hammondtown School, respectively. Outdoor recreation is also viewed favorable – 78% of respondents expressed satisfaction with Center School’s open spaces, and 57% of respondents are satisfied with Old Hammondtown’s. Modern and up-to-date facilities was identified as a significant factor to survey-takers, with 69% articulating it is an important or very important issue. A plurality of respondents indicated traffic congestion during



arrival and dismissal periods is not an inconvenience at either location, with only 4% of respondents deeming it a large issue and problem.

Overall, survey respondents noted that student/teacher ratio, special education programming, health and wellness programming, and music and performing arts were among the most important attributes of the Mattapoissett school experience. Considerations that were viewed as least important to participants include travel time to school, minimal educational costs, and extended day programs before or after school. The data suggests that Mattapoissett residents are willing to support a robust, high-quality education even if that entails paying more, traveling farther, or having less convenient childcare options. Only one in four participants designated they would have difficulty supporting long-range capital improvement programs because taxes are already too high.

More participants than not indicated they agree with sharing Center School space with Town services such as the Council on Aging and the Recreation Department. Of these community needs, additional daycare, senior or intergenerational programming, and Town recreation programming received the most support. When asked what model of school facility arrangement is most preferred, a plurality of survey-takers (48%) indicated they would like to see one school building for grades PreK to 6. However, that preference was not overwhelming; 40% of respondents specified they would rather have no change to the current



school building configuration.

Participants are overall ambivalent towards options for improving the physical condition of Mattapoissett schools. 46% indicated they would like to see additions or renovations; and 51% indicated they were indifferent so long as needs are addressed. An incredibly small minority (3%) would like to see a new school altogether.

In conclusion, survey data determines that it is a key priority for Mattapoissett families to meet the educational needs of the student population. A majority of survey-takers are willing to make financial concessions to ensure the quality of instruction remains high performing.



Threats to Data Validity

A limitation to the survey method is that it was possible to access the survey multiple times via the same IP address. This was done so parents within the same household would both be able to share their opinions; or so public accommodations could be utilized, such as a library. After further review of any duplicated IP addresses, the Project Team believes over 98% of responses come from unique participants, rendering any potential errors immaterial.

Summary of Findings

The overarching sentiment, supported by both public engagement methods, is the clear-cut desire to preserve Center School. In the open-ended section of the survey, respondents described the institution as, “superior,” and “the model example for a safe, dedicated, first learning experience.”

Participants of the focus groups made it known that regardless of whether buildings physically consolidate or not, Center School should remain intact. The Town of Mattapoisett values Center School as a major cultural landmark built into the fabric of the community.



School Facilities Alternatives



Mattapoisett School Facilities Alternatives

Overview

This section outlines five alternatives and incorporates a discussion of each option, including general facilities utilization, observations, and high-level estimated cost considerations. The information is meant to spur conversation and is not all inclusive of every scenario or opportunity possible. The scope of work dictated a listing of options be presented based upon certain data collection, analysis, and findings detailed in the previous study pages. Overall, the alternatives were developed using the following assumptions:

- There is little to no sustained evidence to suggest that the trend of enrollment will reverse. The scenario suggested by the NESDEC data is a stabilization over the next decade, which would not produce the quantity of students required to fully utilize the capacity in the current District facilities, nor would it allow for a full migration of the student body into one facility without expansion.
- New births, new home construction, and economic indicators all suggest the aging and population trends will continue. There are no indications that these trends will reverse or that a significant shift in population or economic growth is on the horizon.
- District facilities have more capacity per student than most cohort districts included in the analysis, though the District does not spend significantly more per student on costs associated with the physical plants.
- Based on the comparative analysis and a review of District facilities expenditure trends, the District is unlikely to find significant cost savings outside of building consolidation. However, any significant cost-saving opportunities are still rooted in the capital investment decisions and the resulting capital or debt service assessment the Town and District adopt.
- Presently, both Center School and Old Hammondtown School are in excellent overall condition and support student programming successfully. However, with extensive updates and renovations having been made at both schools over 20 years ago and based on aging of systems and components over time, sizable and costly capital projects covering the envelope and systems in each school will need to be implemented in the coming years.
- A separate consideration and observation documented by the Mattapoisett Master Plan, prepared by the Southeastern Regional Planning and Economic Development District in November 2022, noted that the future use of the existing Town Hall needs to be determined. According to the Mattapoisett Master Plan, in addition to previously being noted in the 2018 Mattapoisett Municipal Vulnerability Preparedness Plan (MPV), the 1896 Town Hall building could be vulnerable to flooding and sea level rise due to climate change impacts. The Master Plan remarked that \$15,000 in capital planning funds will be earmarked in 2025 to determine if municipal operations could be relocated to an existing facility or if a new building would need to



be constructed. Center School was an alternative documented by the Master Plan to possibly house Town Hall operations.

Process Considerations

The Old Rochester Regional District School and the School Committees forming Massachusetts Superintendency Union #55 have a robust set of governing policies they have adopted to guide the educational environment. Specifically, the policies surrounding facilities, as included in Appendix A, shape the School Committee's procedures as they relate to facilities planning, renovations, and finally the retirement of buildings. Under *Policy FA – Facilities Development Goals*, the School Committee notes a goal of planning appropriately to avoid overcrowding implications while also minimizing the potential of extended day or double school sessions. The policy goes on to mention architects engaged by the School Committee would be directed to consider "simplicity of design; sound economics, including low long-range maintenance costs and efficiency in energy needs; low insurance rates; high educational use; and flexibility". *Policy FJ – Facilities Renovations/Improvements* further outlines the School Committee's expectations surrounding long-term capital planning, specifically noting projections to include a five-to-10-year outlook. The following policy priorities outline the School Committee's requirements when considering a facility renovation or improvement;

- "Maintain the school physical plant in a condition that is safe and healthful;
- Insure against the need for major emergency repairs or sudden requirements for extensive maintenance work;
- Reduce operational costs to reasonable levels, and;
- Provide for a uniform maintenance and capital expense."

Policy FJ further discusses the School District Administration's responsibility to bring forth recommendations for facilities renovations which are "advantageous to the educational program" leaving the final decision to the School Committee regarding facilities renovations and the capital program. Finally, School Committee *Policy FCB – Retirement of Facilities*, offers a set of standards to be considered when a school facility is considered for closure as well as certain criteria, which is required to be completed prior to the recommendation of a building retirement. The initial phase detailed in *Policy FCB* notes a "closing study" be performed to justify closure. The School Committee reserves the right to request both "professional advice and the advice of the community" when considering school retirement. The policy outlines the following factors to be included in a closing study;

1. "Age and current physical condition of the facilities, its operating systems, and program facilities
2. Adequacy of site, location, access, surrounding development, traffic patterns, and other environmental conditions
3. Reassignment of children, including alternative plans according to Committee policy
4. Transportation factors, including numbers of children bused, time, distance, and safety
5. Alternative uses of the building
6. Cost/Savings



- a. Personnel
 - b. Plant Operation
 - c. Transportation
 - d. Capital Investment
 - e. Alternative Use
7. Continuity of instructional and community programs”

Separately, another impacting procedural factor is documented under *MSBA Bulletin 07-01, School Closings, Sales, Leases or Other Removal From Service*, which can be found in Appendix F. The guidance notes, among other factors, “M.G.L. c. 70B and 963 CMR 2.00 make **ineligible** any application for a grant whose purpose is to replace a schoolhouse sold, leased or otherwise removed from service in the past ten years”. The Authority will review a statement of interest to determine if “the proposed project in fact replace(s) the school facility removed from service” and “was the need for the new school facility reasonably anticipated at the time of the removal from service.” In the event that the Authority allows an application to proceed, it is likely the request will be less competitive against other District submissions, this issue is discussed in the next section. Finally, the Authority has laid out steps and a timeline for the removal of a school facility from service, the following are excerpts from the guiding bulletin;

- “Notification to Authority of intent to remove facility from service at least six months before intended removal date.”
 - “the notice must be submitted in the same manner as a SOI, i.e., signed by: (1) the local Chief Executive Officer, (2) the Chairperson of the School Committee and (3) the Superintendent.”
- “In addition to a formal notice signed as above, Districts must include:
 - a plan for accommodating any displaced school programs and services;
 - a plan for accommodating district students within the remaining school buildings, as a result of the sale, lease, or removal from service of said school facility;
 - a long-range plan for accommodating district students based on the Authority’s Enrollment Projections;
 - any future plans for the sale or lease of property under control of the school district; and
 - any future plans for the construction, renovation, addition, or lease of school facilities in the school district.”

Funding Considerations

The pursuit of Massachusetts School Building Authority (MSBA) funding is an important topic to consider for any of the following alternatives as previously mentioned. To provide further context, the MSBA was established in 2004 and is governed by M.G.L. 70B. Within this legislation lie certain guidelines for the Authority to determine project eligibility and priority alongside reimbursement rate methodology and other factors. Districts must first demonstrate a need for major remodeling or construction based upon a series of criteria documented in M.G.L. 70B sections 6, 8, and 9 through a Statement of Interest (SOI). The Authority will then review all submitted SOIs for compliance with the criteria and offer an invitation to



apply for Districts deemed eligible of further consideration. The full application process is voluminous and detailed on the MSBA website. Once an application is submitted, there is no guarantee of grant approval. If an application is accepted as a school building project, the Authority then assigns a reimbursement rate to the project.

Each of the alternative options noted may fulfill certain needs for the Town and District; however, the Project Team wished to caution, the MSBA may not support a major construction or renovation project in Mattapoiet when reviewing a potential SOI against the established list of requirements leaving the municipality to fully fund any project. The following criteria are an excerpt of determining factors considered by the Authority, as set forth in M.G.L. 70B. The full legislation can be found in Appendix A.

- *The school project is in the best interests of the commonwealth and the eligible applicant, with respect to its site, type of construction, sufficiency of accommodations, open space preservation, urban development, urban sprawl, energy efficiency, and otherwise.*
- *The school project is necessary to meet educational standards of the curriculum frameworks established by the board of education pursuant to section 1E of chapter 69 for anticipated enrollment levels.*
- *The school project has a value over its useful life commensurate with the lifecycle cost of building, operating, and maintaining the project.*
- *The school project is not at a school that has been the site of an approved school project pursuant to this chapter or to chapter 645 of the acts of 1948 within the 10 years prior to the project application date, or the approved school project is unrelated to such previously approved project in the same school.*
- *Priority shall be given to school projects needed in the judgment of said board to replace or renovate a building which is structurally unsound or otherwise in a condition seriously jeopardizing the health and safety of school children, where no alternative exists;*
- *Priority shall be given to school projects to eliminate existing severe overcrowding;*
- *Priority shall be given to school projects needed in the judgment of said authority to prevent loss of accreditation;*
- *Priority shall be given to school projects needed in the judgment of said authority to prevent severe overcrowding expected to result from increased enrollments which must be substantiated;*
- *Priority shall be given to projects needed in the judgment of said authority for the replacement, renovation, or modernization of the heating system in any schoolhouse to increase energy conservation and decrease energy related costs in said schoolhouse;*
- *Priority shall be given to any school project needed in the judgment of said authority for short term enrollment growth;*
- *Priority shall be given to school projects needed in the judgment of said authority to replace or add to obsolete buildings in order to provide for a full range of programs consistent with state and approved local requirements; and*



- *Priority shall be given to projects needed in the judgment of said authority to transition from court-ordered and authority approved racial balance school districts to walk-to, so-called, or other school district.*¹

Keeping this external funding constraint in mind, none of the following alternatives account for assistance from MSBA so as to communicate the potential full burden of each project cost being shouldered by the Town.

¹ MSBA Massachusetts School Buildings Guidelines and Policies, https://www.massschoolbuildings.org/sites/default/files/edit-contentfiles/Documents/Guidelines_Policies/MSBA_Enabling_Legislation.pdf, Accessed February 2023.



Alternative #1: Continue Current Facilities Program

Facility Utilization

Under this alternative, current classroom, grade patterns, and services would remain as they are presently configured at both locations. In addition to educational programming, the current arrangement where the Nurse, Council on Aging, and Recreation Department occupy approximately 5,100 square feet of space at Center School would continue. Further, it is assumed that the Southeastern Massachusetts Educational Collaborative would continue to utilize a portion of Old Hammondtown School, approximately 4,000 square feet, which would continue to generate a small annual revenue stream equal to or above the current \$40,000.

Benefits, Challenges & Observations

Making no adjustment to the current facilities configuration, while continuing a responsible maintenance plan, would support a status quo environment, one which has been very successful from an educational programming perspective as evidenced by student performance and resident satisfaction. This alternative also provides sufficient space for comfortable growth within the district while honoring the community's general feeling of Center School being a special part of the student experience as well as vital to the traditional village setting.

While this alternative perpetuates the ongoing operation of both schools, the Mattapoisett Master Plan noted the plateauing and aging town population along with decreasing school enrollment as measured between 2009 and 2022. The plan raised the question that with decreasing enrollment, can the town continue to maintain both the Center School and the Old Hammondtown School. Under this scenario, continuing the current configuration of two school buildings may become burdensome financially for the Town. However, the enrollment projections provided by NESDEC depict a stabilization effect, which supports the current facilities program as being the most cost effective and least disruptive to the educational experience.

Estimated Cost

Alongside funding for educational and administrative costs, budgeting will also be required to support ongoing maintenance, energy use, and capital improvements for each location. Based on the extensive renovations and upgrades made to both schools in the early 2000s, building systems and components are aging; therefore, replacement and/or upgrades must be planned for as with any facility. Costs would not only include actual construction and installation, but associated design and engineering fees. Higher cost building components including roofing, HVAC, windows, lighting, grounds, and parking, in conjunction with items covering bathrooms, cafeteria/kitchen systems, energy management controls, and flooring need to be examined and factored into a multi-year capital improvement program. While the FY2023-2031 Capital Improvement program information presented in Section 08 for each school covers the estimated costs of various items, the potential costs for the components and systems noted above would be much larger than those being carried for FY2023-2031 projects. Given the exemplary condition of the school facilities combined with the consistent attention and support of ongoing maintenance, major



repairs and upgrades may fall outside the nine-year plan presented by the District, which provides ample time to further evaluate the facility priorities and translate the needs into an achievable plan.

Below is a generalized estimate of the expenditures as they relate to continuing the current facilities model. It has been assumed no new major capital expenditures fall within the time period specified by the District and all currently planned annual capital expenditures will be funded. Additionally, and because there is no change to the current programming, the Project Team projects the annual facilities budget to follow closely with historical increases, though, the expenditure data between FY2020 and FY2021 substantially skews the average due to COVID-19 related activities. With this in mind, an assumption can be made the average general fund increase for operations and maintenance of the schools will rise an average of 3.6% based upon trends documented between FY2017 and FY2019.

Facility	Planned CIP (FY2023-2031)	New CIP	Total
Center School	274,151	0	274,151
Old Hammondtown School	292,000	0	292,000
Estimated Total	566,151	0	566,151



Alternative #2 – Renovations to Center School & Consolidation of Pre-K to Grade 6

Facility Utilization

Under Alternative #2, Center School would be renovated to accommodate Grades 4-6, which would be relocated from the Old Hammondtown facility along with administrative activities and educational services. Currently the only space available to house such an expansion are the locations utilized by the Town Nurse, Council on Aging Department, and Recreation Department which are located in the original section of the building. Further, this option likely would not allow for the Southeastern Massachusetts Educational Collaborative to continue operations within the Center School location should Old Hammondtown be decommissioned.

Benefits, Challenges & Observations

Center School is considered a historic building by the Massachusetts Historical Commission. While the Project Team did not note any current evidence of property restrictions based upon this designation, or through the original transfer of property use notations which have since expired per M.G.L., it is still important that a full review of the ability to make significant adjustments to the area be conducted by qualified counsel. Further, it was mentioned through the course of the study that the 2001 School Building Committee was forced to seek a waiver from the state to implement the previous renovations. While the Project Team was unable to obtain a copy of the waiver to verify this situation, it would be necessary to establish the probable possibility of construction to Center School prior to moving forward.

Another observation made surrounded available square footage at Center School. Even with two classrooms currently available, the existing building lacks enough space for the full relocation of grades 4 through 6 plus all other related and required school operations. The only way the Project Team has identified to increase square footage would be to construct an addition off the back of the school as well as to occupy the area currently housing the previously mentioned Town departments. This would reduce or eliminate open space for playgrounds as well as playing fields and would directly impact the already stressed parking situation at the location.

Schematic designs would be required to determine if an addition is possible at the Center School location. Existing utilities including water, sewer, electrical, and gas would require examination relating to capacity increases. Center School is located in the Village Residence (VR10) zoning district therefore, zoning regulations would also need to be reviewed for the overall site planning, setbacks, and lot coverage requirements. Additionally, a site plan review would be required to address permitting activities. Planning, even at the schematic and budget estimating stages, should address climate resilience features including the potential for roof top solar and battery storage as well as the potential for flooding impacts that was raised in both the Master Plan and the Municipal Vulnerability Preparedness plan. Air source heat pumps for cooling and heating to reduce fossil fuel greenhouse gas emissions should also be included in any assessments.



Separately, a space utilization study of Old Hammondtown School would be necessary to accurately determine how much new square footage Center School would need to be constructed to service the full District compliment of students and staff. The study must also include an in-depth population growth and enrollment impact consideration to ensure the new space would adequately house potential expansion to the District.

Under a consolidation scenario, the District would need to determine if certain administrative and support personnel are no longer required. It is the understanding of the Project Team that Mattapoisett currently operates an early childhood model at Center School with a more traditional intermediate configuration utilized by Old Hammondtown School. Mattapoisett also operates very efficiently, already splitting specials and related services staff between the current facilities. Therefore, no savings would be achieved if activities were combined within a single building. It is possible to reduce administrative and other operational supports such as custodial, food services, nursing, and clerical staff when considering a single school location; however, this would depend on the District's strategic planning preferences to ensure the best possible education and environment for students. Finally, the Project Team did not identify any large savings surrounding transportation due to the current shared busing schedule already in place. The bus runs may be reduced to a single school stop, but the number of students served is anticipated to remain steady thus supporting the existing transportation runs.

Aside from the physical and financial challenges anticipated to arise from a Center School consolidation, the Project Team did observe such an action would likely please the Community. Center School remaining a school was documented as being culturally necessary to many Mattapoisett residents. Therefore, housing all activities within this location would preserve this desired educational environment. Further, there are benefits to running a larger grade configuration such as expanding older to younger student programming like book buddies or providing role model character instruction leveraging higher grade levels. Maintaining the village-based school would also continue to support walkable field trips to local landmarks, a unique and preferred feature of Center School's location.

Estimated Cost

Per the information provided by the District Facilities Director, there are currently 12 classrooms at Old Hammondtown School with a total square footage of approximately 11,000, which are used by grades 4 through 6. Constructing an addition at the Center School would require a minimum of 9,000 square feet of new construction and renovations to existing areas, if the available two classrooms were utilized. Space for common areas, upgrades or new bathrooms, labs, other educational spaces, and administrative activities, would be determined through the space utilization study. The cost of additional studies to determine feasibility, space needs, and other vital projections has not been calculated.

Using the above referenced base of 9,000 square feet against the recent \$700 average square foot construction cost published by the Massachusetts School Building Authority, the following estimates a high-level budget addressing major remodeling and/or facilities expansion to Center School. The projections also anticipate approximately 14% more to be allocated for design and construction administration fees, increasing the total estimated square foot cost to approximately \$800 for new



construction. At this rate, the estimated budget to construct 10 new classrooms alone is \$7.2 million. This estimate does not address other required spaces, which may be determined to be necessary through the space utilization study. Additionally, costs for any required renovations to the existing Center School building such as, the impact of site-specific conditions, permitting, and details covering how the new addition would be tied into the existing school would need to be determined.

Finally, the scenario outlined below assumes no further capital improvement investment as determined by the District will be pursued at Old Hammondtown School, though, planned annual investments in Center School maintenance will continue. Naturally, Old Hammondtown School will continue to require facilities maintenance; therefore, additional costs should be expected. Further, utilities and custodial expenditures may provide some savings, but this is likely to be generally immaterial when considering a full transfer of operations to Center School, while still maintaining the Old Hammondtown location. Moreover, it is assumed the Southeastern Massachusetts Educational Collaborative lease will not be renewed removing the annual \$40,000 revenue.

Facility	Planned CIP (FY2023-2031)	New CIP	Total
Center School	274,151	0	274,151
Old Hammondtown School	0	0	0
New Addition / Remodel @ Center School	0	7,200,000	7,200,000
Estimated Total	274,151	7,200,000	7,474,151

Post relocation of grades 4 through 6 to Center School, an adaptive re-use plan would be developed for the Old Hammondtown property. Options could range from surplussing the building, to creating housing, to using the building for an upgraded Town Hall facility.



Alternative #3 – Renovations to Old Hammondtown School & Consolidation of PreK to Grade 6

Facility Utilization

Alternative #3 reverses the consolidation scenario outlined in Alternative #2 to relocate PreK through Grade 3 students, support services, and administrative activities to Old Hammondtown School. The space presently occupied by the Southeastern Massachusetts Educational Collaborative would be the target area to consider transitioning the full student population into the building. This would provide four classrooms and an office space; but as noted in the prior alternative, this is insufficient to house the incoming student population, therefore requiring an addition to the building. The lease with the Southeastern Massachusetts Educational Collaborative would be terminated to make room for the new grade configuration.

Benefits, Challenges & Observations

Like Alternative #2, to achieve the optimum design for space, a space utilization study of Center School would be required. The study would document how much square footage is necessary and currently available at the Old Hammondtown campus to house the increase in student population. Specific considerations surrounding the early childhood student body are essential when planning for young students, specifically for PreK and kindergarten spaces. For example, these educational areas have bathroom facilities designed for young learners, which would need to be constructed accordingly at the Old Hammondtown site. Mirroring Alternative #2 planning stages, the study should encompass population growth and enrollment over an extended future period.

Schematic designs would be required to address how an addition may be implemented at Old Hammondtown School. Existing utilities including water, sewer, electrical, and gas would also need to be examined targeting capacity increases. Zoning regulations necessitate review to guide site planning, setbacks, and lot coverage requirements considering Old Hammondtown school is located in the Rural Residential (RR45) zoning district. Further, a site plan review would be unavoidable to obtain permitting including an increase in parking. Part of the planning process should contemplate climate resilience features including the potential for roof top solar and battery storage as well as air source heat pumps for cooling and heating to reduce fossil fuel greenhouse gas emissions.

Unlike the Center School campus, the Old Hammondtown property encompasses approximately 12 acres of total space; therefore, an assumption can be made that an addition to this facility is possible. However, the school grounds are home to many Town Recreation activities and planning for an addition would demand a holistic community approach to meet all needs.

As discussed in Alternative #2, the District would have to contemplate the need for certain administrative and support personnel. Continuing with an early education model at the lower grades may require a dual administrative structure. The already shared specials and related services staff would simply remain within a single building, reaping no financial benefit. A reduction in personnel, given the consolidation of



operations within this scenario, would likely center around custodial and clerical support; though this determination would depend on the District's mission to offer a leading education to its students. Further, the same transportation savings consideration as was mentioned in Alternative #2 would apply here as bus routing presently is a shared model. Therefore the assumption of reducing the beginning and final stop to one location has minimal impact on savings.

Alternative #3 presents a more plausible expansion possibility; though, this option does not directly reflect the Community's wish to maintain Center School as a learning facility. While public engagement respondents did support potential school consolidation, they also preferred Center School to house education operations. Aside from this preference, Old Hammondtown does have more expansive open space opportunities as well as an existing use partnership with the Recreation Department. Offering a variety of activities to students, before and after school, is a very popular model with these types of partnerships. Further, and as a repeat of the observation discussed in Alternative #2, benefits exist for leveraging an expanded grade configuration sharing a building.

Estimated Cost & Implementation

The District Facilities Director specified a total of 13 existing classrooms at Center School utilizing approximately 12,000 square feet that service PreK through grade 3 would be necessary to replicate educational services under an Old Hammondtown consolidation. The four classrooms occupied by the Southeastern Massachusetts Educational Collaborative would be reallocated to merge all grade levels into the existing space. Given the required 13 classrooms, construction of 9 new classrooms would be necessary, which based upon a 900 square foot classroom design standard, construction of minimally 8,100 square feet would be required. This does not consider renovations to common areas, upgrades or new bathrooms, labs, other educational needs, and administrative activities as determined by a space utilization study. Again, the fees associated with additional pre-planning studies are paramount to determining a path forward and have not been included.

Maintaining the same square foot cost assumptions provided by the Massachusetts School Building Authority plus a 14% add-on for design and construction administration, the applied square footage cost of \$800 provided a base project cost of \$6.48 million for an 8,100 square foot addition. As previously mentioned, this estimate does not address other potentially necessary spaces, which may be determined by the space utilization study. Renovations to the Old Hammondtown building would need to include the impacts of site-specific conditions, permitting, young learner requirements, Recreation Department needs, and details covering the integration of new construction into the existing building.

Alternative #3, outlined below, also assumes no further capital improvement investment as determined by the District will be pursued at Center School. The noted annual maintenance of Old Hammondtown is presumed to continue. As discussed in Alternative #2, Center School will continue to incur facilities maintenance related costs. Again, utilities and custodial expenditures may provide some relief under this scenario; but savings are anticipated to be immaterial with the expansion of Old Hammondtown and continued maintenance of Center School. Further, the lease with the Southeastern Massachusetts



Educational Collaborative will be terminated following this course of action eliminating an annual revenue of \$40,000.

Facility	Planned CIP (FY2023-2031)	New CIP	Total
Center School	0	0	0
Old Hammondtown School	292,000	0	292,000
New Addition / Remodel @ Old Hammondtown School	0	6,480,000	6,480,000
Estimated Total	292,000	6,480,000	6,772,000

Following the implementation of a consolidation to Old Hammondtown, an adaptive re-use plan should be generated addressing Center School. As noted in the prior section, a multitude of options exists for the use of the vacated Center School, from selling the property, to relocating Town Hall. One further observation made by the Project Team and based upon the identified risks for flooding highlighted in the Town’s MVP plan, adaptive re-use of Center School should include features to address flooding impacts such as water and power outages. Stormwater features incorporating nature-based options for collecting and dispersing water along with alternatives for solar and battery storage to supplement generators should be examined. The Project Team cautions placing Town Hall operations fully into Center School given its proximity to the FEMA flood hazard area.²

² FEMA Portal Online Search – Mattapoisett, ([https://msc.fema.gov/portal/search?AddressQuery=center school mattapoisett, ma - searchresultsanchor](https://msc.fema.gov/portal/search?AddressQuery=center%20school%20mattapoisett,%20ma%20-%20searchresultsanchor)), Accessed January 2023.



Alternative #4 – Renovations to Old Hammondtown School & Partial Consolidation of Grade 1 to Grade 6

Facility Utilization

In this scenario, grades 1 through 3 would relocate to Old Hammondtown School while PreK and kindergarten students remained at Center School. Old Hammondtown would undergo necessary renovations related to increasing the student population. This alternative would remove space sharing with the Southeastern Massachusetts Educational Collaborative to reallocate the four classroom spaces to incoming grades.

Benefits, Challenges & Observations

All the same notations documented in Alternative #3 remain present under these conditions, with three added observations. Maintaining PreK and kindergarten in Center School while likely utilizing the freed areas for other Town needs creates challenges surrounding school security. The current school layout has or is working towards a secure building system. However, new plans and installations would be necessary to properly enclose the designated school area from public traffic. This scenario would require a school security plan to be generated and implemented prior to opening school operations.

The second consideration involves potential efficiencies from reduced staffing. A partial consolidation of this nature would eliminate any potential for personnel savings, as both Center School and Old Hammondtown would continue to require full compliments of administrative, clerical, food service, and custodial staffing.

Alternative #4 does provide a unique opportunity for multi-generational programming given the proximity of the Council on Aging as well as the Recreation Department. This concept was noted within the public feedback alongside walkable field trips being important for young learners.

Estimated Cost & Implementation

Presently, nine classrooms at Center School, totaling approximately 8,100 square feet, are servicing grades 1 through 3. This estimate again assumes the four classrooms occupied by the Southeastern Massachusetts Educational Collaborative would be reallocated to merge grades 1 through 3 into existing space. However, four classrooms are not sufficient for this alternative. An additional five classrooms are necessary, which based upon a 900 square foot classroom design, construction of 4,500 square feet would be required to meet the student population needs at Old Hammondtown. This does not account for potential space in common areas, upgrades, or new bathrooms, labs, other educational needs, and administrative activities as determined by a space utilization study. As in other alternatives, additional study costs have not been calculated or included and there is no reduction for MSBA funding.

Maintaining the \$800 per square foot average cost to project the impact of a 4,500 square foot addition to Old Hammondtown School, the estimated budget for five new classrooms, not including other potentially required spaces, would be approximately \$3.6 million. To that figure, costs for any renovations to the existing Old Hammondtown School building would need to be considered following further



planning and study. Costs associated with the security upgrades to Center School would need to be calculated and solidified, though the Project Team did feel it important to incorporate a sum for such activities. The projections noted below continue the annual capital improvement planning scheduled for Old Hammondtown, but reduce the school planned capital investments to 25% of the provided figures for Center School. The Project Team felt, given the unknown use of the freed space in Center School, a minimal portion of the planned capital expenditures should remain in the estimate.

Facility	Planned CIP (FY2023-2031)	New CIP	Total
Center School	68,538	250,000	318,538
Old Hammondtown School	292,000	0	292,000
New Addition @ Old Hammondtown School	0	3,600,000	3,600,000
Estimated Total	360,538	3,850,000	4,210,538

Following the relocation of grades 1 through 3 to Old Hammondtown School, an adaptive re-use plan would be developed for Center School that would focus on potential activities supporting PreK and kindergarten students. With proper separation, the remaining square footage could be used for an upgraded Town Hall facility. As noted previously, based upon the identified risks for flooding detailed in the Town’s MVP plan, adaptive re-use should include features to address flooding impacts including water and power outages. Stormwater features encompassing nature-based options for collecting and dispersing water along with options for solar and battery storage to supplement generators should be examined.



Alternative #5 – Construct a New School

Facility Utilization

Alternative #5 calls for a completely new PreK through 6 building to be constructed. This option assumes vacating both Center School and Old Hammondtown School of all educational activities and transfers the entire elementary student population to a new facility.

Benefits, Challenges & Observations

The construction of a completely new single school building would be the most challenging option. Not only is it by far the most expensive path forward, it would also likely be the most time consuming. There are a multitude of unanswered questions that arise including: If any Town owned land is available and adequate for a new school? If land is not open and available, would the Town demolish Old Hammondtown provided it is the more likely of the two locations to execute major facilities construction? Or would the Town seek to purchase a new parcel of land to accommodate a new school location? If the Old Hammondtown site was selected to pursue, the existing facility may need to be demolished to meet zoning requirements and to gain more parking and field space. If a new site was chosen, however, both existing schools could be repurposed post construction of a new school building.

Many of the previously listed observations remain true with this concept including the need for a space utilization study of both Center School and Old Hammondtown School, which includes a population and enrollment growth component. Calculating not only the required building square footage but accompanying amenities like playing fields and parking would also be necessary. Using the School Board policy *FA – Facilities Development Goals* as a general guide, architects would be asked to “plan for simplicity of design; sound economics, including low long-range maintenance costs and efficiency in energy needs; low insurance rates; high educational use; and flexibility.”

Again, the need for various administrative and support personnel would need to be addressed by the District, as a single building could provide for certain savings measures. The District in concert with the School Committee may opt to continue the early education model at the lower grades thus requiring a dual administrative structure. The consolidation of operations and clerical activities could reduce staffing in these areas; though the specials and related services teachers would remain intact servicing the single location. No transportation savings is anticipated for this alternative, as noted in the prior discussions, due to the already shared model.

The repurposing of Center School could vary from surplussing, to creating housing, to utilizing the building for an upgraded Town Hall facility. As mentioned in the prior alternatives, based upon the identified risks for flooding noted in the Town’s MVP plan and the Mattapoisett Master Plan, adaptive re-use for Center School should include mitigation features to address flooding impacts including water and power outages. Stormwater features encompassing nature-based options for collecting and dispersing water along with options for solar and battery storage to supplement generators should be examined. The Old



Hammondtown School building could also be surplus, used for an upgraded Town Hall facility, or even the development of housing.

Estimated Cost & Implementation

Understanding Alternative #5 has the highest number of unknown variables. The following provides a general outline for designing and constructing a new school facility. It is important to note that the Project Team again cautions funding from MSBA would pose a significant challenge, leaving the potential full cost burden on the Town.

- As documented in the prior Process Consideration section, which prefaced all alternatives, the three School Committee policies governing facilities management would provide the foundational guidelines for this type of activity. Further, if retiring two school buildings the MSBA process to close a facility would need to be followed and executed.
- Engage with appropriate firms to perform a variety of crucial studies including, but not limited to; space utilization, population and enrollment projections, feasibility study, site specific documentation surrounding buildability, zoning, utilities, and a range of other engineering considerations.
- Make the decision to utilize the existing Old Hammondtown School property or purchase an undeveloped site as it is assumed the Center School location would be inadequate to support new construction.
- If the Old Hammondtown site is used, demolition costs for the existing building would need to be determined. Additionally, new parking and the development of school-related and Recreation Department features would be necessary.
- When contemplating a developed new site, land purchase costs and site development costs for parking, utilities, and recreation features encompassing both school and town use would need to be calculated.
- Once a site has been selected and all the appropriate studies supporting the venture completed, engagement with an architect would round out the general planning stages.

Based upon the square footage information obtained from the Director of Facilities it is assumed a new facility would need to measure between 88,000 and 100,000 square feet to service grades PreK through 6. This estimate was derived from the existing Old Hammondtown square footage total of 75,520 square feet plus 12,000 square feet to support PreK through grade 3 operations. In addition, approximately 12,000 square feet allowance for common areas, bathrooms, special education, administrative offices, storage, mechanical spaces, and faculty space was included. As in prior alternative discussions, actual square footage would be determined based upon a space utilization study and final design.

Maintaining the same base estimate methodology, which leverages current square foot costs for design, construction administration, and construction issued by the MSBA totaling \$800 per square foot as of December 2022, a budget estimate for the construction of a new school excluding preliminary studies, land purchase, demolition, or site development costs could be between \$70.4 million to \$80 million. The projections noted below continue the annual capital improvement planning scheduled for both Center



School and Old Hammondtown, as the scenario would likely span several years, meaning the buildings present operations would be maintained. Further, the higher estimated figure of \$80 million was used to display the potential capital impact to the Town.

Facility	Planned CIP (FY2023-2031)	New CIP	Total
Center School	274,151	0	274,151
Old Hammondtown School	292,000	0	292,000
New School Facility	0	80,000,000	80,000,000
Estimated Total	566,151	80,000,000	80,566,151

Again, after the full student population was successfully relocated to the new facility, an adaptive re-use plan would be developed for the two locations. Surplussing the buildings could provide a financial offset to the construction and other related costs. If the Town pursued re-use scenarios for certain operations, the Project Team makes note Center School's proximity to a FEMA documented flood zone should be a significant consideration, particularly from an emergency preparedness perspective.



Appendix

Appendix A1: Old Rochester Policy AA-E-2 - SUPERINTENDENCY UNION #55 AGREEMENT

The three towns of Marion, Mattapoisett, and Rochester jointly administer and finance the junior high and high school as members of the Old Rochester Regional School District. These same towns form Massachusetts School Superintendency Union #55. The Union consists of the elementary schools of the member towns and share many of the personnel who serve the secondary schools. The shared personnel include, but are not limited to, the Superintendent, Assistant Superintendent for Curriculum & Instruction, Business Manager, Director of Student Services, Curriculum Coordinator, District Facilities Manager, Food Service Director, and clerical assistants.

Massachusetts School Superintendency Union #55 was formed in 1957 by Marion and Mattapoisett; Rochester joined the following year. Combining the supervision of the elementary schools and the high schools under one Superintendent provides greater consistency in education throughout the Union and the Region. The costs of maintaining the Superintendent's Office are paid approximately 50% by the Union and 50% by the Region.

The Old Rochester Regional District School Committee is comprised of two elected members from each member town, each elected to a three-year term. A third member from each town is appointed by the local School Committee for a one-year term. The Old Rochester Regional District School Committee has one regularly scheduled meeting each month and special meetings as necessary.

The Old Rochester Regional budget is formulated by the School Committee, reviewed by the Finance Committees of each town, adopted by the School Committee, and submitted to Town meetings. Operating costs are apportioned among the towns by a formula using both the state-imposed assessed valuation and pupil enrollment.

Local school committees have five elected members. The Superintendency Union is comprised of three local committee members each from Marion, Mattapoisett, and Rochester School Committees. This committee meets once a year as a Union Committee as well as at least once simultaneously with the Old Rochester Regional District School Committee.

LEGAL REF.: M.G.L. [71:61](#).

Appendix A2: Old Rochester Policy AA-E-1 - DISTRICT AGREEMENT

AGREEMENT AMONG THE TOWNS OF MARION, MATTAPOISETT AND ROCHESTER WITH RESPECT TO THE FORMATION OF A REGIONAL SCHOOL DISTRICT AS FORMED BY AN AGREEMENT ON FEBRUARY 21, 1958, AMENDED DECEMBER 29, 1969 (FIRST AMENDMENT), DECEMBER 4, 1972 (SECOND AMENDMENT), DECEMBER 27, 1973 (THIRD AMENDMENT), SEPTEMBER 9, 1986 (FOURTH AMENDMENT) AND AS AMENDED AND RESTATED IN ITS ENTIRETY APRIL 13, 2021 (FIRST RESTATEMENT)

THIS AGREEMENT, entered into pursuant to Chapter [71](#) of the General Laws of Massachusetts (M.G.L.), as amended, by the Towns of Marion, Mattapoisett and Rochester (hereinafter sometimes referred to as "member towns") for the purpose of establishing a regional school district and setting forth the terms and conditions for its operation. The regional school district shall be called the Old Rochester Regional School District (hereinafter sometimes referred to as "District"). This First Restatement is made pursuant to Section VII of the original regional agreement, as previously amended, by amending and restating the regional agreement in its entirety. The provisions of this First Restatement supersede any contrary or inconsistent provisions of the original regional agreement and any contrary or inconsistent provisions of any amendments prior to this First Restatement. In consideration of the mutual promises herein contained, it is hereby agreed as follows:

SECTION I THE REGIONAL DISTRICT SCHOOL COMMITTEE

(A) Composition

The powers and duties of the District shall be vested in and exercised by a District School Committee, (hereinafter sometimes referred to as "the Committee"). The Committee shall consist of nine members, three from each member town, of whom one shall be an appointed member and two shall be elected members. Elected members shall be those elected at annual town elections. Appointed members shall be those appointed by the local school committee of each member town. All members shall serve until their respective successors are elected or appointed and qualified.

(B) Elected Members

In every year in which the term of office of an elected member expires, the member town concerned shall, at its annual election, elect one member to serve for a term of three years. The term of the elected member would begin July 1st of the elected year and end on June 30th in the term's expiring year, provided however that such term shall continue until such elected member's successor is duly qualified by having taken his/her oath of office. The date of commencement of such term of office and the duration of such term shall be disclosed to all candidates requesting nomination papers and shall appear on the ballot used in such election.

(C) Appointed Members

Immediately after each annual town election, the Elementary School Committee of each member town shall appoint from its own membership one member to serve on the Committee for a term of one year. The term of the appointed member shall begin July 1st of the year appointed and end on the following June 30th, provided however that that such term shall continue until such appointed member's successor is duly qualified by having taken his/her oath of office. The date of commencement of such

term of office and the duration of such term shall be disclosed to all members of the Elementary School Committee or each member town making such appointment.

(D) Vacancies

In the event that any then serving member of the Committee shall be unable to continue to serve in such office due to death, resignation or lawful removal from office, such event shall be deemed to create a vacancy hereunder. In the event that any newly elected or appointed member shall fail to qualify for office due to death or declination to serve, such failure to qualify shall be deemed to create a vacancy hereunder. If a vacancy occurs among the members elected under Subsection I(B), the Select Board and the remaining Committee members from the member town concerned, acting jointly, shall within thirty days appoint a member to serve until the next annual town election, at which election a successor shall be elected for the balance of the unexpired term, if any. If a vacancy occurs among the members appointed under Subsection I(C), the local school committee of the member town concerned shall within thirty days appoint a member from its own membership to serve for the balance of the unexpired term.

(E) Organization

Annually, at the first meeting of the Committee held on or after July 1, the Committee shall promptly organize and choose by ballot a chairperson and vice-chairperson from its own membership. At the same meeting or at any other meeting the Committee shall appoint a treasurer and secretary who may be the same person but who need not be members of the Committee, choose such other officers as it deems advisable, determine the terms of office of its officers (except the chairperson and the vice-chairperson who shall be elected as provided above) and prescribe the powers and duties of any of its officers, fix the time and place for its regular meetings, and provide for the calling of special meetings.

(F) Powers and Duties

The Committee shall have all the powers and duties conferred and imposed upon such school committees by law and conferred and imposed upon it by this agreement, and such other additional powers and duties as are specified in Sections 16 to 16I inclusive, of Chapter 71 of the M.G.L. and any amendments thereof and additions thereto, now or hereafter enacted, or as may be specified in any other general law or in any applicable special law.

(G) Voting and Quorum

1. In accordance with M.G.L. c. [71, §14E](#)(4), as amended, on the July 1 in the year first following the acceptance of this Agreement by all member towns and the Commissioner of Elementary and Secondary Education (the "Commissioner"), on all issues requiring a vote of the Committee, the two elected Committee members from the Town of Marion shall each cast a weighted vote with a value of 0.9; the two elected Committee members from the Town of Rochester shall each cast a weighted vote with a value of 0.95; and the two elected Committee members from the Town of Mattapoisett shall each cast a weighted vote with a value of 1.1 based on the relative resident populations as required by Massachusetts law utilizing the 2019 Federal census figures estimating the population for each of the member towns.

2. The weight of the votes of the elected members from each member town shall be re-evaluated, and if necessary reset, by the Committee every ten (10) years within one year after the initial release of population data from each Federal decennial census, with the weight of votes of elected members to be based on such most recent Federal decennial census data. The weighted votes of the elected members from each town shall be in proportion to the population of the member town compared to the population of all member towns of the District combined, so that the actual weighted vote of the individual elected members of the Committee from each member town, expressed in tenths, is as nearly equal to one (1) vote per elected Committee member as possible while still ensuring that the largest percentage deviation between any two member towns in the numerical variance of each member town from the ideal representation figure for the District falls within a deviation of 10.0%. The resetting of the weight of the votes of the elected members of the Committee which will come from each member town shall not be viewed as an amendment to the Regional Agreement. The weighted votes of the elected Committee members of a particular member town shall be equal in weight. The vote of any Committee member appointed to fill a vacancy pursuant to Section I (D) shall bear the same weight as the vote of the member whose vacant seat was filled by such appointment.

3. The quorum of the Committee for the transaction of business shall be a majority of the total weighted vote for all Committee members, but a lesser number may adjourn. An affirmative majority of the total weighted vote for all Committee members present and voting shall be required to pass any motion or act upon any other business of the Committee which requires a majority vote. An affirmative two-thirds (2/3) of the total weighted vote for all Committee members present and voting shall be required to pass any motion that requires a two-thirds vote, provided however, that two-thirds (2/3) of the total weighted vote for all Committee members, whether or not present and voting, shall be required to pass any motion to make expenditures from the Capital Stabilization Fund pursuant to Section IV (D) 4, to adopt a budget under Sections V (A) and (B), to vote to utilize the indebtedness approval method set forth at M.G.L. c. [71, §16](#) (n) under Section X of this Agreement, and for any other business which by law requires a vote of two-thirds of all of the members of the Committee.

SECTION II TYPE OF REGIONAL DISTRICT

The District school shall include all grades from seven through twelve inclusive. The Committee is hereby authorized, in its discretion, to establish and maintain state-aided vocational education, acting as trustees therefore, in accordance with the provisions of Chapter 74 of the M.G.L. and acts amendatory thereof, in addition thereto or dependent thereon.

SECTION III LOCATION OF REGIONAL DISTRICT SCHOOL

The District school or schools shall be located within the geographical limits of the member towns.

SECTION IV APPORTIONMENT AND PAYMENT OF COSTS INCURRED BY THE DISTRICT

(A) Classification of Costs

1. Chart of Accounts. In compliance with 603 Code of Massachusetts Regulations (CMR) 10.03(3), as amended, the District shall adopt and consistently use, for all accounting purposes, the Chart of Accounts, as amended, established and maintained by the Massachusetts Department of Elementary and Secondary Education or its successor ("DESE").

District budgets shall consistently be prepared using the line items and associated definitions described in the Chart of Accounts, as amended, established and maintained by DESE.

2. Definition of Operating Costs and Capital Costs. For the purposes of apportioning assessments among the member towns, costs shall be divided into two categories: Operating Costs and Capital Costs.

(a) Capital Costs shall include all expenses in the nature of capital outlay including without limitation all expenses as outlined in M.G.L. Chapter [71, Section 16\(d\)](#) as it may be amended from time to time, such as the cost of acquiring land, the cost of constructing, reconstructing, and adding to buildings, and the cost of remodeling or making extraordinary repairs to a school building or buildings, including without limitation the cost of the original equipment and furnishings for such buildings or additions, plans, architects' and consultants' fees, grading and other costs incidental to placing school buildings and additions and related premises in operating condition, the cost of sewer systems and sewerage treatment and disposal facilities or the cost of purchase or use of such systems with a municipality, and the cost of any other capital asset or outlay which the District may acquire or for which the District may be authorized to borrow under any applicable general or special law now or hereafter in effect. Capital Costs shall also include payment or principal of and interest on bonds, notes or other obligations issued by the District to finance Capital Costs. Capital Costs shall include all capital outlay appearing in DESE 7000 and 8000 function codes.

(b) Operating Costs shall include all costs not included in Capital Costs, as defined herein. Operating Costs do include interest and principal on revenue anticipation notes.

(B) Apportionment

1. Apportionment of Operating Costs -In apportioning Operating Costs among the member towns, the District will follow the statutory methodology as defined in 603 CMR 41.00. In calculating the assessments, the Operating Costs needed to support the District's budget will be reduced by all general fund revenues and state aid. The balance of all Operating Costs shall be apportioned and assessed to each member town as follows: a member town's assessment will be the sum of the following:

(a) The member town's required local contribution as determined by the Commissioner pursuant to M.G.L. c. [70](#) (the "Minimum Required Local Contribution"),

and

(b) The member town's share of that portion of the District's Net School Spending, as defined by M.G.L. c. [70, §2](#), that exceeds the total Minimum Required Local Contributions for all member towns (the "Aggregate Minimum Contributions"),

and

(c) The member town's share of costs for transportation and all other expenditures (exclusive of Capital Costs as defined in Section IV (A) 2 (a), above) that are not included in the definition of Net School Spending.

(i) A member town's share of costs under subsection (b) and (c), above, when added together, is sometimes referred to hereinafter as the member town's "Above Minimum Contribution".

(ii) The total Operating Costs above the Aggregate Minimum Contributions is calculated by subtracting the Aggregate Minimum Contributions, all general fund revenues, and state aid from the Operating Budget.

(iii) A member town's Above Minimum Contribution will be assessed based on the ratio which the member town's Foundation Enrollment, calculated on the basis of the member town's combined three-year rolling average of Foundation Enrollment for grades 7 - 12 for the member town, bears to the total Foundation Enrollment for all member towns in the District, calculated on the basis of a combined three-year rolling average of Foundation Enrollment for grades 7 - 12 for all member towns. The Foundation Enrollment for purposes of calculating apportionment of Operating Costs will be determined using figures reported to DESE by each member town on October 1 for the preceding three years. Each member town will bear the expense of Out of District Placement for Student Services in their own local budget.

(d) The total Operating Costs assessed to each member town will consist of the member town's Minimum Required Local Contribution and the member town's Above Minimum Contribution.

2. Apportionment of Capital Costs - Capital costs will be assessed to member towns based on the ratio which the Member Town's Foundation Enrollment, calculated on the basis of the member town's combined five-year rolling average of Foundation Enrollment for grades 7 - 12 for the member town bears to the total Foundation Enrollment for all member towns in the District, calculated on the basis of a combined five-year rolling average of Foundation Enrollment for grades 7 - 12 for all member towns. The Foundation Enrollment for purposes of calculating apportionment of Capital Costs will be determined using figures as reported to DESE by each member town on October 1 for the preceding five years.

(C) Times of Payment of Apportioned Costs.

Each member town shall pay to the District in each fiscal period its proportionate share, as certified as provided in Subsection V(C), of the capital and operating costs, as well as the member town's proportionate share of the annual appropriation to the Stabilization Fund as defined below, if any. The share for each fiscal period of each member town shall be paid in four (4) equal installments on or before the first day of September, December, March and June.

(D) Capital Stabilization Fund

1. Establishment by the Committee. The Committee shall, by majority weighted vote of all of its members, and only with the approval of a majority of the local appropriating authorities of the member towns, create a Regional School District Capital Fund (the "Capital Stabilization Fund") in accordance with M.G.L. c. [71, §16G ½](#). Such approval by the member towns shall occur by a separate vote to authorize the establishment of the fund.

2. Maintenance of the Capital Stabilization Fund. Once established, the Capital Stabilization Fund will be funded as part of the Committee's regular budget approval process. The Committee shall include a

line item in any year's proposed annual budget to appropriate monies into the Capital Stabilization Fund. The amount to be appropriated to the Capital Stabilization Fund shall be included in each member town's assessment for the applicable fiscal year and shall be apportioned based on the regional agreement methodology for apportioning Capital Costs as set forth in Section IV(B) 2, above.

3. Limits on Funding. The amount budgeted by the Committee for appropriation to the Capital Stabilization Fund in any fiscal year may not exceed the limits established by law, which is currently five percent of the aggregate amount assessed to the member towns for the preceding fiscal year. The aggregate fund balance in the Capital Stabilization Fund shall not at any time exceed the limits established by law, which is currently five percent of the combined equalized valuations of the member towns.

4. Expenditures from the Capital Stabilization Fund. Expenditures from the Capital Stabilization Fund may be authorized at any time by a weighted vote of two-thirds of all the members of the Committee for any purpose for which the District is permitted to borrow funds or for such other District purpose which the Commissioner may approve.

SECTION V BUDGET

The Committee shall prepare an annual operating and maintenance budget using accounts itemized in conformance with the Chart of Accounts as amended, established, and maintained by DESE.

(A) Tentative Maintenance and Operating Budget

At the opening of each academic year, the Committee shall as promptly as practicable proceed with the preparation of a tentative operating and maintenance budget for the next fiscal year. The budget shall contain all proposed operating expenditures, capital expenditures, and debt service payments to be paid from general revenues of the regional school District. The budget shall identify each separate revenue source, and the amount estimated for each revenue source; shall specify whether member town assessments are to be calculated pursuant to the statutory assessment method or the alternative assessment method then provided for in the regional agreement, if any; and shall specify the total amounts to be assessed to the member towns for the support of the budget. All non-recurring expenditures shall be itemized. This tentative budget shall be itemized in such further detail as the Committee may deem advisable.

A proposed budget shall be approved by a majority of the members of the Committee.

Copies of the proposed budget shall be sent to the Chairman of the Finance or Advisory Committee for each member town at least thirty days prior to the date on which the final operating and maintenance budget is adopted by the Committee, or, if there is no Finance or Advisory Committee in a member town, to the Chairperson of the Select Board of such town.

(B) Final Operating and Maintenance Budget

The Committee shall hold a budget hearing consistent with M.G.L. c. [71, §38N](#), as amended, annually on its proposed annual budget not less than seven days after publication of a notice thereof in a newspaper having general circulation in the region. Following the public hearing on the proposed budget, the

Committee may make any such modifications to its proposed budget as it may deem necessary or desirable before voting to adopt a final operating and maintenance budget.

Following such hearing, the Committee shall adopt a final budget by a two-thirds (?) weighted vote of all its members, incorporating such changes from the proposed budget that the Committee has deemed appropriate. Said adoption of a final budget will occur not later than forty-five (45) days prior to the earliest date on which the business section of the annual town meeting of any member town is to be held, but in no event later than March 31 (provided that said budget need not be adopted earlier than February 1).

The budget and assessments shall be so constructed to show debt service, transportation, operating, and capital costs. It shall also list all sources of revenue used to reduce operating costs.

(C) Certification of Assessments

Within thirty (30) days from the date on which the budget is adopted, and in no event later than April 30, the Treasurer of the District shall certify to the Treasurer of each member town that town's assessed share of such budget.

The annual budget, as adopted by the Committee, and the member town's assessment as certified by the Treasurer of the District shall be placed before each local appropriating authority for its consideration. The annual budget, as adopted by the Committee shall require the approval of two-thirds (?) of the member towns by an affirmative vote of the appropriating authorities for such member towns. A vote by the local appropriating authority to appropriate the member town's assessment shall constitute approval of the District's budget. The District budget, so approved, shall be apportioned among the member towns and paid in accordance with the terms in Section IV (B) and Section IV (C) of this agreement.

SECTION VI TRANSPORTATION

School transportation shall be provided according to M.G.L. Ch. [71, Section 16C](#) as amended, by the District and the cost thereof shall be apportioned to the member towns as an annual operating cost in accordance with the formula in Section IV (B) 1 (c)(iii) of this Agreement for Above Minimum Contributions.

SECTION VII AMENDMENTS

(A) Limitation

This Agreement may be amended from time to time in the manner hereinafter provided, but no amendment shall be made which shall substantially impair the rights of the holders of any bonds or notes or other evidences of indebtedness of the District then outstanding, or the rights of the District to procure the means for payment thereof, provided that nothing in this section shall prevent the admission of a new town or towns to the District and the reapportionment accordingly of capital costs of the District represented by bonds or notes of the District then outstanding and of interest thereon.

(B) Procedure

Any proposal for amendment, except a proposal for amendment providing for the withdrawal of a member town (which shall be acted upon as provided in Section IX), may be initiated by a majority weighted vote of all the members of the Committee or by a petition signed by 10% of the registered voters of any one of the member towns. In the latter case, said petition shall contain at the end thereof a certification by the town clerk of such member town as to the number of registered voters in said town according to the most recent voting list and the number of signatures on the petition which appear to be the names of registered voters of said town and said petition shall be presented to the chair of the Committee. In either case, the chair of the Committee shall mail or deliver a notice in writing to the Select Board of each of the member towns that a proposal to amend this Agreement has been made and shall enclose a copy of such proposal (without the signatures in the case of a proposal by petition).

The Select Board of each member town shall include in the warrant for the next annual or a special town meeting called for the purpose an article stating the proposed amendment. Except in the case of amendments resulting from the addition of a new member which shall become effective as set forth in Section VIII, hereinafter, such amendment shall take effect upon its acceptance by all of the member towns, acceptance by each town to be by a majority vote at a town meeting as aforesaid and only after approval of the Commissioner of Elementary and Secondary Education (hereinafter referred to as Commissioner). Should the amendment impact the budget, said amendment will only take effect on the first July 1 which falls after acceptance by all of the member towns and receipt of approval of the Commissioner, and only when there has been sufficient advanced time to prepare the budget/assessment in accordance with the new procedure. All amendments must be approved by the Commissioner.

(C) Review of Agreement

Recognizing that over time circumstances often change, and intending that this Agreement should continue to serve the best interests of the member towns, the Committee should, at five year intervals, review the need to establish an ad hoc study group composed of knowledgeable persons to study the Agreement and report to the Committee as to whether or not any changes to this Agreement might be beneficial, in light of the then prevailing conditions. The Committee shall give any such ad hoc study group's report due consideration, but may exercise its discretion as to whether or not it will implement any of the group's recommendation.

SECTION VIII ADMISSION OF ADDITIONAL TOWNS TO THE DISTRICT

By an amendment of this Agreement adopted under and in accordance with Section VII above, any town or towns may be admitted to the District upon adoption as therein provided of such amendment and upon acceptance by the town or towns seeking admission of the Agreement as so amended and also upon compliance with such provisions of law as may be applicable, including, but not limited to 603 CMR [41.05\(6\)](#), as amended and such terms as may be set forth in such amendment. Notwithstanding the timeline and effective date outlined in Section VII (B), a new member town may only be admitted at the beginning of a fiscal year, effective on July 1 of that fiscal year, and only if the approval of all member towns and the Commissioner has been obtained on or before the preceding December 31st. The authorizing votes of the member towns may provide for the deferral of said admission until July 1 of a subsequent fiscal year.

Upon admission of such town or towns, the total costs of any capital acquisitions and improvements still being incurred by member towns shall be reapportioned to all member towns in the District including

the newly admitted member town (or towns) as per its apportionment. The newly admitted member town shall then assume liability of its entire share of the cost to be paid over the remaining term for any funded debt issued to pay for capital acquisitions or improvements.

SECTION IX WITHDRAWAL

In the event that a member town decides to seek to withdraw from the District the following procedures and requirements will apply:

(A) Vote Expressing Desire to Withdraw

The withdrawal of a member town from the District may be effected by an amendment to this Agreement in the manner hereinafter provided by this Section IX. Any member town seeking to withdraw shall, by vote at an annual or special town meeting, request the Committee to draw up an amendment to this Agreement setting forth the terms by which such town may withdraw from the District. No withdrawal will take effect on other than July 1 of a given year, and the vote referred to in the preceding sentence, the notification to the District consistent with paragraph B below, and the submittal of a long range education plan consistent with paragraph C below, must all occur no less than (2) years prior to the desired date of withdrawal.

(B) Notice and Procedure

The clerk of the member town seeking to withdraw shall, within seven (7) days of such vote at annual or special town meeting requesting the Committee to draw up an amendment to this Agreement, notify the Committee chairperson as well as the District's superintendent in writing that the member town has voted to request the Committee to formulate an amendment to the Agreement setting forth the terms for withdrawal; the clerk will provide a certified copy of the vote with the notification. Thereupon the Committee shall draw up an amendment to the agreement consistent with the terms and provisions of this Section IX and setting forth such other terms of withdrawal as it deems advisable, subject to the limitations contained in subsection VII (A). The Secretary of the Committee shall mail or deliver a notice in writing to the Select Board of each member town that the Committee has drawn up an amendment to the Agreement providing for the withdrawal of a member town (enclosing a copy of such amendment). The Select Board of each member town shall include in the warrant for the next annual or a special town meeting called for the purpose of an article stating the amendment.

(C) Long Range Education Plan

No less than two (2) full years prior to the desired date of withdrawal, the member town seeking to withdraw, in addition to the other requirements referred to in paragraph A above, will submit to the Commissioner and to the District a "Long Range Education Plan" consistent with 603 CMR [41.02](#) (2). The Long Range Education Plan will address, in addition to any other factor required by the Commissioner, the following: the expected educational benefits of reorganization; the current and projected enrollments; an inventory of all educational facilities under the jurisdiction of the member town and under the jurisdiction of the District and construction efficiencies, if any; the proposed administrative structure; the fiscal ramifications of the withdrawal upon the withdrawing town as well as the other member towns in the District; the geographical and physical characteristics of the area; and the effect that withdrawal will have on student transportation.

(D) Requirements

In addition to other terms and requirements which the Committee may include in the proposed amendment, the member town seeking to withdraw will be responsible for the following: (1) payment of all operating costs for which it is liable as a member of the District; (2) continuing payments beyond the time of withdrawal to the District for the withdrawing member town's share of the indebtedness of the District which is outstanding at the time of such withdrawal, and for interest thereon, to the same extent and in the same manner as though the withdrawing member town had not withdrawn from the District; (3) such other liabilities incurred by the District during all times that the withdrawing member town was a member of the District (e.g., Other Post-Employment Benefits (OPEB) as determined by the Committee; and (4) for the costs, including legal fees, that accrue to the District as a result of the withdrawal. The Committee's amendment may condition withdrawal upon the irrevocable deposit, in trust in the name of the District, of funds by the withdrawing member town in an amount sufficient to meet such responsibilities pursuant to Section IX (G), below.

(E) Approval of Withdrawal

A request to withdraw shall become effective only if the Committee's amendment to the Agreement is approved by weighted majority vote of the Committee, is approved by majority vote at an annual or special town meeting in each of the member towns of the District, including without limitation the withdrawing member town, and is approved by the Commissioner. The withdrawal can become effective no less than one full year after the last to occur of the following events: completions of the approval of the amendment to the Agreement by the Committee, the member towns and the Commissioner, and shall become effective only at the beginning of a fiscal year of the District. The authorizing votes of the member towns may provide for the deferral of said withdrawal until July 1 of a subsequent fiscal year.

(F) Cessation of Terms of Office of Withdrawing Town's Members

Upon the effective date of withdrawal, the terms of office of all Committee members from the withdrawing town shall terminate, the total membership of the Committee shall be decreased accordingly, and the voting weight of the remaining Committee members shall be recalculated to comply with the formula set forth at Section I (G) 1, above and the weighted votes redistributed accordingly.

(G) Payments of Certain Capital or Liability Costs Made by a Withdrawing Town

Money received by the District from the withdrawing member town for payment of funded indebtedness, OPEB, such other liabilities incurred by the District during all times that the withdrawing member town was a member of the District or interest thereon shall be used only for such purpose and until so used shall be deposited in trust in the name of the District with a Massachusetts bank or trust company having a combined capital and surplus of not less than \$1,500,000.

SECTION X INCURRING OF DEBT

The District may borrow under M.G.L. c. [71, §16\(d\)](#) and any other applicable general or special law now or hereafter in effect. Pursuant to M.G.L. c. [71, §16\(d\)](#), not later than seven days after the date on

which the Committee authorizes the incurring of debt, other than temporary debt in anticipation of revenue to be received from any source, written notice of the date of said authorization, the sum authorized, and the general purpose or purposes for authorizing such debt, shall be given to the Board of Selectmen for each member town. No debt may be incurred until authorized in accordance with M.G.L. c. [71, §16](#)(d) or pursuant to the provisions of any other applicable general or special law now or hereafter in effect. Notwithstanding the provision of this Section X, the Committee may, by a vote of two-thirds of all its members, require that the approval of any particular authorized issue of indebtedness shall be by the registered voters of the member towns pursuant to the provisions of M.G.L. c. [71, §16](#)(n) rather than pursuant to the provisions of M.G.L. c. [71, §16](#) (d).

SECTION XI STUDENTS

(A) Students Entitled to Attend the District

The District shall accept all children who reside in the District and who have completed the sixth grade.

(B) Vocational and Trade School Students

Any student residing in a member town who is desirous of attending a trade or vocational school outside the District shall have all the privileges of attending such a school as are now or may be hereafter provided for by law, and the cost of tuition for attending such a school and the cost of transportation, when necessary, shall be borne by the member town wherein the student resides, provided, however, that nothing contained herein shall prevent the District from including such costs in its operating budget and assessing the towns involved for such costs.

(C) Admission of Students Residing Outside the District

The Committee may accept for enrollment in the regional district school students from towns other than the member towns on a tuition basis and upon such terms as it may determine. Income received by the District from tuition students shall be deducted from the total operating costs in the next annual budget to be prepared after the receipt thereof, prior to apportionment under Section IV to the member towns.

Approval dates:

AMENDED DECEMBER 29, 1969 (FIRST AMENDMENT),
DECEMBER 4, 1972 (SECOND AMENDMENT)
DECEMBER 27, 1973 (THIRD AMENDMENT)
SEPTEMBER 9, 1986 (FOURTH AMENDMENT)
APRIL 13, 2021 (FIRST RESTATEMENT)

Appendix A3: Old Rochester Policy FA - FACILITIES DEVELOPMENT GOALS

The School Committee believes that any educational program is influenced greatly by the environment in which it functions. The development of a quality educational program and school facilities that help to implement the program must go hand in hand.

Therefore, it is the Committee's goal to provide the facilities needed for the number of students in the school system, and to provide the kind of facilities that will best support and accommodate the educational program.

In planning facilities, the Committee recognizes that capital outlay funds are limited, and that priorities must be established to make the best use of the school building dollar. The Committee's first objective will be to develop a plan that eliminates overcrowding and minimizes the need for extended day programs and double sessions. Whenever possible, the cultural as well as educational needs of the community will be considered in planning facility expansions.

Architects retained by the Committee are expected to plan for simplicity of design; sound economics, including low long-range maintenance costs and efficiency in energy needs; low insurance rates; high educational use; and flexibility.

LEGAL REF.: 963 CMR 2.00

Appendix A4: Old Rochester Policy FJ - FACILITIES RENOVATIONS/IMPROVEMENTS

The Associate Superintendent for Finance and Planning with the Assistance of the Manager of Facilities and Grounds will maintain a five-to-ten-year projection of capital maintenance and improvement projects deemed necessary to:

- Maintain the school physical plant in a condition that is safe and healthful;
- Insure against the need for major emergency repairs or sudden requirements for extensive maintenance work;
- Reduce operational costs to reasonable levels, and;
- Provide for a uniform maintenance and capital expense.

School District Administrators will offer recommendations whenever facilities renovations are concluded to be advantageous to the educational program. All recommendations for these and other capital maintenance and improvement projects will be reviewed by the appropriate School Committees or their sub-committees.

The Superintendent and the appropriate School Committees may modify the Capital Program. The School Committees will make the final decisions concerning expenditure.

Appendix A5: Old Rochester Policy FCB - RETIREMENT OF FACILITIES

When a school building becomes inadequate by virtue of age, condition, size of site, lack of need, or other overriding limitations, and cannot reasonably and economically be brought up to the current educational standards, the building should be considered for a comprehensive closing study. The Superintendent will recommend to the School Committee, which facilities appear to justify further analysis.

The School Committee may seek both professional advice and the advice of the community in making its recommendations as to the retirement of any school facility. This will permit the public, which originally acquired the property, to benefit from its recycling or retirement.

A closing study will include direct involvement by those neighborhoods considered in the study and will be concerned with all or some of the following factors:

1. Age and current physical condition of the facilities, its operating systems, and program facilities
2. Adequacy of site, location, access, surrounding development, traffic patterns, and other environmental conditions
3. Reassignment of children, including alternative plans according to Committee policy
4. Transportation factors, including numbers of children bused, time, distance, and safety
5. Alternative uses of the building
6. Cost/Savings
 - a. Personnel
 - b. Plant Operation
 - c. Transportation
 - d. Capital Investment
 - e. Alternative Use
7. Continuity of instructional and community programs

**STATUTES RELATING TO THE
MASSACHUSETTS SCHOOL BUILDING AUTHORITY**

CHAPTER 10: DEPARTMENT OF THE STATE TREASURER

M.G.L. 10 § 35BB - School Modernization and Reconstruction Trust Fund

(a) As used in this section, the following words shall, unless the context requires otherwise, have the following meanings:--

“Authority”, the Massachusetts School Building Authority, established under section 1A of chapter 70B.

“Dedicated sales tax revenue amount”, all moneys received by the commonwealth equal to 1 per cent of the receipts from sales, as defined by chapter 64H, and 1 per cent of the sales price of purchases, as defined by chapter 64I, from that portion of the taxes imposed under said chapters 64H and 64I as excises upon the sale and use at retail of tangible property or of services, and upon the storage, use or other consumption of tangible property or of services, including interest thereon or penalties, but not including any portion of the taxes that constitute special receipts within the meaning of subsection (b ½) of section 10 of chapter 152 of the acts of 1997 or within the meaning of subsection (b ½) of said section 10 of said chapter 152 or any portion of the taxes imposed on the sale of meals as defined in paragraph (h) of section 6 of said chapter 64H.

“Receipts from sales”, gross receipts from nonexempt sales, less amounts abated or reimbursed.

“Sales price of purchases”, sales price of nonexempt purchases, less amounts abated or reimbursed.

(b) There shall be established on the books of the commonwealth a separate fund, to be known as the School Modernization and Reconstruction Trust Fund. There shall be credited to the fund the dedicated sales tax revenue amount. Annual receipts into the fund on account of any fiscal year shall be considered to meet the full obligation of the commonwealth to the authority for such fiscal year.

(c) Amounts in the fund shall be held by the state treasurer or his designee, as trustee and not on account of the commonwealth, exclusively for the purposes of the authority, and the state treasurer shall disburse amounts in the fund to the authority, without further appropriation, upon the request from time to time of the executive director of the authority. All amounts in the fund, including investment earnings, shall be available for expenditure by the authority for any lawful purpose, including without limitation

payment of debt service on debt obligations issued by the authority, and may be pledged to secure debt of the authority in such manner and according to such priority as the authority may determine.

(d) The authority shall certify annually to the treasurer as trustee with copies provided to the clerks of the house and senate and to the house and senate committees on ways and means that it has made provision in its annual budget and its capital plan under section 17 of chapter 70B for sufficient amounts to be available to meet debt service payments or other payments due under financing obligations, including, without limitation, leases or grant obligations.

(e) Subject to applicable restrictions contained in any bond resolution, trust or security agreement or credit enhancement agreement, surety bond or insurance policy related to indebtedness incurred by the authority, including without limitation coverage requirements, if the authority shall determine that the balance of the fund exceeds the amount necessary to achieve the purposes of the authority, including, without limitation, to meet debt service payments, lease payments and grant obligations, the authority may transfer the excess amount to the commonwealth.

(f) In order to increase the marketability of any bonds or notes of the trust which may be secured by or payable from amounts held in the fund, the sums to be credited to the fund are hereby impressed with a trust for the benefit of the trust and the holders from time to time of the bonds or notes, and in consideration of the acceptance of payment for the bonds or notes, the commonwealth covenants with the purchasers and all subsequent holders and transferees of the bonds or notes that while the bond or note shall remain outstanding, and so long as the principal of or interest on the bond or note shall remain unpaid, the sums to be credited to the fund shall not be diverted from the control of the trust and, so long as the sums are necessary, as determined by the authority in accordance with any applicable bond resolution, trust or security agreement or credit enhancement agreement, surety bond or insurance policy related to indebtedness incurred by the trust, for the purposes for which they have been pledged, the rates of the excises imposed by said chapters 64H and 64I shall not be reduced below the rates prescribed by this section.

[Added by St.2004, c. 210, § 1, eff. July 28, 2004.] [Current through Chapter 153 of the 2019 1st Annual Session]

CHAPTER 70B. SCHOOL BUILDING ASSISTANCE PROGRAM

M.G.L. 70B § 1 - School building assistance program; establishment

Whereas the school building assistance program is the largest capital grant program operated by the commonwealth and is necessary for the establishment of public school buildings in the commonwealth; and whereas the costs of the school building assistance program are increasing at an unsustainable rate and local governments need flexibility in school building assistance to ensure that local needs for school facility space, downtown development, open space and community space are met; and to promote the thoughtful planning and construction of school facility space in order to insure safe and adequate plant facilities for the public schools, and to assist towns in meeting the cost thereof, there is hereby established a school building assistance program. It is in the best interests of the commonwealth and its citizens to create an authority to achieve the objectives of effective management and planning of the commonwealth's investments in school building assets, promoting positive educational outcomes, ensuring the health, safety, security and well-being of students, easing and preventing overcrowding, maintaining good repair, efficient and economical construction and maintenance, financial sustainability of the school building assistance program, thoughtful community development, smart growth and accessibility.

[Added by St.2000, c. 159, § 140. Amended by St.2004, c. 208, § 1, eff. July 26, 2004.]

[Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 1A - School Building Authority

(a) There is hereby created a body politic and corporate and a public instrumentality to be known as the Massachusetts School Building Authority, which shall be an independent public authority not subject to the supervision and control of any other executive office, department, commission, board, bureau, agency or political subdivision of the commonwealth except as specifically provided in any general or special law. The exercise by the authority of the powers conferred by this chapter shall be considered to be the performance of an essential public function.

(b) The authority shall consist of the state treasurer, who shall serve as chairperson, the secretary of administration and finance, the commissioner of education, and 4 additional members appointed by the state treasurer, 2 of whom shall have practical experience in educational facilities planning, school building construction, or architecture and school design, and 2 of whom shall be persons in the field of education with demonstrated knowledge of Massachusetts curriculum frameworks and other relevant federal and state

educational standards, each of whom shall serve a term of 2 years; but, a person appointed to fill a vacancy shall serve only for the unexpired term. An appointed member of the authority shall be eligible for reappointment. The authority shall annually elect 1 of its members to serve as vice-chairperson. Each member of the authority serving ex officio may appoint a designee pursuant to section 6A of chapter 30.

(c) Four members of the authority shall constitute a quorum, and the affirmative vote of 4 members of the authority shall be necessary and sufficient for any action taken by the authority. No vacancy in the membership of the authority shall impair the right of a quorum to exercise all the rights and duties of the authority. Members shall serve without pay but shall be reimbursed for actual expenses necessarily incurred in the performance of their duties. The chairperson of the authority shall report to the governor and to the general court no less than annually, to assist the executive and legislative branches in coordinating educational, community development and fiscal policies of the commonwealth.

(d) Any action of the authority may take effect immediately and need not be published or posted unless otherwise provided by law. Meetings of the authority shall be subject to section 11A ½ of chapter 30A; but, said section 11A ½ shall not apply to any meeting of members of the authority serving ex officio in the exercise of their duties as officers of the commonwealth so long as no matters relating to the official business of the authority are discussed and decided at the meeting. The authority shall be subject to all other provisions of said chapter 30A, and records pertaining to the administration of the authority shall be subject to section 42 of chapter 30 and section 10 of chapter 66. All moneys of the authority shall be considered to be public funds for purposes of chapter 12A. The operations of the authority shall be subject to chapter 268A and chapter 268B and all other operational or administrative standards or requirements to the same extent as the office of the state treasurer.

[Added by St.2004, c. 208, § 2, eff. July 26, 2004.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 2 - Definitions

For the purposes of this chapter, the following words shall have the following meanings:-

“Additional Revenues”, any moneys that are not defined as the dedicated sales tax revenue amount that are appropriated, gifted, granted, pledged, or otherwise made available to the authority by the commonwealth, any local governmental entity, the federal government, not-for-profit organizations, for-profit organizations, or private individuals.

“Advisory board”, the school building advisory board.

“Alternatives to construction”, approved school facilities projects that do not include capital construction, major reconstruction or building renovation, but no alternative project shall be reimbursed if it is determined by the authority to be more costly than construction necessary to achieve the same end.

“Approved school project”, a school project approved by the authority.

“Assisted facility”, a school facility that has received a total facilities grant pursuant to this chapter.

“Authority”, the Massachusetts School Building Authority.

“Capital construction project”, any capital project, other than a major reconstruction project, for the construction, the enlargement or original equipping of any public schoolhouse in any city or town, or a project for the renovation or partial renovation of an existing structure for use as a schoolhouse; or the renovation or partial renovation of an existing schoolhouse.

“Construction manager”, construction manager as defined by section 38A ½ of chapter 7.

“Dedicated sales tax revenue amount”, all moneys received by the commonwealth equal to 1 per cent of the receipts from sales, as defined by chapter 64H, and 1 per cent of the sales price of purchases, as defined by chapter 64I, from that portion of the taxes imposed under chapters 64H and 64I as excises upon the sale and use at retail of tangible property or of services, and upon the storage, use or other consumption of tangible property or of services, including interest thereon or penalties, but not including any portion of the taxes that constitute special receipts within the meaning of subsection (b) of section 10 of chapter 152 of the acts of 1997 or any portion of the taxes imposed on the sale of meals as defined in paragraph (h) of section 6 of chapter 64H.

“Eligible applicant”, a city, town, regional school district or independent agricultural and technical school.

“Energy efficient construction rating”, rating given to eligible applicants by the authority based upon a determination that the construction techniques of an approved school project meet or exceed energy efficiency standards established by the board of building regulations and the National Institute of Standards and Technology and which meet the purposes of subsection (c) of section 9 of chapter 23J.

“Innovative community use”, approved school facilities projects that combine community resources to streamline the costs of and utilize other funding sources for the facilities project.

“Maintenance rating”, rating given to schools and school districts by the authority, based on a maintenance assessment conducted by the authority.

“Major reconstruction project”, any capital school facilities or extraordinary maintenance project including, but not limited to, the retrofitting of a school for the purpose of providing wireless or other learning technologies, the replacement of a roof or heating plant if it is determined by the board that such project has not been necessitated, in whole or in part, by the failure of an eligible applicant to make adequate and prudent provisions for the care and maintenance of said school.

“Nonstate fundraising”, third party monies made available to the eligible applicant for approved school facilities projects including, but not limited to, private donations and federal grants.

“Project manager”, a person designated or assigned by an eligible applicant, and approved by the authority, to manage and coordinate daily administration of a school facility or building project to completion including, but not limited to, school district or municipal staff person or a volunteer with appropriate experience and expertise.

“Prototypical school plans”, school building project architectural designs and plans collected and maintained by the authority for consultation by eligible applicants.

“Regional school”, any public school established under law by the action of two or more cities or towns. For the purposes of this chapter, the agricultural schools maintained by the counties of Bristol and Norfolk shall be deemed to be regional schools.

“Regional school district”, any instrumentality of the commonwealth, established by two or more cities and towns for the purpose of operating a regional school.

“School project”, any capital construction or major reconstruction projects; the lease of buildings or modular facilities; arrangements with higher education facilities or other nonprofit or municipal entities; use of swing space between school buildings in the district; tuition arrangements with other school districts to prevent overcrowding; and other school facilities projects. The cost of tuition arrangements in existence prior to project application shall not be eligible for reimbursement as an approved school project.

“Total facilities grant”, the total grant with respect to an approved school project and which is calculated as follows: In the case of a grant for an approved project of a city or town, the total facilities grant shall be the product of multiplying the final approved costs of such project, including costs referred to in section 4, by the reimbursement percentage determined pursuant to section 10 for the year in which the project is approved.

(1) In the case of a grant for an approved project of a regional school district or a county, the total facilities grant shall be the sum of the grants computed separately for each city

and town which is a member of said regional school district or located in said county as hereinafter provided. For purposes of this computation, each member city's and town's share of the combined grant shall be equal to the total approved project cost, including costs referred to in section 4, multiplied by the product of the reimbursement percentage listed in subsection (a) of section 10, multiplied by the percentage of district or county capital costs that would be apportioned to such city or town in accordance with the applicable regional school district agreement or law for capital costs incurred in the fiscal year in which the grant is approved. The amount of the total capital costs apportioned to a member city or town in any fiscal year on account of an approved school project of a regional school or county, determined in accordance with the applicable regional school district agreement or law, shall be reduced by an amount equal to the amount of the grant payable on account of such project in such fiscal year multiplied by a fraction the numerator of which is the city's or town's reimbursement percentage, determined as aforesaid, multiplied by the percentage of capital costs apportioned to the city or town for such fiscal year in accordance with the applicable regional school district agreement or law and the denominator of which is the sum of the percentages so derived as the numerators for all of the member cities and towns.

(2) In the case of a grant for an approved project of an independent agricultural and technical school, the total facilities grant shall be the sum of the grants computed separately for each city and town in which students of said school reside averaged by means of a weighted average multiplied by the final approved costs.

“Trust”, the Massachusetts School Modernization and Reconstruction Trust, established by section 35BB of chapter 10.

[Added by St.2000, c. 159, § 140. Amended by St.2004, c. 208, §§ 3 to 11, eff. July 26, 2004; St.2006, c. 122, §§ 27, 28, eff. June 24, 2006; St.2006, c. 139, § 43, eff. July 1, 2006; St.2009, c. 158, § 22, eff. Nov. 23, 2009.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 3 - Purpose of program; board of education; general policy and review standards; specific powers of board

There is hereby established a school building assistance program. The purpose of said program is generally to encourage and foster the thoughtful establishment and maintenance of school facility space in and among the cities and towns of the commonwealth; to conduct surveys and studies relative thereto; and to administer the provisions of this chapter relative to grants and loans to cities and towns for the planning and construction of school building and school facility projects.

The purposes of the program shall be the provision of financial assistance to cities, towns and regional school districts as beneficiaries of the trust to finance and refinance the costs of approved school projects as provided in, and as necessary to implement this chapter, including without limitation providing for the payment of grants approved pursuant to this chapter and the payment of all costs of the authority, including professional and financial services incident to the conduct of its operations.

The authority shall establish general policy and review standards regarding school building construction, renovation, maintenance and facility space and administer the school building assistance program in accordance with this chapter. In carrying out its duties, the authority shall be guided by the following principles: preservation of open space and minimization of loss of such open space, emphasis on thoughtful community development, and project flexibility that addresses the needs of individual communities and municipalities. In accordance with the terms of any bond resolution, trust or security agreement or credit enhancement agreement, surety bond or insurance policy related to indebtedness incurred by the authority secured by amounts provided to the trust in accordance with section 35BB of chapter 10, the holders of indebtedness and the providers of any credit enhancement, surety bond or insurance policy shall also be beneficiaries of the trust. The authority shall apply and disburse moneys and revenues of the trust without further appropriation or allotment.

The authority, shall establish general policy and review standards regarding school building construction, renovation, maintenance and facility space, administer the school building assistance program in accordance with this chapter and coordinate the distribution of school facilities grants in accordance with this chapter. The board shall be responsible for the oversight and management of the school building assistance program as established herein and referred to hereafter as the “program”. In carrying out its duties, the authority shall be guided by the following principles: preservation of open space and minimization of loss of such open space; emphasis on thoughtful community development; and project flexibility that addresses the needs of individual communities and municipalities.

Specific powers of the authority shall include, but not be limited to, the following:

- (a) review, approve or deny grant applications, waivers and other requests submitted to the program; review, approve and recommend changes to grant payment schedules or suspend said schedules for program projects such as refinancings, audit findings and such other circumstances that may warrant such action;
- (b) provide architectural or other technical advice and assistance, training and education, to cities and towns or to joint committees thereof and to general contractors,

subcontractors, construction or project managers, designers and others in the planning, maintenance and establishment of school facility space;

(c) recommend to the general court such legislation as it may deem desirable or necessary to further the purposes of this chapter;

(d) develop a formal enrollment projection model or consider using projection models already available;

(e) to apply for, receive, administer and comply with the conditions and requirements respecting any grant, gift or appropriation of property, services or moneys;

(f) to enter into contracts, arrangements and agreements with other persons and execute and deliver all trust agreements, grant agreements and other instruments necessary or convenient to the exercise of the powers of the trust;

(g) to borrow and repay money by issuing bonds or notes of the trust, to apply the proceeds thereof as provided in this chapter and to pledge or assign or create security interests in any revenues, receipts or other assets or funds of the trust to secure bonds or notes;

(h) develop a project priority system;

(i) collect and maintain a clearinghouse of prototypical school plans which may be consulted by eligible applicants;

(j) determine eligibility of cost components of projects for reimbursement, including partial or full eligibility for project components for which the benefit is shared between the school and other municipal entities;

(k) establish appropriate rules and regulations as may be necessary to carry out the purposes of this chapter;

(l) prepare an annual budget for the administration of the program;

(m) collect and maintain data on all the public school facilities in the commonwealth, including information on size, usage, enrollment, available facility space and maintenance;

(n) perform or commission a needs survey to ascertain the capital construction, reconstruction, maintenance and other capital needs for schools in the commonwealth;

(o) develop a long term capital plan in accordance with needs and projected funding;

(p) adopt and amend bylaws and such rules, regulations and procedures for the conduct of the business of the trust as the board shall deem necessary to carry out the provisions of this chapter;

- (q) establish and maintain reserves;
- (r) disburse amounts due to cities, towns and regional school districts under grants approved by the authority to finance or refinance costs of approved school projects and, in conjunction therewith, finance or refinance the local share of costs of these projects, through the purchase of bonds, notes or other evidences of local indebtedness, at the rates and on the terms that the authority may in its discretion determine, and provide for the payment of all costs of the authority, including professional and financial services incident to the conduct of its operations;
- (s) invest the funds of the trust in such investments as may be legal investments for funds of the commonwealth or any fiduciary in the commonwealth;
- (t) obtain insurance and enter into agreements of indemnification necessary or convenient to the exercise of the powers of the trust;
- (u) sue and be sued and to prosecute and defend actions relating to the affairs of the trust; but the trust shall not be authorized to become a debtor under the United States Bankruptcy Code;
- (v) engage accounting, management, legal, financial, consulting and other professional services necessary to the operations of the trust; and
- (w) do all things necessary or convenient to carry out the purposes of this chapter.

The chairperson of the authority shall appoint an executive director, who shall supervise the administrative affairs and general management and operations of the authority and who shall also serve as secretary of the authority, ex officio. The executive director shall receive a salary commensurate with the duties of the office, and may be removed by the board for cause. The executive director may appoint other officers of the authority necessary to the functioning of the authority. The executive director shall designate no fewer than 1 employee to be a municipal liaison to assist cities and towns with concerns regarding the construction of schools. Sections 9A, 45, 46, and 46C of chapter 30, chapter 31 and chapter 150E shall not apply to the executive director or any other employees of the authority. The executive director shall, with the approval of the authority: (i) plan, direct, coordinate and execute administrative functions in conformity with the policies and directives of the authority; (ii) employ professional and clerical staff as necessary; (iii) report to the authority on all operations under his control and supervision; (iv) prepare an annual budget and manage the administrative expenses of the authority; and (v) undertake any other activities necessary to implement the powers and duties set forth in this chapter.

*[Added by St.2000, c. 159, § 140. Amended by St.2004, c. 208, §§ 12 to 15, eff. July 26, 2004; St.2004, 210, §§ 2, 3, eff. July 28, 2004; St.2006, c. 139, §§ 44, 45, eff. July 1, 2006.]
[Current through Chapter 153 of the 2019 1st Annual Session]*

M.G.L. 70B § 3A - School building advisory board; establishment; members

There shall be a school building advisory board comprised of: the state auditor or a designee; the inspector general or a designee; the superintendent of the state police or a designee; the state fire marshal or a designee; the director of the Massachusetts emergency management agency or a designee; the executive director of the authority, who shall serve as the secretary to the advisory board and shall be a nonvoting member of the board; and 17 members to be appointed by and represent the following nongovernmental organizations: Massachusetts Municipal Association, Inc., Massachusetts Association of School Committees, Inc., the Massachusetts Mayors Association, Inc., Massachusetts Association of School Superintendents, Inc., Massachusetts Association of Regional Schools, Inc., Massachusetts Building Trades Council, the Massachusetts chapter of Associated Builders & Contractors, Inc., Massachusetts Alliance for Small Contractors, American Council of Engineering Companies of Massachusetts, Associated Subcontractors of Massachusetts, Inc., American Institute of Architects-Massachusetts, Massachusetts Smart Growth Alliance, Massachusetts Taxpayers Foundation, Inc., Associated General Contractors of Massachusetts, Inc., Massachusetts Chiefs of Police Association Incorporated, Fire Chiefs' Association of Massachusetts, Inc. and acting jointly, the Massachusetts Teachers Association and Massachusetts Federation of Teachers. The advisory board shall assist the authority in the development of general policy regarding school building construction, renovation, reconstruction, maintenance and facility space, preservation of open space and minimization of loss of open space, thoughtful community development, cost management, adequate provisions for safety and security and shall provide technical advice and input to the authority. The advisory board shall meet at least quarterly.

[Added by St.2000, c. 159, § 140. Amended by St.2004, c. 208, § 16, eff. July 26, 2004; St.2014, c. 284, § 8, eff. Jan. 1, 2015; St.2015, c. 10, § 15, eff. Mar. 31, 2015.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 3B - Bonds

(a) The authority may provide by resolution for the issuance from time to time of bonds for any purpose of the trust, which bonds may be issued as general obligations of the authority or as special obligations payable solely from particular revenues or moneys of

the authority. Bonds of the authority shall not be considered to be a debt of the commonwealth or of any of its political subdivisions. The bonds of each issue may be dated, may bear interest at such rate or rates, including rates variable from time to time, and may mature or otherwise be payable or redeemable at such times as the authority may determine. The authority shall determine the denominations of bonds, the details of their execution and authentication and their places of payment within or without the commonwealth. Before initial issuance of each series of bonds the authority shall advise the state finance and governance board established under section 97 of chapter 6 of the terms of the bonds and the timing of their issuance. In case any member or officer of the authority whose signature appears on any bonds shall cease to be such officer before their delivery, the signature shall nevertheless be valid and sufficient as if the officer had remained in office until delivery. Bonds may be issued in certificated or uncertificated form, payable to bearer or registered owners, and, if notes, may be made payable to bearer or to order. The authority may sell the bonds of the authority at public or private sale, at par or for such premium or discount price as it may determine. The authority may by resolution delegate to any member or officer of the authority the power to determine any of the matters set forth in this section. The aggregate principal amount of all bonds issued under this chapter shall not exceed \$10,000,000,000 outstanding at any time. The principal amount of bonds for the payment or redemption of which, either at or before maturity, refunding bonds shall have been issued, shall be excluded from the aggregate principal amount of bonds issued under this chapter for purposes of computing the limit on outstanding bonds under this section.

(b) Bonds of the authority may be secured by a trust agreement between the authority and the bond owners or a corporate trustee, which may be any trust company or bank having the powers of a trust company within or without the commonwealth. A trust agreement may pledge or assign, in whole or in part, any receipts, fees, revenues or other payments received or to be received by the authority, including without limitation amounts provided to the trust in accordance with section 35BB of chapter 10, grants, appropriations or other assistance from the commonwealth or the United States or any political subdivision or instrumentality of either, investment earnings on its funds and accounts and any other fees, charges or other income received or receivable by the authority and any contract or other rights to receive the same, whether then existing or thereafter coming into existence, and whether then held or thereafter acquired by the trust, and the proceeds thereof. A trust agreement may contain, without limitation, provisions for protecting and enforcing the rights, security and remedies of the bondholders, provisions defining defaults and establishing remedies, which may include acceleration and may also contain restrictions on remedies by individual bondholders. A trust agreement may also contain covenants of the trust concerning the custody, investment and application of moneys, the issuance of additional or refunding bonds, the

use of any surplus bond proceeds, the establishment of reserves and the regulation of other matters customarily treated in trust agreements. At the request of the authority, the state treasurer shall join in any trust agreement or to otherwise agree with the authority, any lender or any trustee for bondholders to hold the School Modernization and Reconstruction Trust Fund, established pursuant to said section 35BB of said chapter 10, in compliance with any covenants and provisions relating thereto in any trust agreement.

(c) Bonds may be issued by the authority in the form of lines of credit or other banking arrangements under terms and conditions determined by the authority. In addition to other lawful security, bonds may be secured, in whole or in part, by financial guaranties, by insurance, by letters or lines of credit or by other credit enhancement issued to the authority or to a trustee or other person, by any bank, trust company, insurance or surety company or other financial institution, within or without the commonwealth. The authority may pledge or assign, in whole or in part, revenues, funds or other assets or property held or to be received by the authority, and any contract or other rights to receive the same, whether then existing or thereafter coming into existence and whether then held or thereafter acquired by the authority, and the proceeds thereof, as security for any such guaranties or insurance or for the reimbursement to any issuer of a line or letter of credit.

(d) The authority may by resolution provide for the issuance by the authority of interim receipts or temporary bonds, exchangeable for definitive bonds when the bonds are executed and are available for delivery. The authority may also provide for replacement of mutilated, destroyed or lost bonds. The authority may purchase and invite offers to tender for purchase any outstanding bonds; provided, however, that no purchase by the authority shall be made at a price, exclusive of accrued interest, if any, exceeding the principal amount of the bond or, if greater, the redemption price of the bond when next redeemable at the option of the authority. The authority may resell any bonds it purchases in such manner and for such price as it may determine.

(e) The authority may also provide for issuance by the authority of temporary notes in anticipation of bonds, grants, revenues or appropriations. The issuance of the notes shall be governed by this chapter relating to the issuance of bonds. The authority may also issue refunding bonds of the authority for the purpose of paying any bonds at or before maturity. Refunding bonds may be issued at any time at or before the maturity or redemption or purchase of the refunded bonds. Refunding bonds may be issued in sufficient amounts to pay or provide for payment of the principal of the bonds being refunded, together with any redemption premium thereon, any interest or discount accrued or to accrue to the date of payment, costs of issuance and other expenses and reserves reasonably necessary to achieve the refunding.

(f) Bonds of the authority are securities in which public officers and agencies, insurance companies, financial institutions, investment companies, executors, administrators, trustees and others may properly invest funds including capital within their control and securities which may be deposited with any public officer or any agency for any purpose for which the deposit of bonds is authorized by law.

(g) Bonds of the authority shall be considered to be investment securities under chapter 106. Bonds, their transfer and the income therefrom, including any profit made on the sale thereof, shall at all times be exempt from taxation by and within the commonwealth. The authority shall not be required to pay any taxes, assessments or excises upon its income, existence, operation, assets, moneys or revenues.

(h) It shall be lawful for any bank or trust company to act as a depository or trustee under a trust agreement, provided it furnishes such indemnification and reasonable security as the authority may require. Any assignment or pledge of revenues, funds or other assets or property made by the authority shall be valid and binding and shall be deemed continuously perfected for the purposes of chapter 106 and other laws when made. The revenues, funds and other assets and property, rights therein and thereto and proceeds so pledged and then held or thereafter acquired or received by the authority shall immediately be subject to the lien of the pledge without any physical delivery or segregation or further act, and the lien of the pledge shall be valid and binding against all parties having claims of any kind in tort, contract or otherwise against the authority, whether or not the parties have notice thereof. The trust agreement by which a pledge is created need not be filed or recorded to perfect the pledge except in the records of the trustees and no filing need be made pursuant to said chapter 106. Any pledge or assignment made by the authority is an exercise of its political and governmental powers, and revenues, funds, assets, property and contract or other rights to receive the same and the proceeds thereof which are subject to the lien of a pledge or assignment created under this chapter shall not be applied to any purposes not permitted by the pledge or assignment. Any holder of a bond and any trustee under a trust agreement, except to the extent its rights may be restricted by the trust agreement, may bring suit upon the bonds and may pursue any other legal action to protect and enforce its rights and compel performance of all duties required to be performed by the trust and the authority.

[Added by St.2004, c. 208, § 17, eff. July 26, 2004. Amended by St.2012, c. 165, § 119, eff. Jan. 1, 2013.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 3C - School building authority; termination; projects to conform to federal statutory mandates

The authority and its existence shall continue until terminated by law, but no such law shall take effect so long as the authority shall have bonds outstanding unless adequate provision has been made for the payment or satisfaction thereof. Upon termination of the authority, the title to all properties of the authority that remain after provision for the payment or satisfaction of all bonds of the authority shall vest in the commonwealth. The obligations, debts and liabilities of the authority shall be assumed by and imposed upon the commonwealth and shall be transferred to the state treasurer or to such other successor as may be provided by law.

The commonwealth, subject to appropriation and article 62 of the constitution of the commonwealth, may appropriate, pledge its credit, guaranty, or support the funding of capital construction projects, major reconstruction projects, capital improvements required under the Americans With Disabilities Act, new construction, other improvements, major repairs or renovations, any other projects to conform to federal statutory mandates, or projects specifically authorized and funded from additional revenues by legislation enacted by the general court after July 1, 2004.

The authority shall not be obligated to make any expenditures for any commitments, improvements, repairs, renovations, capital construction projects, major reconstruction projects, capital improvements required under the Americans With Disabilities Act, new construction, other improvements, major repairs or renovations, any other projects to conform to federal statutory mandates, or projects specifically authorized or mandated for which the necessary additional revenues to complete these commitments, improvements, repairs, renovations, capital construction projects, major reconstruction projects, capital improvements required under the Americans With Disabilities Act, new construction, other improvements, major repairs or renovations, or any other projects to conform to federal statutory mandates, have not been made available to the authority by the commonwealth.

Any commitments, improvements, repairs, renovations, capital construction projects, major reconstruction projects, capital improvements required under the Americans With Disabilities Act, new construction, other improvements, major repairs or renovations, any other projects to conform to federal statutory mandates, or projects specifically authorized or mandated for which the necessary additional revenues to complete these commitments, improvements, repairs, renovations, capital construction projects, major reconstruction projects, capital improvements required under the Americans With Disabilities Act, new construction, other improvements, major repairs or renovations, or any other projects to conform to federal statutory mandates, so authorized or mandated

and for which additional revenues have been made available shall be subject to the rules, laws and regulations of the authority.

[Added by St.2004, c. 208, § 17, eff. July 26, 2004. Amended by St.2006, c. 122, § 29, eff. June 24, 2006.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 3D - Accounts; annual report

The authority, in cooperation with the state treasurer, shall at all times keep accounts of all receipts, expenditures and disbursements and all assets and liabilities of the authority, which shall be open to inspection by any officer or duly appointed agent of the commonwealth. The authority shall submit an annual report, in writing, to the governor and the clerks of the house of representatives and the senate, who shall forward the same to the president of the senate, the speaker of the house of representatives, the chairpersons of the house and senate committees on ways and means and the house and senate chairpersons of the joint committee on education, arts and humanities. The report shall include financial statements relating to the operations, assets and expenditures of the authority maintained in accordance with generally accepted accounting principles so far as applicable and audited by an independent certified public accountant firm.

[Added by St.2004, c. 208, § 17, eff. July 26, 2004.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 3E - Municipality indebted to authority; offset of deficiency by state treasurer's disbursement of funds payable to indebted municipality

In addition to other remedies of the authority under any bond, note or other evidence of indebtedness, if at any time any amount is distributable or payable by the commonwealth to any city, town or regional school district, and a sum is due to the authority from that city, town or regional school district, for any cause whatsoever, the sum due to the authority, as certified by the authority to the state treasurer, shall be deducted by the state treasurer from the amount distributable or payable to the city, town or regional school district and shall be paid promptly to the authority. Payment by the state treasurer under this section shall continue to be made until the deficiency on the part of the city, town or regional school district has been offset by the payments from the state treasurer. The authority may also recover from that city, town or regional school district, in an action in superior court, any amount due the authority, together with any other actual damages the authority shall have sustained from the failure or refusal of that city, town or regional school district to make payments owing to the authority.

[Added by St.2006, c. 139, § 46, eff. July 1, 2006.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 4 - Reimbursement for incidental educational, engineering and architectural services; application and documentation

Any eligible applicant may apply to the board for reimbursement, in whole or in part, of any expenses incurred for educational, engineering and architectural services incidental to the planning of a regional school or any expenses incurred for surveys made of school building needs and conditions, the contract for which has been approved by the authority. Such application shall be accompanied by information and documentation that the authority may require.

[Added by St.2000, c. 159, § 140. Amended by St.2004, c. 208, §§ 18, 19, eff. July 26, 2004.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 5 - School facilities grant applications

An eligible applicant may submit to the authority a statement of interest which shall be approved by a vote of the applicable local governing body or bodies as set forth and in a form prescribed by the authority, and which shall state what the eligible applicant believes are the deficiencies in said eligible applicant's respective school facilities that meet one or more of the statutory priorities set forth in section 6, 8 and 9 of this chapter or in such additional regulations as the authority may promulgate. Said statement of interest shall be accompanied by such additional forms, documents, and information as the authority shall deem necessary to review the statement. The submission for a statement of interest shall not commit the authority to accept any further application materials, approve an application, or provide a grant or any other type of funding, or place any other obligation or requirement upon the authority. The authority shall notify an eligible applicant if the authority determines that the statement of interest has not met the criteria established in said sections 6, 8, and 9.

If the authority determines that the statement of interest and associated material merits further consideration, the authority may, in its discretion, invite the eligible applicant to apply to the authority for a school facilities grant to meet in part the cost of a school project; but, a city, town, regional school district or independent agricultural and technical school shall not have an entitlement to funds under this chapter except at the discretion of the authority in accordance with this chapter. Application shall mean a series of documents, forms, letters, statements, certifications, plans, studies, drawings, and other data and information required by the authority to be submitted within the

deadlines and in the format prescribed by the authority and shall be accompanied or supplemented by drawings, plans, estimates of cost and proposals for defraying the costs or any additional information the authority may require, before construction is undertaken. The authority shall promulgate regulations establishing the procedural steps by which applications must be made and reviewed, and may at any time during the application process determine that the application does not warrant further consideration, pursuant to the priority criteria established in said sections 6, 8, and 9, and by the authority's regulations.

In the event that an eligible applicant undertakes construction before approval is obtained, the eligible applicant shall remain subject to the authority's approval process as if the construction were not undertaken. An eligible applicant who is eligible for aid under this chapter and establishes extended courses of instruction in a vocational school, as provided in section 37A of chapter 74, and wishes to enlarge or construct a school for the purpose of maintaining extended courses of instruction on a technical institute level shall be eligible to apply for financial assistance in the construction or enlargement of such school in the manner and to the extent provided by this chapter. If the authority invites an eligible applicant to apply, but is unable to approve the application due solely to the limit on total facilities grants established by section 7, at the request of the eligible applicant, the application shall be retained by the authority for 1 year and reviewed in the year immediately following the year of the application; provided that in said review, the project shall be ranked and evaluated using the priorities established by section 8 and if the application is not approved by the authority during the review, the applicant shall be required to submit a new application; provided, further, that the authority shall require a new application from an applicant seeking to make a substantial change in scope of the project which is the subject of the application subsequent to disapproval by the authority.

[Added by St.2000, c. 159, § 140. Amended by St.2004, c. 208, § 20, eff. July 26, 2004; St.2006, c. 122, § 30, eff. June 24, 2006.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 6 - Examination of application by board of education; notice of approval or rejection

(a) Upon receipt of an application under section 5, from time to time, the authority may designate approved school projects. The authority shall examine forthwith the applications and any facts, estimates, or other information relative thereto, and shall make the following findings in order to designate a school project as an approved school project:

(1) The school project is in the best interests of the commonwealth and the eligible applicant, with respect to its site, type of construction, sufficiency of accommodations, open space preservation, urban development, urban sprawl, energy efficiency, and otherwise.

(2) The school project is necessary to meet educational standards of the curriculum frameworks established by the board of education pursuant to section 1E of chapter 69 for anticipated enrollment levels.

(3) The school project has a value over its useful life commensurate with the lifecycle cost of building, operating, and maintaining the project.

(4) The school project is not at a school that has been the site of an approved school project pursuant to this chapter or to chapter 645 of the acts of 1948 within the 10 years prior to the project application date, or the approved school project is unrelated to such previously approved project in the same school.

(5) The school project is within the capacity of the authority to finance within revenues projected to be available to the trust, established pursuant to section 35BB of chapter 10.

(6) The commissioner of education has certified that adequate provisions have been made in the school project for children with disabilities, as defined in section 1 of chapter 71B, and, in the case of elementary facilities, that adequate provisions consistent with local policy have been made for all-day kindergarten, pre-kindergarten classes and for extended day programs; provided, however, that no district shall be required to adopt the classes or programs.

The authority shall also consider the availability of funds projected in the trust and other financial obligations of the authority, the authority's long term capital plan, the results of needs surveys, the order of priorities under section 8 and construction procedures and standards under section 9 and otherwise as prescribed by law and regulation. With respect to a regional school district, the authority shall also consider whether the school project represents an economy of scale that benefits the commonwealth and the municipalities of the region.

(b) Within a reasonable time after receipt of the application the authority shall notify the applicant of its approval or rejection thereof, and, in the event of its rejection, of the reasons therefor. Notice of approval hereunder shall be accompanied by a statement of the estimated approved cost as determined by the authority, and an estimate of the amount of total facilities grant to which the eligible applicant may be entitled under section 10.

(c) If the authority designates a school project to be an approved school project, the authority shall compute the estimated approved cost of the project, which cost may be

equal to the estimated cost furnished by the eligible applicant or a lesser amount, and compute the amount estimated of facilities grant to which the applicant would be entitled under section 10, such computation being based on said approved cost. The final approved cost shall be determined by the authority within a reasonable time after the acceptance of the completed project by the local school committee. Final audits shall be conducted promptly by the authority. Final payments shall be determined based on the final approved cost.

(d) Any city, town or regional school district which has received, in accordance with subsections (b) and (c), notice of approval and an estimate of the amount of a school facilities grant, may borrow from time to time to finance that portion of the cost of the approved school project not being paid by such grant, in such amount approved by the board of selectmen, mayor or city manager of the city or town, or the regional district school committee of the regional school district, and may issue bonds or notes therefor which shall bear on their face the words --(name of city, town or regional school district) School Project Loan, chapter 70B. Each authorized issue shall constitute a separate loan, and the loans shall be paid in not more than 25 years from their dates or up to 30 years if consistent with the guidelines established by the director of accounts pursuant to section 38 of chapter 44. Any city, town or regional school district which has received, in accordance with subsections (b) and (c), notice of approval and an estimate of the amount of a school facilities grant may issue and renew temporary notes. The authority shall issue regulations relative to issuance of temporary notes for school construction. Indebtedness incurred under this chapter shall be outside the statutory debt limit but shall, except as herein provided, be subject to chapter 44.

(e) A city, town or regional school district may borrow for a term of not more than 5 years for the cost of such feasibility studies as may be required to apply for a school facilities grant under this chapter.

[Added by St.2000, c. 159, § 140. Amended by St.2001, c. 203, § 5; St.2003, c. 46, § 74, eff. July 31, 2003; St.2004, c. 208, § 21, eff. July 26, 2004; St.2006, c. 122, §§ 31, 32, eff. June 24, 2006; St.2008, c. 302, § 13, eff. Jan. 1, 2008; St.2009, c. 27, § 62, eff. July 1, 2009; St.2010, c. 188, § 56, eff. July 27, 2010; St.2016, c. 218, § 178, eff. Nov. 7, 2016.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 7 - Limit on estimated amount of grants approved by authority

There shall be a limit on the estimated amount of grants approved by the authority during a fiscal year. For fiscal year 2008, the limit shall be \$500,000,000. For each fiscal year thereafter, the limit shall be the limit for the previous fiscal year plus the lower of the rate

of growth in the dedicated sales tax revenue amount, as defined in subsection (a) of section 35BB of chapter 10, or 4.5 per cent.

[Added by St.2000, c. 159, § 140. Amended by St.2004, c. 208, § 22, eff. July 26, 2004; St.2006, c. 139, § 47, eff. July 1, 2006.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 8 - Order of priorities for approval of school projects and reimbursements; deferral of approval or disapproval of project applications

The authority shall approve school projects and reimbursements under this chapter in accordance with the following order of priorities:

- (1) priority shall be given to school projects needed in the judgment of said board to replace or renovate a building which is structurally unsound or otherwise in a condition seriously jeopardizing the health and safety of school children, where no alternative exists;
- (2) priority shall be given to school projects to eliminate existing severe overcrowding;
- (3) priority shall be given to school projects needed in the judgment of said authority to prevent loss of accreditation;
- (4) priority shall be given to school projects needed in the judgment of said authority to prevent severe overcrowding expected to result from increased enrollments which must be substantiated;
- (5) priority shall be given to projects needed in the judgment of said authority for the replacement, renovation or modernization of the heating system in any schoolhouse to increase energy conservation and decrease energy related costs in said schoolhouse;
- (6) priority shall be given to any school project needed in the judgment of said authority for short term enrollment growth;
- (7) priority shall be given to school projects needed in the judgment of said authority to replace or add to obsolete buildings in order to provide for a full range of programs consistent with state and approved local requirements; and
- (8) priority shall be given to projects needed in the judgment of said authority to transition from court-ordered and authority approved racial balance school districts to walk-to, so-called, or other school districts.

Notwithstanding the provisions of section 6, the authority may defer its approval or disapproval of any project application if such deferral is necessary for the effective

implementation of the provisions of this section. The authority may issue regulations to define the procedures pursuant to which the priorities established by this section will be implemented. Notwithstanding the foregoing, the authority shall not approve any project for any school district which fails to spend in the year preceding the year of application at least 50 per cent of the sum of said school district's calculated foundation budget amounts for the purposes of foundation utility and ordinary maintenance expenses, and extraordinary maintenance allotment as defined in chapter 70, for said purposes. From fiscal year 1999 forward, no school district shall be approved for a project nor receive school facilities funds unless said district has spent at least 50 per cent of the sum of said district's calculated foundation budget amounts in each of the fiscal years including and succeeding fiscal year 1999. All projects which received first school building assistance payments prior to July 1, 2000 shall be exempted from the provisions of this paragraph. Upon a request of a school district, the authority may grant a waiver from said requirement for unanticipated or extraordinary changes in maintenance spending as determined by said departments including, but not limited to, the impact on said spending due to the opening of a new school building, the closing of an existing school building or the completion of a major renovation project.

[Added by St.2000, c. 159, § 140. Amended by St.2002, c. 300, § 11; St.2004, c. 208, §§ 23, 24, eff. July 26, 2004.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 9 - Cost effective production of efficient and creative school projects; standards and procedures; regulations

(a) In order to maximize the cost effective production of efficient and creative school projects, the authority shall require that every school project conform to standards and procedures as the authority considers appropriate including, not but limited to, the following: (1) that the applicant fully consider all available options for satisfying the described need, including tuition agreements with adjacent school districts, rental or acquisition and any necessary rehabilitation or usage modification of any existing building which could be made available for school use; (2) that the applicant's site selection is based on the cost and environmental factors, including an awareness of soil conditions and their probable effect on foundation and site development costs, transportation effects, dislocation of site occupants and relationship to other community facilities; (3) that the applicant enter into contracts, using forms satisfactory to the authority for such competent architectural, engineering and other services as may be required; and (4) that procedures satisfactory to the board are followed by the applicant throughout the planning and construction of the project such as will assure maximum attention to the operating and capital cost effects of program and design decisions, materials and systems selections.

(b) The authority shall issue annually, as hereinafter provided, maximum eligible cost standards and size standards for school projects. These standards may take into account the type and location of a proposed school project and may also take into account the difficulty of siting school facilities in dense urban areas in which there exists a shortage of available municipally-owned sites and the increased cost of construction and major renovation in such urban areas. The program standards shall define prototype school design and space recommendations for each specified program activity eligible for state financial assistance. The program standards shall, in the judgment of the authority, be in conformity with the minimum requirements of state law and shall also reflect consideration of cost effects, prevailing educational standards in the commonwealth and the needs of efficient and creative school projects. The cost standards shall be based on the price experience of recently completed and recently bid school projects, taking into account the cost effectiveness of design, construction and programming techniques utilized in such school projects. For the purpose of calculating the total construction grant under section 10, the estimated approved cost and the final approved cost for a school project shall not exceed the cost that would result if the project conformed to prototype school standards. The provisions of this section shall not be deemed to preclude an eligible applicant from exceeding prototype school standard; provided, however, the cost of such additional facilities and design shall not be included in the estimated cost and final approved cost on the basis of which the state construction grant is calculated.

(c) On or before March 1 in each year, the authority shall adopt interim regulations, including minimum program standards and maximum cost standards, for the implementation of this section. Upon the adoption of such regulations, the authority shall forthwith file copies thereof with the clerk of the house of representatives who shall refer such regulations to an appropriate committee of the general court. Within 30 days after such filing, said committee may hold a public hearing on the regulations, shall issue a report, and file a copy thereof with the board. Said board shall adopt final regulations making such revisions in the interim regulations as it deems appropriate in view of such report and shall forthwith file a copy of the regulations with the chairperson of the committee of the general court to which the interim regulations were referred. Not earlier than 30 days after the date of such filing, the board shall file the final regulations with the state secretary and the said regulations shall thereupon take effect.

(d) A city, town, regional school district or independent agricultural and technical school shall not have entitlement to funds under this chapter except at the discretion of the authority in accordance with this chapter.

[Added by St.2000, c. 159, § 140. Amended by St.2004, c. 208, §§ 25 to 28, eff. July 26, 2004; St.2006, c. 122, § 33, eff. June 24, 2006.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 10 - Facilities grants for approved projects; formula

The grant percentage for approved school projects shall be calculated based on the following formula, but no grant percentage shall be greater than 80 per cent.

(a) The percentage the commonwealth shall pay towards an approved school facilities project shall be determined by the following formula: Base Percentage (A) + Community Income Factor (B1) + Community Property Wealth Factor (B2) + Community Poverty Factor (B3) + Incentive Percentage (C).

(A) Base Percentage = 31 percentage points.

(B) Ability to pay percentage points (income/wealth factor) is determined as follows:

(1) Community Income Factor = per capita income, as determined by the department of revenue, for a municipality as a per cent of the statewide average per capita income.

The Community Income Factor is then determined by using the chart below.

Income	
Municipality's per capita income as per cent of statewide average per capita income	Community income factor percentage points
0-9%	12.00
10-19%	11.37
20-29%	10.74
30-39%	10.11
40-49%	9.47
50-59%	8.84
60-69%	8.21
70-79%	7.58
80-89%	6.95
90-99%	6.32

PLEASE NOTE THAT THIS IS AN UNOFFICIAL VERSION OF STATUTES RELATING TO THE MASSACHUSETTS SCHOOL BUILDING AUTHORITY AND IS INTENDED FOR INFORMATIONAL PURPOSES ONLY.

100-109%	5.68
110-119%	5.05
120-129%	4.42
130-139%	3.79
140-149%	3.16
150-159%	2.53
160-169%	1.89
170-179%	1.26
180-189%	0.63
190% +	0.00

(2) Community Property Wealth Factor = Equalized property valuation per capita as determined by the department of revenue, for the municipality as a per cent of the statewide average equalized property valuation per capita.

The Community Property Wealth Factor is then determined by using the chart below.

Equalized Property Valuation

Municipality's EQV as per cent of statewide average EQV	Community property wealth factor percentage points
0-9%	28.00
10-19%	26.53
20-29%	25.05
30-39%	23.58
40-49%	22.11
50-59%	20.63
60-69%	19.16
70-79%	17.68
80-89%	16.21

90-99%	14.74
100-109%	13.26
110-119%	11.79
120-129%	10.32
130-139%	8.84
140-149%	7.37
150-159%	5.89
160-169%	4.42
170-179%	2.95
180-189%	1.47
190% +	0.00

(3) Community Poverty Factor = Proportion of low income students, as determined by federal eligibility for free or reduced price lunch, for the district as a per cent of the statewide average proportion of low income students.

The Community Poverty Factor is then determined by using the chart below.

Poverty

School district proportion of low income students as per cent of state average proportion of low income students	Community poverty factor percentage points
0-99%	0.00
100-102%	1.42
103-105%	2.83
106-108%	4.25
109-111%	5.67
112-114%	7.08

PLEASE NOTE THAT THIS IS AN UNOFFICIAL VERSION OF STATUTES RELATING TO THE MASSACHUSETTS SCHOOL BUILDING AUTHORITY AND IS INTENDED FOR INFORMATIONAL PURPOSES ONLY.

115-117%	8.50
118-120%	9.92
121-123%	11.33
124-126%	12.75
127-129%	14.17
130-132%	15.58
133%+	17.00

(C) Incentive percentage points may be awarded by the authority. Incentive percentage points granted, if any, shall be in the sole discretion of the authority. The authority may issue regulations delineating the type and amounts of any such incentive percentage points; provided, however, that no individual category of incentive points shall exceed 6 additional points; and provided further, that no district shall receive more than 18 incentive percentage points. Such incentive points may be awarded for a district's use of efficient construction delivery methods; regionalization with other districts; superior maintenance practices of a district; energy efficient and sustainable design and construction; major renovation rather than building new construction; the use of model schools as adopted by the authority; and other incentives as determined by the board of the authority in order to encourage the most cost-effective and quality construction.

(b) In the case of regional school districts, B1 and B2 shall be determined by calculating the relationship to the statewide average for each municipality of the regional district as stated in this section. For purposes of this computation, each member city's and town's share of the total cost shall be determined by multiplying the total approved cost by the percentage of district or county capital costs that would be apportioned to such city or town in accordance with the applicable regional school district agreement or law for capital costs incurred in the fiscal year in which the grant is approved. The amount of the total capital costs apportioned to a member city or town in any fiscal year on account of an approved school project of a regional school or county, determined in accordance with the applicable regional school district agreement or law, shall be reduced by an amount equal to the amount of the grant payable on account of such project in such fiscal year multiplied by a fraction the numerator of which is the city's or town's reimbursement percentage, determined as aforesaid, multiplied by the percentage of capital costs apportioned to the city or town for such fiscal year in accordance with the applicable regional school district agreement or law, and the denominator of which is the sum of the percentages so derived as the numerators for all of the member cities and towns.

In the case of independent agricultural and technical schools, B1 and B2 shall be determined by calculating the relationship to the statewide average for each municipality of the school as stated in this section. A weighted average will then be determined for these municipalities, weighted as compared to the number of students attending the school from each member municipality, which will be used to determine the final B1 and B2 factors.

(c) For approved school projects in districts which have a racial desegregation plan approved by the board of education not later than June 30, 2000, the reimbursement percentage shall be the sum of: (a) the percentage calculated pursuant to subsections (a) and (b); and (b) for projects designated as approved school projects on or before June 30, 2006, 10 percentage points, or, for projects designated as approved school projects on or before June 30, 2012, 5 percentage points. Only new project applications which present clear and convincing evidence that the proposed school building project will promote the objectives of achieving racial balance expressed in sections 37C and 37D of chapter 71 for the students attending the new, renovated, or repaired school will be eligible for the added percentage points. The total reimbursement percentage shall in no circumstances exceed the maximum grant percentage under the first paragraph of this section.

[Added by St.2000, c. 159, § 140. Amended by St.2004, c. 208, §§ 29, 33, 34, eff. July 26, 2004; St.2004, c. 208, §§ 30 to 32, eff. Aug. 1, 2005; St.2009, c. 27, §§ 63, 64, eff. July 1, 2009.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 11- Disbursement schedule

Grants for approved school projects shall be paid in accordance with a disbursement schedule approved by the authority.

[Added by St.2000, c. 159, § 140. Amended by St.2004, c. 208, § 35, eff. July 26, 2004.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 12

§§ 12, 13. Repealed, 2004, 208, Sec. 36

[Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 13

§§ 12, 13. Repealed, 2004, 208, Sec. 36

[Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 14 - Approved alternative projects; allowable costs

For approved projects that are an alternative to construction or renovation, the authority shall establish eligible cost criteria, and on a case by case basis, shall determine the allowable cost of the project. Eligible costs may include but shall not be limited to furnishings and equipment, including upgrades and technological devices necessary for enhanced safety and security, lease costs, rental fees, tuition costs and transportation costs. In no event shall an alternative project be reimbursed if it is determined by the authority to be more costly than construction necessary to achieve the same end.

[Added by St.2000, c. 159, § 140. Amended by St.2004, c. 208, § 37, eff. July 26, 2004; St.2014, c. 284, § 9, eff. Jan. 1, 2015.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 15 - Sale or lease of school buildings for which school facilities project applicant receives grant payments

(a) In the event that an eligible applicant sells or leases an assisted structure or facility, or a portion of that structure or facility, on account of which it is receiving grant payments for an approved school project or, in the case of an approved school project approved on or after July 1, 2004, on account of which it has received at least 1 grant payment in the preceding 20 years, under this chapter or under chapter 645 of the acts of 1948, the sale or lease of the assisted structure or facility, or portion of that structure or facility, shall be for no less than fair market value as determined by independent appraisal, unless the eligible applicant receives prior written approval from the authority to do otherwise, and the proceeds from the sale or lease shall be divided between the authority and the general funds of the applicable eligible applicant in proportion to the commonwealth's and authority's prior investments in the assisted structure or facility under this chapter or said chapter 645, as applicable. In the case of an approved school project approved before July 1, 2004, the authority's share of the proceeds shall reduce the balance of outstanding grant payments that would otherwise be payable except for this section and shall not exceed that amount. An eligible applicant which sells, leases or otherwise removes from use by the eligible applicant as a schoolhouse an approved school project on account of which it is receiving grant payments or, in the case of an approved school project approved on or after July 1, 2004, on account of which it has received at least 1 grant payment in the preceding 20 years, under this chapter or under said chapter 645, shall report the sale, lease or removal to the authority in the form and manner and within

the time prescribed by the authority. The authority may issue regulations to recapture commonwealth and authority assistance for an approved school facilities projects for school buildings that are removed from service.

(b) In the event an eligible applicant sells or leases an assisted structure or if the assisted structure was not used as a schoolhouse for at least half of the preceding fiscal year, the amount of outstanding grant payments remaining after reductions under the provisions of subsection (a), shall be deducted from each city, town or regional school district's cherry sheets, so-called, as an assessment in accordance with the provisions of section 21 of chapter 59, according to a schedule agreed to between the city or town and the authority; provided, however, that at the discretion of the authority, deductions authorized from said cherry sheets under the provisions of this subsection may be waived for an assisted structure or facility which has been removed from use as a schoolhouse by a city, town or regional school district, pursuant to a plan approved by said city, town or regional school district and the authority, which provides for the reuse of the assisted structure or facility as a schoolhouse within two years of the adoption of the plan or prior to the expiration of the term of any bonds or notes issued to finance the project for which the grant was approved, whichever is the earliest.

Before the sale or lease of an assisted structure or facility or a portion of that structure or facility, the school district in control of the structure or facility shall submit to the authority a district-wide school facility use plan that shall include, but not be limited to, a listing of all school facilities under the control of the school district, a detailed description of both the current use and proposed use of each school facility, the most recent enrollment data, by school facility, then available to the school district, a detailed floor plan of each school facility that shows and labels each space in the facility and whether it is used as a classroom or has some other use and any other information that may be required by the authority to understand the district's school facility use plan. If the plan includes the closure, sale or lease of a school facility or any part of a school facility, the authority may conduct, with the full cooperation of the district, an analysis of district-wide enrollment capacity and future enrollment trends for the district. If the capacity analysis and enrollment projection indicate an extended period of significant excess capacity within the district's educational facilities, the district may, prior to consideration of any other disposition of the identified excess capacity, make a good faith offer to sell or lease at fair market value the identified excess capacity to a commonwealth charter school established pursuant to section 89 of chapter 71 or an applicant for a commonwealth charter school pursuant to said section 89 of said chapter 71 that serves or is seeking to serve students who live in the school district. The authority shall not recapture commonwealth and authority assistance for any such excess capacity that is sold or leased to a commonwealth charter school or applicant for a commonwealth charter school.

(c) Any eligible applicant which applies for a grant pursuant to this chapter and which has, prior to such application, sold, leased or otherwise removed from service any schoolhouse operated by said eligible applicant shall be eligible for such grant only if the board determines either that the grant is not for the purpose of replacing a schoolhouse sold, leased or otherwise removed from service in the past ten years or that the need for the project covered by the grant could not have reasonably been anticipated at the time that such schoolhouse was sold, leased or otherwise removed from service.

(d) The provisions of this section, at the discretion of the authority, shall not apply to sales or leases of such assisted structures or facilities for nonprofit public purposes.

[Added by St.2000, c. 159, § 140. Amended by St.2004, c. 208, §§ 38, 39, eff. July 26, 2004; St.2006, c. 122, § 34, eff. June 24, 2006; St.2010, c. 12, § 4, eff. Jan. 19, 2010.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 16 - Maintenance assessment program for school buildings

The authority shall create a maintenance assessment program for school buildings. Such assessment program shall include a review of all major building components, maintenance records, existing staff and vendor contracts. The authority shall use such assessment program to issue ratings of the building conditions for each school district; survey current conditions, develop a model plan for the proper maintenance of school buildings, and provide technical assistance and information to municipalities and school districts.

[Added by St.2000, c. 159, § 140. Amended by St.2004, c. 208, § 40, eff. July 26, 2004.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 17 - Annual report; anticipated needs for school facilities projects

(a) On or before June 30 of each year, the authority shall submit a report to the governor, the house and senate committees on ways and means, the joint committee on education, arts and humanities, the joint committee on natural resources, the house and senate committees on long-term debt and capital expenditures and the joint committee on local affairs which analyzes the anticipated financial needs for school facilities projects of the kind that qualify for assistance under this chapter. The report shall include a listing of each school building within the commonwealth, together with a description of its size, capacity, age and state of maintenance and whether it is likely to require construction, enlargement, reconstruction, rehabilitation or improvement due to such factors as

deterioration, lack of adequate facilities to meet educational standards and anticipated increases in school-age population.

(b) The authority shall also conduct periodic surveys of the cities, towns and regional school districts to determine the need for new school facility construction to meet demand.

(c) The authority shall develop a long-term capital plan in accordance with needs and funding projected to be available in the trust under this chapter for purposes of planning and guiding the policies of the authority.

(d) The capital plans, needs surveys and reports of the authority shall not give rise to any claim, legal or moral, or enforceable right in any party to benefits or funds from the trust or from other sources.

*[Added by St.2000, c. 159, § 140. Amended by St.2004, c. 208, § 41, eff. July 26, 2004.]
[Current through Chapter 153 of the 2019 1st Annual Session]*

M.G.L.A. 70B § 18

Repealed, 2004, 208, Sec. 36

[Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 19 - Notification of actual interest rate for bond issuance

Municipalities and school districts shall notify the authority no later than 14 days before refinancing any bond for which the municipality or district will receive state reimbursement under chapter 645 of the acts of 1948 or other law. The authority shall reimburse municipalities or districts at the actual interest rate obtained. The authority shall encourage municipalities and school districts to refinance any bond for which the municipality or district will receive state reimbursement where the refinancing would result in savings for the commonwealth or the municipality or school district and where the refinancing is otherwise in accordance with the law.

[Added by St.2000, c. 159, § 140. Amended by St.2004, c. 208, § 42, eff. July 26, 2004; St.2006, c. 122, § 35, eff. June 24, 2006.] [Current through Chapter 153 of the 2019 1st Annual Session]

M.G.L. 70B § 20 - Submission of plans or blueprints associated with construction, renovation or reconstruction of school building to police and fire departments and emergency management agency

The authority shall, in cooperation with a school district or municipality, submit plans or blueprints approved by the authority, associated with approved construction, renovation or reconstruction of a school building, to the local police department, fire department, Massachusetts emergency management agency and any regional law enforcement entity. The plans shall identify points of entry into a school building, emergency access routes for ingress or egress and other public safety features, including, but not limited to: fire hydrants, utility access points and stairwells. Any department in receipt of such plans may submit comments to the authority and school district. Upon completion of the approved construction, the authority shall, subject to appropriation, in cooperation with a school district or municipality, submit updated, as-built plans to the local police department, fire department, Massachusetts emergency management agency and any regional law enforcement entity, a copy of which shall be maintained on file by each department or agency in receipt of the plans. Plans submitted pursuant to this section shall be deemed confidential and shall not be considered public records under clause Twenty-sixth of section 7 of chapter 4.

[Added by St.2014, c. 284, § 10, eff. Jan. 1, 2015.] [Current through Chapter 153 of the 2019 1st Annual Session]

THE FOLLOWING PROVISIONS ARE NON-CODIFIED SECTIONS FROM CHAPTER 208 OF THE ACTS OF 2004, AS AMENDED:

SECTION 43. Section 329 of chapter 159 of the acts of 2000 is hereby repealed.

SECTION 44. Chapter 26 of the acts of 2003 is hereby amended by striking out section 668 and inserting in place thereof the following section:- Section 668. Notwithstanding any general or special law to the contrary, the board of education and the school building authority established pursuant to section 1A of chapter 70B of the General Laws shall not accept an application for the school building assistance program established in said chapter 70B until after July 1, 2007.

SECTION 45. On or before August 1, 2004, the commissioner of education shall submit to the Massachusetts School Building Authority a list of school projects consisting of: (i) all projects approved in accordance with chapter 645 of the acts of 1948 for which the state has outstanding liability as of July 1, 2004; (ii) all approved school projects that were approved by the board of education in accordance with section 6 of chapter 70B of the General Laws on or before June 30, 2004, for which the state has outstanding liability as

of July 1, 2004; (iii) all projects on the school building assistance priority waiting list maintained by the department of education as of July 1, 2004; and (iv) projects in Quincy and Swampscott which, prior to the effective date of this act, were eligible for funding under section 668 of chapter 26 of the acts of 2003. The list shall identify for each project: (i) total estimated construction costs; (ii) total estimated short-term and long-term interest costs; (iii) reimbursement rate pursuant to chapter 70B of the General Laws as in effect prior to the effective date of this act, section 329 of chapter 159 of the acts of 2000 as in effect prior to the effective date of this act, and section 668 of chapter 26 of the acts of 2003 as in effect prior to the effective date of this act; (iv) year of application; (v) year of approval, if approved; (vi) rank order on the waiting list; and (vii) other information as appropriate upon the request of the Massachusetts School Building Authority. Projects included on the list submitted pursuant to this section shall not be counted toward the limit found in section 7 of chapter 70B of the General Laws on aggregate estimated amount of total facilities grants approved.

SECTION 46. Notwithstanding any general or special law to the contrary, the Massachusetts School Building Authority may accept an application for an emergency situation capital school construction grant for the city of Springfield under chapter 70B of the General Laws and may add the project to the list submitted pursuant to section 45 of this act at the reimbursement rate in effect on June 30, 2003. For the purposes of this section, an emergency situation shall consist of: (i) a school that has been determined to be underperforming by the board of education and has lost or is at risk of losing its accreditation; and (ii) a determination by the commissioner that such project is needed to address significant deficiencies which cannot be cost-effectively addressed through major reconstruction or repair work. The application shall meet all requirements of said chapter 70B and the regulations promulgated therefor.

SECTION 47. (a) As of July 1, 2004, the Massachusetts School Building Authority shall succeed to all powers previously granted to the board of education and the department of education with respect to projects on the list submitted under section 45. As soon as practicable following July 1, 2004, the commissioner of education shall transfer to the Authority all records and documents which immediately before that date are in the custody of the board of education or the department of education and which relate to or are maintained for the purpose of the school building assistance program.

(b) The amendments made in this act to chapter 70B of the General Laws shall not affect the schedule of payment for any approved project on the list submitted under section 45 receiving payment as of July 1, 2004, except as specifically provided in this section and in sections 48 to 53, inclusive, of this act. The reimbursement rate paid by the Authority for approved project costs for projects on the list submitted under section 45 shall not be altered from the reimbursement rate under chapter 70B of the General Laws as in effect

before the effective date of this act, section 329 of chapter 159 of the acts of 2000 as in effect before July 1, 2004, and section 668 of chapter 26 of the acts of 2003 in effect before July 1, 2004 as a result of the amendments made by this act to said chapter 70B.

(c) Grants for the Authority's share of approved costs of projects on the list submitted under section 45 shall be payable by the Massachusetts School Building Authority rather than by legislative appropriations.

(d) For projects which, before July 1, 2004, were approved by the board of education under either section 6 of chapter 70B of the General Laws, as in effect prior to July 1, 2004, or chapter 645 of the acts of 1948 and for projects on the list submitted under section 45 with respect to which bonds or long-term indebtedness shall have been issued before July 1, 2004, the final approved cost of the project shall include, only to the extent eligible for reimbursement and allowed by the department of education and board of education

(i) the eligible interest payable on the authority's share of bonds or long-term indebtedness issued to finance the project,

(ii) the eligible interest payable on the authority's share of temporary notes issued to finance the project on or after July 1, 2004 but before receipt of any funding from the authority, and

(iii) may, in the discretion of the authority, include eligible principal of any bonds issued before July 1, 2004. For projects on the list submitted by the department of education under section 45 and not approved by the board of education under either section 6 of chapter 70B of the General Laws, as in effect before July 1, 2004, or chapter 645 of the acts of 1948 for which no bonds or long-term indebtedness have been issued before July 1, 2004, approved project costs shall include the authority's share of eligible interest on temporary notes issued to finance the project, paid before the receipt of a grant, but shall not include interest or principal on bonds or long-term indebtedness.

(e) Grants for approved projects shall be paid under a disbursement schedule approved by the authority.

(f) In no event shall the authority be responsible for paying or reimbursing any costs, including but not limited to, project costs, interest or principal on any notes, bonds or long-term indebtedness that were disallowed by the department of education or board of education under any statute, rule, regulation, policy, or established practice. *[Ch. 122 of the Acts of 2006, §58]*

SECTION 48. (a) The Massachusetts School Building Authority shall complete final audits on all projects on the list submitted pursuant to section 45 for which a final audit had not been completed as of the effective date of this act, and shall adjust payments in

accordance with the result of those audits. For projects for which a final audit was complete as of the effective date of this act and for which substantial new information has become available since the completion of the audit, the authority may, at the request of a city, town, regional school district or independent agricultural and technical school, review the audit and make adjustments to approved project costs. (b) For the purposes of expediting the payout of school building assistance grants, at the written request of a city, town, regional school district, or independent agricultural and technical school, the authority may in its discretion expedite the timing of a final audit. The requesting municipality shall assume responsibility for the cost of the expedited auditing services, if the services are authorized by the authority under this section. (c) Any additional amounts owed to the city of Lynn as a result of audits performed shall be paid to the city by the authority in 7 annual installments. The first such installment shall be made in fiscal year 2005. (d) For a project for which, prior to the effective date of this act, delays of 5 or more years between project completion and completion of the final audit resulted in a reduction in annual payments of greater than 35 per cent, at the request of a city, town, regional school district or independent agricultural and technical school, the authority shall return the level of annual payments to the level of annual payments for that project prior to the completion of the final audit and make payments over a shorter number of years; provided, however, that the total payment shall not exceed the amount identified in the final audit.

SECTION 49. Projects on the list submitted pursuant to section 45 shall be funded by the Massachusetts School Building Authority with no substantial changes in scope except: (i) those changes in scope which had received preliminary or final approval from the board of education prior to the effective date of this act; or (ii) those changes in scope which result in a total grant amount owed to the municipality or district equal to or less than the total grant amount owed as of the effective date of this act. The Massachusetts School Building Authority shall work with cities, towns, regional school districts and independent agricultural and technical schools to finalize modified applications for projects with preliminary approval for modification of the scope in a manner consistent with the preliminary approval granted by the commissioner of education prior to the effective date of this act.

SECTION 50. The School Building Assistance Authority shall provide financial assistance under this act for projects on the list submitted pursuant to section 45 and not yet approved by the board of education prior to the effective date of this act in the order in which they appear on the list; provided, however, that the authority may deviate from the order if it determines that it is necessary to do so in order to comply with federal income tax laws or regulations related to the tax exemption of indebtedness incurred by the authority or to provide grants to municipalities or districts whose short-term borrowing would otherwise terminate prior to the award of a grant. The authority shall

notify the house and senate committees on ways and means and the joint committee on education, arts, and humanities within 30 days whenever changes in list order will result in a project getting funds more than a year earlier or later than would have been the case had the authority provided funds to districts in the order in which they appear on the list. Projects with respect to which, in the reasonable judgment of the authority, no substantial progress has been made by July 1, 2009 may be removed by the authority from the list. Any project so removed from the list may be the subject of a new grant application to the authority under chapter 70B of the General Laws but shall have no specific entitlement to funding under this act.

SECTION 51. Notwithstanding section 17 of chapter 44 of the General Laws, the officers of a city, town or regional school district authorized to issue bonds, notes or certificates of indebtedness for a school construction project on the list submitted pursuant to section 48, may refund, by the issuance of refunding notes, a temporary loan issued in anticipation of money to be derived from the sale of the bonds, notes or certificates, but the period from the date of issue of the original temporary loan to the final maturity of any such refunding notes shall not exceed 7 years; but the period from the date of issue of the original temporary loan to the final maturity of all school construction project financing shall not exceed 30 years. The refunding notes shall not be required to be paid in part from revenue funds of the city, town or regional school district until the end of the fiscal year following the fiscal year in which the board of education or the Massachusetts School Building Authority as applicable approves the project for a school construction grant. The time within which the serial bonds, notes or certificates of indebtedness issued to pay refunding temporary notes issued hereunder shall be due and payable shall be extended by the period from the date of the original temporary loan to: (a) the date of issue of such serial bonds, notes or certificates; or (b) the end of the fiscal year in which the board of education or the Massachusetts School Building Authority as applicable approves the project for a school construction grant, whichever date is earlier.

SECTION 52. Subject to appropriation, cities and towns receiving reimbursement pursuant to section 12 of chapter 70B of the General Laws in fiscal year 2004 shall continue to be reimbursed in accordance with said section 12 of said chapter 70B, as in effect prior to the effective date of this act.

SECTION 53. Notwithstanding any general or special law to the contrary and except as specifically provided in this act, no city, town, regional school district or independent agricultural and technical school shall have any entitlement to funds under chapter 70B of the General Laws except at the discretion of the Massachusetts School Building Authority in accordance with said chapter 70B. If an eligible applicant undertakes construction for a project not included in the list submitted pursuant to section 45 or incurs indebtedness for such a project not yet designated as an approved school project, as defined in section

2 of said chapter 70B, the applicant shall remain subject to the authority's approval process as if the construction had not been undertaken or the indebtedness had not been incurred. Applications submitted subsequent to July 1, 2007, for projects which commence construction between July 1, 2004 and June 30, 2006, shall, if approved by the Massachusetts School Building Authority, be reimbursed at the rate in effect at the time of approval. In considering whether to designate such projects as approved school projects and in calculating approved costs, the Massachusetts School Building Authority may consider allowable cost standards and other pertinent department of education regulations in effect on June 30, 2004. Applications submitted subsequent to July 1, 2007, for projects which commence construction between July 1, 2006 and June 30, 2007, shall, if approved by the Massachusetts School Building Authority, be reimbursed at the rate in effect at the time of approval. In calculating approved costs for such projects, the Massachusetts School Building Authority shall use regulations promulgated by the authority pursuant to section 55. The authority may refuse to designate a project as an approved school project.

SECTION 54. The Massachusetts School Building Authority, in consultation with the advisory board established pursuant to section 3A of chapter 70B of the General Laws, shall review matters including, but not be limited to, the appropriateness of existing regulations and laws governing the School Building Assistance program, the appropriate cost and size standards, to be promulgated by the Massachusetts School Building Authority under section 9 of chapter 70B of the General Laws, the appropriate formula for facilities grants under section 10 of said chapter 70B, and all other standards and procedures established in sections 8, 9 and 10 of said chapter 70B, the best means to encourage energy-efficient schools, the advisability of allowing or requiring cities, towns and regional school districts to establish funds for building maintenance, the advisability of further changes to chapter 70B of the General Laws in accordance with construction reform, the feasibility of requiring prototype designs for school building projects, the feasibility of allowing public-private partnerships in constructing schools, or the use of lease- purchase in providing educational space, the best means to assist in meeting the building needs of charter schools and educational collaboratives, the feasibility of requiring future school buildings to be constructed so as to facilitate early education and care programs, full day kindergarten, proper tutorial space, services which may go beyond direct instructional services but which may be best provided to students in a school setting, uses that extend beyond the typical school day for extended hours, weekends and during the summer months for educational, recreational and other purposes which provide community uses, the introduction of wireless technology in the classroom, and the feasibility of providing financial incentives to communities that have adopted zoning policies or other initiatives that encourage increased affordable housing production in the commonwealth, including, but not limited to, inclusionary zoning, so-

called. The authority shall file a progress report not later than December 31, 2004, and a final report, along with any regulatory and legislative proposals necessary to carry its recommendations into effect, not later than April 1, 2005, with the secretary of administration and finance, the house and senate clerks, the chairpersons of the house and senate committees on ways and means and the house and senate chairs of the joint committee on education, arts and humanities. The secretary of administration and finance shall submit a report on recommended changes to section 10 of chapter 70B of the General Laws no later than May 1, 2005, with proposed legislation, to the clerks of the house and senate, the house and senate committees on ways and means, and the joint committee on education, arts, and humanities.

SECTION 55. Notwithstanding any general or special law to the contrary, the authority shall not issue maximum eligible cost standards nor size standards for school projects pursuant to section 9 of chapter 70B of the General Laws, nor shall it promulgate regulations pursuant to said chapter 70B prior to January 1, 2006. In drafting regulations, the authority shall review the needs analysis and capital plan required by section 17 of said chapter 70B to be completed by the board on June 30, 2005, and shall propose draft regulations based on the report, capital plan and needs analysis not later than January 1, 2006. The authority shall hold not less than 5 hearings on the draft regulations in locations reflective of the geographic diversity of the commonwealth, and shall submit the draft regulations to the joint committee on education, arts and humanities, which shall have 30 days to review and comment on the regulations. The authority shall promulgate final regulations no later than July 1, 2006.

SECTION 56. Notwithstanding any general or special law to the contrary, the Massachusetts School Building Authority, with the advice of the school building advisory committee, shall conduct a comprehensive analysis of the needs of municipal and regional school districts for projects eligible for reimbursement under chapter 70B of the General Laws beginning July 1, 2007.

THE FOLLOWING SECTION, SECTION 56A, WAS ADDED TO CH. 208 OF THE ACTS OF 2004 BY CH. 139 OF THE ACTS OF 2006, § 83:

SECTION 56A. (a) A city, town or regional school district may request, in writing not later than August 31, 2006, that the Authority remove a project on the list pursuant to section 45 and may request that a portion of the Authority's anticipated grant for the project be applied to another project on the list pursuant to said section 45 that is within the same city, town, or regional school district as the project being removed. Approval of the request shall be at the sole discretion of the Authority.

(b) A project being so removed from the list shall:

- (1) not have started construction before application to the Authority for removal of a project from the waiting list;
- (2) not be eligible to receive reimbursement from the Authority for any costs that may have been incurred for the project prior to its removal from the list;
- (3) not be eligible to receive reimbursement for interest on short or long term notes or bonds for the project; and
- (4) submit a plan to the Authority that demonstrates the city, town or regional district will be adequately able to accommodate a displaced school program or service and a plan for accommodating district students within remaining school buildings.

(c) A project on the list, for which funds may be reallocated in the sole discretion of the Authority, shall meet the following criteria:

- (1) the project shall have begun construction after January 1, 2005;
- (2) the project shall have overall project costs that are in excess of the maximum allowable costs, as determined by the Authority, and the excess costs are not related to changes in project scope;
- (3) reallocated costs shall only be used to reimburse approved, eligible costs, as determined by the Authority.
- (4) the city, town or regional school district shall agree to work with the Authority in a value engineering exercise to determine viable options to reduce the overall cost of the project;
- (5) the city, town or regional school district shall have multiple projects on the list submitted pursuant to said section 45;
- (6) the project on the list for which funds may be reallocated, at the sole discretion of the Authority, shall be within the same city, town or regional school district as the project being removed;
- (7) the city, town or regional school district shall have submitted all audit materials for any other projects for which the audit materials have been requested by the Authority; and

(8) the city, town or regional school district shall have executed a project funding agreement with the Authority for any project on the list that has not completed construction.

(d) The Authority shall have sole discretion in determining the portion of grant, if any, which may be reallocated to another project. Funds that may be reallocated in the sole discretion of the Authority to another project shall only be used to cover approved, eligible costs that are in excess of the maximum allowable cost that are not related to changes in project scope. Reimbursements may be made under the existing grant program, as determined by the Authority. In no instance shall reimbursement rates for any project for which reallocated funds are distributed to by the Authority, exceed the reimbursement rates pursuant to clause (iii) of said section 45. Any funds that may be allocated by the Authority, shall not be used for interest or costs related to any indebtedness, or for any expenditure that is considered to be ineligible by the Authority. A project removed from the list pursuant to said section 45 shall no longer be eligible for a portion of the grant and shall have no entitlement to funds for the project in the future. A project removed from the list may apply to the Authority for funding after July 1, 2007 and shall be subject to the laws, rules and regulations governing school building construction in place at the time of application. *[Ch. 139 of the Acts of the 2006, §83]*

SECTION 57. Sections 30 to 32, inclusive, shall take effect on August 1, 2005.

THE FOLLOWING PROVISIONS ARE NON-CODIFIED SECTIONS FROM CHAPTER 210 OF THE ACTS OF 2004:

SECTION 4. Notwithstanding section 35BB of chapter 10 of the General Laws, in fiscal year 2005, there shall be credited to the School Modernization and Reconstruction Trust Fund, hereinafter referred to as the "fund", an amount equal to \$395,700,000; in fiscal year 2006, there shall be credited to the fund moneys equal to 70 per cent of the dedicated sales tax revenue amount but not less than \$488,700,000; in fiscal year 2007, there shall be credited to the fund moneys equal to 78 per cent of the dedicated sales tax revenue amount but not less than \$557,400,000; in fiscal year 2008, there shall be credited to the fund moneys equal to 85 per cent of the dedicated sales tax revenue amount but not less than \$634,700,000; in fiscal year 2009, there shall be credited to the fund moneys equal to 90 per cent of the dedicated sales tax revenue amount but not less than \$702,300,000; and in fiscal year 2010, there shall be credited to the fund moneys equal to 95 per cent of the dedicated sales tax revenue amount. The amounts credited to the fund under this section shall be considered to meet the full obligation of the commonwealth to the Massachusetts School Building Authority for those fiscal years, respectively.

THE FOLLOWING PROVISION IS A NON-CODIFIED SECTION FROM CHAPTER 27 OF THE ACTS OF 2009:

SECTION 137. Notwithstanding any general or special law to the contrary, the commonwealth hereby designates the Massachusetts School Building Authority, established in section 1A of chapter 70B of the General Laws, to allocate to governmental issuers of bonds within the commonwealth, pursuant to section 54F(d)(1) of the American Recovery and Reinvestment Act of 2009, Pub. L. No. 111-5, including to said authority, the limitation amount allocated to the commonwealth by the United States Department of the Treasury, but not including the amount allocated to large local educational agencies pursuant to section 54F(d)(2) of said act except to the extent that any such large local educational agency reallocates amounts to the commonwealth pursuant to said section 54F(d)(2), in which case such reallocated amounts shall also be allocated by said authority. Notwithstanding section 89 of chapter 71 of the General Laws, or any other general or special law to the contrary, the Massachusetts School Building Authority may, in its discretion, distribute to charter schools proceeds from bonds authorized under section 54F(d)(1) of the American Recovery and Reinvestment Act of 2009, Pub. L. No. 111-5, or make a portion of the allocation available to other issuers on behalf of charter schools.

THE FOLLOWING PROVISIONS ARE NON-CODIFIED SECTIONS FROM CHAPTER 139 OF THE ACTS OF 2019:

SECTION 29. (a) Notwithstanding any general or special law to the contrary, the Massachusetts School Building Authority, in consultation with the department of elementary and secondary education, shall review eligible expenses and reimbursement rates in the school building assistance program.

(b) The review shall include, but not be limited to: (i) the impact of the maximum grant percentage under the first paragraph of section 10 of chapter 70B of the General Laws on communities adopting certain practices under paragraph (C) of subsection (a) of said section 10 of said chapter 70B; (ii) reimbursement rates per square foot relative to construction costs and changes to this ratio over time; (iii) eligible expenses and the efficacy of establishing certain priority for expenses not currently eligible for reimbursement; and (iv) recommendations for improving the program to ensure that, to the greatest extent possible, the school building assistance program is accessible and affordable to all communities in the commonwealth and that appropriate incentives are in place to support the renovation and construction of high quality and cost-effective school building facilities.

(c) The review, including any analysis, recommendations or proposed legislation, shall be filed with the clerks of the house of representatives and the senate, the chairs of the joint committee on education and the chairs of the house and senate committees on ways and means not later than June 30, 2020.

THE FOLLOWING PROVISIONS ARE NON-CODIFIED SECTIONS FROM CHAPTER 41 OF THE ACTS OF 2019:

SECTION 66. Notwithstanding section 10 of chapter 70B of the General Laws or any other general or special law to the contrary, in determining the grant percentage for approved school projects for calendar year 2019 and calendar year 2020, the Massachusetts School Building Authority shall calculate the community poverty factor by examining the proportion of economically disadvantaged students from calendar year 2014 to the present and assigning whichever year's factor is the highest as determined by the department of elementary and secondary education.

Appendix B1

DESE Year End Expenditure Totals by Category (Mattapoisett vs. State Average)

Function	Description	2019				2020				2021			
		\$ Per In-District Pupil A	% Share of In-District B = A / IIII	State Average B	% Share of State C = B / IIII	\$ Per In-District Pupil A	% Share of In-District B = A / IIII	State Average B	% Share of State C = B / IIII	\$ Per In-District Pupil A	% Share of In-District B = A / IIII	State Average B	% Share of State C = B / IIII
ADMN	Administration	\$629.48	3.3%	\$537.79	3.2%	\$649.22	3.3%	\$562.13	3.3%	\$874.78	3.9%	\$630.15	3.4%
LDRS	Instructional Leadership	\$1,400.58	7.3%	\$1,094.75	6.6%	\$1,110.73	5.7%	\$1,142.13	6.7%	\$1,240.49	5.5%	\$1,232.22	6.7%
TCHR	Teachers	\$7,478.38	38.8%	\$6,426.16	38.8%	\$7,704.60	39.5%	\$6,665.96	39.3%	\$8,802.47	38.8%	\$7,171.41	38.7%
TSER	Other Teaching Services	\$1,754.79	9.1%	\$1,400.14	8.4%	\$1,875.99	9.6%	\$1,435.09	8.5%	\$2,148.82	9.5%	\$1,551.62	8.4%
PDEV	Professional Development	\$72.31	0.4%	\$161.62	1.0%	\$70.25	0.4%	\$166.92	1.0%	\$58.68	0.3%	\$182.28	1.0%
MATL	Instructional Materials, Equipment and Technology	\$209.54	1.1%	\$481.01	2.9%	\$274.02	1.4%	\$505.39	3.0%	\$660.09	2.9%	\$760.21	4.1%
GUID	Guidance, Counseling and Testing	\$680.93	3.5%	\$536.33	3.2%	\$865.41	4.4%	\$566.23	3.3%	\$995.35	4.4%	\$624.87	3.4%
SERV	Pupil Services	\$1,162.18	6.0%	\$1,727.27	10.4%	\$1,149.39	5.9%	\$1,624.10	9.6%	\$1,411.87	6.2%	\$1,614.96	8.7%
OPMN	Operations and Maintenance	\$1,464.71	7.6%	\$1,290.08	7.8%	\$1,361.34	7.0%	\$1,268.21	7.5%	\$1,984.08	8.7%	\$1,498.73	8.1%
BENE	Insurance, Retirement Programs and Other	\$4,400.65	22.9%	\$2,921.75	17.6%	\$4,448.10	22.8%	\$3,030.63	17.9%	\$4,499.02	19.8%	\$3,255.44	17.6%
IIII	In-District Per Pupil Expenditure	\$19,253.55		\$16,576.90	\$2,676.7	\$19,509.07		\$16,966.79	\$2,542.3	\$22,675.67		\$18,521.88	
TTPP	Total Per Pupil Expenditures	\$20,581.69		\$17,141.30		\$20,890.73		\$17,578.37		\$23,678.54		\$19,082.15	

DESE Per Pupil Expenditure

School Year	District Name	District Code	In-District Expenditures	Total In-district FTEs	In-District Expenditures per Pupil	Total Expenditures	Total Pupil FTEs	Total Expenditures per Pupil
2016-2017	Mattapoisett	1730000	\$7,610,630.00	480.1	\$15,852.18	\$8,441,599.00	496.8	\$16,991.95
2017-2018	Mattapoisett	1730000	\$8,099,939.00	446.3	\$18,149.09	\$8,998,564.00	463.2	\$19,426.95
2018-2019	Mattapoisett	1730000	\$8,196,473.47	448.2	\$18,287.54	\$9,181,940.90	465	\$19,746.11
2019-2020	Mattapoisett	1730000	\$8,546,651.27	443.9	\$19,253.55	\$9,502,567.70	461.7	\$20,581.69
2020-2021	Mattapoisett	1730000	\$8,562,532.00	438.9	\$19,509.07	\$9,315,178.60	445.9	\$20,890.73

DESE Per Pupil Expenditure Calculation Method- Per pupil expenditures are calculated by dividing a district's operating costs by its average pupil membership (FTEs), including in-district expenditures per pupil and total expenditures per pupil, which includes in-district and out-of-district spending and enrollment. (<https://profiles.doe.mass.edu/statereport/ppx.aspx>)



Mattapoisett, MA

2022-23 Enrollment Projection Report

Revised 2/16/23

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Enrollment Summary

The global pandemic continues to influence our nation's public health and economic stability in unpredictable ways. As such, it is still too early to identify many of the factors that could impact school enrollments. Over the past school year, we have seen fluctuations in the real estate market and job trends, which have impacted student attendance patterns. Moreover, during the past school year, we have seen how school enrollment patterns can differ substantially from one district to another, with some districts losing students while others experience an influx of students.

We are pleased to send you this report displaying the past, present, and projected enrollments for the District. These ten-year projections are designed to provide the District with yearly, up-to-date enrollment information that can be used by boards and administrators for effective planning and allocation of resources. Included in this report are graphs representing historical and projected grade-by-grade enrollments, as well as historical and projected enrollments in grade combinations. We have received the figures given to us by the District, and we assume that the method of collecting the enrollment data has been consistent from year to year.

Enrollment projections are more reliable in Years #1-4 in the future and less reliable in the "out-years." Projections six to ten years out may serve as a guide to future enrollments and are useful for planning purposes. In light of this, NESDEC has added a "Second Semester Refresher" enrollment projection at no cost to affiliates. (For more information, please refer to the Reliability and Use of This Document section)

This is the first projection for Mattapoisett. Next fall, we can determine the accuracy of NESDEC's projection for 2022-23.

Births decreased by 4 from a previous ten-year average of 38 to a projected average of 34.

Over the next three years, K-3 enrollments are projected to decrease by 22 students, and Grades 4-6 enrollments are projected to decrease by 20 students, as students move through the grades

Historical Enrollment

School District: Mattapoisett, MA - rev. 2

2/16/2023

Historical Enrollment By Grade																			
Birth Year	Births*	School Year	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	UNGR	K-6	PK-6
2007	46	2012-13	26	64	60	70	73	74	71	65	0	0	0	0	0	0	0	477	503
2008	33	2013-14	21	59	65	67	71	81	76	72	0	0	0	0	0	0	0	491	512
2009	39	2014-15	19	55	59	67	71	70	82	79	0	0	0	0	0	0	0	483	502
2010	36	2015-16	20	53	53	59	68	73	74	84	0	0	0	0	0	0	0	464	484
2011	42	2016-17	21	46	55	52	61	67	73	72	0	0	0	0	0	0	0	426	447
2012	43	2017-18	25	58	46	58	52	62	69	74	0	0	0	0	0	0	0	419	444
2013	37	2018-19	26	51	60	52	60	55	67	70	0	0	0	0	0	0	0	415	441
2014	35	2019-20	23	52	58	60	57	62	55	75	0	0	0	0	0	0	0	419	442
2015	38	2020-21	21	48	49	63	54	57	61	52	0	0	0	0	0	0	0	384	405
2016	36	2021-22	25	59	51	50	64	63	64	60	0	0	0	0	0	0	0	411	436
2017	33	2022-23	25	53	58	51	50	62	67	64	0	0	0	0	0	0	0	405	430

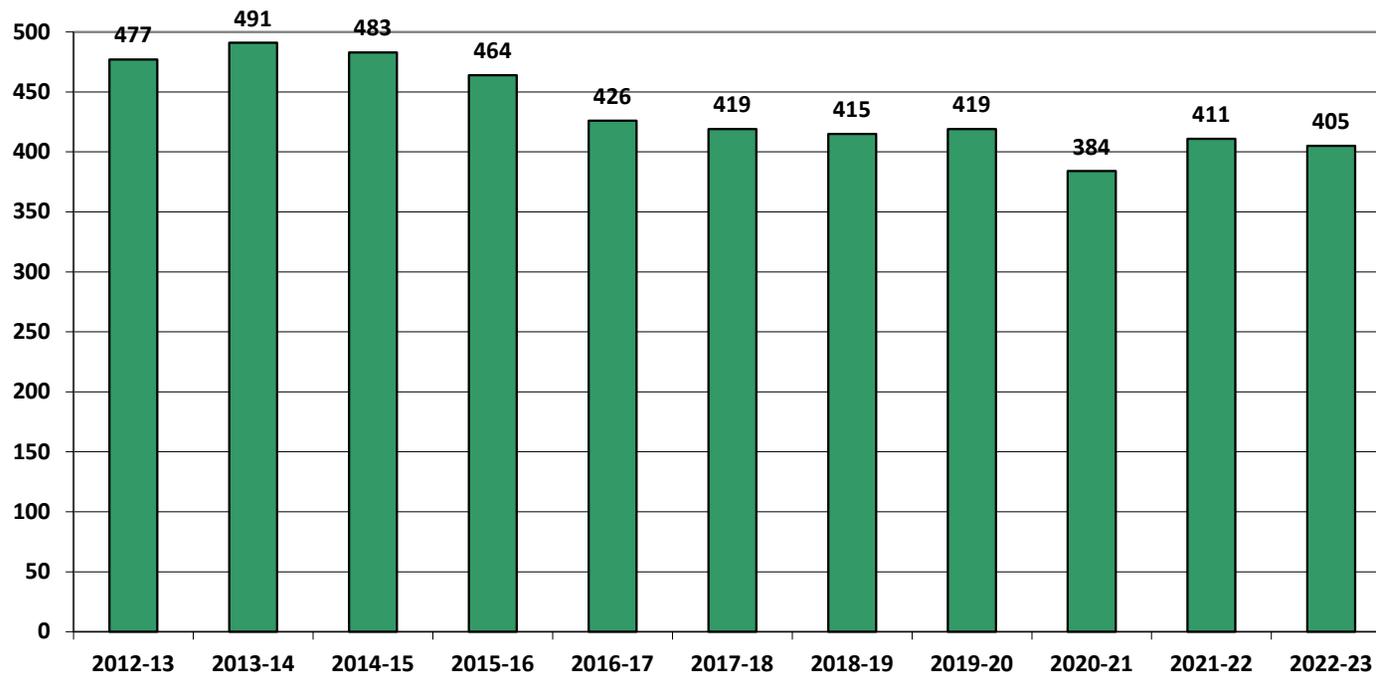
*Birth data provided by Public Health Vital Records Departments in each state.

Historical Enrollment in Grade Combinations						
Year	PK-3	K-3	4-6	PK-6	K-6	
2012-13	293	267	210	503	477	
2013-14	283	262	229	512	491	
2014-15	271	252	231	502	483	
2015-16	253	233	231	484	464	
2016-17	235	214	212	447	426	
2017-18	239	214	205	444	419	
2018-19	249	223	192	441	415	
2019-20	250	227	192	442	419	
2020-21	235	214	170	405	384	
2021-22	249	224	187	436	411	
2022-23	237	212	193	430	405	

Historical Percentage Changes			
Year	K-6	Diff.	%
2012-13	477	0	0.0%
2013-14	491	14	2.9%
2014-15	483	-8	-1.6%
2015-16	464	-19	-3.9%
2016-17	426	-38	-8.2%
2017-18	419	-7	-1.6%
2018-19	415	-4	-1.0%
2019-20	419	4	1.0%
2020-21	384	-35	-8.4%
2021-22	411	27	7.0%
2022-23	405	-6	-1.5%
Change		-72	-15.1%

Historical Enrollment

K-6, School Years 2012-13 to 2022-23



Projected Enrollment

School District: **Mattapoissett, MA - rev. 2**

2/16/2023

Enrollment Projections By Grade*																				
Birth Year	Births*		School Year	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	UNGR	K-6	PK-6
2017	33		2022-23	25	53	58	51	50	62	67	64								405	430
2018	35		2023-24	25	49	55	60	52	52	64	69								401	426
2019	30		2024-25	25	42	51	57	61	54	53	66								384	409
2020	26		2025-26	25	36	43	53	58	63	55	55								363	388
2021	46	(prov.)	2026-27	25	64	37	45	54	60	65	57								382	407
2022	34	(est.)	2027-28	25	48	66	38	45	56	62	67								382	407
2023	34	(est.)	2028-29	25	48	50	68	38	46	57	64								371	396
2024	34	(est.)	2029-30	25	48	50	52	69	39	47	59								364	389
2025	35	(est.)	2030-31	26	49	50	52	53	71	40	48								363	389
2026	37	(est.)	2031-32	26	51	51	52	53	55	73	41								376	402
2027	35	(est.)	2032-33	26	49	53	53	53	55	56	75								394	420

Note: Ungraded students (UNGR) often are high school students whose anticipated years of graduation are unknown, or students with special needs - UNGR not included in Grade Combinations for 7-12, 9-12, etc.

Based on an estimate of births

Based on children already born

Based on students already enrolled

*Birth data provided by Public Health Vital Records Departments in each state.

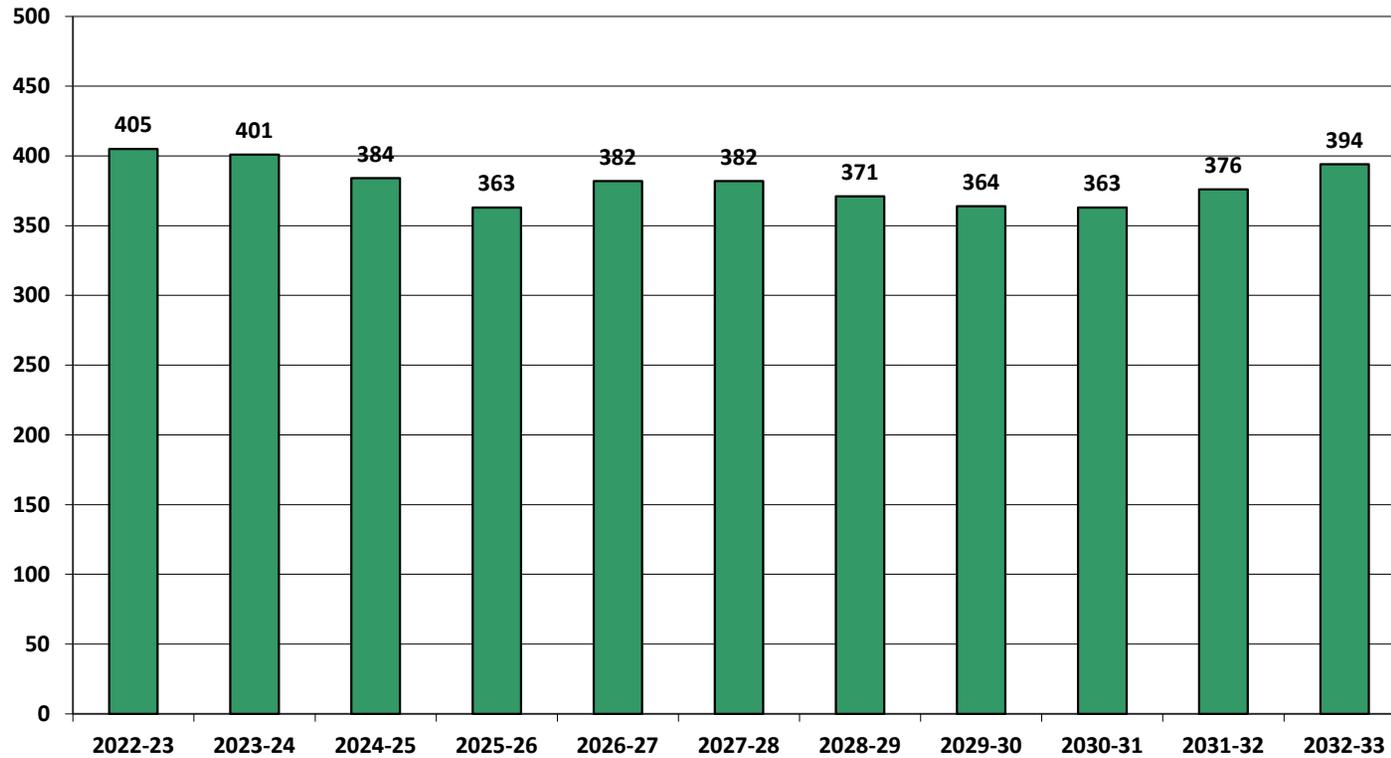
Projected Enrollment in Grade Combinations*						
Year	PK-3	K-3	4-6	PK-6	K-6	
2022-23	237	212	193	430	405	
2023-24	241	216	185	426	401	
2024-25	236	211	173	409	384	
2025-26	215	190	173	388	363	
2026-27	225	200	182	407	382	
2027-28	222	197	185	407	382	
2028-29	229	204	167	396	371	
2029-30	244	219	145	389	364	
2030-31	230	204	159	389	363	
2031-32	233	207	169	402	376	
2032-33	234	208	186	420	394	

Projected Percentage Changes			
Year	K-6	Diff.	%
2022-23	405		
2023-24	401	-4	-1.0%
2024-25	384	-17	-4.2%
2025-26	363	-21	-5.5%
2026-27	382	19	5.2%
2027-28	382		
2028-29	371	-11	-2.9%
2029-30	364	-7	-1.9%
2030-31	363	-1	-0.3%
2031-32	376	13	3.6%
2032-33	394	18	4.8%
Change		-11	-2.7%

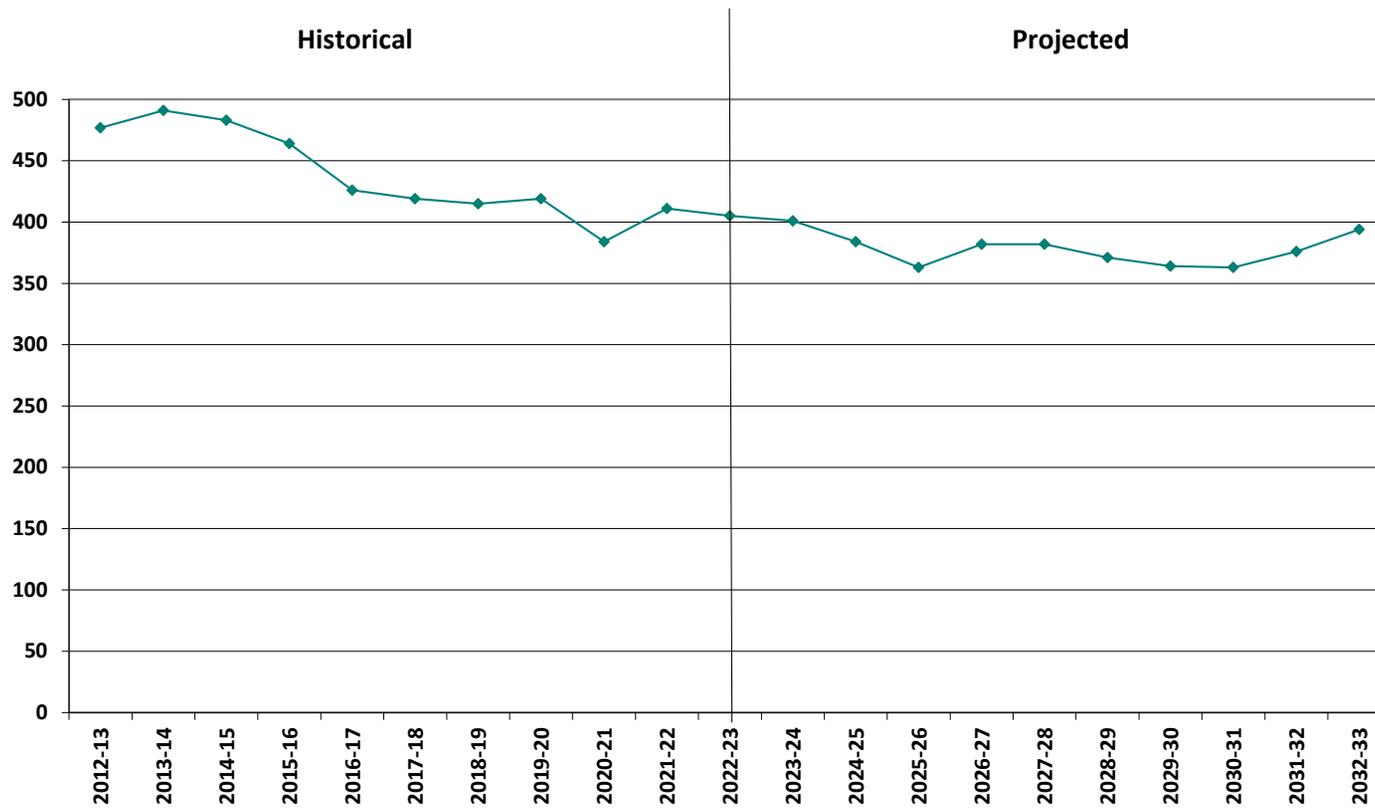
*Projections should be updated annually to reflect changes in in/out-migration of families, real estate sales, residential construction, births, and similar factors.

Projected Enrollment

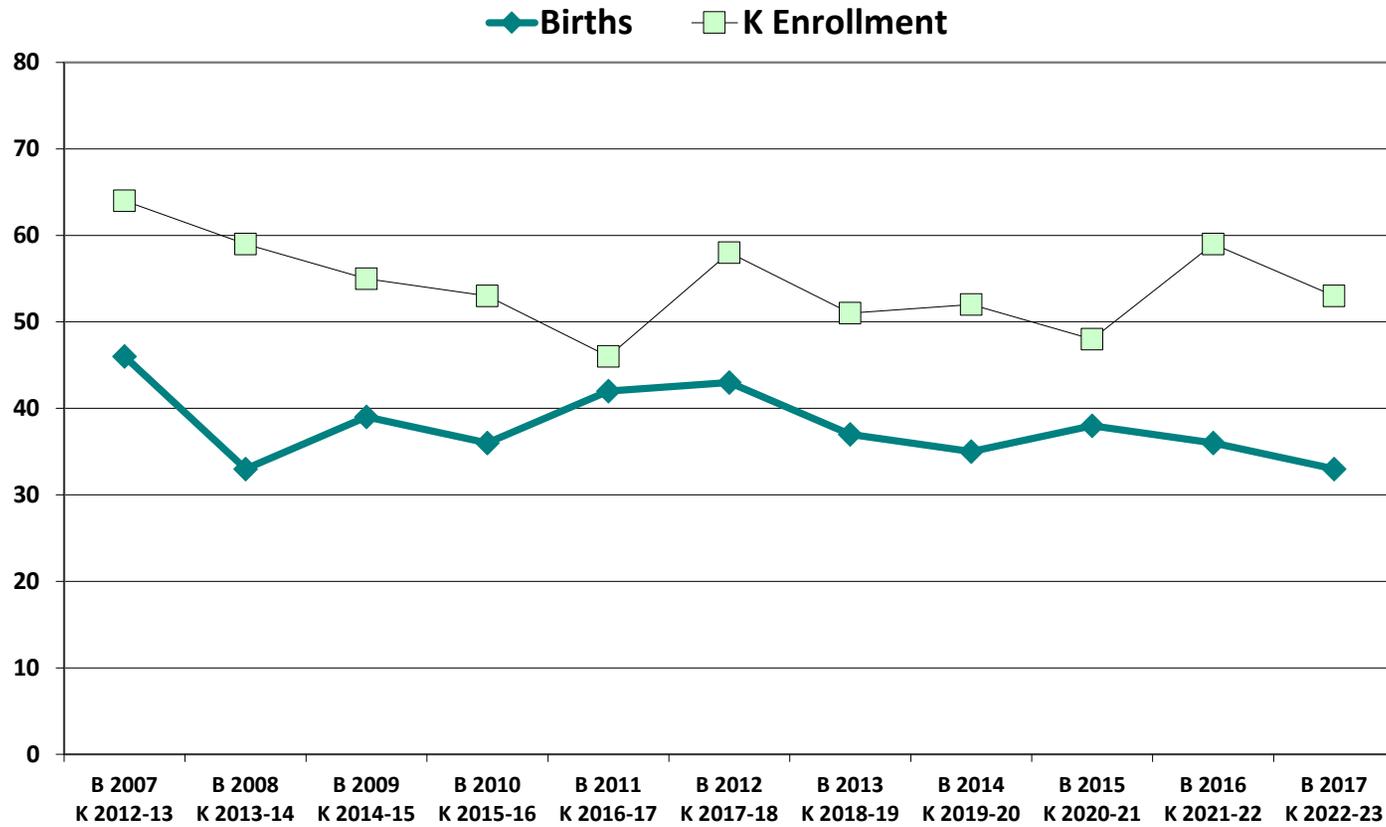
K-6, School Years 2022-23 to 2032-33



Historical & Projected Enrollment



Birth-to-Kindergarten Relationship



Additional Information

Building Permits Issued (Source: HUD)		
Year	Single-Family	Multi-Units
2012	22	0
2018	15	0
2019	16	0
2020	39	0
2021	43	0
2022	28 to date	0 to date

Enrollment History*		
Year	Career-Tech 9-12 Total	Non-Public K-12 Total
2012-13	n/a	n/a
2018-19	n/a	17
2019-20	n/a	n/a
2020-21	n/a	n/a
2021-22	n/a	n/a
2022-23	n/a	n/a

Residents in Non-Public Independent and Parochial Schools (General Education)*														
Oct. 1 Enrollment	K	1	2	3	4	5	6	7	8	9	10	11	12	K-12 TOTAL
	n/a													

K-12 Home-Schooled Students*	
2022	< 10

K-12 Residents in Charter or Magnet Schools, or Choiced-out*	
2022	< 10

K-12 Special Education Outplaced Students*	
2022	< 10

K-12 Tuitioned-In, Choiced-In, & Other Non-Residents*	
2022	117

*The above data were provided by the District, with the exception of building permit data (provided by HUD).

"n/a" signifies that information was not provided by District.

** < 10 Not reported to protect subgroups with fewer than 10 students

New England's PK-12 Enrollment Trends

From 2020 to 2030, the US Department of Education anticipates changes in PK-12 enrollment of -2.4% in the South, -6.5% in the West, -3.8% in the Midwest, -6.2% in the Northeast, and a total of -4.3% nationwide.

State	Fall 2020 PK - 12	Fall 2030 Projected	PK-12 Decline	% Change 2020-2030
CT	509,058	475,600	-33,458	-6.6%
ME	172,455	161,800	-10,655	-6.2%
MA	921,712	879,900	-41,812	-4.5%
NH	169,027	144,600	-24,427	-14.5%
RI	139,184	130,200	-8,984	-6.5%
VT	82,401	74,600	-7,801	-9.5%

Source: U.S. Department of Education, National Center for Education Statistics, *Enrollment In Public Schools fall 1990 to fall 2030*, Table 203.20, March 2022.

Although most New England Districts are seeing a decline in the number of births, NESDEC's experience indicates that the impact on enrollment varies from District to District. Almost half of New England Districts have been growing in PK-12 enrollment, and a similar number are declining (often in rural areas), with the other Districts remaining stable.

Reliability and Use of this Document

PROJECTION METHODOLOGY

Cohort component (survival) technique is a frequently used method of preparing enrollment forecasts. NESDEC uses this method, but modifies it in order to move away from forecasts that are wholly computer- or formula-driven. Such modification permits the incorporation of important, current district-specific information into the generation of enrollment forecasts (such as in/out-migration of students, resident births, HUD-reported building permits, etc.). Percentages are calculated from the historical enrollment data to determine a reliable percentage of increase or decrease in enrollment between any two grades. For example, if 100 students enrolled in Grade 1 in 2018-19 increased to 104 students in Grade 2 in 2019-20, the percentage of survival would be 104%, or a ratio of 1.04. Ratios are calculated between each pair of grades or years in school over several recent years.

After study and analysis of the historical ratios, and based upon a reasonable set of assumptions regarding births, migration rates, retention rates, etc., ratios most indicative of future growth patterns are determined for each pair of grades. The ratios thus selected are applied to the present enrollment statistics to project into future years. The ratios are the key factors in the reliability of the projections, assuming validity of the data at the starting point.

RELIABILITY OF ENROLLMENT PROJECTIONS

Projections can serve as useful guides to school administrators for educational planning. Enrollment projections are more reliable in Years #1-4 in the future and less reliable in the "out-years." Projections six to ten years out may serve as a guide to future enrollments and are useful for planning purposes, but they should be viewed as subject to change given the likelihood of potential shifts in underlying assumptions/trends, such as student migration, births as they relate to Kindergarten enrollment, and other factors.

Projections that are based upon **the children who already are in the district** (the current K-12 population only) will be the most reliable. The second level of reliability will be for those children already **born into the community but not yet old enough to be in school**. The least reliable category is the group for which an estimate must be made **to predict the number of births**, thereby adding additional uncertainty. See these three multi-colored groupings on the "Projected Enrollment" tab.

Annual updates allow for early identification of recent changes in historical trends. When the actual enrollment in a grade is significantly different (higher or lower) from the projected number, it is important (yet difficult) to determine whether this is a one-year aberration or whether a new trend may have begun. **In light of this possibility, NESDEC urges all school districts to have updated enrollment forecasts developed by NESDEC each October.** This service is available at no cost to affiliated school districts.

USING THIS INFORMATION ELECTRONICALLY

If you would like to extract the information contained in this report for your own documents or presentations, you can use screenshots, which can be inserted into PowerPoint slides, Word documents, etc. Because screenshots create graphics, the image is not editable. Please feel free to contact us if you need assistance in this matter, by phone (508-481-9444) or by email (ep@nesdec.org).

Appendix D4

Inventory of Student Services & Special Education Programming Spaces

Mattapoisett utilizes a fully inclusive model to provide both student services and special education programming.

Center School

Project Grow (Integrated Preschool Special Education Classroom & Office Space)

Kindergarten/1st Grade Special Education Classroom & Office

2nd Grade Special Education Classroom & Office

3rd Grade Special Education Learning Space & Office

Speech & Language Pathologist Office/Therapy Space

Occupational Therapist/Physical Therapist Therapy Space/Classroom

School Adjustment Counselor Office/Therapy Space

School Psychologist Office/Therapy Space

Reading Specialist (x2) Office/Learning Classroom

Math Specialist Office/Learning Classroom

English Language Learner Learning Space

Special Education Secretary Office

Old Hammondtown School

4th Grade Special Education Classroom & Office

5th Grade Special Education Classroom & Office

6th Grade Special Education Classroom & Office

Speech & Language Pathologist Office/Therapy Space

Occupational Therapist/Physical Therapist Therapy Space/Classroom

School Adjustment Counselor Office/Therapy Space

School Psychologist Office/Therapy Space

Reading Specialist Office/Learning Classroom

Title I Math Learning Space & Office

Title I ELA Learning Space & Office

Math Specialist Office/Learning Space

English Language Learner Learning Space

Special Education Secretary Office

Appendix D5

Inventory of Other Programs – Location/Description/Enrollment

- Mattapoisett Public Health Nurse/Center School (1 classroom)/Town Health Services
- Mattapoisett Recreation Department/Center School (1 classroom)/Town Recreation Services
- Mattapoisett Council on Aging/Center School (4 classrooms & general space)/Council on Aging Programming
- Coordinated Family and Community Engagement (CFCE) Playgroups/Old Hammondtown School (1 classroom as needed)/Weekly playgrounds facilitated by a playgroup facilitator for students 0-3 years of age.
- Southeastern Massachusetts Education Collaborative (SMEC)/Old Hammondtown School (4 classrooms & small nurse's office space)/Special Education Programming

Program Description:

The SMEC Multidisciplinary Learning Center is new Collaborative special education program offering students with significant physical and medical needs a safe and supportive learning environment. Located at the Old Hammondtown School in Mattapoisett, the program is a substantially separate classroom serving students in grades 1-5 and follows a 180 day school calendar with an additional 5 week part-time extended year summer component. School year program hours are from 8:45 A.M. to 2:45 P.M. With a 3:1 student to educational staff ratio, the MLC offers instruction in core academic and specialty areas modified as appropriate to meet the students' needs and as documented in their IEPs. Our special education teacher(s), RN, CNA(s) and paraprofessional(s) work together as a team to create an environment where students with physical and medical challenges are able to succeed. Our speech pathologist, physical therapist, occupational therapist and school adjustment counselor are available for therapeutic services as needed.

The mission of the MLC is to facilitate a student's personal growth in a supportive, safe environment. Students are referred to the program by their Local Educational Authority (LEA).

Services:

- *Individual/small group instruction*
- *ADLs*
- *Medical supervision*
- *Social skills development*
- *Community outings*
- *School lunch program*
- *Speech/Language Therapy as indicated*
- *Occupational Therapy as indicated*
- *Physical Therapy as indicated*
- *Physical Education*

The Mattapoisett School Committee is exploring the possibility of adding before/after care programming by partnering with a community-based vendor (i.e. YMCA, private daycare, etc.).

Appendix E1: Public Engagement Session #1 Summary

Session #1

Date: 11/2/2022

Time: 10:00 AM – 12:00 PM

Location: The Knights of Columbus, 57 Fairhaven Rd, Mattapoisett, MA 02739

Participants: 42

Why I Love Living in Mattapoisett...

- “ocean & people”
- “harbor”
- “the people”
- “sense of community”
- “the schools!”
- “fun community to raise kids / family”
- “Please watch the evening news and then you will realize why you LOVE Mattapoisett!”

Harvest #1: Priority Values

- “quaint small history – ship bldg. ocean bike path safety for kids”
- “effective use of money”
- “land avlb. For resid. or business”
- “ocean”
- “people”
- “great public service”
- “good education”
- “using resources wisely”
- “can one school provide best learning environment?”
- “good education”
- “schools add value to town”
- “education is very important”
- “education”
- “affordable”
- “parking”
- “best value”
- “facilities would need to be appropriate in size and design to house students”

Harvest #1: Presentation Take Aways

- “town hall needs are driving this issue”
- “more information needed on changes to student / teacher ratio if consolidation takes place”
- “aging population”
- “need more info”
- “relative steadiness of school population – ratio of student / teacher adds value to town – schools determine value”
- “need reliable data for population projections”
- “wasn’t surprised”

- “absence of information presented projectory data”
- “excellence according to metrics”
- “good teacher – student ratio”
- “recent school population”
- “not enough information”

Harvest #2: Current Attributes

- “student-teacher ratio”
- “quality of schools / teachers”
- “location of Center & up to state code”
- “want to conserve small student to teacher ratios and quality of teachers”
- “the quality of education at CS & OHS prepare students very well for the future”
- “like the small town aspect of our elementary school”
- “we have a moral priority to maintain our high school quality”
- “we like the student teacher ratio”
- “keep teacher student ratio”
- “our students go on to succeed then want to come back and raise their kids here”
- “low student teacher ratio”
- “we have quality schools”
- “dedicated professional caring staff at CS and OHS”
- “high quality education for all students”
- “value student inclusion at schools”

Harvest #2: Balancing Ideas

- “consolidate planning integrate school plans with master plan”
- “combine schools & move town hall to empty school”
- “we should always prioritize schools – but there are no blank checks”
- “we need the school numbers”
- “when families look to move to Mattapoissett, they look at schools not town hall so this is more important”
- “this is hard to answer without financial information”
- “more transparency in budget”
- “school consolidation”
- “balance projects based on demographics”
- “renovate town hall”
- “town mtgs & elections”
- “representation from all departments”
- “separate school community from town offices”
- “raise taxes”
- “does the land with each school allow for future new additions?”
- “use our existing building”
- “inform the community of all town projects, needs transparency”
- “balance school needs against other capital projects”

Harvest #3: Future Opportunities

- “keep up IT, grow environmental, practical life skills”

- “1 school preferably Center”
- “keep a strong well respected education system”
- “improving resources (K-6)”
- “more resources w/ consolidation”
- “improve our state standing”
- “one site with superior facilities”
- “merge 2 schools into one school – cost effective”
- “build a community of students K-6”
- “partnership with Matt Rec”
- “increase STEM education”
- “consolidating school would allow town hall to move to Center School”
- “consolidation would provide space for other dept”

Harvest #3: Questions about the future...

- “more transparency”
- “more in common than less”
- “intergenerational experiences”
- “renewable – sustainability”
- “concern – plan for commuter rail demographic changes”
- “concern – lack of fiscal transparency from schools”
- “will consolidation improve schools”
- “affordable housing effect our school population”
- “\$ some more on the majority of population”
- “expansion of schools if population increases”
- “what happens if Pre School for students age 4 is presented”
- “impact of train service”
- “protectory #'s”
- “schools to be able to pivot for future needs ex: IT”
- “we need to effectively use finances in the most transparent way”
- “keeping the town affordable for young families”
- “we would like to have more relevant info about state requirements re: classroom size per # of pupils, how much does consolidation save the town?”
- “need to balance the needs of an aging community while drawing young families with quality education and up to date school facilities”
- “this decision has to be made based on concerns about educations outside of Town Hall concerns”

Additional notes documented on scrap paper

- “Attributes - moral obligation, class size in important, testing shows we’re doing well, students go on to succeed, they want to come back to Mattapoissett to raise their children here, it’s the teacher & the atmosphere in the classroom”
- “schools & ed will always be our highest priority but how do we know how to plan when we don’t have the numbers, prioritize.”
- “opportunities we envision – partnership w/ Matt Rec increase STEM education”
- “concerns about future of schools – balance needs of aging community w/ drawing young families w/ quality education / school facilities”

- “changing diversity of demographics”
- “keeping the town affordable for young families”
- “most recent population up”
- “historic village location / Center School location”
- “best value?”
- “capacity of existing O.H.S.”
- “parking?”
- “expand at O.H.S.”
- “COA needs”
- “cost of insurance at schools”
- “specs – following regulations Center is up to code”
- “our “quality” reputation”
- “need to better balance our town projects”
- “as people age how are we projecting their needs”
- “town hall decrepit”
- “Long Warf is a time bomb”
- “Losing more trees than planting”
- “having K-6 in 1 facility allows better resources”
- “need reliable data for population projections”
- “current teachers are outstanding”
- “schools prepare the students very well for future”
- “conserve small student to teacher ratios”
- “keep architecture of Center School”
- “maintaining high quality education in Matt that is affordable to residents & tax base”
- “facilities need to be appropriate in size & design to house students”

Appendix E2: Public Engagement Session #2 Summary

Session #2

Date: 11/2/2022

Time: 6:00 PM – 8:00 PM

Location: Old Rochester Regional High School Cafeteria, 135 Marion Rd, Mattapoisett, MA 02739

Participants: 32

Why I Love Living in Mattapoisett...

- “Great Schools! Kids 1st! The Beach!”
- “Strong community!”
- “The people”
- “small community, lovely waterfront, great schools”
- “home!”
- “small town atmosphere – great friends and neighbors – seaside town”
- “lovely waterfront – wonderful elementary school in heart of village”
- “great place to raise a family”

Harvest #1: Priority Values

- “quality of education”
- “efficiently streamlining assets (other properties)”
- “value the truth and honesty”
- “continuation of quality education”
- “it’s important to verify students that are attending Matt. (live in Matt.)”
- “stability”
- “value quality education”
- “safety in schools”
- “school in village is the heart of our community”
- “continued quality education in village”
- “community”
- “young students separate from older students”

Harvest #1: Presentation Take Aways

- “Town Hall \$\$\$\$. So much money. Why relocate?”
- “Presentation was misleading”
- “Concerned that the small amount of data we do have is not correct. School choice and how it affects class.”
- “Where you’re getting your stats? Ck with schools!”
- “Matt. may become unaffordable”
- “Budget % has dropped over time (used to be over 60%)”
- “surprised students look consistent compared to age population”
- “ratio breakdown classroom only & w/ paras”
- “more budget analysis”
- “recognize population trends”

Harvest #2: Current Attributes

- “quality of education”
- “safety for school population”
- “true partnership between school & families”
- “quality education”
- “heart of the village”
- “quality building”
- “strong relationships between Town & community”
- “quality education”
- “Intent: history of Center School gifted. Keyed for younger children.”
- “conserve an environment of loving, caring teachers & staff with good student: teacher rat. To raise loving, kind, smart kids.”
- “keep history, town access within reach (library, beach, fire & police stions) field trips & education”

Harvest #2: Balancing Ideas

- “we need cooperative, transparent communication”
- “balance by having negotiation”
- “consider all needs prioritize schools”
- “move Old Ham students to part of school only”
- “town hall / office can help finance school renovations for all students”
- “Old Hammondtown has space for other non-education needs”
- “utilize one building for Town Hall, COA, Recreation, ect”
- “outside consultant”
- “explore other budget areas also (where does the other 50% go?)”
- “consolidate schools”
- “explore other funding sources and work together”

Harvest #3: Future Opportunities

- “hope the future generations have the space they need to learn & thrive”
- “investment in a quality education”
- “40B affordable impact to ability to afford future ed. Costs”
- “no consolidation – priority to preserve Center School”
- “better school systems attract better teacher & therefore higher salary”
- “single-use school buildings – safety concerns – non porous buildings – no voting in school”
- “more services which require more space (science, before & aftercare, extracurricular activities)”

Harvest #3: Questions about the future...

- “if a school isn’t a school anymore it’s too expensive to add it back”
- “end up with less necessary staff and high student to teacher ratios”
- “small town mentality”
- “Is school consolidation all about the relocation of Town Hall?”
- “we need transparent communication and revealed agendas concern that some at Town Hall already have a plan without consulting citizens”

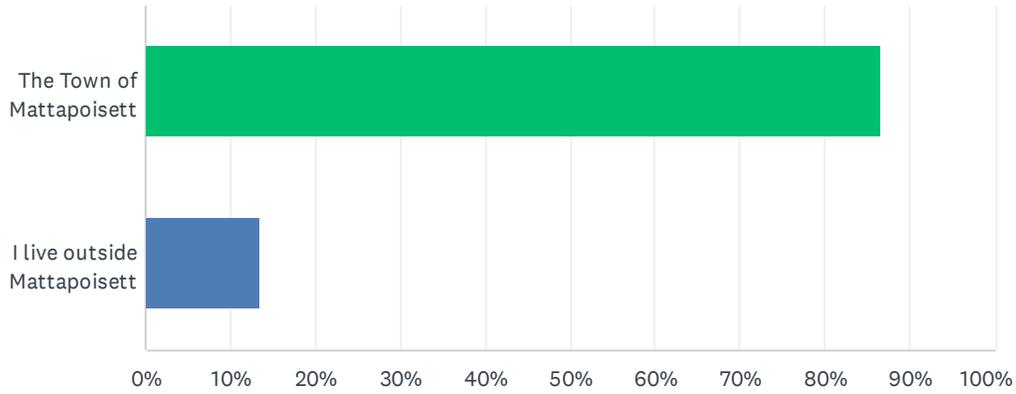
- “the past – quality ed. Fair non-prejudice experience”
- “quality education”
- “cont. good education evol. education trends”
- “40B”
- “misleading data (verify sources)”
- “Agenda of those driving study? Why only the school?”
- “survey cannot be tracked & could be done multiple times by special interests”
- “eventually demographics shift & we will not have space (do this again in 20 years)”

Additional notes documented on scrap paper

- “No consolidation – priority to preserve Center School”
- “Forethought / Transparent Communication”
- “Single Use School Buildings – safety concerns, non porous buildings”
- “How do we predict population trends accurately?”
- “Transparent Communication”
- “Clear agendas”
- “lack MCAS score report”
- “12 school choice students (more data needed)”
- “report does not reflect growth that is anecdotally evident”
- “no mention of 40B potential”
- “more budget analysis – make it clear”
- “why relocate Town Hall – why build new Town Hall – too much \$\$\$”
- “school legacy (multiple generations attend Center School)”
- “school in village is the heart of our community”
- “students’ ability to walk to other important places in village – library, beach, wharf, museum”
- “Rec camp needs Center School”
- “continued quality of education – no going backward”
- “built by Henry Huttleston Rogers for our town”
- “proud”
- “small town / small schools”
- “awesome teachers”
- “responsive schools”
- “familial relationships”
- “supportive family base in this town”
- “high teacher retention”
- “budget dedicated to education”
- “prioritize schools & education”
- “planners need to be more open-minded”
- “capital projects list seems rigid and inaccurate”
- “things have been mismanaged?”
- “NO CONSOLIDATION!”
- “ratio”
- “misleading information – student / teacher ratio – consolidating schools class sizes down – not true!!”
- “quality education is important”

Q1 Where do you currently reside?

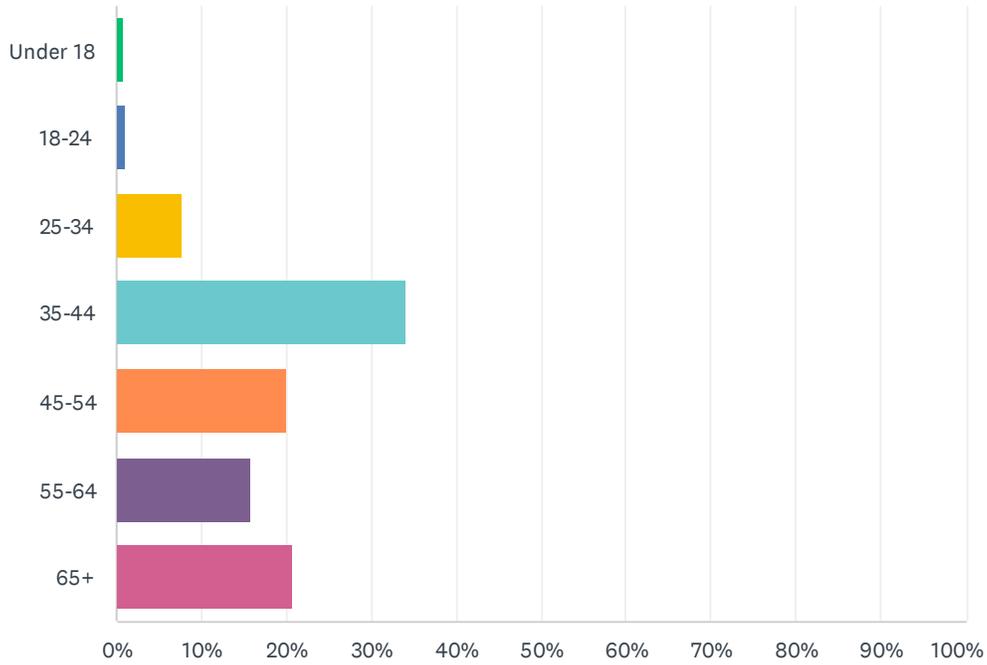
Answered: 515 Skipped: 0



ANSWER CHOICES	RESPONSES	
The Town of Mattapoissett	86.60%	446
I live outside Mattapoissett	13.40%	69
TOTAL		515

Q2 What is your age?

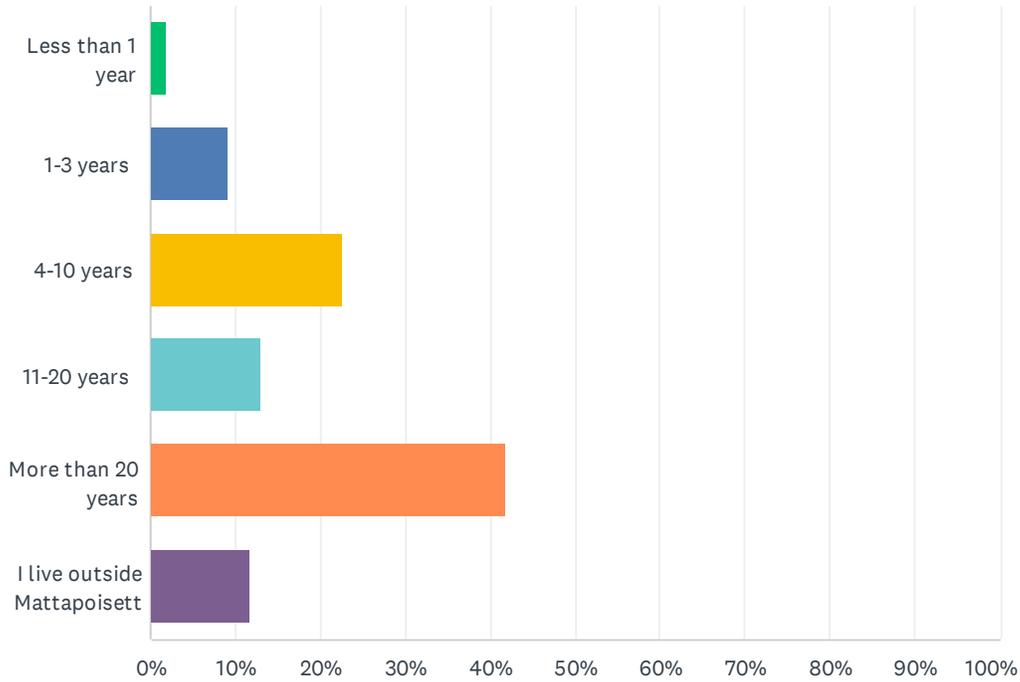
Answered: 514 Skipped: 1



ANSWER CHOICES	RESPONSES
Under 18	0.78% 4
18-24	1.17% 6
25-34	7.59% 39
35-44	34.05% 175
45-54	20.04% 103
55-64	15.76% 81
65+	20.62% 106
TOTAL	514

Q3 How long have you lived in Mattapoissett?

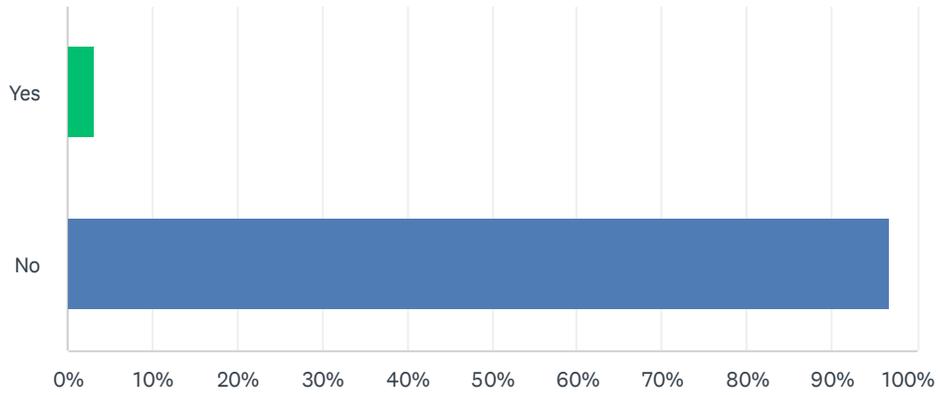
Answered: 515 Skipped: 0



ANSWER CHOICES	RESPONSES	
Less than 1 year	1.94%	10
1-3 years	9.13%	47
4-10 years	22.52%	116
11-20 years	13.01%	67
More than 20 years	41.75%	215
I live outside Mattapoissett	11.65%	60
TOTAL		515

Q4 Are you currently a student attending a school in the Mattapoissett Public School District?

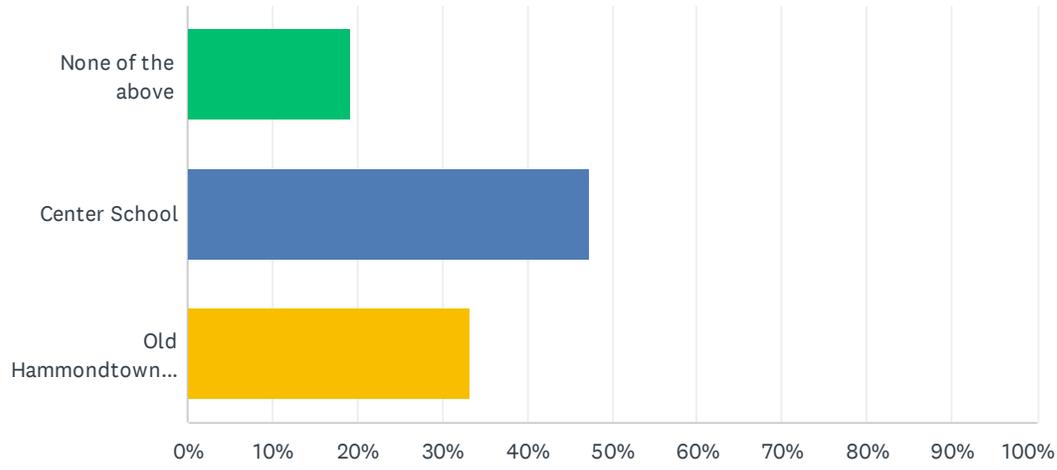
Answered: 515 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	3.30%	17
No	96.70%	498
TOTAL		515

Q5 If you are a student currently, which school do you attend?

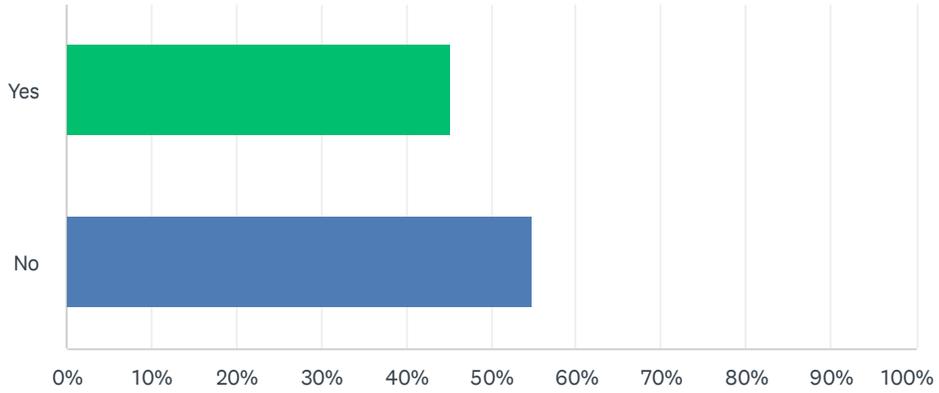
Answered: 78 Skipped: 437



ANSWER CHOICES	RESPONSES	
None of the above	19.23%	15
Center School	47.44%	37
Old Hammondtown School	33.33%	26
TOTAL		78

Q6 Does someone in your household currently attend school in the Mattapoissett Public School District?

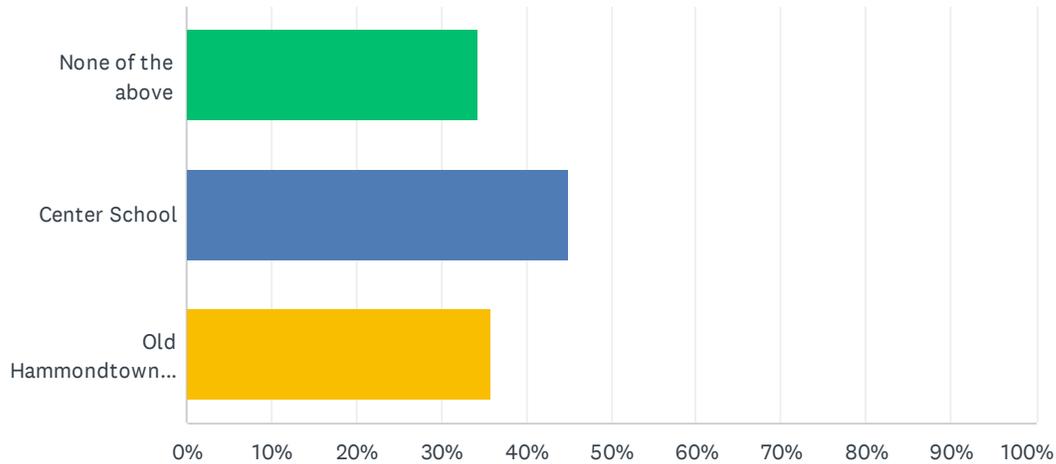
Answered: 504 Skipped: 11



ANSWER CHOICES	RESPONSES	
Yes	45.24%	228
No	54.76%	276
TOTAL		504

Q7 If yes to the above, which school(s) does someone in your household currently attend? (Choose all that apply)

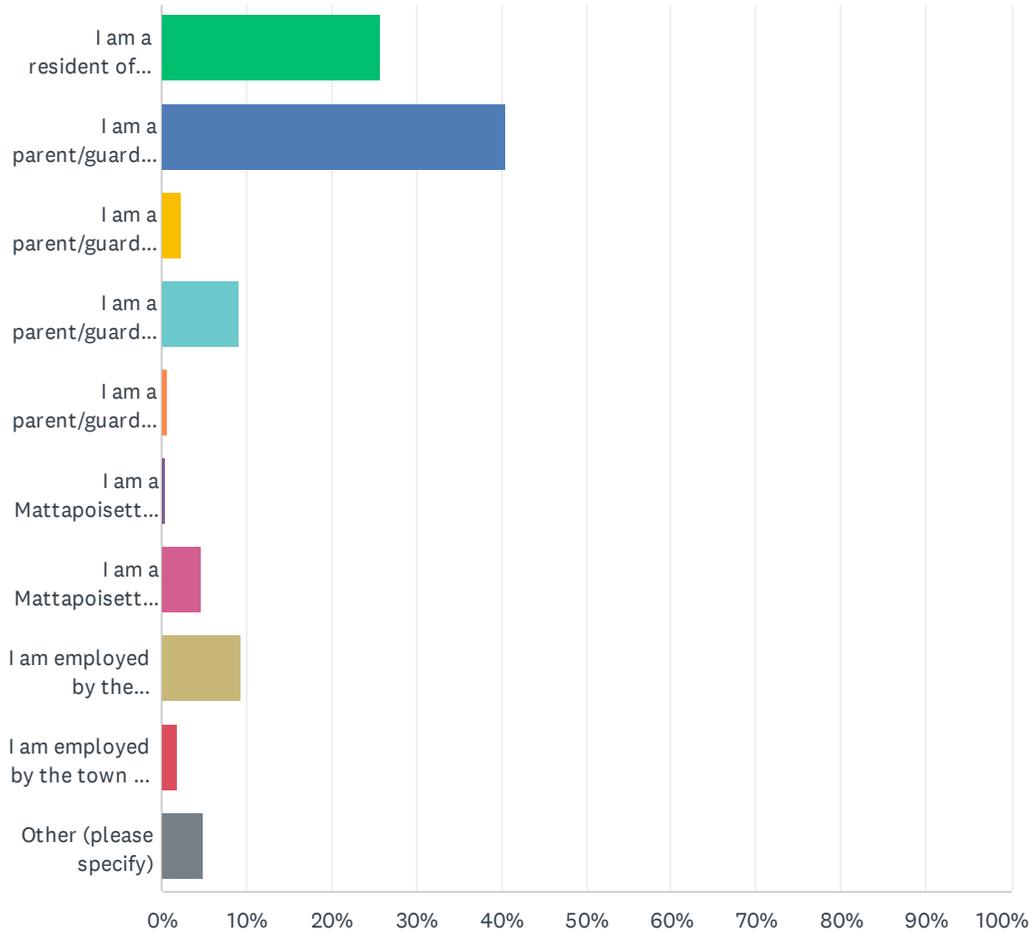
Answered: 318 Skipped: 197



ANSWER CHOICES	RESPONSES	
None of the above	34.28%	109
Center School	44.97%	143
Old Hammondtown School	35.85%	114
Total Respondents: 318		

Q8 Which of the following best describes your perspective in responding to this survey?

Answered: 507 Skipped: 8

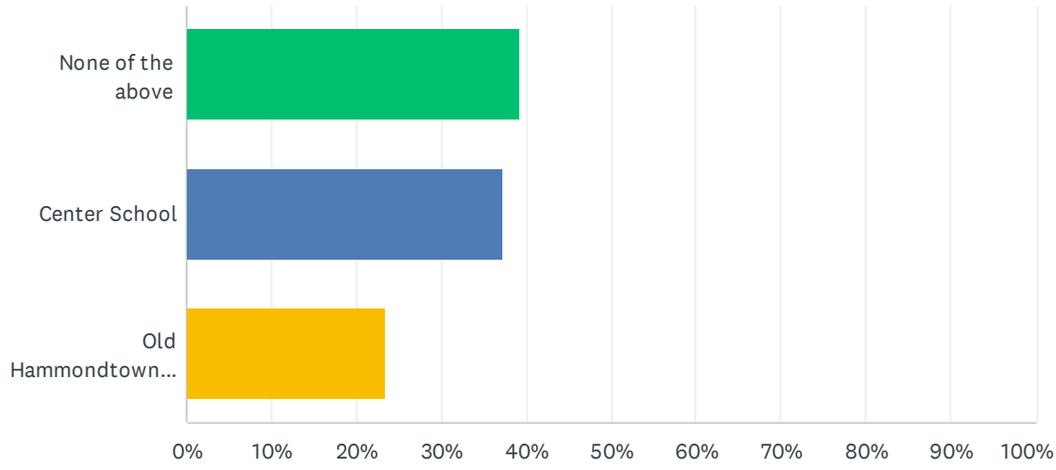


Mattapoisett School Consolidation Study Survey

ANSWER CHOICES	RESPONSES	
I am a resident of Mattapoisett	25.84%	131
I am a parent/guardian of a current Mattapoisett student or students attending school in the District	40.43%	205
I am a parent/guardian of a future Mattapoisett student or students	2.37%	12
I am a parent/guardian of a past Mattapoisett student or students that attended a school in the District	9.27%	47
I am a parent/guardian of a Mattapoisett student who attends school out of the District or is homeschooled	0.59%	3
I am a Mattapoisett student	0.39%	2
I am a Mattapoisett Public Schools alumnus	4.73%	24
I am employed by the Mattapoisett School District	9.47%	48
I am employed by the town of Mattapoisett	1.97%	10
Other (please specify)	4.93%	25
TOTAL		507

Q9 To which school are you primarily assigned?

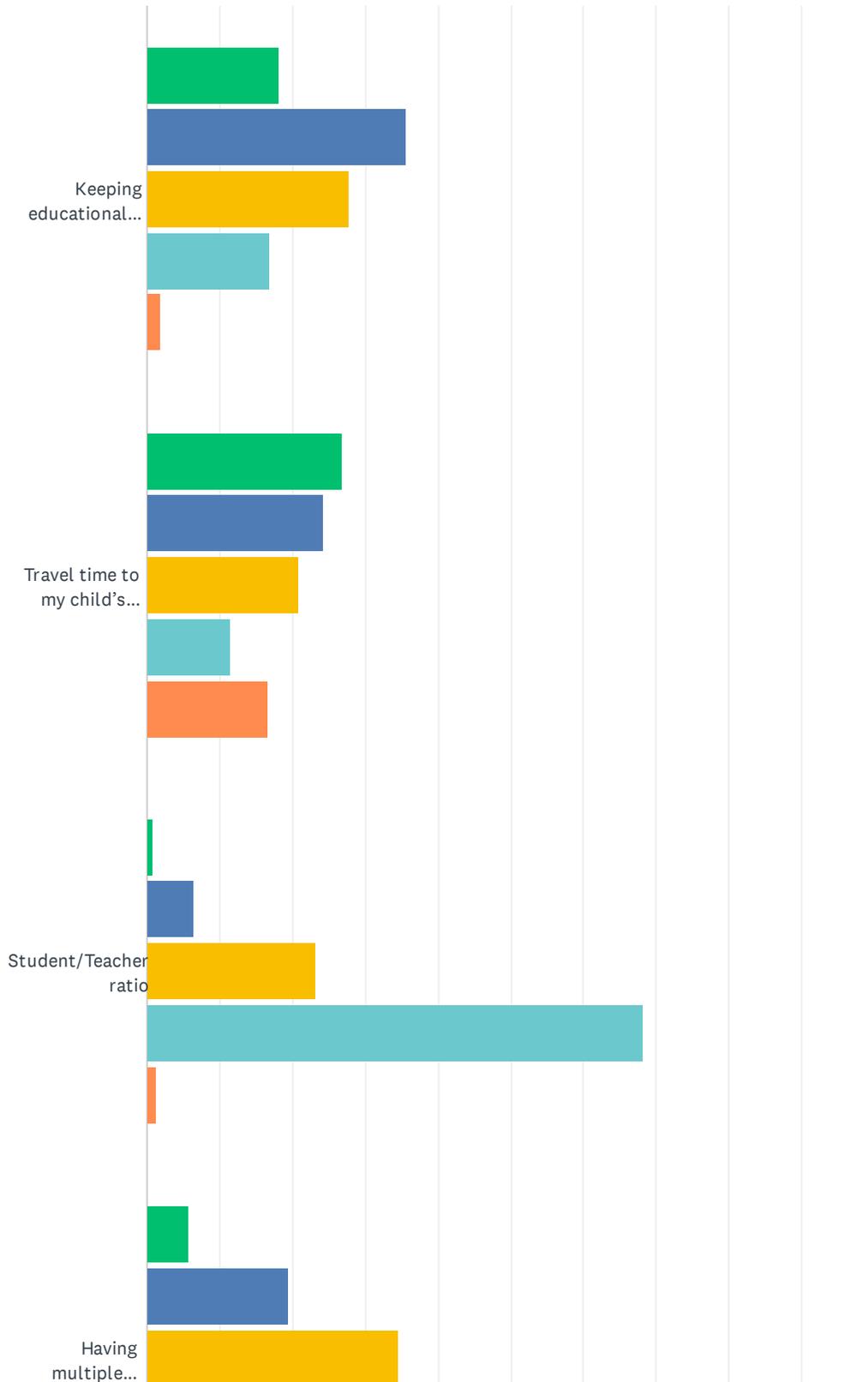
Answered: 286 Skipped: 229



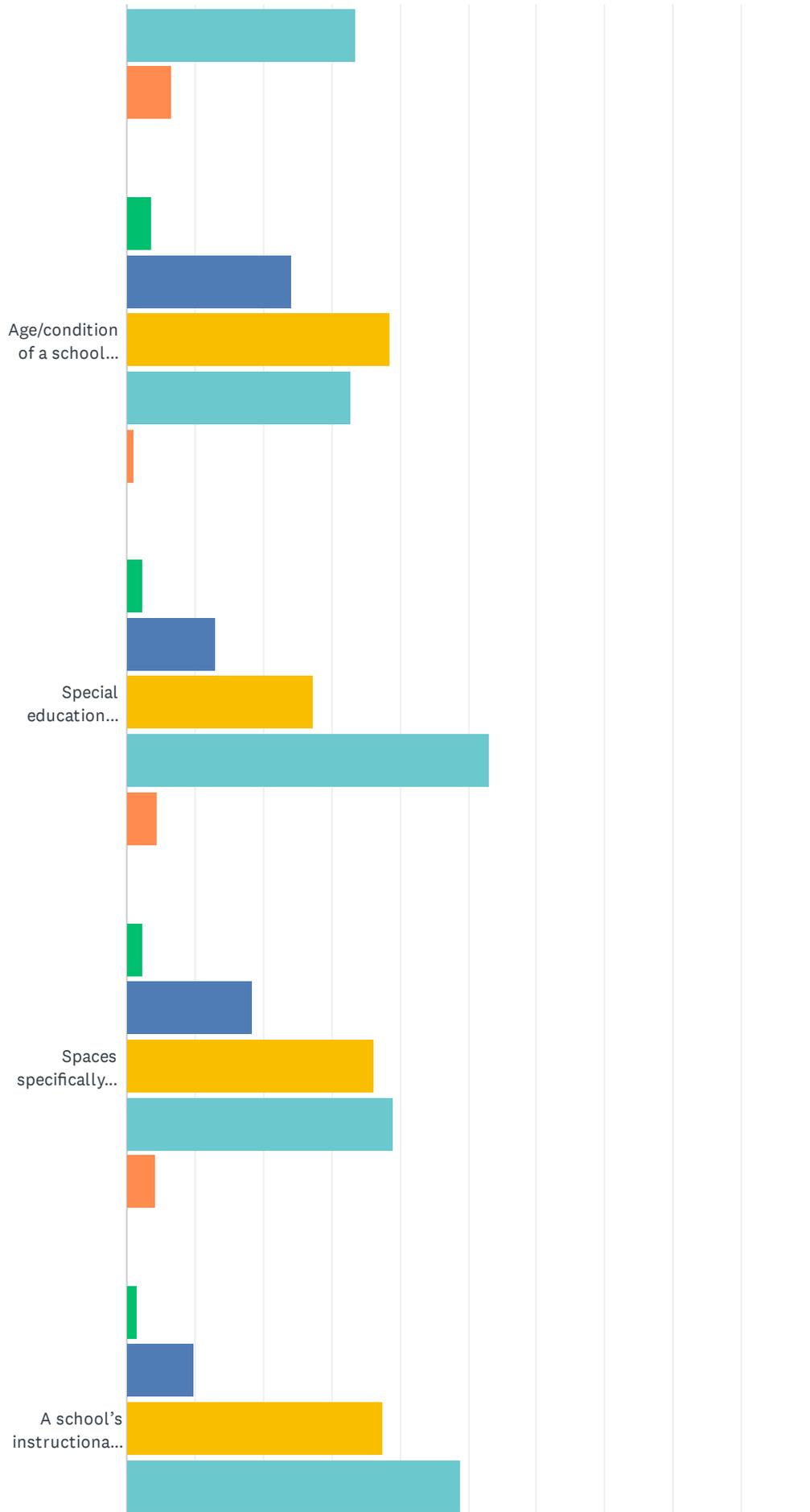
ANSWER CHOICES	RESPONSES	
None of the above	39.16%	112
Center School	37.41%	107
Old Hammondtown School	23.43%	67
TOTAL		286

Q10 Please rate the level of importance of the following school considerations:

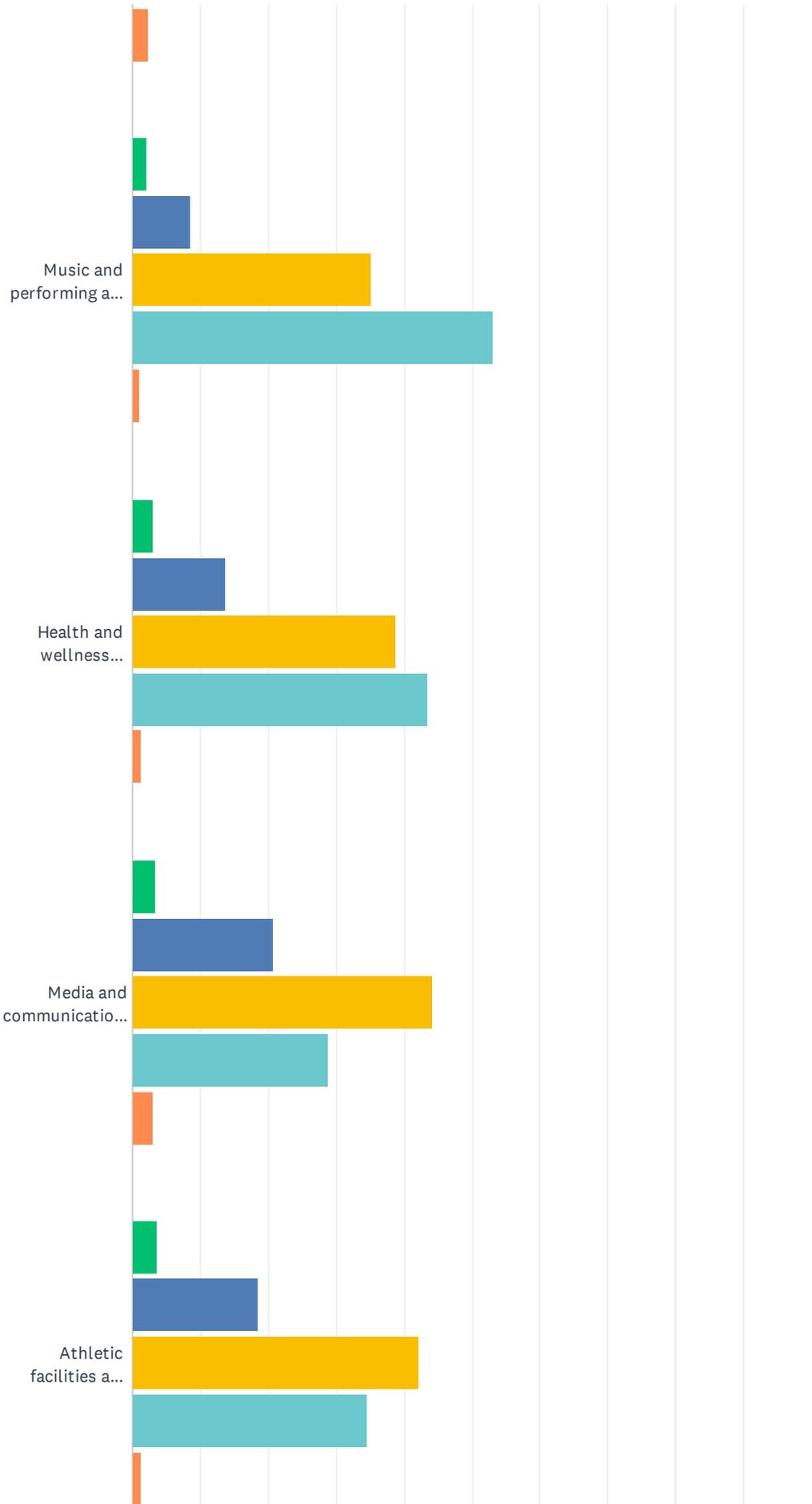
Answered: 481 Skipped: 34



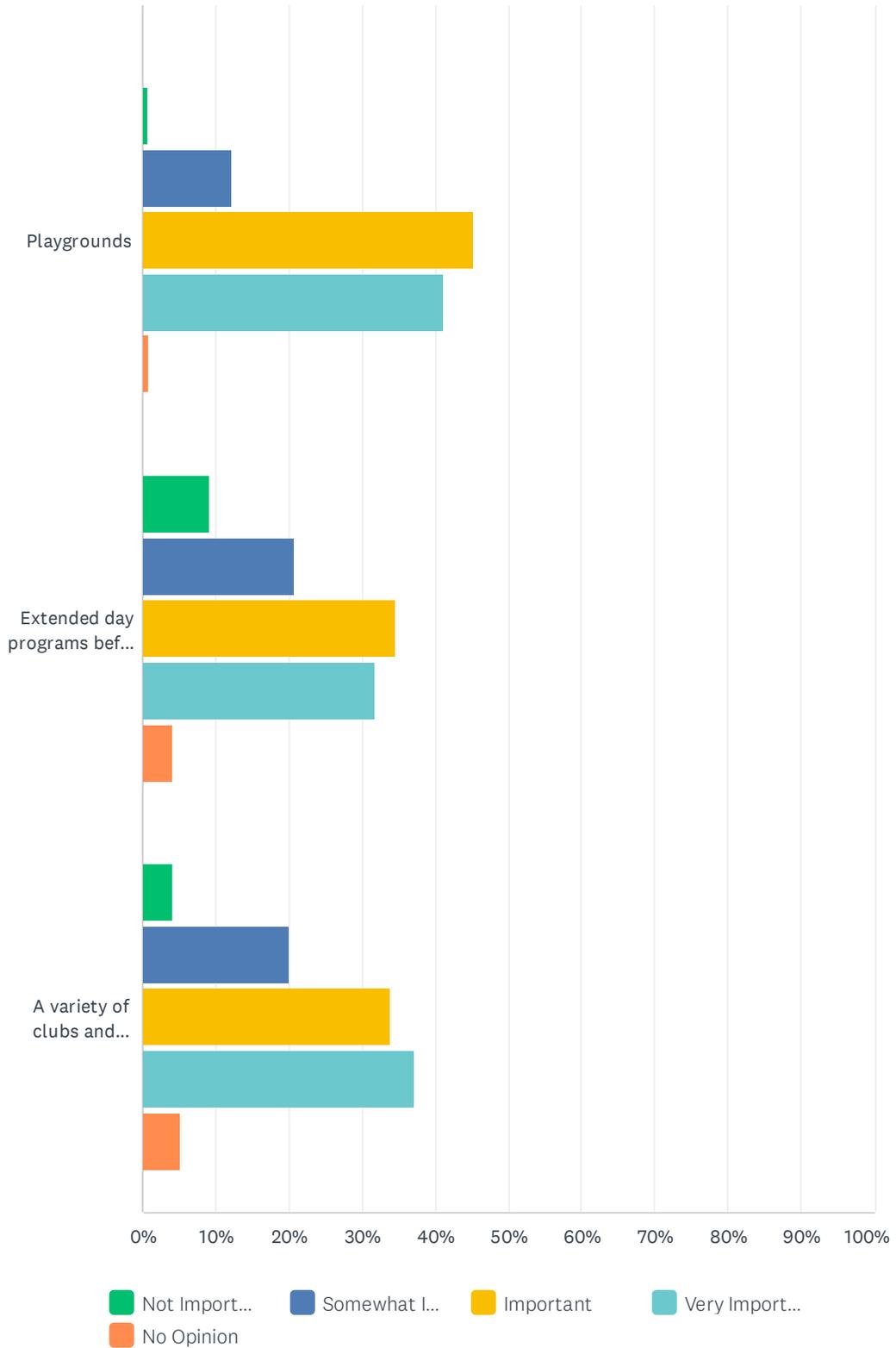
Mattapoissett School Consolidation Study Survey



Mattapoissett School Consolidation Study Survey



Mattapoissett School Consolidation Study Survey

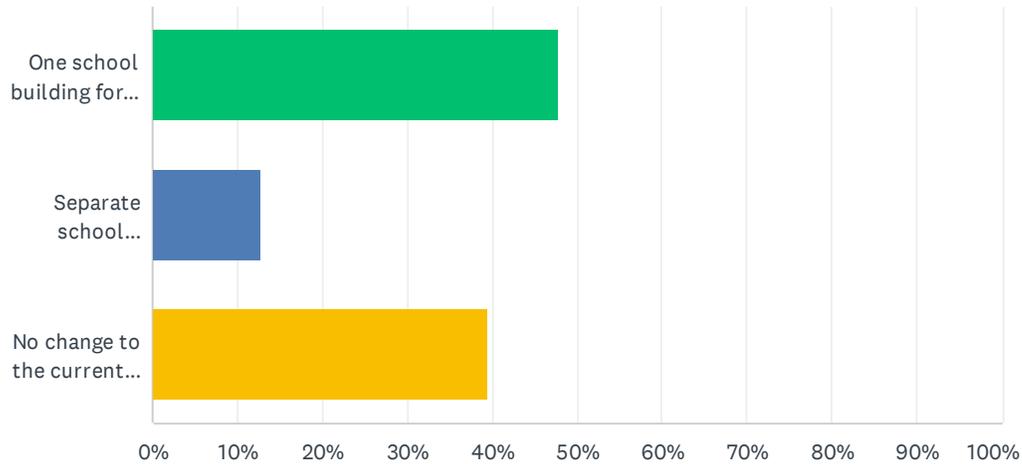


Mattapoissett School Consolidation Study Survey

	NOT IMPORTANT	SOMEWHAT IMPORTANT	IMPORTANT	VERY IMPORTANT	NO OPINION	TOTAL	WEIGHTED AVERAGE
Keeping educational costs to a minimum	18.07% 86	35.50% 169	27.73% 132	16.81% 80	1.89% 9	476	2.44
Travel time to my child's school	26.81% 126	24.26% 114	20.85% 98	11.49% 54	16.60% 78	470	2.20
Student/Teacher ratio	0.84% 4	6.50% 31	23.27% 111	68.13% 325	1.26% 6	477	3.61
Having multiple classroom/teacher options	5.66% 27	19.50% 93	34.59% 165	33.54% 160	6.71% 32	477	3.03
Age/condition of a school building	3.55% 17	24.01% 115	38.62% 185	32.78% 157	1.04% 5	479	3.02
Special education programming	2.31% 11	13.00% 62	27.25% 130	53.04% 253	4.40% 21	477	3.37
Spaces specifically designed for STEM/STEAM programming	2.31% 11	18.24% 87	36.27% 173	38.99% 186	4.19% 20	477	3.17
A school's instructional technology	1.46% 7	9.81% 47	37.58% 180	48.85% 234	2.30% 11	479	3.37
Music and performing arts programming	2.09% 10	8.56% 41	35.28% 169	53.03% 254	1.04% 5	479	3.41
Health and wellness programming	2.92% 14	13.57% 65	38.83% 186	43.42% 208	1.25% 6	479	3.24
Media and communications programming	3.37% 16	20.63% 98	44.21% 210	28.84% 137	2.95% 14	475	3.02
Athletic facilities and programming	3.55% 17	18.58% 89	42.17% 202	34.45% 165	1.25% 6	479	3.09
Playgrounds	0.63% 3	12.18% 58	45.17% 215	41.18% 196	0.84% 4	476	3.28
Extended day programs before and after school	9.24% 44	20.59% 98	34.45% 164	31.72% 151	3.99% 19	476	2.92
A variety of clubs and extracurricular activities for my child(ren) to choose from	3.97% 19	20.08% 96	33.89% 162	37.03% 177	5.02% 24	478	3.09

Q11 If school facilities were considered for reconfiguration, which model would you rather see?

Answered: 478 Skipped: 37



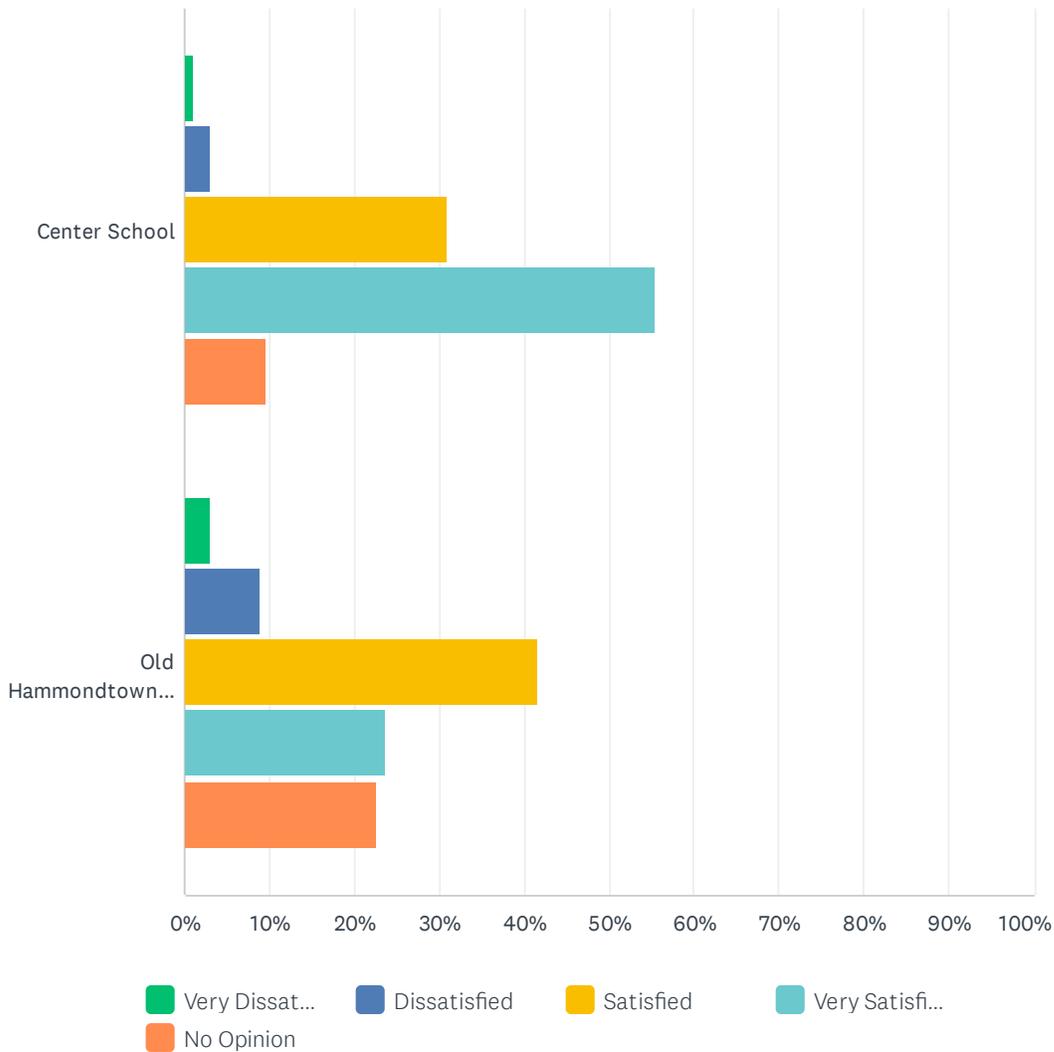
ANSWER CHOICES	RESPONSES	
One school building for grades Pre-K to 6	47.70%	228
Separate school buildings, but on a shared campus	12.76%	61
No change to the current school building configuration	39.54%	189
TOTAL		478

Q12 What is your opinion of a shared Pre-K through 6 facility?

Answered: 438 Skipped: 77

Q13 How would you rate your level of satisfaction with the general condition of the following Mattapoissett school facilities?

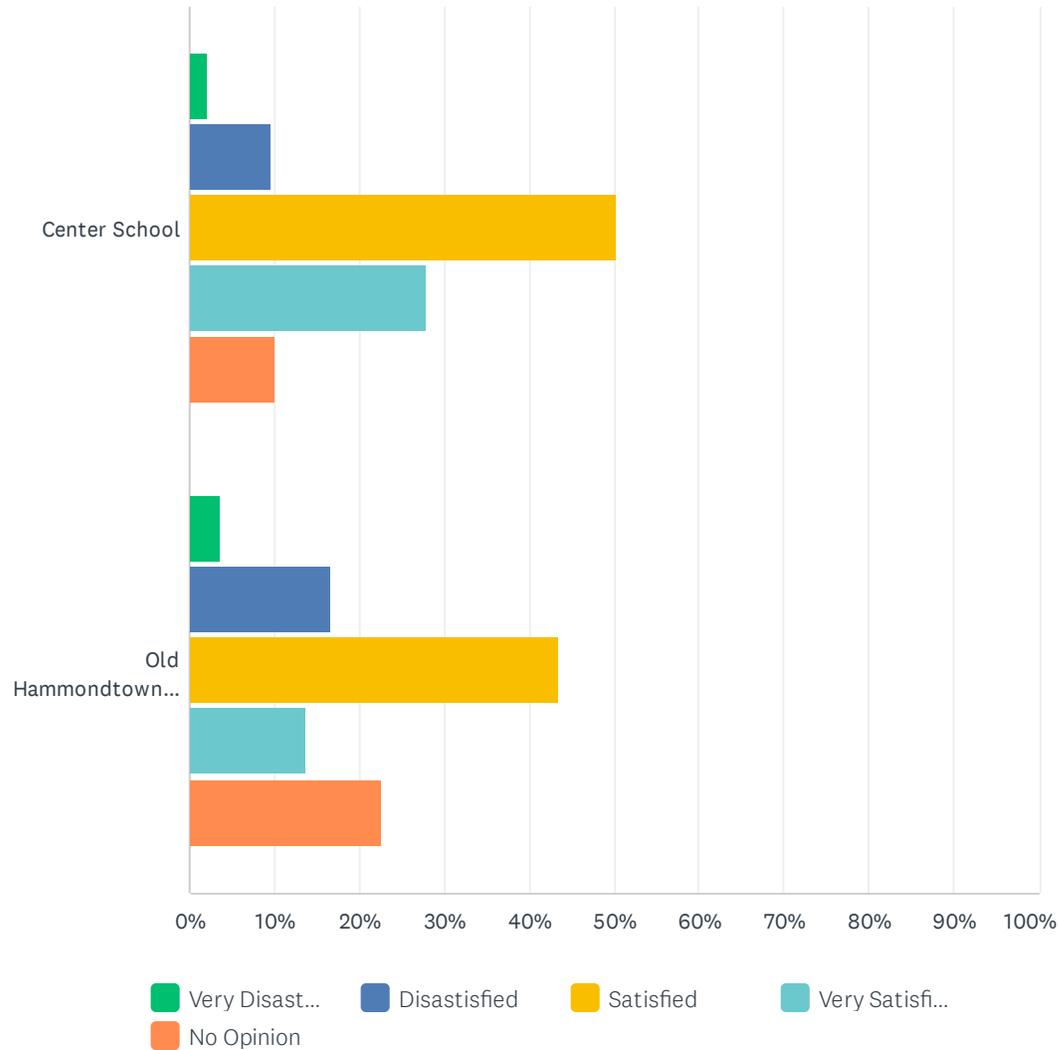
Answered: 480 Skipped: 35



	VERY DISSATISFIED	DISSATISFIED	SATISFIED	VERY SATISFIED	NO OPINION	TOTAL	WEIGHTED AVERAGE
Center School	1.06% 5	2.97% 14	31.00% 146	55.41% 261	9.55% 45	471	3.56
Old Hammondtown School	2.94% 14	9.03% 43	41.60% 198	23.74% 113	22.69% 108	476	3.11

Q14 How would you rate your level of satisfaction with the outdoor recreation and open spaces for the following Mattapoissett schools?

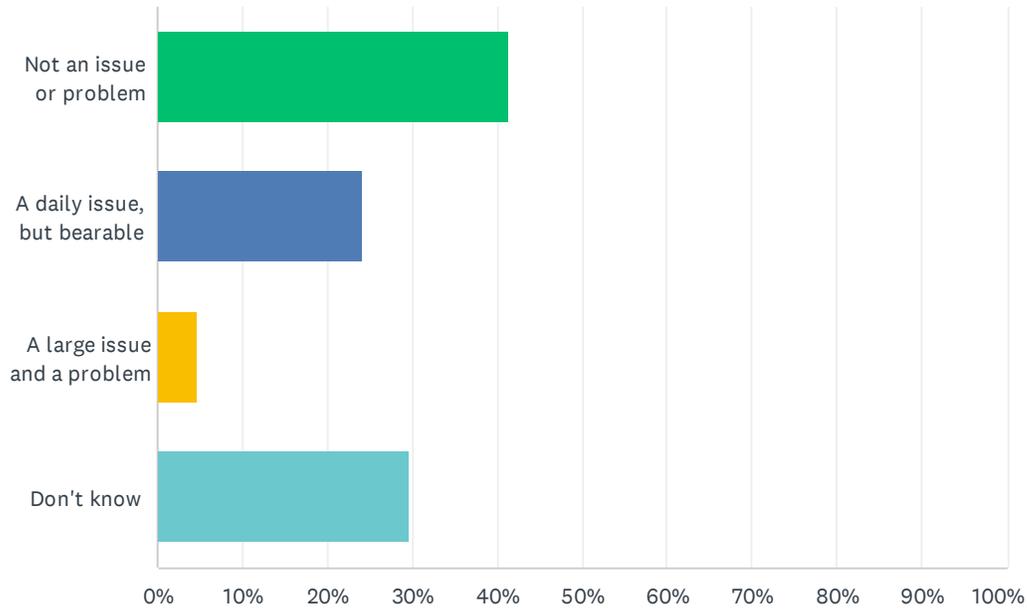
Answered: 478 Skipped: 37



	VERY DISASTISFIED	DISASTISFIED	SATISFIED	VERY SATISFIED	NO OPINION	TOTAL	WEIGHTED AVERAGE
Center School	2.12% 10	9.55% 45	50.32% 237	28.03% 132	9.98% 47	471	3.16
Old Hammondtown School	3.58% 17	16.63% 79	43.58% 207	13.68% 65	22.53% 107	475	2.87

Q15 How would you categorize current traffic congestion during arrival and dismissal periods at Center School?

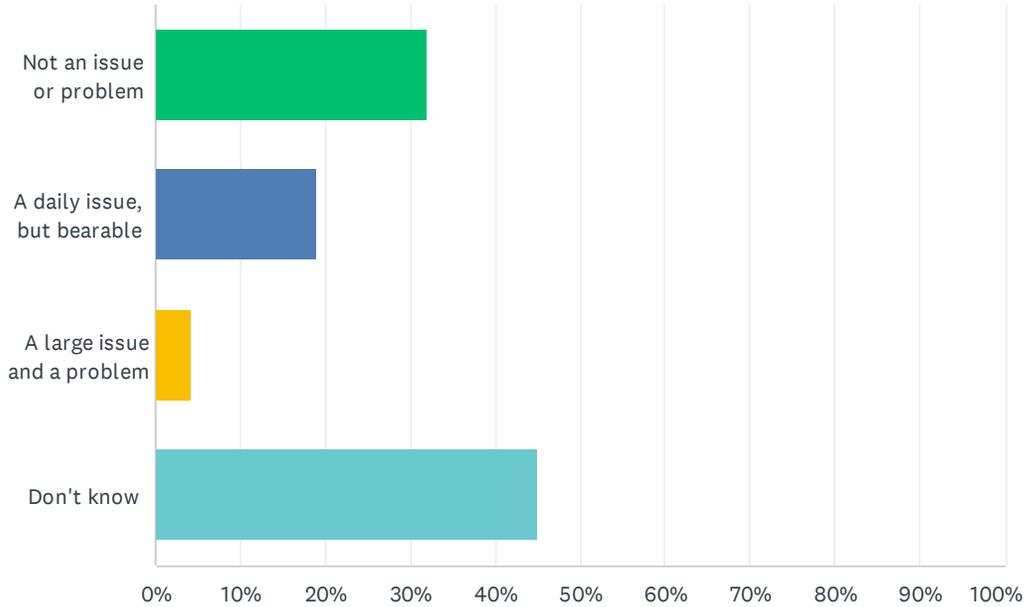
Answered: 480 Skipped: 35



ANSWER CHOICES	RESPONSES	
Not an issue or problem	41.46%	199
A daily issue, but bearable	24.17%	116
A large issue and a problem	4.79%	23
Don't know	29.58%	142
TOTAL		480

Q16 How would you categorize current traffic congestion during arrival and dismissal periods at Old Hammondtown School?

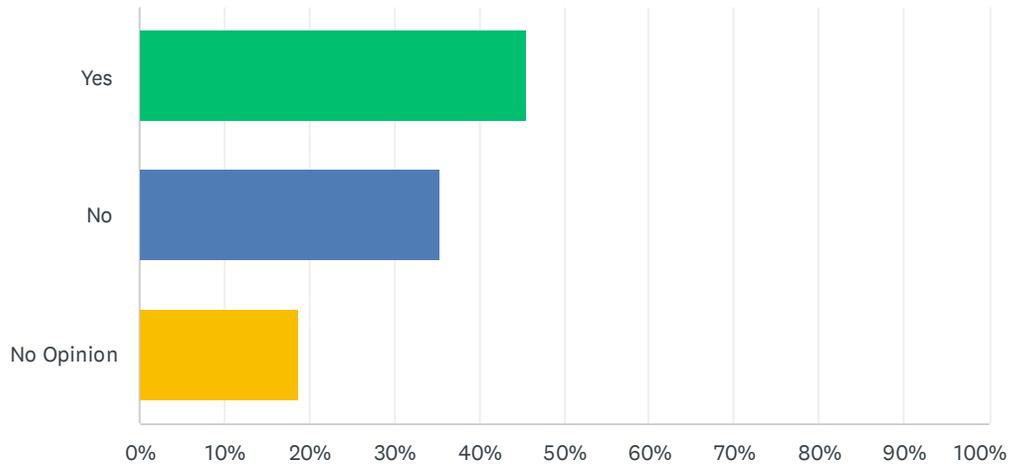
Answered: 479 Skipped: 36



ANSWER CHOICES	RESPONSES	
Not an issue or problem	31.94%	153
A daily issue, but bearable	19.00%	91
A large issue and a problem	4.18%	20
Don't know	44.89%	215
TOTAL		479

Q17 Center School currently houses other non-school related town services including the Council on Aging and the Recreation Department. Do you agree with sharing space with non-school related town services?

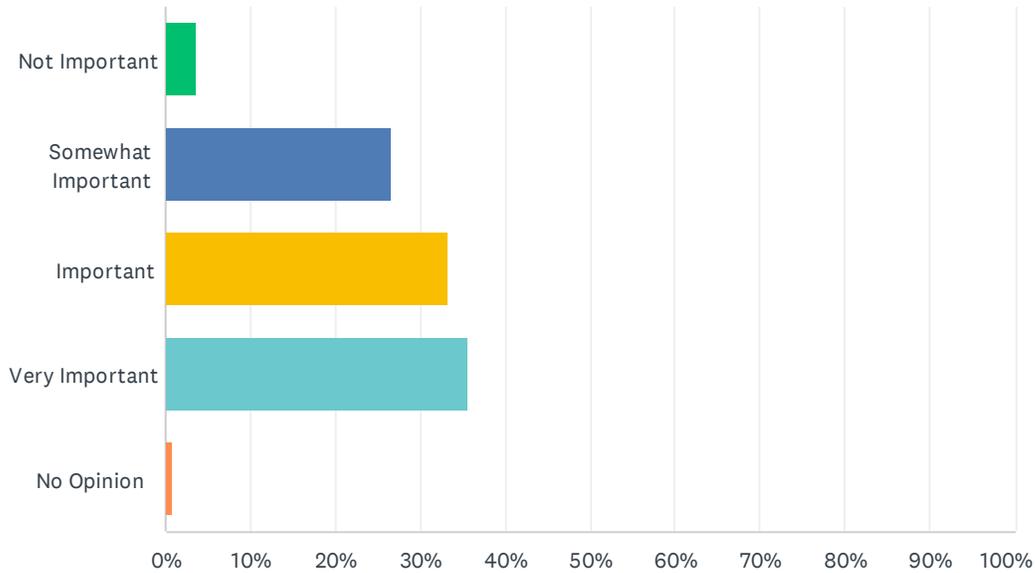
Answered: 479 Skipped: 36



ANSWER CHOICES	RESPONSES	
Yes	45.72%	219
No	35.49%	170
No Opinion	18.79%	90
TOTAL		479

Q18 How important is it to you that all school facilities in town are modern, up to date, and in excellent condition?

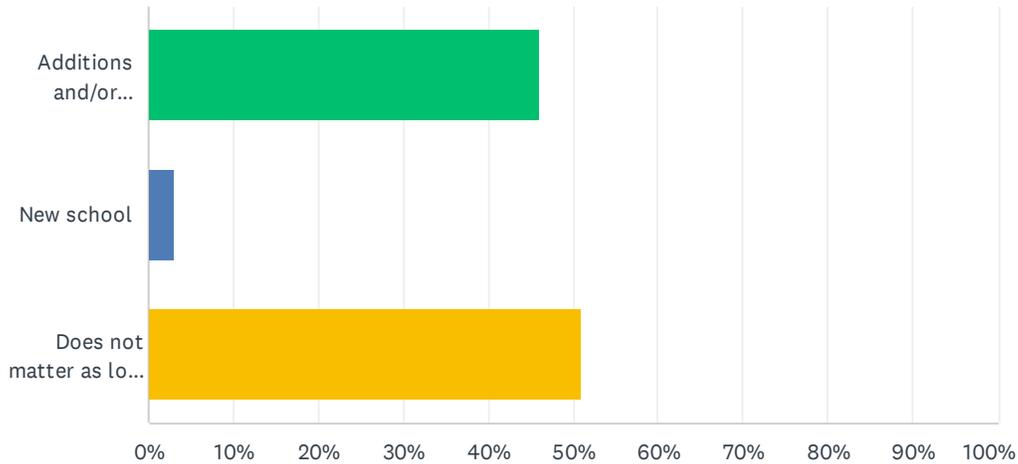
Answered: 479 Skipped: 36



ANSWER CHOICES	RESPONSES	
Not Important	3.55%	17
Somewhat Important	26.72%	128
Important	33.19%	159
Very Important	35.70%	171
No Opinion	0.84%	4
TOTAL		479

Q19 In planning for improvements to the physical condition of the Mattapoissett schools, what would you rather see?

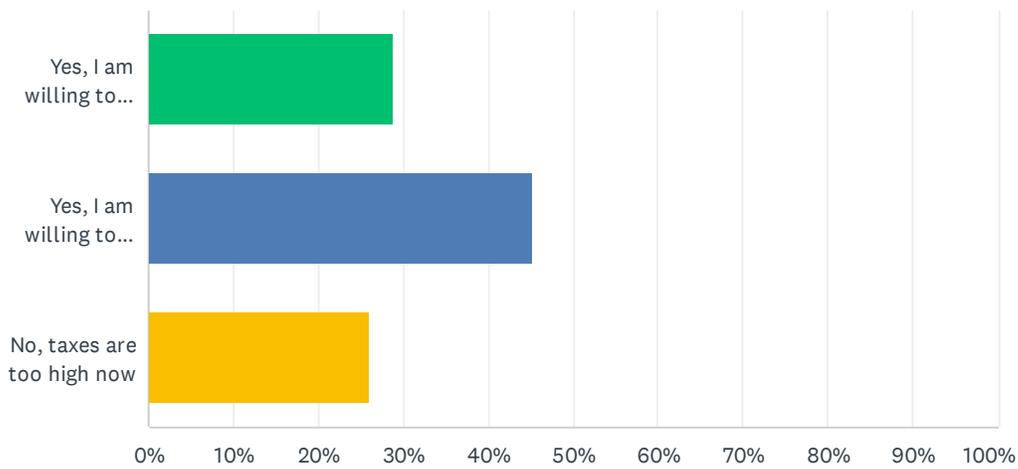
Answered: 478 Skipped: 37



ANSWER CHOICES	RESPONSES	
Additions and/or renovations	46.03%	220
New school	2.93%	14
Does not matter as long as needs are addressed	51.05%	244
TOTAL		478

Q20 The School District, alongside the Town, has need of capital improvements to maintain facilities. A school consolidation effort would likely require a major capital investment, such as an addition of space or renovation. These types of projects are typically funded by issuing debt, which is a long-term cost for residents that may or may not require additional tax revenue. Would you support a long-range capital improvement program to address the physical and educational needs of Mattapoissett students?

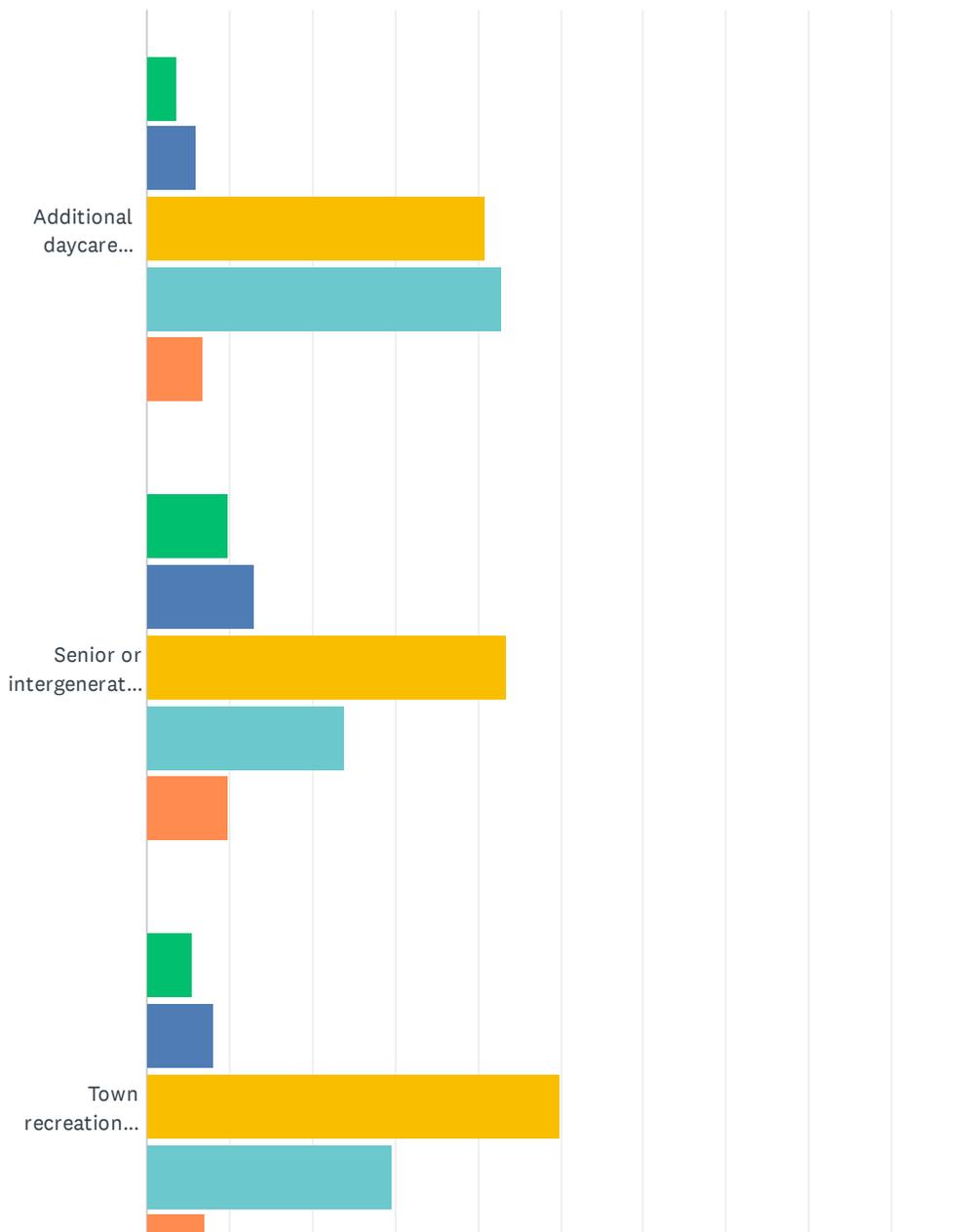
Answered: 466 Skipped: 49



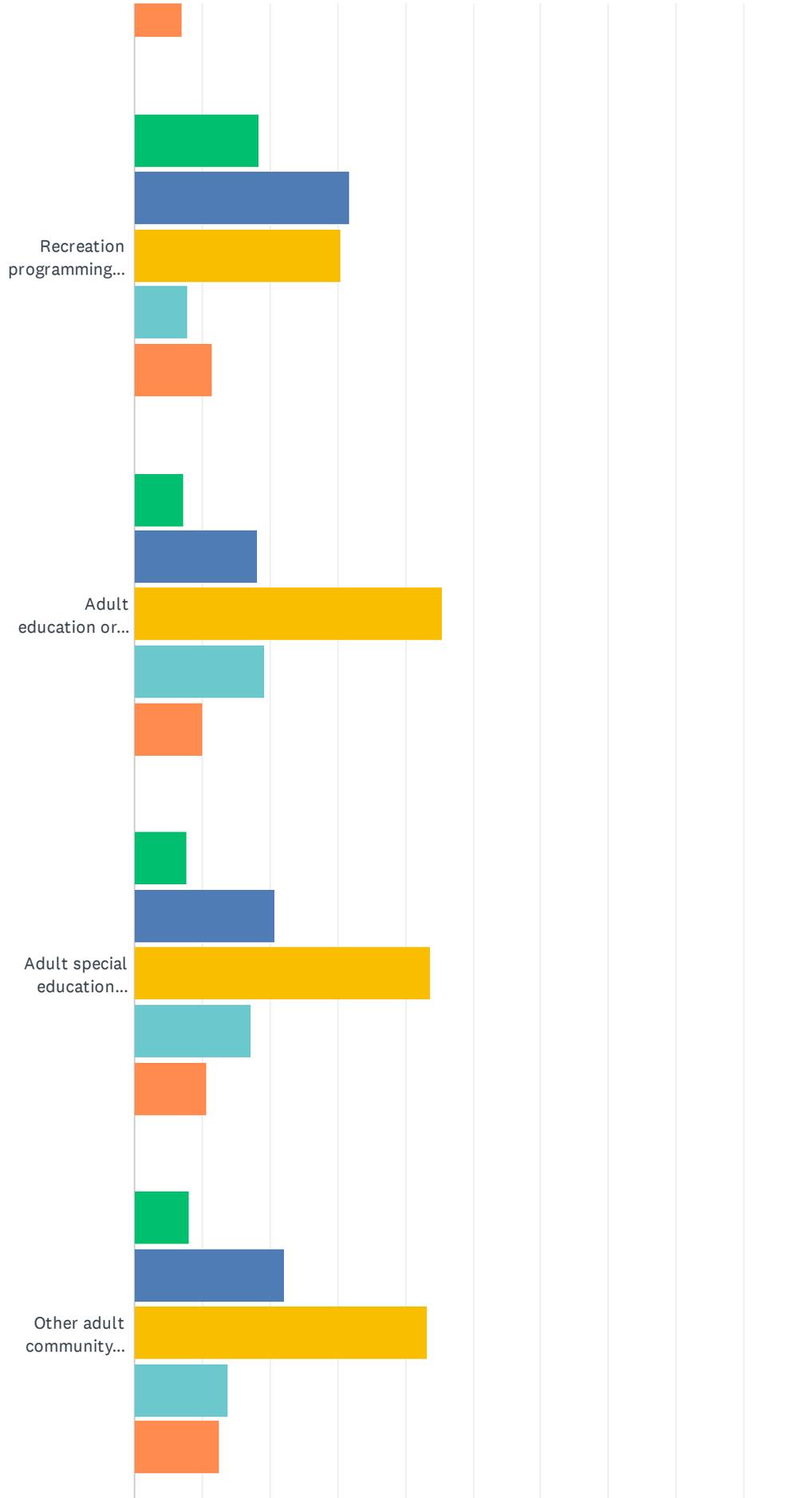
ANSWER CHOICES	RESPONSES
Yes, I am willing to support major capital projects to benefit the schools	28.76% 134
Yes, I am willing to support major capital projects, but they must have a phased approach to mitigate the tax impact	45.28% 211
No, taxes are too high now	25.97% 121
TOTAL	466

Q21 Schools are a focal point for a town, a source of local pride, and can be an important asset for residents without school-aged children. Many communities lease excess physical capacity to subsidize operating costs or meet other community needs. Mattapoissett utilizes space within Center School for the Council on Aging and the Recreation Department as well as leases space to a special education collaborative. Provided these and other services could be accommodated without sacrificing safety and security, how supportive would you be of spaces at current school facilities being used for:

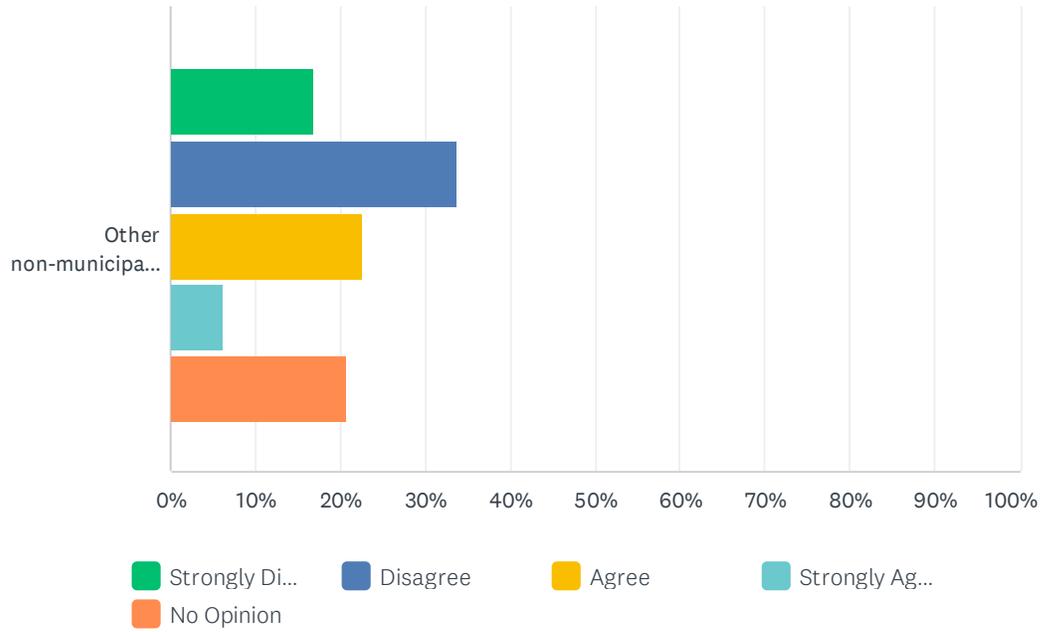
Answered: 479 Skipped: 36



Mattapoissett School Consolidation Study Survey



Mattapoissett School Consolidation Study Survey



	STRONGLY DISAGREE	DISAGREE	AGREE	STRONGLY AGREE	NO OPINION	TOTAL	WEIGHTED AVERAGE
Additional daycare programming, including before and after school care	3.56% 17	5.87% 28	40.88% 195	42.77% 204	6.92% 33	477	3.32
Senior or intergenerational programming	9.83% 47	12.97% 62	43.51% 208	23.85% 114	9.83% 47	478	2.90
Town recreation programming	5.46% 26	8.19% 39	49.79% 237	29.62% 141	6.93% 33	476	3.11
Recreation programming from non-town entities (for example, private leagues)	18.28% 87	31.72% 151	30.46% 145	7.98% 38	11.55% 55	476	2.32
Adult education or community education programming	7.17% 34	18.14% 86	45.36% 215	19.20% 91	10.13% 48	474	2.85
Adult special education programming	7.58% 36	20.63% 98	43.79% 208	17.26% 82	10.74% 51	475	2.79
Other adult community programming	8.02% 38	22.15% 105	43.25% 205	13.92% 66	12.66% 60	474	2.72
Other non-municipal use	16.88% 80	33.76% 160	22.57% 107	6.12% 29	20.68% 98	474	2.23

Q22 Is there anything else you would like the Town and District to know as they consider alternatives to space utilization and school consolidation?

Answered: 337 Skipped: 178

Appendix E4: Town Handout for Public Engagement Sessions

Town of Mattapoissett - Important Capital Projects

Public Forums on School Consolidation – 11/2/2022

Source: Town of Mattapoissett, M. Lorencio, Town Administrator

Highway Barn Renovation \$4,000,000

The Town has engineered plans to do a renovation to the Town’s Highway Building. The building currently doesn’t meet current building code standards and is in disrepair in several areas. It needs a new roof, proper floor drainage in the garage bay, and a fire suppression system (currently has no system) to name a few issues. The Town received a professional estimate of just below \$4,000,000 for the necessary renovation. The building hasn’t had any significant updates since 1983.

Long Wharf \$ 12,000,000

The Town is in the process of developing engineered plans for the renovation of “Long Wharf” in the Mattapoissett Harbor (Mattapoissett has 5 public wharves). Long Wharf was constructed in the 1800s, when Mattapoissett was the center of a thriving shipbuilding industry. The Wharf has had minor repairs since its construction but is currently in a state where significant repairs are needed to maintain the integrity of the structure. \$12 million is a professional estimate from the engineer.

Town Hall \$ 10,000,000 +

The Mattapoissett Town Hall is reaching the end of its useful life. The building has served the Town for over 100 years. The building is in a FEMA Flood Zone and therefore any significant repairs will likely result in the requirement to elevate the building, which isn’t considered fiscally viable. The Capital Planning Committee has a “placeholder” cost of \$15,000,000 to build a new Town Hall, but the true cost is unknown. However, given the cost of similar structures in other communities, it is safe to assume a cost above \$10 million.

Roads/Culverts \$ 250,000 Annually

The Town of Mattapoissett has several roads, culverts, and bridges with deferred maintenance due to lack of funding. The Town receives approximately \$260,000 annually from Chapter 90, but when the cost of paving a mile of roadway is approximately \$140,000, clearly more funding is needed. Mattapoissett also has several culverts and bridges (coastal community with several wetlands) that will need to be addressed in the coming years as well. Town Administration would like to allocate \$250,000 annually to tackle roadway maintenance. Deferred maintenance will only increase the cost of roadway repairs. This does not include the cost of major roadway projects (including reconstruction of Village Roads, Molly’s Cove Replacement, etc.).

Maintenance to Town Buildings

The Police Department Building is over 30 years old and although it is still in very good shape, maintenance will be required to ensure it will continue to function properly. The Town Library is also in need of several repairs and maintenance (roof restoration, carpet replacement, outdoor lighting, etc.). The Harbormaster building will require renovation soon and the Town is considering renovation ideas for the Holy Ghost property.

Mattapoisett Bike Path

The Town is continuing to engineer and construct the Mattapoisett Bike Path. The Town still has several miles to complete in order to connect the pathway from the Depot Street Parking lot to the Industrial Drive Connector. Although, the Town is trying to complete this section of the pathway with the use of little to no Town funding, it is possible that some investment from the community may be necessary.

Miscellaneous (Vehicles, Equipment, IT Upgrades)

This category includes all other capital expenses which the Town needs to plan for annually. Periodic replacement of vehicles (police cruisers, fire engines, plow trucks, etc.) are required to ensure the Town can continue to maintain a proper level of service to the community. The Town also has several pieces of equipment that need replacement including public safety radio consoles, ambulance stretchers, thermal imaging cameras for the Fire Department and essential and necessary IT upgrades for the Town Hall, Police Department and Highway Department.

School Construction & Maintenance

- **Vocational Schools Bristol Aggie & Old Colony**

The Town is paying for debt related to the cost of a \$104 million building project at the Bristol County Agricultural High School and Old Colony Regional Vocational School (which Mattapoisett is a member community) has submitted a statement of interest to the MSBA with the hopes of moving forward with a reconstruction project of their own.

- **Old Hammondtown, Center School, Old Rochester Regional School**

The debt for the renovations of these three schools is expiring in the coming years. This may signal the need for projects to repair, improve and renovate the current infrastructure. The Town has already made significant investments to repair HVAC control systems at Old Hammondtown and Center School in the previous year, which helps to signal that these aging infrastructures will need some monetary investment soon.

Massachusetts School Building Authority

Timothy P. Cahill
Chairman, State Treasurer

Katherine P. Craven
Executive Director

Bulletin 07-01

School Closings, Sales, Leases or Other Removal From Service.

Scope: This bulletin is intended to provide guidance to cities and towns and school districts (collectively "Districts") with respect to closing or otherwise removing school facilities from service. In particular, this bulletin will discuss: (a) how the removal from service of a school facility might affect any pending or subsequent grant applications to the Massachusetts School Building Authority ("the Authority"); (b) the calculation and enforcements of amounts owed to the Authority pursuant to M.G.L. c. 70B and 910 CMR 2.00 as a result of removal from service; and (c) notice and other procedural requirements in connection with closing or otherwise removing a school from service.

Executive Summary: Although Districts may have valid reasons for school reconfigurations, the Authority's grant monies are finite and must be awarded in accordance with clear statutory priorities. Accordingly, as described below, Districts that have closed school buildings within ten years may be ineligible for Authority assistance, and in any event will likely be at a disadvantage vis-a-vis other Districts in the competition for Authority resources. **(See §I (A) and (B))**

The Authority expects that eligibility issues will be determined in connection with its review of a District's Statement of Interest ("SOI"). Although Districts should not hesitate to submit SOIs for all proposals, not all proposals will advance to the formal application stage. **(See §I (C))**

Further, when contemplating the removal of a facility from service, Districts should conform to the procedures described below so as to ensure eligibility for future applications. Although a proposal for a new project will be reviewed at the SOI stage, certain notice and compensation requirements are triggered earlier, beginning at the time a District proposes to remove a school from service. **(See §II, III)**

I. Removal of A School Facility From Service and Eligibility for Authority Grant Applications.

(A) Statutory and Regulatory Provisions.

M.G.L. c. 70B and 963 CMR 2.00 make ineligible any application for a grant whose purpose is to replace a schoolhouse sold, leased or otherwise removed from service in the past ten years. Such an application may only be considered if the Authority determines that the need for the facility covered by the proposed grant could not have reasonably been anticipated at the time that such schoolhouse was removed from service. Thus, the removal of a school facility, for whatever reason, means a subsequent application may not even be eligible for consideration.

This statutory prohibition raises two issues for potential applicants: (1) does the proposed project in fact replace the school facility removed from service, and (2) was the need for the new school facility reasonably anticipated at the time of the removal from service?

Whether a new facility is replacing a facility removed from service may be obvious in some cases but in others less so. Certainly, closing a facility cannot create a contemporaneous or foreseeable need for a new facility or even new construction. In the Commonwealth's very largest cities, however, a proposed new school may not be replacing a school removed from service if the school-aged population has migrated to the area in which the new project is proposed (and the older school is geographically distant from any student population). In most cases, however, if students could have been educated in a facility removed from service and are now proposed to be educated in a new facility, then the Authority will likely find the proposed facility replaces the facility removed from service.

With respect to the question of reasonable anticipation, note that 963 CMR 2.21(1) requires Districts to notify the Authority prior to removal from service and to provide a significant amount of information intended to show that at the time of closing there will not be any anticipated need for a new facility as a result of the closing. (The process for providing this information is described below at Section III.) While either enrollment patterns or existing facilities may change unexpectedly during ten years, the need for a new facility cannot be apparent from the outset.

As more fully described below (See I(C)), the Authority will review both questions subsequent to the submission of the SOI based on the submitted SOI and supporting documents as well as the Authority's fact finding. Also, separately, Districts should review the process associated with removal of a facility from service as described below (Section III). These steps may be necessary years in advance of the submission of an SOI and are mandatory for Districts in order to remain eligible for Authority grants.

(B) Prioritization of Projects.

Applicants should also be aware that even if the removal from service of a facility does not render an application ineligible, it might make the application less competitive given the nature of the Authority's grant program. The limit on total facilities grants for fiscal year 2008 is \$500,000,000. Although a large sum, it is finite, especially given the costs of individual projects. Thus, not every application, even if eligible, will be awarded a grant in a given year.

The Legislature has required the Authority to prioritize the award of grants pursuant to statutory standards. Specifically, section eight of c. 70B establishes an order of priorities for the grant program. Applicants should review those priorities, but their focus is to ameliorate safety issues, to ameliorate existing, expected or short term overcrowding and to prevent loss of accreditation. While school districts and eligible applicants may have many good reasons for reconfiguring schools, those reasons may not mesh with the statutorily created priorities and care should be taken not to create a situation which does not compete favorably. Specifically, reconfiguration, including some new construction, to realize operational savings does not, on its own, constitute a high priority rationale.¹

Chapter 70B § 15(d) does provide that these ineligibility provisions might not apply, at the discretion of the Authority, if the sale or lease of a facility removed from service is for "non profit public purposes." In connection with submitted SOI's, the Authority will evaluate every sale or changed use of a facility, but given the nature of the program, the use of the removed facility for a public purpose will not automatically render eligible a proposal for a new facility.

(C) Process for Evaluating Applications in Light of Earlier School Closings.

The Authority's application process is best described in 963 CMR. In particular, §§2.09 and 2.10 describe the process for the submissions and review of SOI's and, if appropriate, the more formal application process. The SOI process, described at both 963 CMR 2.09 and the Authority's web site (www.massschoolbuildings.org), calls for the submission of materials that would demonstrate the District's needs under the statutory priorities. A District submitting an SOI that has closed or removed a school from service will have an opportunity to discuss its decision during the SOI process, but c. 70B § 15, 963 CMR 2.09(3) and (5), and 963 CMR 2.10 (2)(b) all create the presumption that an application following a facility's removal from service, will be ineligible.

As the Authority describes in the SOI forms, the grant process will require a collaborative review of a District's needs. Thus, once an SOI is submitted, the Authority will work closely with the District to identify deficiencies remediable through the Authority's grant

¹ We do note that pursuant to c. 70B § 8, priority number five in the Order of priorities is for "projects needed in the judgment of said authority for the replacement renovation, or modernization of the heating system in any school house to increase energy conservation and decrease energy related costs in said schoolhouse."

program. The Authority will review projected enrollments, the District's master plan, and the state of the school facilities. In particular, the Authority may undertake a Facilities Assessment to understand fully the deficiencies identified in the report. The Facilities Assessment will review the state of existing facilities and historical maintenance levels.

At the conclusion of the SOI process, the Authority will determine whether to invite a District to submit a formal application. At this point, the Authority will make eligibility determinations based on what it has learned, including whether the proposed facility replaces one removed from service in the preceding ten years.

(In addition to the SOI process, Districts must comply with notice and process requirements of 963 CMR 2.21 when contemplating removing a facility from service. Those requirements may well be triggered in advance of the SOI and are described below at Section III).

II. Calculations of Amounts Owed the Authority as a Result of Removal From Service.

(A) Calculation

In addition to the effect removal from service may have on the application process, 70B also provides that the Authority is entitled to certain sums in connection with any sale or lease of the facility removed from service. In particular, section 15(a) provides that "net proceeds from the sale or lease shall be divided between the commonwealth and the general funds of the applicable eligible applicant in proportion to the commonwealth's prior investment in the assisted structure or facility..." In addition, "[t]he authority may issue regulations to recapture commonwealth assistance for capital construction for any approved school facilities projects for school buildings that are removed from service". 963 CMR 2.21 further requires that the sale or lease of a facility may be for no less than fair market value.

In essence, the Authority will require the District to first use the proceeds to pay off the bondholders and the Authority will terminate any remaining grant assistance payments. The remaining proceeds will be divided between the Commonwealth and the District in proportion to the Commonwealth's prior investment. If the proceeds from any sale or lease are less than the amount needed to repay the debt, the District shall make future debt payments out of the proceeds, but the Authority's grant assistance payments shall terminate.

(B) Enforcement

For pre 2004 school buildings, c. 70B section 15(b) requires that outstanding grant payments, after reduction reflecting allocation of proceeds from a sold or leased building shall be deducted from the town or district's "cherry sheet." Moreover, c. 70B authorizes the authority to develop rules to recapture commonwealth investment in schools removed from service. The Authority has a local aid intercept authority and will use that

mechanism unless a satisfactory agreement is reached with respect to any proceeds. Going forward, the Authority anticipates that it will require applicants to pay all amounts owed to the Commonwealth under section 15, before additional grant applications will be processed.

III. Procedures for Removing Schools from Service.

Both 70B and 963 CMR 2.21 establish rules for notice and process when removing schools from service. Following these rules are crucial for Districts to ensure eligibility for future Authority grants. The notice and process provisions are intended to ensure that: (1) a Districts understand the full ramifications of removing a school from service (and allows a District an opportunity to establish that new school construction was not anticipated at the time of a school closing), and (2) proper calculations can be made and agreements entered into, to reimburse the Authority for its contributions to the facility. Failure to comply will jeopardize a District eligibility of future grants.

Districts must comply with the following timeline:

- Notification to Authority of intent to remove facility from service at least six months before intended removal date.
 - Because this notice, and any subsequent closure, triggers a formal process with respect to Commonwealth recoupment of funds, and because it will determine eligibility of pending or future applications, the notice must be submitted in the same manner as a SOI, i.e., signed by; (1) the local Chief Executive Officer, (2) the Chairperson of the School Committee and (3) the Superintendent.
 - Although the Authority will continue to try to provide informal guidance to districts at all times, for purposes of statutory and regulatory compliance, inquiries or other informal letters will not satisfy the Authority's notice requirements.
- In addition to a formal notice signed as above, Districts must include:
 - a plan for accommodating any displaced school programs and services;
 - a plan for accommodating district students within the remaining school buildings, as a result of the sale, lease or removal from service of said school facility;
 - a long-range plan for accommodating district students based on the Authority's Enrollment Projections;
 - any future plans for the sale or lease of property under control of the school district; and
 - any future plans for the construction, renovation, addition or lease of school facilities in the school district.

- Districts must thereafter cooperate in a final audit to determine the cost of the facility to be removed.
- The Authority will arrange for an appraisal to be performed to determine fair market value of facility.
- Authority and District enter into agreement for repayment of commonwealth funds.

As stated above, the Notice obligations accrue when a District intends to remove a school from service and are independent of the SOI and application projects. While school closings may be part of a proposed reconfiguration, often they are not, and Districts should have these notification requirements in mind.

Issued May _____, 2007

Massachusetts Cultural Resource Information System

Scanned Record Cover Page

Inventory No:	MAT.342
Historic Name:	Center School - Mattapoisset School
Common Name:	Mattapoisset Senior Center - Elementary School
Address:	17 Barstow St
City/Town:	Mattapoisset
Village/Neighborhood:	Mattapoisset;
Local No:	
Year Constructed:	1898
Architectural Style(s):	English Revival;
Architect(s):	Brigham, Charles A.; Thomas, Seth Clock Company;
Use(s):	Community Center; Library; Public School;
Significance:	Architecture; Community Planning; Education; Music;
Area(s):	MAT.C
Designation(s):	
Building Materials:	Roof: Asphalt Shingle; Wall: Brick; Cast Concrete; Copper; Half Timbering; Wood; Foundation: Granite; Stone, Cut;
Demolished	No



The Massachusetts Historical Commission (MHC) has converted this paper record to digital format as part of ongoing projects to scan records of the Inventory of Historic Assets of the Commonwealth and National Register of Historic Places nominations for Massachusetts. Efforts are ongoing and not all inventory or National Register records related to this resource may be available in digital format at this time.

The MACRIS database and scanned files are highly dynamic; new information is added daily and both database records and related scanned files may be updated as new information is incorporated into MHC files. Users should note that there may be a considerable lag time between the receipt of new or updated records by MHC and the appearance of related information in MACRIS. Users should also note that not all source materials for the MACRIS database are made available as scanned images. Users may consult the records, files and maps available in MHC's public research area at its offices at the State Archives Building, 220 Morrissey Boulevard, Boston, open M-F, 9-5.

Users of this digital material acknowledge that they have read and understood the MACRIS Information and Disclaimer (<http://mhc-macris.net/macrisdisclaimer.htm>)

Data available via the MACRIS web interface, and associated scanned files are for information purposes only. THE ACT OF CHECKING THIS DATABASE AND ASSOCIATED SCANNED FILES DOES NOT SUBSTITUTE FOR COMPLIANCE WITH APPLICABLE LOCAL, STATE OR FEDERAL LAWS AND REGULATIONS. IF YOU ARE REPRESENTING A DEVELOPER AND/OR A PROPOSED PROJECT THAT WILL REQUIRE A PERMIT, LICENSE OR FUNDING FROM ANY STATE OR FEDERAL AGENCY YOU MUST SUBMIT A PROJECT NOTIFICATION FORM TO MHC FOR MHC'S REVIEW AND COMMENT. You can obtain a copy of a PNF through the MHC web site (www.sec.state.ma.us/mhc) under the subject heading "MHC Forms."

Commonwealth of Massachusetts
Massachusetts Historical Commission
220 Morrissey Boulevard, Boston, Massachusetts 02125
www.sec.state.ma.us/mhc

This file was accessed on: Friday, February 24, 2023 at 12:15 PM

FORM B – BUILDING

MASSACHUSETTS HISTORICAL COMMISSION
MASSACHUSETTS ARCHIVES BUILDING
220 MORRISSEY BOULEVARD
BOSTON, MASSACHUSETTS 02125

Assessor's Number USGS Quad Area(s) Form Number

009.0-0000-028-0

MAT.C

MAT.342

Town/City: Mattapoisett

Place: Mattapoisett Village

Photograph



Address: 17 Barstow Street

Historic Name: Mattapoisett School

Uses: Present: Senior Center/Elementary School

Original: Public School

Date of Construction: 1898

Source: Mattapoisett Town Meeting Minutes: 1897-1902

Style/Form: Tudor

Architect/Builder: Charles Brigham

Exterior Material:

Foundation: Granite

Wall/Trim: Brick/Wood

Roof: Asphalt. Shingle

Outbuildings/Secondary Structures: N/A

Major Alterations (with dates): 1980: Slate roof removed. Replaced with asphalt shingle.
2004: Addition

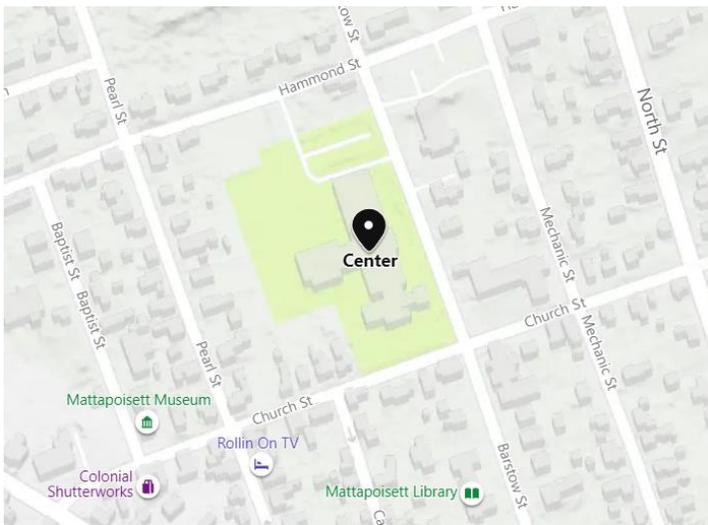
Condition: Excellent

Moved: no yes **Date:**

Acreage: 5.0 acres

Setting: Mattapoisett Village

Locus Map



Recorded by: Rachel McGourthy

Organization: Mattapoisett Historical Commission

Date: August 2021

RECEIVED
AU

MASS. HIST. COMM.

INVENTORY FORM B CONTINUATION SHEET

MATTAPOISETT

17 BARSTOW ST

MASSACHUSETTS HISTORICAL COMMISSION

Area(s) Form No.

220 MORRISSEY BOULEVARD, BOSTON, MASSACHUSETTS 02125

MAT.C

MAT.342

Recommended for listing in the National Register of Historic Places.

If checked, you must attach a completed National Register Criteria Statement form.

Use as much space as necessary to complete the following entries, allowing text to flow onto additional continuation sheets.

ARCHITECTURAL DESCRIPTION:

Describe architectural features. Evaluate the characteristics of this building in terms of other buildings within the community.

The building is built in the Tudor style. It is adorned with 14 Jester Masques molded in concrete and positioned to observe the generations of children who passed through the doors. The faces are smiling and winking. There is a copper finial on the clock tower. Beautiful woodwork and wainscoting remain preserved throughout the interior of the building. There are proscenium arches throughout, most prominently in the music room. There is a magnificent clock tower which houses a Seth Thomas clock. The four sided clock is visible throughout Mattapoisett Village and continues to ring out on the hour. An ornate weathervane adorns the top of the tower.

HISTORICAL NARRATIVE

Discuss the history of the building. Explain its associations with local (or state) history. Include uses of the building, and the role(s) the owners/occupants played within the community.

The Center School Building (Mattapoisett School) was donated by Henry Huttleston Rogers, the oil tycoon-philanthropist from Fairhaven, Ma. Mr. Rogers had spent time in Mattapoisett as a child. He and his wife attended the dedication of the new Mattapoisett Town Hall in 1897, and on returning home he said to his wife: "I've a good mind to build a school for Mattapoisett." Her reply was: "Why don't you do it?" (Lopes: 1992) On October 27, 1897 at a special Town Meeting it was voted to purchase a lot at the corner of Barstow and Church Streets "to erect a schoolhouse two stories high with a clock and all the modern improvements and second to none in the state so far as convenience and sanitation were concerned." (Minutes of Special Town Meeting Wednesday, October 27, 1897.) Mr. Rogers engaged the architect, Charles Brigham of Watertown to design the school. Mr. Brigham has designed 69 buildings which are on the National Historic Register. Among his designs are the original Museum of Fine Arts and The First Church of Christ, Scientist in Boston.

The Mattapoisett School was dedicated in January of 1899. It served to educate students in grades 1-12 until 1905 when Mr. Rogers donated a new high school in Fairhaven, Ma. (Also designed by Charles Brigham and placed on the National Historic Register in 1981.) Mr. Rogers directed the new Fairhaven High School be free to all Mattapoisett high school age children. In 1962 Mattapoisett built its own high school.

There were two small additions to the original building. A six room addition was added in 1936 and in 1950 a cafeteria and kitchen were added. A major addition was added in 2004 to house grades kindergarten to three. The original building maintained its integrity during the additions and the architectural design has not been altered. One of the original classrooms still contains a blackboard with a world history outline which is encased in glass, and the Music Room on the second floor continues in its original function for music lessons for the school children. Throughout the years the school has served as the site of many political and cultural presentations and has been designated as a storm shelter and a town disaster management center. The School housed the Mattapoisett Free Public Library from 2006-2008 while the town library was undergoing expansion. In 2008 the Council on Aging moved into the original Mattapoisett (Center School) building.

INVENTORY FORM B CONTINUATION SHEET

MATTAPOISETT

17 BARSTOW ST

MASSACHUSETTS HISTORICAL COMMISSION

Area(s) Form No.

220 MORRISSEY BOULEVARD, BOSTON, MASSACHUSETTS 02125

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MAT.342

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Center School 1898 (Mattapoissett Historical Society)



Center School Addition 2004