

# FY23 Submission: Massasoit Community College - Science, Nursing and Allied Health Renovations

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## Major Project Capital Request - FY23 Funding

### Instructions

#### Final Submission:

- Due December 23, 2021
- Required information as noted

### Summary Application Information

\* Denotes required fields

#### Linked 23 Applicants

(untitled)

#### Submitting Institution Name

Massasoit Community College

#### Partner Institution(s)

No

#### Project Name

Science, Nursing and Allied Health Renovations

### Required Attachments

#### Major Project Capital Request Form

MassasoitCommunityCollege\_FY23 MPCR-FINAL.pdf

#### Board of Trustees Support

Board Approval FY23 Major Capital Project Funding.pdf

#### Memorandum of Understanding (partnerships)

Massasoit\_MOUs.pdf

#### Commitment Letters (funding)

Funding Sources\_Massasoit.pdf

### Optional Attachments

Please note that "optional additional" information will serve as back-up information and will be consulted by the evaluation committee only as needed. Complete studies should not be included and information should be limited to 10 pages.

#### General Additional Information

BOT\_10-20-21\_Presentation\_Final.pdf

#### Preliminary Project Schedule

Prelim Project Schedule\_Massasoit.pdf

#### Cost Estimate

### Electronic Signature

Please note that your eSignature on the following is the electronic equivalent of a hand-written, original signature, and is authentic for all purposes to the full extent of the law.

#### Signature of Institution President or Chancellor

Ray DiPasquale

**Title**

President

**Date**

12/22/2021

## Saving Submission For Further Editing

To save for subsequent access and continued editing, please click on the "Save Draft" button below. For the peer review submission and the final submission, please click on the "Submit" button below. Please note that once you have submitted, there will be no further access for editing (the submission will be reverted to draft form following the peer review).

**Submission Date**

12/22/2021

**Submission Date**

12/22/2021

## FY23 Submission: File Attachments

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**Major Project Capital Request Form**

MassasoitCommunityCollege\_FY23 MPCR-FINAL.pdf

**Board of Trustees Support**

Board Approval FY23 Major Capital Project Funding.pdf

**Memorandum of Understanding (partnerships)**

Massasoit\_MOUs.pdf

**Commitment Letters (funding)**

Funding Sources\_Massasoit.pdf

**General Additional Information**

BOT\_10-20-21\_Presentation\_Final.pdf

**Preliminary Project Schedule**

Prelim Project Schedule\_Massasoit.pdf

# Instructions

- ***Please “save as” this PDF file*** Please

save with a new name that includes:

- The name of your institution
- The words: “FY23MPCR”

Example: College Name\_FY23MPCR.pdf

- ***This PDF form is an interactive fillable PDF form.***

For instructions on how to use an interactive form with adobe, please see:

<https://helpx.adobe.com/acrobat/using/filling-pdf-forms.html>

- ***Submission is online***

This form, along with any other attachments, will be submitted (either for peer review or for final submission) online.

The following is the link for submission: <https://webportalapp.com/appform/fy23mpcr>

- You will need to establish a login to access the online submittal document.
- The online submittal process can be initiated at any time and will provide an option to “Save Draft” so that users can return at a later date and edit information.
- Submissions will not be viewable by evaluators until the applicant clicks on the submit button.
- There will be an opportunity to attach additional pertinent information (limit pages please) when submitting.

# Higher Education Capital Project Funding FY23

## MAJOR PROJECT CAPITAL REQUEST FORM

### PART A – GENERAL INFORMATION

**Objective:** Provide pertinent identifying project information.

**A.1 Institution Name & Primary Address**

**A.2 Contact Information**

Name:

Telephone:

Email:

**A.3 Project Name and Location**

(if different from institution primary address)

**A.4 Total Project Cost (TPC)**

**A.5 Amount (\$) Requested from DCAMM:**

**A.6 Existing Building(s) Impacted**

If applicable, list the names of the buildings being impacted by the project

**A.7 Project Type** (select all that apply)

Renovation

New Construction

Demolition

Property Disposition

Lease Replacement or Elimination

### PART B – EXECUTIVE SUMMARY

**Objective:** Provide a one-page succinct summary of the project, including project goals and impacts.

**B.1 Executive Summary** (maximum 5,000 characters (approximately 770 words))

Provide a narrative summary to describe the project and the project's impact on student success and its value proposition to the institution, to the broader community and to the Commonwealth of Massachusetts. Include:

- A brief (1-3 sentence) description of the project
- short- and long-term project objectives in alignment with the Commonwealth Priorities
- a description of the specific need for this project – including limitations of any existing spaces, leasing or funding arrangements.

*(This is a summary narrative; more specific and detailed information will be requested in the following sections).*



## PART C – PROJECT SCOPE

**Objective:** Provide specific project information regarding the proposed project size, space type and program.

### C.1 Summary Project Gross Square Foot (GSF) information

	<b>TOTAL GSF*</b> Total work area	<b>GSF of Programmatic Renovation**</b>	<b>Additional Comments</b> (Ex.: How GSF breaks out for different buildings, brief description...etc.)
<b>Renovation GSF</b>	GSF	GSF	
<b>New Construction GSF</b>	GSF	GSF	
<b>Demolition GSF</b>	GSF	GSF	
<b>Disposition GSF</b>	GSF	GSF	
<b>Lease Replacement/ Elimination USF***</b> (Usable or rentable square footage)	USF	USF	

\* **GSF:** the total gross square footage of the building impacted, including areas where only infrastructure or envelope work is being conducted, and where no programmatic changes will occur.

\*\* **GSF of Programmatic Renovation:** the total gross square footage of the project resulting in programmatic change and or modernization.

\*\*\* **USF:** usable or rentable square footage (square footage of leased space per the lease agreement)

*Please note that information should align with Part E – Project Program Impact.*

## PART D – BUILDING CONDITION IMPACT

**Objective:** Identify Critical Repairs being addressed by the proposed project.

**Note:** Identified critical repairs projects may also be requested through the separate critical repairs (deferred maintenance) funding process. Should the major project be funded, the critical repairs being addressed will be funded through the allocation for the major project, and DCAMM will prioritize another project for critical repair funding based on the priority level and categorization for all projects in CAMIS.

### D.1 Critical Repairs - CAMIS

For the Commonwealth owned facility(ies) impacted by this project proposal, run and download information from the CAMIS Report entitled “Major Project Capital Request – Deferred Maintenance.”

For each building, summarize in the below table, TOTAL \$ Need and TOTAL \$ Addressed by the proposed projects for the specified timeframes. **\$ should reflect only those projects identified in CAMIS as DCAMM Project Type “DM – Deferred Maintenance” or “DM – ADA”; do not include additional deferred maintenance being addressed or updated costs not reflected in CAMIS.**

Building Name	Project Type	Timeframe	TOTAL \$ Need Identified	TOTAL \$ Addressed by Proposed Project
	DM	A		
	DM-ADA*	A		
	DM	B		
	DM	C		
	DM	A		
	DM-ADA*	A		
	DM	B		
	DM	C		
	DM	A		
	DM-ADA*	A		
	DM	B		
	DM	C		
	DM	A		
	DM-ADA*	A		
	DM	B		
	DM	C		
<b>TOTAL (Calculated Field)</b>				

\* DM-ADA Projects in CAMIS are all Timeframe A



**D.2 Critical Repairs – Other** (Maximum 1,650 characters (approximately 250 words))

- Please describe major critical repairs and ADA issues being addressed.
- Please note any additional major issues being addressed that are not included in the CAMIS list or changes in cost (from what is in CAMIS) that have been identified or that will be addressed by the proposed project.

**D.3 Executive Order 594** (maximum 3,300 characters (approximately 500 words))

Describe how the project will address [\*Executive Order 594\*](#) with regards to climate resilience, low carbon fuels, and energy efficiency.

## PART E – PROJECT PROGRAM IMPACT

**Objective:** Describe the impact of the programmatic changes relative to this project on student capacity, student success, space-use, and state-wide needs. Please incorporate impacts and best practices learned from the COVID-19 pandemic on the Future of Work and learning.

**E.1 Summary Programmatic Change** (maximum 3,300 characters (approximately 500 words))

Describe below the programmatic impact of the project on student seats / capacity in classroom, laboratory and studio spaces.

**E.2 Space Use** (maximum 3,300 characters (approximately 500 words))

Respond to the following questions as they apply:

- How is the building or project space currently being used?
- Is the space suitable for its current use? If not, why not?
- How will renewal of this space (or new space) maximize utilization of the space including during non-traditional times?
- How will the new space use improve student equity, access and success?

Where possible, include space utilization quantitative data specific to the project building(s) (including source of information), as it applies to the program.

DCAMM Space Utilization Guidelines for Academic Space:

*Please note these are guidelines only; they represent a starting point, not a definitive requirement.*

CLASSROOMS	Utilization:	67% of scheduling window (typically +/- 40 hrs.)
	Occupancy:	67% of available seats, overall average of classes
LABORATORIES	Utilization:	50% of scheduling window (including set up & breakdown)
	Occupancy:	80% of available seats; overall average of classes

### E.3 Programs Impacted (maximum of 10 programs)

Identify the instructional and training program(s) (maximum 10 programs) most significantly impacted by this project, their associated target occupation(s), current program capacity and projected program capacity (following completion of the project). Please include Classification of Instructional Programs (CIP\*) code (4 digit) for each program and the primary Standard Occupational Classification (SOC\*\*) code(s) for each targeted occupation(s).

[illegible]

\* **CIP** - provides a taxonomic scheme that supports the accurate tracking and reporting of fields of study and program completions activity. Please go to the following link to help determine CIP codes  
<https://nces.ed.gov/ipeds/cipcode/Default.aspx?y=55>.

\*\* **SOC** - Information can be found at <http://www.onetonline.org/crosswalk/>

**E.4 State and Regional Labor Market Information** (maximum 4,000 characters (approximately 600 words))

Describe the extent to which the program aligns to priority industry sectors and high demand occupations to address training and employment gaps as defined by the Regional Workforce Skills Planning Initiative Regional Blueprints. For information see: <https://www.mass.gov/service-details/view-your-regions-blueprint>. Please note that 2020 updates are available in addition to the blueprints.

- Describe alignment to identified workforce / economic development needs specifically addressed by this project.
- Identify the source(s) of information that document the ability of programs impacted by the proposed project to close skill gaps in high need occupations.

**E.5 Advancing the Equity Agenda** (maximum 3,300 characters (approximately 500 words))

Describe how the proposed capital project will improve access, opportunity, and success as defined by the BHE's stated goal of increasing overall attainment with a targeted focus on first-generation and other traditionally underserved and underrepresented students.

**E.6 Efficiencies in Program Delivery** (Maximum 3,300 characters (approximately 500 words))

Describe any efforts to optimize space use through flexible or innovative hybrid working and program delivery models that enhance student, staff, and faculty experience and productivity. Examples include:

- Shared workstations, offices, classrooms, labs, and collaboration spaces (multi-use space, multiple users, etc.)
- Collaboration/partnership with external organization and/or institutions.
- Alternative teaching methods (e.g., Flipped classroom, makerspace, project-based learning, and work-based learning)
- Alternative delivery methods (online learning, hybrid program delivery, etc.)
- Alternative student support and engagement methods.



## PART F – COLLABORATIONS & PARTNERSHIPS

**Objective:** Describe collaborations and partnerships that are contributing to and/or being strengthened by the proposed capital project. Partnerships / collaborations can be between and among other academic institutions (secondary and/or postsecondary) and/or with outside public/private partners.

**F.1 Impact on collaborations and partnerships** (Maximum 3,300 characters (approximately 500 words))

Identify collaborations and partnerships that relate directly to the proposed project and that are both contributing to, and being strengthened by, the proposed capital project; clearly delineate between existing and new collaborations/partnerships. Include:

- Facility or space sharing agreements or collaborations and describe how these collaborations and partnerships impact the proposed project in terms of program access, project size, and space utilization and efficiency.
- Programmatic collaborations that directly impact program delivery and describe how each partnership/collaboration impacts enrollment, student equity, access, and success.

## PART G - PROJECT IMPLEMENTATION & SCHEDULE

**Objective:** Describe project phasing required and estimated schedule

### G.1 Estimated Project Schedule

Indicate a preliminary project schedule assuming funding in FY23 below. Include all enabling projects, designer selection (if applicable), design, bidding, and construction.

Project Tasks	Estimated Time (Months)	Remarks
Project Prep/Scope Confirmation (1-2 months)		
DSB Ad / Designer Selection (If through DCAMM – 3 months)		
Study & Schematic Design (DCAMM guideline – 9 months)		
Certification (DCAMM Guideline - 1 month)		
Design (DCAMM guideline – 9 months)		
Bidding (If through DCAMM – 3 months)		
Construction (including enabling & backfill projects)		

**G.2 Anticipated occupancy (and use) date** (assume a July 15, 2022 project start date)

Format: mm/dd/yyyy

**G.3 Swing space** (maximum 3300 char. (approx. 500 words))

Describe how the implementation plan will address swing space/program needs during construction.

**G.4 Construction - Project Components**

If applicable, identify below major project components required for project completion. List:

- Enabling projects (including program relocation/swing space);
- The proposed major capital project (including all phases of design through construction);
- Backfill projects required for full completion of the project.

Project Components	NASF of swing space required (if applicable)	Estimated Total Construction Cost of Phase (ECC)	Time to complete construction (months)

## PART H – PROJECT BUDGET & BUSINESS CASE

**Objective:** Describe the funding for the capital project and consider the impact of the proposed capital project on operating and maintenance budgets and understand the financial assumptions regarding the impact of the proposed capital project on enrollment, retention and institutional budget.

### H.1 Total Estimated Project Cost

Indicate ECC and TPC for project

Project Cost	Amount (\$)	Remarks
Total Estimated Construction Cost (ECC*)		
<b>TOTAL PROJECT COST (TPC**)</b> <b>(DCAMM projects use TPC = 1.4 x ECC)</b>		

\* ECC to include escalation contingency of 4.5% per year (compounded annually) to mid-point of construction.

\*\* The TPC includes planning and design fees, cost of furnishings and equipment, cost of any additional consultants required (access, environmental, envelope, commissioning, etc.), contingencies, and various management costs. A 40% markup is the standard markup used by DCAMM at this stage of a project.

### H.2 Total funding:

Identify the \$ amount being requested from DCAMM and indicate what other sources of funding are being used for this project. Under "Timing and Constraints" describe whether these are matching funds, grants, loans or gifts and clarify timing and other constraints on the funding \$.

Confirm timing constraints of financial commitment. Please note: all \$ (including fundraising \$ that have not yet been committed) must be committed and confirmed prior to completion of Study/Schematic Design Certification.

If the IHE is providing funding to support completion of the project, indicate amount and timing of confirming the availability of cash resources of institution. If the IHE has secured private sector funding to support completion of the project, indicate the name of the provider (s) amount and timing of the availability of cash resources of institution. Provide a letter from the Trustees confirming a commitment to providing IHE's resources and indicating the availability of funding timing.

Funding Source	Amount (\$)	Timing & Constraints
DCAMM		
<b>TOTAL FUNDS (calculated field)</b>		<b>Total funds must equal the TPC in H.1</b>

**H.3 Potential revenue from sale of state-owned property**

If the project involves the potential sale of state-owned property, include the name of the building or asset that will be sold, and the estimated total amount of revenue that would be deposited to the Commonwealth’s General Fund as a result of the sale, pursuant to current state law. While the revenue would not be used directly to fund the project, it could be considered as an offset to the overall cost to the Commonwealth.

Property/Building Name	Amount of Potential Revenue (\$)	Timing & Constraints

**H.4 Business Model** (maximum 2,300 characters (approximately 350 words))

Describe the business model and its impact on the College’s overall financial position, including any changes to the College’s expendable net assets.

**H.5 Previously Completed Enabling Projects** (maximum 2,300 characters (approximately 350 words))

If applicable, please identify any projects that have been previously completed by the IHE **and** directly support this project proposal. Please identify funding sources and describe project impact on this proposal.

**H.6 Financial Impact** (maximum 2,300 characters (approximately 350 words))

Describe how the proposed project business model will impact operating efficiency and sustainability. Where applicable, indicate briefly how the proposed project will substantially impact operations and efficiencies. Highlight the connection between the proposed capital project and anticipated changes in revenue or costs through increased enrollment, increased retention, expanded program expenses, increased maintenance costs, change in lease payments or other operating budget impacts.

**H.6 Operational Budget Impact**

Provide a financial plan for operations of the renovated/new facility that describes ongoing operational impacts of this project following completion; include any funding mechanism that may be a supplemental source of annual revenues. Where \$ not available, indicate projected % change in the comment field.

	Current Annual \$	Projected Annual \$ (at project completion)	Narrative Comments on anticipated change
<b>Revenue</b>			
Enrollment			
State Funding			
Other			
<b>Total Revenue (calculated field)</b>			
<b>Costs (enter as positive #)</b>			
Facility Operational Costs			
Utilities			
Maintenance			
Security			
Other			
Institutional Operating Budget			
Staff / salary costs			
Equipment costs			
Lease payments			
Other			
<b>Total Costs (calculated field)</b>			
<b>TOTAL INCOME / (LOSS ) (calculated field)</b>			

**MASSASOIT COMMUNITY COLLEGE  
BOARD OF TRUSTEES  
REQUEST FOR BOARD ACTION**

**December 1, 2021**

<b>RECOMMENDED:</b>	That the Board of Trustees approve the Division of Capital Asset Management and Maintenance (DCAMM) Higher Education Capital FY23 Funding Proposal – Massasoit Community College Science, Nursing and Allied Health Renovation Project.
<b>COMMENTS:</b>	<p>Massasoit’s Science, Nursing and Allied Health Buildings Renovation project consists of renovations in two buildings to provide new teaching labs, support spaces, classrooms, and associated offices for the Science, Nursing and Allied Health Departments.</p> <p>This project has three phases. First, the Liberal Arts (LA) Building will be renovated into a Science Building with instructional labs designed for maximum flexibility. Second, the existing Science Building will be renovated into a Nursing &amp; Allied Health Building with instructional labs that are right sized and designed for flexibility. In addition, a proposed simulation lab would enhance Massasoit’s position as a leader in regional health care training programs. Third, backfilling the Allied Health spaces in the Humanities Building with Liberal Arts department programs (offices and general purpose classrooms) can be accomplished with relatively low investment and provide adequate replacement space for the LA department, co-located with the Humanities Department without a major renovation. The project will provide needed upgrades to specialized instructional spaces as well as remedy existing deferred maintenance, accessibility, and hazardous materials issues. The renovations will serve every credit program, and thus, almost every student at the college. It should be noted that this plan will address over \$6.5 million of deferred maintenance and over \$1.7 million in ADA compliance projects.</p> <p>This project, if funded, will be DCAMM managed. The estimated total project cost is \$41.1 million.</p>
<b>RECOMMENDATION:</b>	The President, Provost/VP of Academic and Student Affairs, and Vice President for Administration/CFO recommend approval of this action.
<b>MOVED:</b>	<p>A motion was made by Trustee Andrade and Seconded by Trustee Silvera to approve the Division of Capital Asset Management and Maintenance (DCAMM) Higher Education Capital FY23 Funding Proposal – Massasoit Community College Science, Nursing and Allied Health Renovation Project.</p> <p>Trustee Andrade - yes Trustee Blackler - yes Vice Chair Carroll - yes Trustee Chakrabarti - yes Trustee Silvera - yes Trustee Spitz - yes Chair Sullivan - yes</p>



Trustee Welch -yes

**VOTED:**

The motion was unanimously approved by the Board of Trustees on 12/01/2021.

A handwritten signature in blue ink, appearing to read "Ann Sullivan", is centered on the page. The signature is fluid and cursive, with the first name "Ann" and last name "Sullivan" clearly distinguishable.

Ann Sullivan  
Chair, Massasoit Community College Board of Trustees



**Community College to University (MCC2BSU) Initiative  
Between  
Bridgewater State University & Massasoit Community College**

Bridgewater State University and Massasoit Community College are committed to a collaboration that will provide students with access to the most affordable, high quality and convenient associate's and bachelor's degree opportunities in the Commonwealth. This agreement advances these important goals and describes a series of specific measures that will encourage and support students to clearly see their path from community college to university and bachelor's degree completion.

**Guiding Principles**

- To provide an affordable, high quality and convenient pathway for students to complete a bachelor's degree in a manner that builds upon and extends the Massachusetts Department of Higher Education's Commonwealth Commitment.
- This initiative will provide the collaborative framework through which both institutions will identify and focus resources on meeting the workforce needs of the Commonwealth.

**Key Features**

- Guaranteed admission to a wide range of Bridgewater State University undergraduate degree programs upon acceptance at Massasoit Community College.
- Collaborative on-site academic advising for students who express an interest in a Bridgewater State University major.
- Access to the benefits of a Bridgewater State University education while pursuing a Massasoit Community College associate degree.
- Access to summer residential programs for promising Massasoit Community College students.
- Access to financial literacy and other select specialized programs at Bridgewater State University.
- Deep engagement of peer mentors, faculty members and administrators to ensure the success of this initiative.

### Steering Committee

Bridgewater State University and Massasoit Community College agree to form a Steering Committee and associated Sub-Committees to discuss and develop implementation plans for each of the key features described above. The Steering Committee will be Co-Chaired by the Vice Presidents for Academic Affairs from both institutions, with an initial meeting of representatives to take place within 30 days of the agreement being approved by the Presidents of Bridgewater State University and Massasoit Community College.

### Implementation of Agreement

It is expected that all of the various elements of the agreement will be implemented at the start of the 2017-2018 academic year, with some specific elements to be implemented sooner where possible.

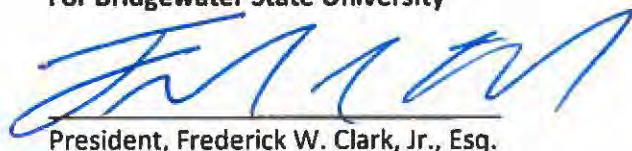
This agreement becomes effective from the day the representatives of both institutions affix their signatures below, and will continue for an initial period of four years, whereupon it shall be reviewed and may be extended by the mutual written agreement of both institutions. This agreement may be revised through the mutual agreement of both institutions and may be terminated by either party upon giving six months' written notice signed by the presiding officer of the notifying party.

Any use of the names 'Bridgewater State University' or 'Massasoit Community College', including any constituent departments, programs or logos, relating in any way to the activities described in this agreement, shall be subject to prior written approval.

The administration of this agreement will be the responsibility of the Provost and Vice President for Academic Affairs at Bridgewater State University and the Vice President for Academic Affairs at Massasoit Community College.

In witness to this agreement, the following individuals append their signatures:

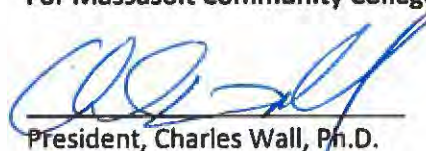
**For Bridgewater State University**



President, Frederick W. Clark, Jr., Esq.

Date: 5-2-17

**For Massasoit Community College**



President, Charles Wall, Ph.D.

Date: May 2 2017





# COMMONWEALTH OF MASSACHUSETTS

## INTERDEPARTMENTAL SERVICE AGREEMENT (ISA) FORM

This Form is issued and published by the Office of the Comptroller (CTR) pursuant to 815 CMR 6.00 for use by all Commonwealth Departments. Departments may add non-conflicting additional terms, but changes to the official printed language of this Form shall be void.

BUDGET FISCAL YEAR: 2014-2022		RFR REFERENCE NUMBER: STEM STARTER ACADEMY RFP 10-24-2013	
MMARS ALPHA BUYER/PARENT DEPARTMENT CODE: RGT		MMARS ALPHA SELLER/CHILD DEPARTMENT CODE: MAS	
BUSINESS MAILING ADDRESS: DEPARTMENT OF HIGHER EDUCATION ONE ASHBURTON PLACE, ROOM 1401 BOSTON, MA 02108		BUSINESS MAILING ADDRESS: MASSASOIT COMMUNITY COLLEGE ONE MASSASOIT BOULEVARD BROCKTON, MA 02402	
ISA MANAGER: THOMAS SIMARD C/O ALLISON LITTLE		ISA MANAGER: WILLIAM MITCHELL	
PHONE: 617-994-6935	FAX: 617-727-0955	PHONE: 508-588-1510	FAX:
E-MAIL ADDRESS: ALITTLE@DHE.MASS.EDU		E-MAIL ADDRESS: WAMITCHELL@MASSASOIT.MASS.EDU	
Purpose of ISA: (Check one option only and complete applicable information) (Attachment A required for New ISAs and all ISA Amendments.) <input type="checkbox"/> New ISA. Current Maximum Obligation for total duration of ISA \$ _____ (Use "N/A" for Non-Financial ISA.) (Complete Attachment B) <input checked="" type="checkbox"/> Amendment to Existing ISA. What is being amended? (Attachment C required for all Federal and Bond Account Amendments) <input checked="" type="checkbox"/> Amend Budget/Accounts. Change Maximum Obligation from: \$2,202,990.00 to New Maximum Obligation <u>\$2,467,990.00</u> (Attachment B) <input type="checkbox"/> Amend Budget/Accounts. No Change in Maximum Obligation (Attachment B) <input checked="" type="checkbox"/> Amend Dates of Performance. New Dates of Service: Start Date: _____ End Date: <u>09/21/2022</u> (Subject to execution dates below) <input type="checkbox"/> Amend Scope of Services/Performance			
BRIEF DESCRIPTION OF PERFORMANCE GOALS TO BE ACCOMPLISHED BY ISA, OR IF AMENDMENT, IDENTIFY WHAT IS BEING AMENDED: An increase of \$265,000.00 for the FY22 STEM Starter Academy Award and an amendment of the ISA Termination date from 09/21/21 to 09/21/22, inclusive of expenditures through summer months as authorized by FY22 STEM Starter Academy line item (7066-0036) language			
WILL SELLER/CHILD DEPARTMENT STATE EMPLOYEES (AA OBJECT CLASS) BE FULLY OR PARTIALLY FUNDED UNDER THIS ISA? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes. If Yes, Seller/Child certifies that the ISA is not being used as an alternative funding mechanism for state employees, that the identified personnel in Attachment A are necessary for completion of the ISA due to particular expertise or other factors that can not be obtained through the use of contractors, and that if federal funds are being used, funds shall not be used to supplement the regular salary or compensation of any officer or employee of the Commonwealth for services performed during their regular working hours. M.G.L. c. 29, § 6B.			
ACCOUNT INFORMATION. Complete for all new ISAs and Amendments (even if account information is not changing). Check one option, indicate "add", "delete" or "no change" and enter account, fund, major program code and program code. <input type="checkbox"/> BGCN – non-subsidiarized (federal, capital, trust). Attachment C required for any new ISA or ISA Amendment involving federal funds <input type="checkbox"/> BGCS – subsidiarized (budgetary) <input checked="" type="checkbox"/> Other (CT, RPO as authorized by CTR): <u>CT</u> <input type="checkbox"/> Non-Financial ISA (no funds are transferred from Buyer/Parent to Seller/Child), however, resources are committed to ISA. <input type="checkbox"/> Amendment with no Accounting Changes to Budget/Accounts or to Attachments B or C. (Indicate no change below and complete account information.)			
<input type="checkbox"/> ADD <input type="checkbox"/> DELETE <input type="checkbox"/> NO CHANGE	Account: 7066-0036	Fund: 0010	Major Program Code: _____
<input type="checkbox"/> ADD <input type="checkbox"/> DELETE <input type="checkbox"/> NO CHANGE	Account: _____	Fund: _____	Major Program Code: _____
<input type="checkbox"/> ADD <input type="checkbox"/> DELETE <input type="checkbox"/> NO CHANGE	Account: _____	Fund: _____	Major Program Code: _____
<input type="checkbox"/> ADD <input type="checkbox"/> DELETE <input type="checkbox"/> NO CHANGE	Account: _____	Fund: _____	Major Program Code: _____
ISA ANTICIPATED START DATE: <u>2/1/2014</u> , provided that the Seller/Child certifies that it will not incur any obligations related to this ISA prior to the date that this ISA is executed, NOR prior to the date that sufficient funding for the obligations for this ISA is available in the Seller/Child account for expenditure.			
TERMINATION DATE OF THIS ISA: This ISA shall terminate on <u>9/21/2022</u> unless terminated or properly amended in writing by the parties prior to this date.			
BUYER/PARENT AND SELLER/CHILD DEPARTMENT CERTIFICATIONS. IN WITNESS WHEREOF, by executing this ISA below, the Buyer/Parent and Seller/Child certify, under the pains and penalties of perjury, that Buyer/Parent and Seller/Child understand and agree that any Buyer/Parent or Seller/Child officer or employee who knowingly violates, authorizes or directs another officer or employee to violate any provision of state finance law relating to the incurring of liability or expenditure of public funds, including this ISA, may be considered to be in violation of M.G.L. c. 29, § 66, and therefore the Buyer/Parent and the Seller/Child agree to ensure that this ISA complies with, and that all staff or contractors involved with ISA performance are provided with sufficient training and oversight to ensure compliance with 815 CMR 6.00, CTR applicable policies and the ISA Terms and Conditions which are incorporated by reference into this ISA, in addition to the performance requirements identified in Attachment A of this ISA, and that all terms governing performance of this ISA are attached to this ISA or incorporated by reference herein, and the Buyer/Parent and Seller/Child agree to maintain the necessary level of communication (including immediate notification of any amendments to accounting information, program codes or performance needs), coordination, access to reports and other ISA information, and cooperation to ensure the timely execution and successful completion of the ISA, amendments, and state finance law compliance; and that the Buyer/Parent certifies it will ensure that sufficient funds are timely made available in the Seller/Child account(s), with the proper accounting codes, prior to the Seller/Child's need to begin initial or amended performance, and that the Seller/Child will not allow initial or amended performance to begin until the ISA is executed AND the ISA Seller/Child account is sufficiently funded to support encumbrances and payments for performance (including payroll), and the Seller/Child will make encumbrances and payments (including payroll) only from the authorized ISA Seller/Child account(s) and shall not be entitled to transfer charges made from any other account not approved in writing by CTR in advance of expenditures by the Seller/Child.			
BUYER/PARENT DEPARTMENT'S AUTHORIZED SIGNATURE  DATE: <u>10/15/2021</u> (Date must be handwritten by signatory at time of signature)		SELLER/CHILD DEPARTMENT'S AUTHORIZED SIGNATURE  william mitchell (Oct 15, 2021 14:15 EDT) DATE: _____ (Date must be handwritten by signatory at time of signature)	
PRINT NAME: THOMAS J. SIMARD		PRINT NAME: WILLIAM MITCHELL	
PRINT TITLE: DEPUTY COMMISSIONER FOR ADMINISTRATION AND FINANCE		PRINT TITLE: VICE PRESIDENT, ADMINISTRATION AND FINANCE	



## INTERDEPARTMENTAL SERVICE AGREEMENT (ISA) FORM TERMS AND CONDITIONS

The following terms and conditions are incorporated by reference into any ISA Role of the Office of the Comptroller. All ISA fiscal transactions shall be made through the state accounting system as prescribed by the Office of the Comptroller (CTR). CTR will interpret 815 CMR 6.00 and applicable policies and take any fiscal or other actions necessary to ensure ISA compliance with state finance law, including but not limited to correcting accounting transactions, resolving ISA disputes and identifying corrective action by the Buyer/Parent or Seller/Child Departments.

Seller/Child Department Certifications. By executing an ISA the Seller/Child certifies that it is statutorily authorized to provide the type of performance sought by the Buyer/Parent, and shall at all times remain qualified to perform the ISA, that performance shall be timely and meet or exceed ISA standards, that the Seller/Child will not allow initial or amended performance to begin, may not authorize personnel or contractors to work, nor incur any obligation to be funded under an ISA prior to the execution of an ISA AND the availability of ISA funding in the Seller/Child account to support encumbrances and payments for performance. The Seller/Child will make encumbrances and payments (including payroll) only from the authorized ISA Seller/Child account(s) and shall not be entitled to transfer charges made from any other account not approved in writing in advance by CTR. The Seller/Child must immediately notify CTR whenever a delay in funding is anticipated for which performance is expected. The Seller/Child is authorized to use ISA funding only for the actual costs of ISA performance and may not use ISA funds to supplement non-ISA related personnel or expenditures.

Buyer/Parent Department Certifications. Signature by the Buyer/Parent certifies that it is statutorily authorized or required to procure the type of performance required under this ISA, that the Buyer/Parent certifies it will ensure that sufficient funds are timely made available in the Seller/Child Seller/Child account(s), with the proper accounting codes, prior to the Seller/Child's need to begin initial or amended performance; that the Buyer/Parent will monitor and reconcile ISA performance in compliance with state appropriation language or federal grant requirements, communicate all fiscal information necessary for the set up of the Seller/Child account(s) including budget information, and if the ISA is funded with federal funds provide accurate accounting information in Attachment C, and immediately notify the Seller/Child of any changes in Attachment C (such as program codes) to ensure the ISA and Seller/Child account can be timely updated to avoid lapses in funding or the inability of the Seller/Child to make timely payroll and other expenditures from the Seller/Child account.

Chief Fiscal Officer. The Chief Fiscal Officer (CFO) for the Buyer/Parent and Seller/Child will be responsible for the fiscal management of ISAs within their Departments in accordance with these ISA Terms and Conditions, 815 CMR 6.00 and policies and procedures published by CTR.

ISA Manager. Both the Buyer/Parent and Seller/Childs are responsible for ensuring that the ISA Manager listed on the ISA, or ISA Amendment, is current and that the ISA Manager is an authorized signatory for the Department supported by the appropriate Security Profile. If the listed ISA Manager changes, the CFO shall be the ISA Manager until a replacement is identified in the same manner as other Written Notice.

Record-keeping and Retention, Inspection of Records. The Buyer/Parent and Seller/Child shall maintain all ISA records in such detail as necessary to support claims for payment, including reimbursement or federal financial participation (FFP), for at least seven (7) years from the last payment under an ISA Seller/Child account, or such longer period as is necessary for the resolution of any litigation, claim, negotiation, audit or other inquiry involving an ISA. In addition to any specific progress, programmatic or expenditure reports specified in Attachment A, the Seller/Child is required to provide the Buyer/Parent (and to CTR, the State Auditor and the House and Senate Ways and Means Committees upon request) with full cooperation and access to all ISA information.

Payments and Compensation. The Seller/Child may accept compensation only for performance delivered and accepted by the Buyer/Parent in accordance with the specific terms and conditions of the ISA. All ISA payments are subject to appropriation pursuant to M.G.L. C. 29, or the availability of sufficient non-appropriated funds for the purposes of an ISA. Overpayments or disallowed expenditures shall be reimbursed by the Seller/Child or may be offset from future ISA payments in accordance with state finance law and instructions from CTR.

ISA Termination or Suspension. An ISA shall terminate on the date specified, unless this date is properly amended prior to this date, or unless terminated or suspended under this Section upon prior written notice to the Seller/Child. The Buyer/Parent may terminate an ISA without cause and without penalty with at least thirty days prior written notice, or may terminate or suspend an ISA with reasonable notice if the Seller/Child breaches any material term or condition or fails to perform or fulfill any material obligation required by an ISA, or in the event of an elimination of an appropriation or availability of sufficient funds for the purposes of an ISA, or in the event of an unforeseen public emergency mandating immediate Buyer/Parent action. Upon immediate notification to the other party, neither the Buyer/Parent nor the Seller/Child shall be deemed to be in breach for failure or delay in performance due to Acts of God or other causes factually beyond their control and without their fault or

negligence. Contractor failure to perform or price increases due to market fluctuations or product availability will not be deemed factually beyond the Seller/Child's control.

Written Notice. Any notice shall be deemed delivered and received when submitted in writing in person or when delivered by any other appropriate method evidencing actual receipt by the Buyer/Parent or the Seller/Child. Unless otherwise specified in the ISA, legal notice sent or received by the Buyer/Parent's ISA Manager or the CFO (with confirmation of actual receipt) through the listed fax number(s) or E-Mail address for the ISA Manager will satisfy written notice under the ISA. Any written notice of termination or suspension delivered to the Seller/Child shall state the effective date and period of the notice, the reasons for the termination or suspension, if applicable, any alleged breach or failure to perform, a reasonable period to cure any alleged breach or failure to perform, if applicable, and any instructions or restrictions concerning allowable activities, costs or expenditures by the Seller/Child during the notice period.

Confidentiality. The Seller/Child shall comply with M.G.L. C. 66A if the Seller/Child becomes a "holder" of "personal data". The Seller/Child shall also protect the physical security and restrict any access to personal or other Buyer/Parent data in the Seller/Child's possession, or used by the Seller/Child in the performance of an ISA, which shall include, but is not limited to the Buyer/Parent's public records, documents, files, software, equipment or systems. If the Seller/Child is provided access with any other data or information that triggers confidentiality requirements under FIPA, HIPPA or other federal or state laws, the Seller/Child shall be responsible for protection of this data as instructed by the Buyer/Parent.

Assignment. The Seller/Child may not assign, delegate or transfer in whole or in part any ISA, or any liability, responsibility, obligation, duty or interest under an ISA, to another Department or an outside contractor. Assumption of an ISA by a successor Department due to a legislative change in the Seller/Child or Buyer/Parent's department status shall be accomplished through the execution of a new ISA.

Subcontracting By Seller/Child. Since it is presumed that contracting through the Seller/Child is more cost effective and a better value than the Buyer/Parent directly contracting with an outside contractor(s), any subcontract entered into by the Seller/Child for the purposes of fulfilling the obligations under an ISA must be approved by the Buyer/Parent in advance of the ISA and justified as part of the ISA Attachment A. The Seller/Child is responsible for full state finance law and procurement compliance for all subcontracts, and shall supply a copy of any subcontract to the Buyer/Parent upon request.

Affirmative Action, Non-Discrimination in Hiring and Employment. In performing this ISA, the Seller/Child shall comply with all federal and state laws, rules, regulations and applicable internal state policies and agreements promoting fair employment practices or prohibiting employment discrimination and unfair labor practices and shall not discriminate in the hiring of any applicant for employment nor shall any qualified employee be demoted, discharged or otherwise subject to discrimination in the tenure, position, promotional opportunities, wages, benefits or terms and conditions of their employment because of race, color, national origin, ancestry, age, sex, religion, disability, handicap, sexual orientation or for exercising any rights afforded by law. The Seller/Child commits to, when possible, to purchasing supplies and services from certified minority or women-owned businesses, small businesses or businesses owned by socially or economically disadvantaged persons or persons with disabilities in accordance with the Commonwealth's Affirmative Market Program.

Waivers. Forbearance, indulgence or acceptance by the Seller/Child or Buyer/Parent of any breach or default in any form shall not be construed as a waiver and shall not limit enforcement remedies or allow a waiver of any subsequent default or breach.

Risk of Loss. The Seller/Child shall bear the risk of loss for any materials, deliverables, personal or other data that is in the possession of the Seller/Child or used by the Seller/Child in the performance of an ISA until it is accepted by the Buyer/Parent.

Disputes. The Buyer/Parent and Seller/Child agree to take all necessary actions to resolve any dispute arising under the ISA within 30 calendar days including department head and secretariat involvement, but in no event shall a dispute remain unresolved beyond May 30th in any fiscal year, nor may the Buyer/Parent or Seller/Child allow a dispute to create a state finance law or other violation of ISA terms (such as a delay in funding, failure to timely communicate funding or program code changes, or failure to timely process ISA paperwork). Seller/Child and Buyer/Parent must immediately notify CTR to assist in resolution of the dispute and shall implement any actions required by CTR to resolve the dispute, which shall be considered final.

Interpretation, Severability, Conflicts with Law, Integration. Any amendment or attachment to any ISA that contains conflicting language or has the effect of deleting, replacing or modifying any printed language of the ISA shall be interpreted as superseded by the ISA Form as published. If any ISA provision is superseded by state or federal law or regulation, in whole or in part, then both parties shall be relieved of all obligations under that provision to the extent necessary to comply with the superseding law, provided however, that the remaining provisions of the ISA, or portions thereof, shall be enforced to the fullest extent permitted by law. The terms of this ISA shall survive its termination for the purpose of resolving any claim, dispute or other action, or for effectuating any negotiated representations and warranties.



# INTERDEPARTMENTAL SERVICE AGREEMENT (ISA) FORM TERMS AND CONDITIONS



## ATTACHMENT A – TERMS OF PERFORMANCE AND JUSTIFICATIONS

This Attachment Form must be used. Insert (type or copy and paste) all relevant information using as many pages as necessary. Attach any additional supporting documentation as appropriate. If Amending the ISA, completion of Sections 1, 2 and 3 identifying what is being amended and the reasons for the amendments is required. For sections 4-9 enter only the amended language in the sections being amended.

### 1. [REQUIRED] Purpose and other performance goals of ISA, or as amended.

The Massachusetts STEM Starter Academy funds projects at the Community Colleges that inform, engage, recruit, retain and graduate significantly more student and enhance their success in STEM pathway programs leading to job placements or college transfer to higher level STEM academic programs.

### 2. [REQUIRED] Identify in detail, the responsibilities of the parties, the scope of services and terms of performance under the ISA, or as amended.

Massasoit Community College, hereinafter referred to as "the college", shall expend its awarded funds as approved by the DHE and specified in the institution's budget proposal. The college is required to spend the funds authorized in this ISA by the following dates:

- FY14 Award of \$347,200.00 – All funds must be expended by December 31, 2014, as authorized by line item 7066-0036, section 2 of Chapter 38 of the Acts of 2013.
- FY15 Award of \$150,000.00 – All funds must be expended by August 31, 2015, as authorized by line item 7066-0036, section 2 of Chapter 165 of the Acts of 2014. The Department of Higher Education authorizes campuses to incur costs for this program period on or after October 1, 2014.
- FY16 Award of \$300,000.00 – All funds must be expended by September 21, 2016, as authorized by line item 7066-0036, section 2 of Chapter 46 of the Acts of 2015. The Department of Higher Education authorizes campuses to incur costs for this program period on or after September 1, 2015.
- FY17 Award of \$349,790.00 – All funds must be expended by September 21, 2017, as authorized by line item 7066-0036, section 2 of Chapter 133 of the Acts of 2016. The Department of Higher Education authorizes campuses to incur costs for this program period on or after September 1, 2016.
- FY18 Award of \$261,000.00 – All funds must be expended by September 21, 2018, as authorized by line item 7066-0036, section 2 of Chapter 47 of the Acts of 2017. The Department of Higher Education authorizes campuses to incur costs for this program period on or after September 1, 2017.
- FY19 Award of \$265,000.00 – All funds must be expended by September 21, 2019, as authorized by line item 7066-0036, section 2 of Chapter 154 of the Acts of 2018. The Department of Higher Education authorizes campuses to incur costs for this program period on or after September 1, 2018.
- FY20 Award of \$265,000.00 – All funds must be expended by September 21, 2020, as authorized by line item 7066-0036, section 2 of Chapter 41 of the Acts of 2019. The Department of Higher Education authorizes campuses to incur costs for this program period on or after September 1, 2019.
- FY21 Award of \$265,000.00 – All funds must be expended by September 21, 2021, as authorized by the interim budget, Ch. 131 of the Acts of 2020. The Department of Higher Education authorizes campuses to incur costs for this program period on or after September 1, 2020.
- FY22 Award of \$265,000.00 – All funds must be expended by September 21, 2022, as authorized by Ch. 24 of the Acts of 2021. The Department of Higher Education authorizes campuses to incur costs for this program period on or after September 1, 2021.

FY22 Funds will be disbursed by the DHE according to the following schedule:

Project Benchmark	Date Funds are Released	Grant Fund Allocation
Project Begins	September 1, 2021/upon execution of ISA	30% of grant funds
Fall Data submission due January 14, 2022	February 1, 2022	35% of grant funds
Interim expense report due on April 29, 2022	June 1, 2022	20% of grant funds
<i>DHE Carry Forward into FY23</i>	<i>(July 2022)</i>	<i>(15%)</i>
Year-end expense report due on October 31, 2022	November 11, 2022	15% of grant funds or final balance due to reimburse for project costs incurred, not to exceed FY22 allocation. The amount will be carried forward per the summer months language in line item 7066-0036

Funds spent between September 1, 2021 and September 21, 2022, are intended to support activities and programs attributed to closing out FY22 activities and retaining the Summer 2022 students into Fall 2022. Any future funding provided by the Commonwealth of Massachusetts to support an additional year of SSA would begin on September 1, 2022.

### 3. [REQUIRED] Identify schedule of performance or completion dates or other benchmarks for performance, or as amended.

The college is required to submit the following reports to the department of Higher Education:

- FY14 Funding authorized for expenditures through December 31, 2014: a fiscal-year end progress report to the Department of Higher Education is due on December 1, 2014. These campus reports will provide data and information necessary to support the development of an overall project evaluation report to be developed by the UMass Donahue Institute (evaluator). This evaluation report will be provided to the Massachusetts Legislature and in it will project anticipated outcomes from the planned summer and fall STEM Starter Academy activities.
- FY15 continuation funding authorized for expenditures through August 31, 2015: a fiscal progress report is due to the Department of Higher Education on July 31, 2015, to facilitate a report to the legislature by August 31, 2015, report requested by the legislature.
- FY16 continuation funding authorized for expenditures through September 21, 2016: a fiscal progress report is due to the Department of Higher Education on July 31, 2016, to facilitate a report to the legislature by August 31, 2016, report requested by the legislature.
- FY17 continuation funding authorized for expenditures through September 21, 2017: a fiscal progress report is due to the Department of Higher Education on July 31, 2017, to facilitate a report to the legislature by August 31, 2017, report requested by the legislature.
- FY18 continuation funding authorized for expenditures through September 21, 2018: a fiscal progress report is due to the Department of Higher Education on July 31, 2018, to facilitate a report to the legislature by August 31, 2018, report requested by the legislature.
- FY19 continuation funding authorized for expenditures through September 21, 2019: a fiscal progress report is due to the Department of Higher Education on July 31, 2019, to facilitate a report to the legislature by August 31, 2019, report requested by the legislature.
- FY20 continuation funding authorized for expenditures through September 21, 2020: a fiscal progress report is due to the Department of Higher Education on May 31, 2020, to facilitate appropriate allocation of grant dollars from the Department of Higher Education to Massasoit Community College; a year-end expense report will be due on October 31, 2020, and will reflect the final amount of funding needed to cover all FY20 expenses.

## INTERDEPARTMENTAL SERVICE AGREEMENT (ISA) FORM TERMS AND CONDITIONS



- FY21 continuation funding authorized for expenditures through September 21, 2021 a fiscal progress report is due to the Department of Higher Education on May 31, 2021, to facilitate appropriate allocation of grant dollars from the Department of Higher Education to Massasoit Community College, a year-end expense report will be due on October 29, 2021, and will reflect the final amount of funding needed to cover all FY21 expenses
- FY22 continuation funding authorized for expenditures through September 21, 2022 a fiscal progress report is due to the Department of Higher Education on April 29, 2022, to facilitate appropriate allocation of grant dollars from the Department of Higher Education to Massasoit Community College, a year-end expense report will be due on October 31, 2022, and will reflect the final amount of funding needed to cover all FY22 expenses

4. [REQUIRED] Justification that use of ISA is best value vs. contract with outside vendor.

These funds are awarded per the budget authorized in Ch. 24 of the Acts of 2021. The line item specifies that these funds are to be distributed to the community colleges for the public purpose specified in the line item. Additional, in 2013 the Department issued an RFP to define the goals, objectives and measures for success of the STEM Starter Academy program in Massachusetts. The college receives these funds as a grantee selected by the DHE in response to a request for proposal.

5. Will Seller/Child department state employees (AA Object Class) be fully or partially funded under this ISA? ☐ No ☒ Yes

If Yes, justify necessity to use state employees for the ISA vs. use of contractors (contract employees or outside vendors).  
The college may use grant funds to support employees working on the initiative as stated in the proposed budget.

6. Subcontractors. Since it is presumed that contracting through the Seller/Child is more cost effective and a better value than the Buyer/Parent directly contracting with an outside contractor(s), any subcontract entered into by the Seller/Child for the purposes of fulfilling the obligations under an ISA must be approved by the Buyer/Parent in advance of the ISA and justified as part of the ISA Attachment A, as follows: (enter "N/A" if subcontractors will not be funded with ISA funds)

The college may use grant funds to support subcontractors as stated in the proposed budget provided that these vendors are procured in a manner consistent with Massachusetts procurement and finance law.

7. Identify any equipment that will be leased or purchased by the Seller/Child using ISA funds. (The Buyer/Parent shall determine ownership of equipment purchased by the Seller/Child with ISA funds. Enter "N/A" if equipment not included in ISA.)

The college may use grant funds to for equipment purchases/leases as stated in the proposed budget provided that these items are procured in a manner consistent with Massachusetts procurement and finance law.

8. [REQUIRED] Identify the format and timing of ISA reports to the Buyer/Parent Department. Include the type of reports (e.g., progress or status, data, etc.), timing of reports (e.g., weekly, monthly, final) and the medium for submission of reports (e.g., e-mail, Excel spreadsheet, paper, telephone).

The college acknowledges that the activities funded by the STEM Starter Academy grant will be formally evaluated by the University of Massachusetts Donahue Institute (UMDI) and each campus will work with the Institute toward that end. The UMDI will collaborate with the colleges' Institutional Research staff to develop a common and uniform set of outcome measures specific to the grant-funded work proposed by that college.

9. Additional ISA Terms [Insert Terms here. Do not refer to separate attachment(s)]

**Settlement and Release Language**

Obligations were incurred by the college (the child) in the amount of \$51,490.00 or less for the time period September 1, 2021 – October 30, 2021, for FY22 award year activities, prior to the Effective Date of this Contract (for which a payment obligation has been triggered) are intended to be part of this ISA Contract and shall be considered a final Settlement and Release of these obligations which are incorporated herein. Upon payment of these obligations through this ISA, the college forever releases the Department of Higher Education (RGT) from any further claims related to these obligations.

**Conditions for Authorization of Use of CT Transaction**

In accordance with the provisions of Section 15C of Chapter 15A and Section 13 of Chapter 73 of the Massachusetts General Laws, and in addition to any other reporting requirements set by the Buyer/Parent agency, the Seller/Child agency shall report monthly all expenditures and revenues from all appropriated and non-appropriated funds on the Massachusetts management and accounting reporting system. Reporting shall be completed by the 5<sup>th</sup> day of each calendar month through Receipt Of Trust (RT) and Trust Voucher (TV) documents as required by the Office of the Comptroller.

**Contact Information:**

The Program Contact for MAS is \_\_\_\_\_@massasoit.edu

The Program Contact for DHE is Allison Little, 617-994-6935, ALittle@dhe.mass.edu

# INTERDEPARTMENTAL SERVICE AGREEMENT (ISA) FORM



## ATTACHMENT B - BUDGET

Check one

☐ Initial ISA Budget

☒ ISA Budget/Account Amendment. Maximum Obligation of ISA before this Amendment \$2,202,990.00

PRIOR MMARS DOCUMENT ID: ISARGT70660036MAS21A (for reference - if applicable)

CURRENT DOC ID: ISARGT70660036MAS22A

[See Instructions for Additional Guidance on completion Insert as many additional lines as necessary]

A	B	C	D	E	F	G	H	I
Budget Fiscal Year	Seller/Child Account	Object Class	Description	Initial ISA Amount / or Amount Prior to Amendment	Indicate Add or Reduce +/-	Amendment Amount	Enter "YES" if Amount is a prior FY budget reduction or a current FY "Carry-in" authorization for Federal ISA Funds	New Amount After Amendment
2014	7066-0036	PP	Grants to Public Entities	\$347,200.00		\$		\$347,200.00
2015	7066-0036	PP	Grants to Public Entities	\$150,000.00		\$		\$150,000.00
2016	7066-0036	PP	Grants to Public Entities	\$300,000.00		\$		\$300,000.00
2017	7066-0366	PP	Grants to Public Entities	\$349,790.00		\$		\$349,790.00
2018	7066-0366	PP	Grants to Public Entities	\$261,000.00		\$		\$261,000.00
2019	7066-0366	PP	Grants to Public Entities	\$265,000.00		\$		\$265,000.00
2020	7066-0366	PP	Grants to Public Entities	\$265,000.00		\$		\$265,000.00
2021	7066-0036	PP	Grants to Public Entities	\$265,000.00		\$		\$265,000.00
2022	7066-0036	PP	Grants to Public Entities	\$	+	\$225,250.00		\$225,250.00
2023	7066-0036	PP	FY22 Carry Forward	\$	+	\$39,750.00		\$39,750.00
				\$		\$		\$
				\$		\$		\$

FISCAL YEAR SUBTOTALS AND TOTAL MAXIMUM OBLIGATION FOR DURATION OF ISA				
FISCAL YEAR	2014	SUBTOTAL (or New Subtotal if Fiscal Year Subtotal being amended)		\$347,200.00
FISCAL YEAR	2015	SUBTOTAL (or New Subtotal if Fiscal Year Subtotal being amended)		\$150,000.00
FISCAL YEAR	2016	SUBTOTAL (or New Subtotal if Fiscal Year Subtotal being amended)		\$300,000.00
FISCAL YEAR	2017	SUBTOTAL (or New Subtotal if Fiscal Year Subtotal being amended)		\$349,790.00
FISCAL YEAR	2018	SUBTOTAL (or New Subtotal if Fiscal Year Subtotal being amended)		\$261,000.00
FISCAL YEAR	2019	SUBTOTAL (or New Subtotal if Fiscal Year Subtotal being amended)		\$265,000.00
FISCAL YEAR	2020	SUBTOTAL (or New Subtotal if Fiscal Year Subtotal being amended)		\$265,000.00
FISCAL YEAR	2021	SUBTOTAL (or New Subtotal if Fiscal Year Subtotal being amended)		\$265,000.00
FISCAL YEAR	2022	SUBTOTAL (or New Subtotal if Fiscal Year Subtotal being amended)		\$265,000.00
TOTAL MAXIMUM OBLIGATION FOR DURATION OF ISA (or New Total Maximum Obligation if amended)				\$2,467,990.00



**INTERDEPARTMENTAL SERVICE AGREEMENT (ISA) FORM**



# INTERDEPARTMENTAL SERVICE AGREEMENT (ISA) FORM



## ATTACHMENT C – FEDERAL GRANT SELLER/CHILD ACCOUNT

[Complete ONLY if Buyer/Parent Account is a Federal Grant Account. Seller/Child Department must signoff in order to process document.]

New ISA      ISA AMENDMENT		BUDGET FISCAL YEAR:	
BUYER/PARENT DEPARTMENT:		SELLER/CHILD DEPARTMENT:	
<b>CTR ONLY - REVENUE BUREAU WILL ASSIGN</b>			
Revenue Budget		Revenue Source	
<b>BUYER/PARENT DEPARTMENT MUST COMPLETE ALL ITEMS BELOW</b>			
<b>CENTRAL BUDGET STRUCTURE (BGCN - BQ89)</b>			
Appropriation Number		Payroll Indicator      Yes      No	
Budgetary Estimated Receipts      \$		BGCN Document Identification No.	
<b>COST ACCOUNTING STRUCTURE (BGRG- BQ88)</b>			
Total Maximum Obligation of ISA. \$		BGRG Document Identification No.	
<b>MAJOR PROGRAM TABLE SET-UP</b>			
Major Program (6 chars. or less):		Major Program Short Name (same as appropriation number):	
Major Program Name:			
<b>PROGRAM PERIOD TABLE SET-UP OR EXTENDED PROGRAM PERIOD</b>			
Effective From Date:		Effective To Date:	
Program Period:			
Program Period Name:		Program Period Short Name	
<b>PROGRAM TABLE SET-UP</b>			
Effective From Date:		Effective To Date:	
Program Name:		Program Short Name:	
Program Code: (MUST START WITH "F" followed by up to 9 characters) F		Sub Account:	
<b>FUNDING PROFILE - FUNDING LINE</b>			
Draw Name:	Customer ID	Payment System Code - Check one option only	
EDCAPS:	VC7000000001	<b>D</b>	
ECHO:	VC7000000002	<b>E</b>	
LOCES:	VC7000000003	<b>L</b>	
SMARTLINK:	VC7000000004	<b>S</b>	
ASAP- OTHER:	VC7000000005	<b>Y</b>	
ASAP:	VC7000000006	<b>Z</b>	
GRANT- NON DRAW:	VC7000000007	<b>No Code</b>	
<b>FUNDING IDENTIFICATION</b>			
Federal Catalog Agency: (2 digit code)		Federal Catalog Suffix: (3 digit code)	
Letter of Credit No.:			

Authorized Signatory Seller/Child Department: \_\_\_\_\_ Date: \_\_\_\_\_ Name: \_\_\_\_\_

# INTERDEPARTMENTAL SERVICE AGREEMENT (ISA) FORM INSTRUCTIONS



The Interdepartmental Service Agreement (ISA) Form is issued by the Office of the Comptroller (CTR) pursuant to 815 CMR 6.00 for use by all Commonwealth Departments. The ISA Instructions are provided to assist both Buyer/Parent and Seller/Child Commonwealth Departments with the interpretation and completion of the ISA Form and are incorporated by reference into the ISA. The ISA Form is the "Contract" that documents the business agreement (joint venture) between two Commonwealth departments within the Executive, Judicial and Legislative Branches of government. A Department must be recognized as a Department in the State Accounting System (hereinafter referred to as "MMARS") in order to transfer or receive funding under an ISA. The ISA must comply with funding language in any appropriation act funding the ISA, as well as all applicable general and special state or federal laws, regulations. The Buyer/Parent and Seller/Child are responsible for reviewing and complying with the applicable CTR policies (including but not limited to the ISA, electronic signature and state finance law policies) located at the [CTR Knowledge Center](#) under Procurement and Contracts and also at the CTR Website at: [Comptroller Policies](#). While reasonable efforts have been made to assure the accuracy of the legal requirements for ISAs, Departments should consult with their legal counsel to ensure compliance with all legal requirements related to their performance under an ISA. PLEASE NOTE THAT NOT ALL APPLICABLE LAWS HAVE BEEN CITED IN THIS DOCUMENT. INSTRUCTIONS AND HYPERLINKS MAY BE ADDED OR CHANGED WITHOUT NOTICE, SO CHECK THIS DOCUMENT PERIODICALLY FOR UPDATES.

- ➔ **MMARS DOCUMENT ID:** Enter the state accounting system (MMARS) BGCN or BGCS or other authorized MMARS document number associated with this ISA. ISA related DOC ID Numbering must be done as described below. The Doc ID must be the Doc ID entered into MMARS and reflected on the supporting ISA paperwork. All ISA Doc IDs MUST START WITH "ISA", as follows

EXAMPLE DOC ID Number: ISAEPS12345678SDF06A

First 3 Characters	Second 3 Characters	Next 8 Characters	Next 3 Characters	Next 2 Characters*	Last Character
ISA	Buyer/Parent Department Alpha	Buyer/Parent defined May be numeric, alpha or combination	Seller/Child Department Alpha	Fiscal Year	A (initial document ) B (1st Amendment) C (2nd Amendment)
ISA	EPS	12345678	SDF	06	A

- ➔ **BUDGET FISCAL YEAR:** Enter the Budget Fiscal Year of the ISA or ISA Amendment, as appropriate
- ➔ **REQUEST FOR RESPONSE REFERENCE NUMBER:** If the Seller/Child responded to an RFR that was posted on Comm-PASS, enter the RFR Reference Number as posted. If an RFR was not used, indicate "N/A". Seller/Child Departments may respond to a Request for Response (RFR) or other solicitation of a Buyer/Parent Department. If the Seller/Child Department is selected as a contractor, the ISA Form must be used as the "contract" (instead of the applicable Commonwealth Terms and Conditions and Standard Contract Form and Instructions)
- ➔ **BUYER/PARENT/SELLER/CHILD DEPARTMENT NAME:** Enter the 3 Alpha MMARS Department Code. For Example "CTR" for the Office of the Comptroller.
- ➔ **BUSINESS MAILING ADDRESS:** Enter the address where all correspondence to the ISA Manager must be sent. Unless otherwise specified in the ISA, legal notice sent or received by the Department's ISA Manager (with confirmation of actual receipt) through the listed fax number(s) or electronic mail address for the ISA Manager will meet any requirements for written notice under the ISA.
- ➔ **ISA MANAGER:** Identify the authorized ISA Manager who will be responsible for managing the ISA. ISA Managers must be Department Head Authorized Signatories in order to execute the ISA and otherwise obligate the Department with the appropriate MMARS Security to support Department Head Signature Authorization.
- ➔ **PHONE/FAX/E-MAIL ADDRESS:** Identify the phone, fax number(s) and electronic mail (e-mail) address of the ISA Manager.
- ➔ **PURPOSE OF ISA:** Check off whether this is a new ISA or an ISA Amendment. For New ISAs, enter the total Maximum obligation for the duration of the ISA. If an ISA Amendment, check off any of the Amendments that are being made and complete any information in the blanks provided and the Attachments that are identified.
- ➔ **BRIEF DESCRIPTION OF PERFORMANCE GOALS TO BE ACCOMPLISHED BY THIS ISA, OR IF AMENDMENT, IDENTIFY WHAT IS BEING AMENDED:** Identify a brief description of the ISA, ISA name and performance to be accomplished under the ISA. If an ISA Amendment, identify what is being amended. Merely stating "see attached" or referencing attachments without a narrative description of performance is insufficient and will result in ISA or Amendment being returned to MMARS Liaison of Buyer/Parent Department. The description is used to specifically identify the ISA performance, match the ISA with attachments and determine if the appropriate process has been selected.
- ➔ **INDICATE WHETHER SELLER/CHILD DEPARTMENT STATE EMPLOYEES (AA OBJECT CLASS) WILL BE FULLY OR PARTIALLY FUNDED UNDER THIS ISA:** Justification for use of state employees and details of who will be working and work that will be performed must be included as part of ATTACHMENT A.
- ➔ **ACCOUNT INFORMATION**
  - \* Check the correct option for either a BGCN – non-subsidiarized (federal, capital, trust), BGCS – subsidiarized (budgetary), Other (CT, RPO or other document authorized by CTR); Non-Financial ISA (no funds are transferred from Buyer/Parent to Seller/Child with resources committed to ISA, or Amendment without Budget changes to ISA (used only for an Amendment if there are no changes to the budget and no changes to Attachments B and C (if applicable))
  - \* Identify for each account under the ISA whether the account is "added", "deleted" or "no change". **THIS SECTION MUST BE COMPLETED FOR AMENDMENTS EVEN IF THE ACCOUNT INFORMATION HAS NOT CHANGED.** Enter each ISA account, fund, major program code and program code for all funding under the ISA. Attachment B must be completed for all financial ISAs and ISA Amendments (with Budgetary or Account amendments). Attachment C must be completed for any financial ISAs or ISA Amendments with Budgetary or Account amendments involving federal or capital funds).
- ➔ **ISA ANTICIPATED START DATE:** Enter the anticipated start date, provided that the Seller/Child certifies that it will not incur any obligations related to this ISA prior to the date that this ISA is executed, NOR prior to the date that sufficient funding for the obligations under this ISA available in the Seller/Child account for expenditure.

# INTERDEPARTMENTAL SERVICE AGREEMENT (ISA) FORM INSTRUCTIONS



Note - ISA Duration. ISAs can be executed for the duration that makes sense from a business perspective. Multi-Year ISAs are encouraged if it best supports the Buyer/Parent and Seller/Child business processes. Similar to other types of contracts, all ISAs are subject to appropriation or other available funding. Therefore, Departments can enter into a Multi-year ISA even if funding transactions have to be processed annually to support each fiscal year of the ISA. Buyer/Parent and Seller/Child Departments are responsible for ensuring that the funding is in place in the authorized Seller/Child account(s) to ensure that the Seller/Child Department can timely encumber funds and pay employees, contractors, grantees, etc. from the authorized ISA Seller/Child account(s) in accordance with the ISA Terms and Conditions.

- ➔ **TERMINATION DATE OF THIS ISA.** The Buyer/Parent Department must enter the date the ISA will terminate. An ISA must be signed for the full duration and amount in accordance with what is negotiated between the Buyer/Parent and Seller/Child Department. Amendments to extend the termination date, such as renewals, must be made using the ISA Form and must be signed by authorized Department Head signatories (with appropriate MMARS Authorized Signatory Security roles) of both the Buyer/Parent and the Seller/Child Department contemporaneously with the need for the amendment but no later than the termination date (or as previously amended) in accordance with 815 CMR 6.00.
- ➔ **AUTHORIZING SIGNATURE FOR BUYER/PARENT DEPARTMENT/DATE.** The Authorized Buyer/Parent Department Signatory must, in their own handwriting, and in ink, sign AND enter the date the ISA is signed. **THE DATE IS AN INEXTRICABLE PART OF THE SIGNATURE AND MUST BE COMPLETED BY THE SIGNATORY AND MAY NOT BE PRE-FILLED OR ENTERED AFTER THE SIGNATURE BY ANOTHER PERSON.** Rubber stamps, typed or other images are not acceptable. See CTR policies on Electronic Signature and Department Head Signature Authorization for Department Head and Authorized Signatory certifications and responsibilities.
- ➔ **NAME /TITLE:** The Buyer/Parent and Seller/Child Department Authorized Signatory's name and title must appear legibly.  
**NOTE:** Secretariat signoff is not required in order for CTR to process an ISA. However, Seller/Child and Buyer/Parent Departments are required to follow any internal secretariat procedures when obtaining authorization for an ISA (or for certain ISA transactions such as an inter-subsidiary transfer "TS") prior to submission to CTR. All ISAs are periodically reviewed by CTR to verify that the signatories are authorized by their Department Head to execute contracts. Departments are responsible for timely processing through secretariats to ensure timely funding as required under the Department Head certifications.
- ➔ **ATTACHMENT A – TERMS OF PERFORMANCE AND JUSTIFICATIONS.** *Attachment A is required for all new ISAs and for all ISA Amendments.* Departments must use this attachment and insert (type, or copy and paste) the required information in addition to other terms of performance negotiated by the parties under Section 9. Sections 1-8 are mandatory and must be answered in detail or the ISA will be returned to the Buyer/Parent Department MMARS Liaison. All information must be inserted into Attachment A using as many pages as necessary. If Amending the ISA, completion of Sections 1, 2 and 3 identifying what is being amended and the reasons for the amendments is required. For sections 4-9 enter only the amended language in the sections being amended.
- ➔ **ATTACHMENT B - ANTICIPATED BUDGET.** *Attachment B is required for all New ISAs and for all ISA Amendments with budget and accounting transactions.* Departments must use this form. Insert all required information and use as many additional lines and pages as necessary. This attachment must breakdown the specifics of the ISA funding, by fiscal year, Seller/Child account, object class, description and amount. For multi-year ISAs the Attachment must provide a subtotal each fiscal year of the ISA (which equals each fiscal year's anticipated maximum obligation). All ISAs must provide a total maximum obligation for the total duration of the ISA (which must equal the total of all fiscal year subtotals) and must match the "Total Maximum Obligation for Duration of ISA" on the executed ISA.
  - \* Check "Initial ISA Budget", or "ISA Amendment".
  - \* Identify the MMARS Doc ID if the ISA is being amended.
  - \* **Complete Columns A-E For New ISAs. Complete Columns A-I for Amendments.**
    - **Column "A" (Budget Fiscal Year).** Enter the fiscal year of the funding, or amendment. For Multi year ISAs Column A must list planned expenditures by each fiscal year of the ISA.
    - **Column "B" (Seller/Child Account).** Enter the number of each Seller/Child account listed on the ISA Form. For ISAs using multiple Seller/Child Accounts, Column B must list planned expenditures for each Seller/Child account.
    - **Column "C" (Object Class).** Enter the Object Class (subsidiary) as outlined in the CTR Expenditure Classification Handbook (for example, "AA" for Employee compensation, "EE" for Administrative Expenses, "HH" for Consultant Contracts, etc.) IF the line item is authorized for multiple fiscal years, enter a separate line-item for each fiscal year of the ISA in which the line-item is authorized, specifying the estimated amount of the authorized expenditure. Line-items break downs of estimated expenditures by Object Class are required even if the Buyer/Parent account is non-subsidiarized, since the Budget acts as the authorization for the ISA expenditures. For subsequent fiscal years, entering "Balance Forward Amount" for federal, bond and trust accounts is insufficient, since good project management practices presume that departments will be managing estimated expenditures over the life of a project with planned fiscal year obligations, rather than managing projects solely based upon remaining uncommitted estimated receipts or uncommitted balances.
    - **Column "D" (Description).** Enter a brief description of the type of authorized budget expenditure or category, (e.g., "Conference Materials", "Program Manager", "Health Evaluations" etc.)
    - **Column "E" (Initial ISA Amount/or Amount Prior to Amendment).** Enter the amount for the budget item authorized under the ISA for each fiscal year. If the ISA is being amended, enter the current amount for this line-item, prior to the amendment. The Amendment amount will be entered in Column G and the new total will be entered in Column I.
    - **Column "F" (+/-)** is only used if the ISA is being amended to add or reduce a budget line item. Enter "+" for budget addition or "-" for a budget reduction.
    - **Column "G" Amendment Amount** is only used if the ISA is being amended to add or reduce a budget line item. Enter the amount of the budget line being increased or decreased.
    - **Column "H" (Carry-In)** is only used if the ISA is being amended to reduce a prior year federal grants fund line item with uncommitted estimated receipts that are being re-authorized in the current or a future fiscal year. Enter "YES" in this column for each line item being amended (by object class and description) to reflect a reduction in the budget in a prior fiscal year line item, and for each line item being added (by object class and description) to reflect a reauthorization of the funds in the current or a future fiscal year.



# INTERDEPARTMENTAL SERVICE AGREEMENT (ISA) FORM INSTRUCTIONS



- **Column "I" New Amount After Amendment** is only used if the ISA is being amended to add or reduce a budget line item. Enter new ISA Amount after the adding or reduction of the line-item amount referenced in Column G
- \* **FISCAL YEAR SUBTOTALS AND TOTAL MAXIMUM OBLIGATION**
  - **Fiscal Year Subtotals** For single fiscal year ISAs enter the fiscal year (e.g., "Fiscal Year 2007") and enter the subtotal of all "Current Amounts" (Column E) for that fiscal year. For Multi-year ISAs, enter each fiscal year of the ISA as a separate subtotal and enter the subtotal of all "Current Amounts" for each fiscal year
  - **Total Maximum Obligation for Duration of ISA** Enter the Total Maximum Obligation for the Duration ISA for all fiscal years (as identified on the executed ISA Form). For single fiscal year ISAs, this amount should be the same as the Fiscal Year Subtotal. For Multi-fiscal year ISAs, this amount should equal the total of all the listed fiscal year subtotals.
- ➔ **ATTACHMENT C – FEDERAL GRANT SELLER/CHILD ACCOUNT** (complete only if Buyer/Parent Account is a Federal Account). Please enter the following information on this form:
  - \* Enter whether this is a "New" ISA or an ISA Amendment and enter the Budget fiscal year.
  - \* Enter the Buyer/Parent and Seller/Child Departments, which must match the ISA
  - \* *Skip the Revenue Budget and Revenue Source which will be completed by CTR.*
  - \* **CENTRAL BUDGET STRUCTURE:**
    - **Appropriation Number** Enter the Appropriation Number assigned by ANF
    - **Payroll Indicator** Enter a Payroll indicator of Yes or No.
    - **Estimated Budgetary Receipts** Enter the amount of the Estimated Budgetary Receipts (the amount estimated in the ISA or Amendment for the current state fiscal year).
    - **BGCN Document Identification No.** Enter the MMARS Document Identification Number for the Central Expense Document (BGCN). The BGCN must be entered and submitted to PEND in MMARS. Providing a screen print of the BGCN aids CTR in the processing of the ISA and set up of the accounts or account changes.
  - \* **COST ACCOUNTING STRUCTURE:**
    - **Total Maximum Obligation of ISA or ISA Amendment Amount** For New ISAs, enter the Total Maximum Obligation of the ISA for the full duration of the ISA. For ISA Amendments, enter the amount of the modification.
    - **BGRG Document Identification No.** Enter the MMARS Document Identification Number for the Reimbursable Grant Budget Document (BGRG). The BGRG must be entered and submitted to PEND in MMARS. Providing a screen print of the BGRG aids CTR in the processing of the ISA and set up of the accounts or account changes.
  - \* **MAJOR PROGRAM TABLE SET-UP.** This sets up the cost accounting hierarchy with groups of activities (programs) all part of one structure. For example – a major program could be wastewater management – WASTE. All documents (contracts, encumbrances, payments will reference this code.) All documents (contracts, encumbrances, payments will reference this code.)
    - **Major Program** Enter the 6 (or fewer) character Major Program Code assigned by the department
    - **Major Program Name** Enter the full Major Program Name
    - **Major Program Short Name** Enter the Major Program Short Name
  - \* **PROGRAM PERIOD TABLE SET-UP OR EXTENDED PROGRAM PERIOD (EPP)** Enter the Program Period or Extended Program Period (EPP) information. This establishes the effective period of the grant. Please note that end dates are "hard edited" by the system, thus please take into account the accounts payable period for grants when establishing this date. Multiple periods allow for easy periodic reporting aligned to federal reporting dates. However, a Buyer/Parent department may choose to use 1 reporting period – EPP – that encompasses all dates. The downside of this method is that specific periodic federal reporting by the system is not achieved.
    - Enter the Program Effective From Date and Effective to Date
    - Enter the Program Period or Extended Program Period (EPP) information
    - Enter the Program Period Name, and Program Period Short Name
  - \* **PROGRAM TABLE SET-UP:**
    - Enter Program Name. For example a program could be for "storm water discharge"
    - Enter Program Short Name
    - **Program Code** Enter the 10 (or fewer) characters. All Federal Program codes must begin with the letter "F". This is the second level of the cost accounting hierarchy. Programs are individual activities within a Major Program. Using the major program example, a program could be for storm water discharge – the program code would be "Fstormdis". All documents (Recurring Payment Order (RPO), payments will reference this code.)
    - The sub account must be the sub account in the award letter or the draw on the federal grant will fail. If a sub-account changes, this code must change.
  - \* **FUNDING PROFILE - Funding Line** This must be filled out properly – indicating the federal payment system to be used. If the wrong payment system is indicated, the draws on the federal grant will fail. Enter a check next to appropriate Payment System Code.
  - \* **FUNDING IDENTIFICATION**
    - **Federal Catalog Agency Code** Enter the 2 digit Federal Catalog Agency code
    - **Federal Catalog Suffix** Enter the 3 digit Federal Catalog Suffix code from your award letter or contact the appropriate agency. This must align to the grant award. The proper grant identification information is a federal reporting requirement
    - **Letter of Credit No.** Enter the Letter of Credit No. for this grant award.

## COMPLETED ISAS SHOULD BE SUBMITTED FOR PROCESSING TO:

Office of the Comptroller, One Ashburton Place – 9<sup>th</sup> Floor, Attention: Accounts Payable Bureau, Contracts, Boston, MA 02108  
CTR Helpline **617-973-2468**









# FY22 STEM Starter Academy ISA

Final Audit Report

2021-10-15

Created:	2021-10-15
By:	Elhame Kajtazi (ekajtazi@dhe.mass.edu)
Status:	Signed
Transaction ID:	CBJCHBCAABAABZa1E0Fr2vTX3bcnRoRHp577HFj2EFH4

## "FY22 STEM Starter Academy ISA" History

-  Document created by Elhame Kajtazi (ekajtazi@dhe.mass.edu)  
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-  Document emailed to william mitchell (wamitchell@massasoit.mass.edu) for signature  
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-  Email viewed by william mitchell (wamitchell@massasoit.mass.edu)  
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-  Document e-signed by william mitchell (wamitchell@massasoit.mass.edu)  
Signature Date: 2021-10-15 - 6:15:22 PM GMT - Time Source: server
-  Document emailed to Thomas Simard (tsimard@dhe.mass.edu) for signature  
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-  Email viewed by Thomas Simard (tsimard@dhe.mass.edu)  
2021-10-15 - 6:17:11 PM GMT- IP address: 73.69.57.140
-  Document e-signed by Thomas Simard (tsimard@dhe.mass.edu)  
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-  Agreement completed.  
2021-10-15 - 6:17:43 PM GMT



Adobe Sign

## **Memorandum Of Understanding Early College High School**

This Memorandum of Understanding (MOU) is by and between Massasoit Community College (herein called the "MCC"), located at \_\_\_\_\_, and New Heights Charter School of Brockton (herein called "NHCS"), located at \_\_\_\_\_ (collectively the "Parties").

The parties to this MOU desire to establish an Early College High School ("School") serving grades 6-12 in the Brockton area. The parties intend to provide college courses for high school students for whom a smooth transition into post-secondary education can be a challenge, including low-income students; students who are highly motivated but have not received the academic preparation necessary to meet high academic standards; students who are English language learners; students who have family obligations; and students for whom the cost of college is prohibitive. Accordingly the parties mutually agree as follows:

1. **GOVERNANCE:** The Early College High School established under this agreement will be governed by the New Heights Charter School Board of Trustees and subject to all state and federal policies and requirements. A Board of Trustees will meet regularly to evaluate instructional and programmatic activities; identify problems, issues, and challenges that arise; and make recommendations regarding more effective coordination and collaboration.
2. **IDENTIFICATION OF COLLEGE REPRESENTATIVE(S) ON BOARD OF TRUSTEES:** MCC will identify 1 college staff member to serve on the School's Board of Trustees. MCC will establish a college working group comprised of the Dean of Liberal Arts, the Dean of Science and Mathematics, and the Director of the Gateway to College Program to coordinate/consult with the Board of Trustees and School personnel.
- 
3. **PROVISION OF COLLEGE COURSES:** MCC will offer college-level courses to eligible and qualified students enrolled at the School. MCC will award credit for courses for which Course Articulation Agreements have been approved and such courses as have been evaluated and approved through the official MCC curriculum approval process. MCC, in collaboration with NHCS staff, will identify applicable college courses. MCC will be responsible for all hiring and supervision of college teaching staff. MCC will engage NHCS staff in conversations about characteristics that are best suited to teaching high school-aged students.
- 
4. **COURSE COMPLIANCE:** MCC is responsible for identifying faculty to teach college courses at MCC and at NHCS to ensure that course goals and standards are understood, that course guidelines are followed, and that the same standards of expectation and assessment are applied in all venues where MCC offers courses.
5. **STUDENT QUALIFICATIONS:** All students who seek to enroll in college courses must meet the College's enrollment requirements, including placement testing and pre-requisite course sequencing, before they will be enrolled in a college course.
- 
6. **TUITION AND FEES:** NHCS will pay a flat rate of approximately \$5000 per course (this rate is subject to change over time to allow for annual adjustments), taught at either NHCS or MCC. MCC will invoice NHCS. NHCS shall be required to cover the cost of academic accommodations required for School students participating in College courses taught at the NHCS campus.
7. **INSTRUCTORS:** All instructors must meet MCC's academic requirements. The College will identify and hire all instructors for courses conducted on the college campus as well as for the courses conducted at the high school. MCC will pay the salary of instructors who teach a college course. Two NHCS instructional staff will attend college courses (1 per course) to learn the material and provide academic support to students. One additional NHCS staff member, a special education support



specialist, will be available for students with IEPs and 504s. The NHCS staff members are provided for educational support purposes only and will not interfere in classroom instruction management unless requested to do so by the College instructor.

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- 8. **FACILITIES:** Courses will be conducted at facilities provided by NHCS and on the MCC campus. Students and NHCS instructors will receive a campus identification card. MCC will schedule all courses on the MCC campus. MCC will provide space for NHCS staff and NHCS will provide space for MCC faculty on an as-needed basis.
- 9. **SUMMER BRIDGE:** During the summer months, MCC will provide space, with incurred costs invoiced to NHCS, for a Summer Bridge program to be taught for four weeks, four days a week in the month of July. NHCS will be responsible for all incurred cost for the Summer Bridge.
- 10. **TESTING:** NHCS students will take the ACCUPLACER placement or diagnostic test multiple times in preparation for college course selection. MCC will not hold the NHCS students accountable to practice testing until such a time as the student qualifies for credit-bearing coursework.
- 
- 11. **BOOKS AND SUPPLEMENTAL MATERIALS:** All textbooks, syllabi, and course outlines for all college courses offered shall be approved by MCC. Payment for all textbooks and supplemental materials required for classes, as determined by the faculty member teaching the course, will be the responsibility of NHCS. NHCS will purchase these materials through MCC's vendor, Barnes and Noble.
- 12. **DINING SERVICES:** MCC and NHCS will work together to develop a meal plan for students who are enrolled full-time on MCC's campus. Incurred costs associated with the meal plan will be invoiced to NHCS.
- 
- 13. **ENROLLMENT:** NHCS students will be enrolled by MCC staff and their progress tracked as is done for other MCC students. MCC and NHCS staff will establish protocols for NHCS to receive progress reports, grades, and other tracking information.
- 14. **INSTRUCTIONAL CALENDAR:** College courses will be taught on the College calendar, with the exception of the shortened Summer Bridge program.
- 
- 15. **CONDUCT:** NHCS students are required to adhere to all MCC regulations regarding facilities and equipment usage and to the MCC code of conduct when on the MCC campus. They are subject to appropriate action taken by MCC. MCC reserves the right to remove any student from its property. In the event the student is on the NHCS campus when a breach of conduct occurs, MCC and NHCS will collaborate on an appropriate course of action.
- 
- 16. **SAFETY:** If any high school student, instructor, or administrator should experience an accident or sudden illness while on the premises of MCC, the response to such incidents will be based upon MCC's regulations, guidelines, and procedures.
- 17. **RENEWAL AND TERMINATION OF AGREEMENT:** This MOU may be amended by mutual written agreement of the parties. The MOU will be in force for five (5) years following signing and is renewable based on the written consent of the parties. MCC and NHCS reserve the right to terminate this MOU upon service of written notice to the other party 90 days prior to the date of termination. If a termination notice is serviced during a semester, the effective date of termination will be the day after the end of the semester during which the 90-day period expires.

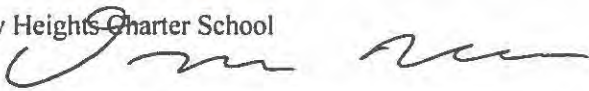
IN WITNESS THEREOF, the parties have duly approved THIS AGREEMENT, EXECUTED IN TWO original counterparts on this \_\_\_\_\_ date of \_\_\_\_\_.



Massasoit Community College

By:   
College President

New Heights Charter School

By:   
NHCS Executive Director



MASSASOIT  
COMMUNITY COLLEGE

Massasoit Community College  
and  
Curry College

Memorandum of Understanding

## **1.0 Background and Objectives**

1.1 Curry College (CC) proposes offering a Bachelor of Science Degree (BS with Nursing Major) at Massasoit Community College (MCC) for graduates of the MCC Nursing Program (Degree Program). Through this collaboration, MCC graduates will be able to complete their BS degree at a location that is convenient for them.

1.2 This Memorandum of Understanding (MOU) acknowledges that both MCC and CC are committed to providing a pathway for the attainment of a BS in Nursing degree to MCC Nursing graduates and other eligible candidates who find the MCC location beneficial.

## **2.0 Terms of Agreement**

2.1 Classes will be offered in a cohort model at MCC.

2.2 The goal cohort size is 25 enrolled students, but may be run at a lower or higher number at CC's discretion.

2.3 If minimum/maximum course enrollment is not met one month prior to the start of the cohort, application/registration will be open to RN-BS applicants of Curry College's Continuing and Graduate Studies Division.

2.4 The Nursing major will be offered in an eight- (8) week hybrid format. (See 2.11 for more detail.)

2.5 The standard CC application and admission process for the Nursing Program will be followed. This process, including the impacts and implications for student credit transfer and tuition, are detailed in the existing Master Agreement for Associate Degree Graduates of Academic Degree Programs (dated June 28, 2018) between CC and MCC. First preference for seats will go to MCC students. Empty seats may be filled by others as indicated herein at Section 2.3.

2.6 Students participating in this program shall be subject to CC's policies and procedures, including those addressing student conduct, affirmative action and Title IX. Any disciplinary decision made by CC that effect a student's continued enrollment in the Degree Program shall be reported to MCC. MCC reserves the rights to restrict access to its campus to any Degree Program participant.

2.7 Hiring, evaluation, and supervision of faculty will be done by CC personnel. In such cases where MCC faculty are hired to teach in the CC RN-BS program (as anticipated), such faculty shall be considered CC employees and will be governed by the rights, privileges and responsibilities articulated in the CC-AAUP Collective Bargaining Agreement, as applicable, as well as the CC Handbook. MCC reserves the right to prohibit an MCC faculty member from teaching in the Degree Program if such employment interferes with the faculty member's primary employment responsibilities at MCC.

2.8 CC shall be primarily responsible for providing Degree Program students with student support services (e.g. writing tutors, academic advisors, counselors, etc.). Prior to MCC providing any student support services to Degree Program participants, CC and MCC shall agree upon applicable reimbursement rate(s) for the provision of such services.

2.9 All educational programming components of the BS program, including admissions criteria, course sequence, course curriculum, faculty expertise and credentialing, learning outcomes and assessment will be determined at the discretion of CC.

2.10 Students enrolled in the Degree Program shall be CC students. CC will determine and be responsible for all admissions, transfer credit evaluation, course registration, financial aid counseling/advising, collection of tuition payments and related fees, instruction and textbook purchase options for students registered in this BS program. CC will confer a BS degree (Nursing major) upon students that successfully achieve CC and Program graduation requirements.

2.11 Courses in the Degree Program will be offered in an 8-week hybrid format. The class will meet face-to-face weekly for approximately 2.5 hours in a standard classroom. A second asynchronous class will be delivered weekly in an online format via CC's Learning Management System. Students will be expected to bring or have access to a personal computer during face-to-face sessions. The CC Technology Center posts recommendations for laptop specs on the MyCurry portal. Students are advised that they must maintain a valid antivirus subscription. Students may be required to purchase other course specific software, as determined by CC.

2.12 MCC will provide classroom technology support for instructors and students. CC will provide student support for Blackboard issues and other technical issues.

### **3.0 Joint Obligations**

3.1 MCC and CC will collaborate on marketing efforts for the RN-BS Collaborative Cohort and MCC will provide directory information for graduates for the past five years and promote this opportunity to current MCC students and alumni through marketing channels deemed appropriate by their administration.

3.2 CC will engage in an integrated marketing plan including search ads, programmatic display, social media advertising, co-branding and regularly scheduled outreach events.

3.3 The MCC website will include information about the program with a page specific to the CC RN-BS program, which links to the appropriate CC webpage.

3.4 Any co-branding and use of CC or MCC logos, trademarks or other licensed or copyrighted materials, requires prior approval by the originating institution, CC and MCC.

#### **4.0 Annual Evaluation**

There will be an annual evaluation of the program supported by this MOU conducted by representatives at the decision-making level of both institutions. Both parties may request a more frequent review in response to curricular or institutional changes.

#### **5.0 Terms and Modification**

5.1 This Agreement is effective upon the date of execution by both parties and shall remain in effect for an initial term of three (3) years from the Effective Date. Following the initial term, this Agreement shall automatically renew on an annual basis. This Agreement may be terminated by either party for any reason upon ninety (90) days written notice to the other party. Notwithstanding, the parties agree to use their best efforts to delay the effective date of termination until those students who are then enrolled in the Degree Program have completed the program.

Termination shall be the sole remedy for breach or inability to perform the terms of this Agreement (i.e., regulatory approval).

5.2 This MOU is the Entire Agreement between CC and MCC relative to the subject matter described in Section 1.0 of this MOU, and will be in force until terminated under the conditions described herein, or superseded by a duly executed, written agreement between CC and MCC that explicitly replaces this MOU.

5.3 This document is entered into under the laws of the Commonwealth of Massachusetts and shall be interpreted by a Massachusetts court of competent jurisdiction under the laws of the Commonwealth. Should disputes arise as to the terms of this MOU or enforcement thereof, the parties may seek alternative means of dispute resolution prior to judicial enforcement. If any provision herein should, for any reason, be construed by a court of competent jurisdiction to be invalid or unenforceable, all other provisions shall remain in full force and effect and be construed so as to make this Agreement enforceable to the maximum extent allowed by law.

5.4 The implementation of the programming contemplated by this MOU is contingent upon receipt of any required accreditation or regulatory certification.

#### **6.0 Limitation of Liability**


During the term of this Agreement, CC shall maintain a policy of insurance for personal injury, death and property damage with minimum terms of one million dollars (\$1,000,000) per occurrence and three million dollars (\$3,000,000) in the aggregate. MCC shall be named as an additional insured under the policy of insurance. CC must provide MCC with at least ten (10) days written notice prior to the termination, suspension or modification of such insurance coverage. CC agrees to indemnify and hold harmless MCC, its officers, employees and agents for and against any and all loss, damages, suits, claims, costs, expenses, demands, judgments of liabilities of whatsoever kind or nature, arising out of this Agreement and attributable to the negligence of CC, its officers, agents, guests, employees, subcontractors or students.

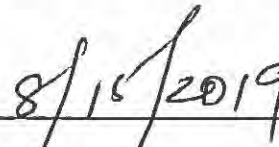
## 7.0 Notice

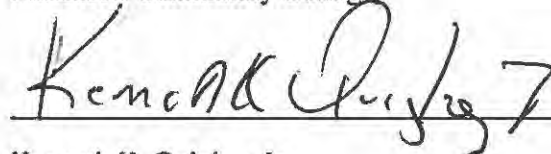
Notice shall be provided as required in this Agreement in writing (in a method that provides for receipt verification) as follows:

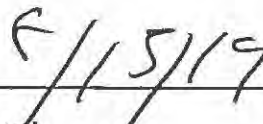
- a. *Admissions information (Fall cohort matriculants):*  
Vice President for Strategic Enrollment and Student Success  
Curry College  
1071 Blue Hill Avenue  
Milton, MA 02186
- b. *If to Curry (all other provisions):*  
Provost and Vice President for Academic Affairs  
Curry College  
1071 Blue Hill Avenue  
Milton, MA 02186
- c. *If to MCC:*  
Provost/Vice President of Academic and Student Affairs  
Massasoit Community College  
One Massasoit Boulevard  
Brockton, MA 02302

Duly authorized administrative representatives of Massasoit Community College and Curry College executed this Agreement as of the day and year given below.

  
\_\_\_\_\_  
Gena Glickman, Ph.D.  
President  
Massasoit Community College

  
\_\_\_\_\_  
Dated

  
\_\_\_\_\_  
Kenneth K. Quigley, Jr.  
President  
Curry College

  
\_\_\_\_\_  
Dated



[Return to Award Documents Page](#)

# National Science Foundation

**2415 Eisenhower Avenue, Alexandria, Virginia 22314, USA**

## AWARD NOTICE

Award Date:	June 9, 2017
Award No. (FAIN):	1643585
Proposal No.:	1643585
Managing Division Abbreviation:	DUE

Hollyce States  
Director of Grants  
Massasoit Community College  
One Massasoit Boulevard  
Brockton, MA 02302-3996  
DUNS ID: 948677075

Dear Mr. States:

The National Science Foundation hereby awards a grant of \$649,999 to Massasoit Community College for support of the project described in the proposal referenced above as modified by revised budget dated December 15, 2016. This award is expected to total \$649,999.

This project, entitled "STEM Scholars Associates," is under the direction of Michael Bankson, Andrew Oguma, LeeAnn Griggs.

This award starts June 15, 2017 and ends May 31, 2022.

This grant is awarded pursuant to the authority of the National Science Foundation Act of 1950, as amended (42 U.S.C. 1861-75) and is subject to Research Terms and Conditions (RTCs) dated March 14, 2017, and NSF Agency Specific Requirements, dated April 3, 2017, available at: <https://www.nsf.gov/awards/managing/rtc.jsp>. and the following terms and conditions:

This award is subject to the Federal Funding Accountability and Transparency Act (FFATA) award term entitled, Reporting Subawards and Executive Compensation, which has been incorporated into the NSF Terms and Conditions referenced above.

If the awardee has any questions related to the pre-populated data associated with this award in the FFATA Subaward Reporting System, such questions should be submitted to: [FFATAREporting@nsf.gov](mailto:FFATAREporting@nsf.gov) or by phone to: (800) 673-6188.

This award is subject to the requirements of NSF 16-540, NSF Scholarships in Science, Technology, Engineering, and Mathematics (S-STEM) and the following terms and conditions:

S-STEM scholarship recipients will be selected by the awardee institution, but must:

1. be citizens of the United States, Nationals of the United States (as defined

in Section 101 (a) of the Immigration and Nationality Act), aliens admitted as refugees under Section 207 of the Immigration and Nationality Act, or aliens lawfully admitted to the United States for permanent residence;

2. be enrolled full time in one of the degree programs specified in NSF 16-540 at the associate, baccalaureate, or graduate level. Enrollment must be full-time for each semester or quarter a student receives a scholarship;

3. demonstrate academic potential or ability; and

4. demonstrate financial need, defined for undergraduate students by the US Department of Education rules for need-based Federal financial aid, or, for graduate students, defined as financial eligibility for Graduate Assistance in Areas of National Need (GANN).

Scholarships are to be used for expenses normally incurred by all full-time students in the indicated fields at the institutions, as outlined in the US Department of Education Cost of Attendance definition. The scholarship amount shall not exceed the amount given in the original program solicitation.

Funds provided for participant support may not be diverted by the awardee to other categories of expense without the prior written approval of the cognizant NSF Program Officer. Since participant support cost is not a normal account classification, the awardee organization must be able to separately identify participant support costs. It is highly recommended that separate accounts, sub-accounts, sub-task, or sub-ledgers be established to accumulate these costs. The awardee should have written policies and procedures to segregate participant support costs.

The rates in the award letter are applicable to the federally approved negotiated rate dated 02/25/2016 for salaries and wages at 46.20% as indicated below.

The attached budget indicates the amounts, by categories, on which NSF has based its support.

The indirect cost rate(s) for this award is/are :

Item Name

Indirect Cost Rate

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US Dept of Health and Human Services negotiated rate	46.2000%
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These rates are at the time of award and are based upon the budget submitted to the NSF. It does not include any out-year adjustments. The NSF will not modify awards simply to correct indirect cost rates cited in the award notice. See the Proposal & Award Policies & Procedures Guide (PAPPG) Chapter X.A.3.a. for guidance on re-budgeting authority.

Please view the project reporting requirements for this award at the following web address [<https://reporting.research.gov/fedAwardId/1643585>].

The cognizant NSF program official for this grant is Thomas Higgins, (703) 292-8670

The cognizant NSF grants official contact is Jannele Gosey, (703) 292-4445.

Sincerely,



LeVar Rashawn Farrior  
Grants and Agreements Officer

CFDA No. 47.076, Education and Human Resources  
hstates@massasoit.mass.edu

DUE-1643585

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## SUMMARY PROPOSAL BUDGET

### Award No. 1643585

Person MOS				Funds
	cal	acad	sumr	granted By NSF
A. (10.00) Total Senior personnel	15.00	0.00	0.00	\$86,065
B. Other Personnel				
1. (0.00) Post Doctoral associates	0.00	0.00	0.00	\$0
2. (20.00) Other professionals	5.00	0.00	0.00	\$35,328
3. (0.00) Graduate students				\$0
4. (0.00) Secretarial-clerical				\$0
5. (0.00) Undergraduate students				\$0
6. (0.00) Other				\$0
Total salaries and wages (A+B)				\$121,393
C. Fringe benefits (if charged as direct cost)				\$2,652
Total salaries wages and fringes (A+B+C)				\$124,045
D. Total permanent equipment				\$0
E. Travel				
1. Domestic				\$7,500
2. International				\$0
F. Total participant support costs				\$454,900
G. Other direct costs				
1. Materials and supplies				\$6,245
2. Publication costs/page charges				\$0
3. Consultant services				\$0
4. Computer (ADPE) services				\$0
5. Subcontracts				\$0
6. Other				\$0
Total other direct costs				\$6,245
H. Total direct costs (A through G)				\$592,690
I. Total indirect costs				\$57,309
(For information on the rate used, please refer to the award notice)				
J. Total direct and indirect costs (H+I)				\$649,999
K. Small Business Fee				\$0
L. Amount of this request (J) or (J+K)				\$649,999
M. Cost sharing				\$0

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February 17, 2021

## Addendum to the Articulation Agreement

The addendum changes reflect the changes to the amount of credit maximum that can be transferred in. The words “up to” have be added before 40 and 96 credits.

- Students who have fulfilled the learning outcome objectives and have successfully completed graduation requirements within your college for an Associate Degree in Nursing can transfer up to 96 credits, including up to 40 credits awarded for an Associate Degree in Nursing. This reflects the accurate transfer credit possible.

This above accurately reflects the changes to our previous Articulation Agreement signed: November 2017

2/17/21

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Josef Kurtz, Ph.D.  
Vice President of Academic Affairs and Chief Academic Officer  
Emmanuel College

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Massasoit Community College

2/17/21

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Diane Shea Ph.D., RN

Associate Dean and Professor of Nursing  
Emmanuel College

3/3/2021

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Susan E. Clover, MS, RN, ACM

Associate Dean of Nursing

Massasoit Community College



## Articulation Agreement of Academic Programs

### Massasoit Community College and University of Massachusetts Boston

The University of Massachusetts, Boston and Massasoit Community College, hereby enter into an agreement **(the "Agreement")**, to facilitate the transfer of students enrolled in the Associate in Science program in Nursing at Massasoit Community College into the RN-BS program in Nursing at University of Massachusetts Boston this 9th day of July 2021.

#### Objectives:

1. To attract qualified students to Massasoit Community College and University of Massachusetts Boston.
2. To promote and facilitate an efficient transition of transfer students between institutions.
3. To provide specific information and guidelines for transfer students.
4. To encourage academic coordination and cooperation, including curricular reviews, on-site visits when applicable, and joint academic advising for students attending Massasoit Community College.

#### Stipulations:

1. This agreement applies to Massasoit students who have obtained an Associate of Science in Nursing and Registered Nurse licensure in the state they reside.
2. Massasoit students who meet the requirements, will receive their entire Massasoit Nursing degree as a package of transfer credit and have the remainder of courses specific to **UMASS Boston's nursing requirements for their BSN.**

#### Mutual Responsibilities:

1. Both institutions agree to maintain current listings of the course equivalencies. This will be the responsibility of the two designated representatives on behalf of each institution.
2. Massasoit Community College and University of Massachusetts Boston will incorporate a summary of this agreement into official publications and web sites upon mutual agreement of the language.
3. Massasoit Community College and University of Massachusetts Boston agree to encourage qualified students to participate in this program by providing information, transfer advising and other assistance required to foster a seamless transition between institutions.

Eligibility for Admissions:

**Students in Massasoit's Associate in Science in Nursing program will be** admitted into UMass Boston's RN-BS program who have met the requirements set forth in this Agreement and the requirements of the University program, contingent upon the following:

1. Successful completion of Massasoit Community College Associate in Science in Nursing program as evidenced by an official transcript reflecting a conferred ASN degree.
2. Current valid Massachusetts RN license.  
Review of Personal Disclosure responses on the admission application.

Application Process:

In order to be admitted to the RN-BS program, students must submit a UMass Boston application and all official college transcripts. Massasoit students will receive the following application benefits based on the articulation agreement: Application Fee Waiver

Review/Revision:

1. Designated representatives from each institution will evaluate and review this agreement every two years. Substantive changes in the courses or program of either institution will require a full review of this articulation agreement. Revisions will be implemented with one year's notice prior to termination of the agreement.

Curriculum and Program:

1. Students must complete 30 credits in residency at UMass Boston. These five six-credit Nursing Major courses will be completed in an online and asynchronous format.
2. Students must also fulfill all health science prerequisites as well as required general education and distribution requirements to earn a UMass Boston degree.

### Articulation Agreement

Institution: Massasoit Community College

Transfer Institution: University of Massachusetts Boston

Students completing their ASN at Massasoit Community College will transfer all courses within **their Associate's degree as long as** a minimum grade of 78 (C+) is achieved in all nursing courses and a grade of C- is achieved in all other degree course requirements. Students will **receive an additional 42 credits toward their bachelor's degree with the successful completion of** their ASN and receipt of their RN license.

The following additional courses are required for a UMass Boston degree and can either be taken prior to transferring or at UMass Boston:

Massasoit Community College	Credit(s)	UMASS Boston Requirement	Credit(s)
MATH 158 Introduction to Statistics	3	MATH 125 Introductory Statistics	3
World Culture or Language Electives	6	Contact UMB representative for assistance in selecting Massasoit courses	6

Arts and Humanities Electives	6	Contact UMB representative for assistance in selecting Massasoit courses	6
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The following courses must be completed at UMass Boston:

Courses in Major (must be taken in sequence)	
NUR 314 Pharmacology	3
NUR 360 Professional Issues in Nursing	6
NUR 361 Heal Assessment & Promotion	6
NU 362 Nursing Research & Evidence Based Practice	6
<b>NU 461 Community Health Nursing for RN's</b>	6
NU 462 Legal & Ethical Health Policy	6
Total Nursing Credits	33

\*If you have already completed Pharmacology, please consult with the UMass Boston admissions representative to discuss the transferability of the course.

#### TERM, TERMINATION AND TEACH-OUT

This term of this Agreement shall be from August 31, 2021 to August 31, 2023, unless otherwise terminated in accordance with this Agreement.

- A. Without Cause. This Agreement may be terminated without cause by either party by giving written notice to the other at least thirty (30) calendar days prior to the effective date of termination stated in the notice.
- B. With Cause. If either Party breaches any material term or condition stated herein or fails to perform or fulfill any material obligation required by this Agreement, the nonbreaching party may terminate this Agreement by giving written notice to the alleged breaching party stating the circumstances of the breach at least seven (7) calendar days before the effective date of termination stated in the notice. Notwithstanding the foregoing, the notice of termination provided by the nonbreaching party may state a period during which the alleged breach may be cured by the breaching party, which cure shall be subject to approval by the nonbreaching party. In the event of a breach the breaching party may be subject to any and all applicable contract rights and remedies available to the University. Applicable statutory or regulatory penalties may also be imposed.

Notwithstanding Sections A and B above, if this Agreement is terminated for any reason while students are participating in the program, all rights and privileges provided under this Agreement to currently enrolled students in the program in Nursing shall continue until the end of the semester in which termination of this Agreement occurs.

University of Massachusetts Boston's designated representative will be the RN-BS program director and Massasoit Community College's representative will primarily be the Associate Dean of Nursing.

This Agreement constitutes the entire understanding between the Parties and with respect to the subject matter governed herein, and shall not be deemed to be waived, added to or modified orally; and no waiver, addition, modification, or amendments shall be valid unless in writing, and signed by the authorized representatives of the parties hereto.

The laws of the Commonwealth of Massachusetts without giving effect to its conflicts of law principles govern all matters arising out of or relating to this Agreement and all of the transactions it contemplates, including, without limitation, its validity, interpretation, construction, performance and enforcement.

**Forum Selection.** The Parties agree to bring any action arising out of or relating to this Agreement or the relationship between the Parties in the state courts of the Commonwealth of Massachusetts, Suffolk County, which shall have exclusive jurisdiction thereof. The Community College expressly consents to the jurisdiction of the state courts of the Commonwealth of Massachusetts, Suffolk County, in any action arising out of or relating to this Agreement or the relationship between the Parties, waiving any claim or defense that such forum is not convenient or proper. This paragraph shall not be construed to limit any other legal rights of the Parties.

The Parties acknowledge that the University is an agency of the Commonwealth of Massachusetts. No provision (or lack of provision) shall be construed explicitly or implicitly to be a waiver or **limitation of the University's sovereign immunity or rights or defenses arising out or related to its** sovereign immunity including; but not limited to, its rights under the Massachusetts Tort Claims Act.

University of Massachusetts Boston Approval



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Dr. Rosanna DeMarco  
Interim Dean

Massasoit Community College Approval



Dr. Deanna Yameen  
Provost



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Dr. Catherine Powers Ozyurt  
Interim Dean, Nursing and Allied Health



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Susan E. Clover

Date \_\_\_\_\_






### Articulation Agreement

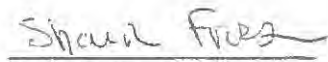
Between Massasoit Community College and Fisher College

1. Fisher College assures the acceptance of Massasoit Community College Associate in Science in Nurse Education program graduate who has been awarded the Associate in Science Nurse Education and are licensed as a registered nurse into the Bachelor of Science in RN to BSN program.
2. Transfer students will receive full academic credit for their conferred Associate in Science in Nurse Education degree credits from Massasoit Community College.
3. Additional transfer credits may be considered and accepted if a Massasoit Community College graduate has additional college credits beyond the Associate in Science in Nurse Education degree. Student credits beyond the Associate in Nurse Education degree will be evaluated separately and on a case by case basis.
4. Massasoit Community College will assure the curriculum as identified below is taught according to the materials provided and by a properly credentialed faculty member (master's degree required, doctorate degree preferred) including both academic and professional credentials.
5. Non-credit or remedial courses adjudged to be below college level may not be accepted for transfer. ESL courses are not accepted for credit.
6. It is understood that if a student does not have the foundation or skill to enroll in an upper level course because he/she has not taken introductory courses, he/she will be required to take the necessary prerequisite(s). Therefore, Fisher College cannot assure every student the completion of requirements for the bachelor degree in 4 semesters.
7. The Fisher College catalog contains all information about the degree requirements. Students wishing to plan their bachelor degree program to ensure meeting prerequisites for upper level courses are encouraged to communicate early with an admissions counselor at Fisher College to secure specific information about their transfer credits.
8. This agreement will be reviewed bi-annually and may be revised by mutual agreement.
9. Both Fisher College and Massasoit Community College agree to the right to use each other's names in print materials and media advertising. All materials must be approved by the respective communications and/or marketing offices at the partner college.
10. This agreement is expected to continue in force indefinitely but may be terminated by either party with not less than one year's notice.

  
Janet Kuser, Ed.D.

Vice President for Academic Affairs  
Fisher College

10/5/17  
Date

  
Sharon L. Fross, Ph.D.

Dean  
Fisher College

  
Dr. Barbara McCarthy

Vice President of Academic Affairs  
Massasoit Community College

10/30/17  
Date

  
Anne Scalzo McNeil Ph.D.

Dean of Nursing & Allied Health  
Massasoit Community College



Labouré College  
And  
MASSASOIT  
Community  
College  
Nursing Articulation Agreement



**Labouré  
College**

Labouré College and MASSASOIT Community College are committed to supporting the continuing education of registered nurses. As a result of this commitment, the Nursing divisions of Labouré College and MASSASOIT Community College (MASSASOIT) have collaborated on the development of the Nursing Articulation Agreement.

Labouré College agrees to accept for admission into the RN to BSN program any graduate of MASSASOIT's Associate Degree in Nursing (ADN) program who satisfactorily meets the following criteria for admission:

1. A cumulative GPA of 2.5 or higher in the Associate Degree in Nursing program;
2. A minimum course grade of C+ (78) for all Nursing courses; and
3. Evidence of a current RN license in Massachusetts (required of all new Associate Degree in Nursing graduates before beginning the professional Nursing courses).

Labouré College will waive the application fee for MASSASOIT graduates who wish to enter Labouré's RN-BSN program. Applicant RN students will be granted 41 credits for Nursing courses based on passing the National Council Licensure Examination Registered Nurse (NCLEX-RN). Students graduating from MASSASOIT Community College with an Associate Degree in Nursing will have 71 credits transferred from MASSASOIT Community College toward the Labouré College Bachelor of Science in Nursing completion program. Other applicants who do not meet these criteria will be evaluated for admission and transfer credit on an individual basis. Students must complete all 3000-level and 4000-level professional Nursing courses and the senior capstone course at Labouré College.

As part of this agreement, the institutions mutually agree to review and provide updates every two years regarding curriculum and transfer credit changes in an effort to make the transition from an ADN to the RN to BSN program as seamless as possible (*see attached curriculum plan*). Both institutions agree to share data longitudinally and to collaborate on new theories and best practices for student success.

This articulation agreement between Labouré College and MASSASOIT Community College is effective as of March 1, 2016, and will be honored by Labouré College's Office of Admissions Office until March 1, 2018, when it will be reviewed for renewal. This articulation agreement will remain in effect annually thereafter by mutual agreement providing the curriculum remains unchanged.

**Labouré College and MASSASOIT Community College  
Associate Degree Curriculum Overview with Credits**

<u>Labouré Course Requirements</u>		<u>MASSASOIT Equivalent</u>	
Nursing	37	Nursing	35
A & P 1 with lab	4	A & P 1 with lab	4
A & P 2 with lab	4	A & P 2 with lab	4
Micro with lab	4	Micro with lab	4
Intro Psychology	3	General Psychology	3
Human Growth	3	Human Growth and Development	3
Social Science Elective	3	Principles of Sociology	3
English Composition	3	English Composition I	3
Humanities Elective	3	English Composition II	3
Elective	3	Elective	3
Research Skills	1		
Humanities 200 Elective	3		
<b>Total Credits for A.S. Degree</b>	<b>71</b>	<b>Total Credits for A.S. Degree</b>	<b>65</b>
Passing grade, Nursing Courses: C+ (77%)		Passing grade, Nursing Courses: C+ (78)	



**Labouré College**  
**Transfer Credit Evaluation Form**

<b>Pre-licensure Nursing Program (ADN or Diploma)</b>	<b>Credits</b>	<b>Transfer <input type="checkbox"/></b>	<b>Comments</b>
<b>Pre-licensure Nursing Courses</b>	<b>37</b>		
<b>Natural Science/ Math</b>	<b>Total-12</b>		
<b>Social Sciences</b>	<b>Total-9</b>		
<b>Humanities</b>	<b>Total- 9</b>		
<b>Elective</b>	<b>Total- 3</b>		
<b>Research Methods</b>	<b>Total- 1</b>		
<b>Total Pre-Req. Courses</b>	<b>71 credits</b>		

<b>RN-BSN Program</b>	<b>Credits</b>	<b>Transfer <input type="checkbox"/></b>	<b>Comments</b>
<b>General Education Courses</b>	<b>Total-21</b>		
<b>Math and Natural and Physical Sciences</b>	<b>Total -6</b>		
<i>Statistics taken at MASSASOIT will be accepted as a substitute for Labouré's MAT 3410.</i>			
<b>Social Sciences</b>	<b>Total- 9</b>		
SES 4350 Senior Capstone must be taken at Labouré College	3		
<b>Arts &amp; Humanities</b>	<b>Total-6</b>		
A 300 or 400 level ethics course required for transfer.	3		
<b>*General Education Credits earned beyond the AS degree at MASSASOIT or Labouré</b>	<b>18</b>		
<b>Nursing Courses</b>	<b>Total-28</b>		
NUR 3110 Professional Nursing Perspective	3		
NUR 3225 Pathophysiology	3		
NUR 3330 Health Assessment	3		
NUR 3445 Communication and Informatics in Health Care	3		
NUR 3660 Evidence-Based Nursing Practice	3		
NUR 4225 Leadership & Management in Health Care	4		
NUR 4230 Foundations of Community/Public Health Nursing	3		
NUR 4335 Application of Evidence-Based Nursing Practice & Practicum	6		
<b>Total RN-BSN Program Credits</b>	<b>49 Credits</b>		<i>For the BSN degree the student must earn a minimum of 120 credits.</i>

**Labouré College**  
**RN-BSN Nursing Course Descriptions**

**NUR 3110 Professional Nursing Perspectives**

**Credits: 3**

This is an introductory bridge course for RN-BSN students. Core concepts of professional nursing practice are explored and analyzed within the framework of selected theories, trends, and issues of contemporary professional nursing practice.

**Prerequisites:** Acceptance into the RN-BSN program and current RN licensure.

**NUR 3225 Pathophysiology**

**Credits: 3**

This course explored the pathologies of the human body to altered states of health throughout the lifespan. Factors that influence health and illness, such as genomics, culture, and environment are examined in relation to disease processes.

**Prerequisites:** NUR 3110. For diploma RNs completion of all 1000- and 2000-level science courses is required.

**NUR 3330 Health Assessment**

**Credits: 3**

The Health Assessment course is designed to provide the RN student with the knowledge and skills to perform a comprehensive health assessment. This course will expand upon prior knowledge of health assessment and will address cultural, developmental, psychosocial, environmental and societal factors inherent in promoting health across the lifespan. Techniques of data collection and documentation will be expanded upon to enhance critical thinking skills. This course will then shift the paradigm focus from the individual to the community with a focus on prevention and early detection of disease. Students will be introduced to the health care needs of diverse and vulnerable populations.

**Prerequisites:** Acceptance into the BSN program and current RN licensure. May be taken concurrently with Professional Nursing Perspectives.

**NUR 3445 Communication and Informatics in Health Care**

**Credits: 3**

Interdisciplinary communication within the present day health care arena encompasses many forms. The professional nurse as an effective communicator must be able to deliver clear and concise communication which is essential to safe patient care. This course will examine the role and impact that effective communication skills have on patient care outcomes and in clinical practice. In addition, communication and informatics as they relate to professional nursing will be explored. The concepts and skills of communication, informatics, and information literacy will be presented.

**Prerequisites:** NUR 3110

**NUR 3660 Evidence-Based Nursing Practice**

**Credits: 3**

This course provides a basic understanding of the research process and its application to nursing practice. Components of both quantitative and qualitative research techniques and ethical conduct required of nurse researchers are explored.

**Prerequisites:** MAT 3410 and NUR 3110

**NUR 4225 Leadership and Management in Healthcare****Credits: 4**

This course will explore key organizational structures and operation of healthcare within the United States with a focus on quality of healthcare and error reduction. This course will provide an overview of the functions of leadership and management within a changing healthcare environment. Emphasis will be placed on current issues that affect leadership and management in the practice setting. The science of management and the integration of leadership principles are explored within the context of clinical microsystems. Students are required to attend one nursing organization meeting that will be approved by faculty.

**Prerequisites:** All 3000 level NUR courses

**NUR 4230 Foundations of Community/Public Health Nursing****Credits: 3**

This course provides an overview of the field of community/public health nursing in assessing the health care needs of aggregates and communities. This course explores the physical, economic, societal and environmental factors that affect public health. Selected extramural activities augment the theoretical aspects of the course in relation to multidisciplinary collaboration and coordination of care in the community.

**Prerequisites:** NUR 4225 Leadership and Management in Healthcare

**NUR 4335 Application of Evidence-Based Nursing Practice Practicum****Credits: 6**

This course and practicum offers the student the opportunity of identifying a substantive, research problem related to improving patient outcomes in a healthcare setting, and will assist the student to synthesize concepts and knowledge learned in the RN-BSN program. The student will work in conjuncture with a mentor to identify a research problem related to the mentorship experience. The previous nursing research course serves as the foundation for implementing the principles of evidence-based practice. The student will begin to develop the first three phases on an evidence based proposal. This course involves six hours per week of clinical time; this time is flexible to maximize the student learning by allowing practical application of theory and principles in a practice setting. Consideration is given to the student's career objectives be it service, education or administration.

**Prerequisites:** All 3000-level courses. NUR 4225.

**GENERAL EDUCATION COURSES RN-BSN PROGRAM****HUM 3010 Critical Analysis****Credits: 3**

This course focuses on the skills and concepts needed to develop reading and listening habits necessary for critical thinking. The course emphasizes thinking skills: comprehension, application, analysis, synthesis, and evaluation in order to develop inter-related questions, which serve as the direction toward better opinions and decisions. Current topics from a variety of sources will provide the basis for analysis and application of skills. Students synthesize learning to present their own positions and arguments.

**Sequencing:** As the concepts and skills covered in this course are applicable to all disciplines, it is recommended that this course be taken at the beginning of the student's course of study.

**MAT 3410 Essentials of Statistics****Credits: 3**

This course introduces the various methods used to collect, organize, summarize, interpret and reach conclusions about data. An emphasis is placed on demonstrating that statistics is more than mathematical calculations. By using examples gathered from real life, students learn to use statistical methods as analytical tools to develop generalizations and meaningful conclusions in their field of study.

**Prerequisite:** A college algebra course or successful achievement on the algebra exemption examination.

**ETH 3210 Ethical Domains and Dilemmas****Credits: 3**

This course compares and contrasts views of human nature that underlie social, business, and personal ethical dilemmas. Catholic philosophical perspectives are explored. Course readings are analyzed and evaluated for meaning, implications, and consequences of views of human nature as they impact theories of ethics within a sampling of historical turning points. Case studies, selections, and accounts of major contributions to human knowledge and understanding are analyzed from the perspectives of varied "schools of ethics." Cultural relativism, utilitarianism, and other others of thought are studied within contexts, categories of understanding or domains, and themes of human nature.

**SSC 3310 Intercultural Communication****Credits: 3**

Intercultural Communication explores effective communication in contexts of varied backgrounds, experiences, ideas, and styles of expression. Students identify, compare, contrast, and critique communication behaviors within and between cultures. Readings and discussions address differences between individuals and groups rather than ignoring differences or stereotyping others.

***\*All 3000-level courses must be completed before progressing into the 4000-level general education courses.***

**SCI 4010 Scientific Revolutions****Credits: 3**

This course focuses on the substantial risks associated with spectacular scientific discoveries. Selected intersections of time and place in the quest for discovery, proof, and supportive experimental and empirical evidence are studied. Professional determination to engage in and document investigative research findings are analyzed and evaluated. Readings and discussions in Scientific Revolutions document changes in worldview, human productivity, and quality of life.

**SSC 4010 Agents of Social Change****Credits: 3**

Knowledge and understanding of social concepts and constructs that bond, bind, and sometimes separate individuals and groups are studied. Comparative analyses of assigned readings illustrate requirements and results of successful growth and necessary development for the individual and society. Students evaluate individual motivation, resourcefulness, and networks of reciprocal influence that can bring about dramatic and necessary changes in everyday life and social policy.



**SES 4350 Senior Capstone****Credits: 3**

The Senior Capstone is reflection, insight, and synthesis driven. This course is an interdisciplinary course taught by general education and nursing faculty to assist the student to investigate, demonstrate, and synthesize course and program learning for problem solving and applications of undergraduate course work across the entire curriculum. This course synthesizes concepts across the disciplines to create a unified framework for developing pathways for understanding the value, applications, and transferable use of the cumulative study at Labouré College. Students demonstrate collective competencies; pedagogical, practical, and personal advancement for the benefit of self and others; personal and professional growth that reflect cognitive and emotional intelligence; and knowledge and understanding of life span challenges and choices. Future contexts of professional growth are considered. A professional portfolio will be completed to demonstrate achievement of end of program outcomes from the RN-BSN curriculum.

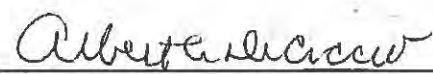
**Prerequisites:** All 4000- level General Education and Nursing courses; can be taken concurrently with NUR 4335.

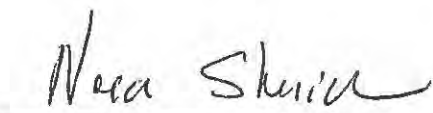


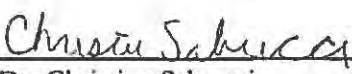
Signature Page

Labouré College


  
Maureen A. Smith  
President

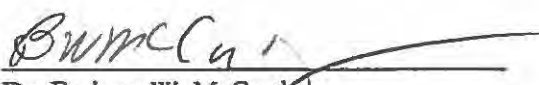
  
Albert C. DeCiccio, PhD  
Vice President of Academic Affairs

  
Nora Sheridan  
Vice President of Enrollment Management

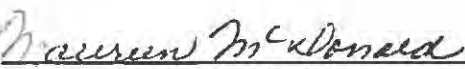
  
Dr. Christine Salvucci  
Assistant Chair, Nursing

MASSASOIT Community College

  
Dr. Charles Wall  
President

  
Dr. Barbara W. McCarthy  
Chief Academic Officer

  
Anne-Scalzo McNeill, PhD  
Division Dean

  
Maureen McDonald MS, RN  
Chair, Department of Nursing



## **Memorandum of Understanding July 2019**

This Memorandum of Understanding establishes the mission, governance and operating procedures of CONNECT, a collaborative organization of higher education institutions in Southeastern Massachusetts.

### **I MISSION**

Leveraging the quality, strength, resources, and excellence of the five public higher education institutions of CONNECT (Bridgewater State University, Bristol Community College, Cape Cod Community College, Massachusetts Maritime Academy, and Massasoit Community College), it is our collective mission to enhance educational collaboration and efficiency while improving student success, increasing educational pathways, and strengthening economic health throughout the region.

To actualize this mission, CONNECT (1) serves as an agency for conducting collaborative activities among the member institutions; (2) articulates and advocates for the higher education needs of the region; (3) serves as a conduit for coordinating academic planning, as well as regional and economic development activities of the members and, (4) identifies and leverages the competitive advantages of the consortium and its partners.

### **II GOVERNANCE**

#### **A. Membership**

1. Membership in CONNECT is open to all public higher education institutions in Southeastern Massachusetts.
2. Membership in CONNECT is open, by invitation only, to all private higher education institutions in Southeastern Massachusetts.

#### **B. Board of Directors**

CONNECT shall be governed by a Board of Directors comprised of the chief executive officers of the Member institutions

#### **C. Meetings**

##### **1. Annual meeting**

The annual meeting of the Board of Directors shall be held in June for the purpose of electing officers and approving a budget for the following fiscal year, beginning July

1. The Chairperson, or one or more of the Directors, may specify other purposes.

##### **2. Regular meetings**

The Board of Directors and the executive director shall meet not less than five times annually at times and places to be specified by a majority of the Directors. A majority of the Directors may constitute a quorum.

#### **D. Officers**

The officers of CONNECT shall be a Chairperson and a Treasurer selected from the Board of Directors. The Directors, by majority vote, shall elect at the annual meeting a Chairperson who will serve for a term of two years.

The Treasurer, elected by majority vote, shall make a report to the Board at each annual year-end meeting and prepare an annual budget in collaboration with the executive director to be approved by the Board at the annual meeting. The Treasurer shall not be precluded from serving contemporaneously as Chairperson of CONNECT. The Treasurer will serve a term of two years.

#### **E. Working Groups**

The Board of Directors, in collaboration with the executive director, may establish and appoint committees and project-specific task groups, representing the member institutions, in order to execute the business of CONNECT.

### **III OPERATING AGREEMENTS**

#### **A. Offices**

1. The Board of Directors agrees to designate a volunteer member campus as the host location for the CONNECT offices.

2. The Board shall enter into a written agreement with that campus describing the facilities and services to be provided and under what terms.

#### **B. Finances**

1. The Board of Directors agrees to designate one of the member institutions as fiscal agent for CONNECT.

3. The Board of Directors agrees to finance the operating budget of CONNECT through an annual assessment. The annual membership fee shall be assessed in the following manner: IHE members whose annual enrollment is 1-3,000 students shall be assessed \$20,000; IHE members whose annual enrollment is 3,001 -7000 students shall be assessed \$30,000; and IHE members whose annual enrollment is 7,001 students or more, shall be assessed \$40,000. The annual assessment shall be approved at the annual meeting in June.

#### **C. Personnel**

The Board of Directors shall have sole authority to employ full or part time staff and to establish the terms of their employment.



**D. Notice of Withdrawal**

Any member who wishes to withdraw from CONNECT, shall provide one year's written notice, via certified mail, to the Board Chair, the Board of Directors, and the Executive Director.

**E. Amendments**

The Board of Directors shall biennially review this memorandum of understanding and make amendments, if requested, with the approval of two-thirds of the members.

APPROVED ON BEHALF OF CONNECT MEMBER INSTITUTIONS on July 22, 2019, as attested by the signatures which appear below.

**For Bridgewater State University:**

  
Fredonck Clark, Esq., President

**For Bristol Community College:**

  
Dr. Laura Douglas, President

**For Cape Cod Community College:**

  
Dr. John Cox, President

**For Massachusetts Maritime Academy:**

  
Rear Admiral Francis X. McDonald, President

**For Massasoit Community College:**

  
Dr. Gena Glickman, President

## PART H – PROJECT BUDGET & BUSINESS CASE

**Objective:** Describe the funding for the capital project and consider the impact of the proposed capital project on operating and maintenance budgets and understand the financial assumptions regarding the impact of the proposed capital project on enrollment, retention and institutional budget.

### H.1 Total Estimated Project Cost

Indicate ECC and TPC for project

Project Cost	Amount (\$)	Remarks
Total Estimated Construction Cost (ECC*)		
<b>TOTAL PROJECT COST (TPC**)</b> <b>(DCAMM projects use TPC = 1.4 x ECC)</b>		

\* ECC to include escalation contingency of 4.5% per year (compounded annually) to mid-point of construction.

\*\* The TPC includes planning and design fees, cost of furnishings and equipment, cost of any additional consultants required (access, environmental, envelope, commissioning, etc.), contingencies, and various management costs. A 40% markup is the standard markup used by DCAMM at this stage of a project.

### H.2 Total funding:

Identify the \$ amount being requested from DCAMM and indicate what other sources of funding are being used for this project. Under "Timing and Constraints" describe whether these are matching funds, grants, loans or gifts and clarify timing and other constraints on the funding \$.

Confirm timing constraints of financial commitment. Please note: all \$ (including fundraising \$ that have not yet been committed) must be committed and confirmed prior to completion of Study/Schematic Design Certification.

If the IHE is providing funding to support completion of the project, indicate amount and timing of confirming the availability of cash resources of institution. If the IHE has secured private sector funding to support completion of the project, indicate the name of the provider (s) amount and timing of the availability of cash resources of institution. Provide a letter from the Trustees confirming a commitment to providing IHE's resources and indicating the availability of funding timing.

Funding Source	Amount (\$)	Timing & Constraints
DCAMM		
<b>TOTAL FUNDS (calculated field)</b>		<b>Total funds must equal the TPC in H.1</b>

**MASSASOIT COMMUNITY COLLEGE  
BOARD OF TRUSTEES  
REQUEST FOR BOARD ACTION**

**December 1, 2021**

<b>RECOMMENDED:</b>	That the Board of Trustees approve the Division of Capital Asset Management and Maintenance (DCAMM) Higher Education Capital FY23 Funding Proposal – Massasoit Community College Science, Nursing and Allied Health Renovation Project.
<b>COMMENTS:</b>	<p>Massasoit’s Science, Nursing and Allied Health Buildings Renovation project consists of renovations in two buildings to provide new teaching labs, support spaces, classrooms, and associated offices for the Science, Nursing and Allied Health Departments.</p> <p>This project has three phases. First, the Liberal Arts (LA) Building will be renovated into a Science Building with instructional labs designed for maximum flexibility. Second, the existing Science Building will be renovated into a Nursing &amp; Allied Health Building with instructional labs that are right sized and designed for flexibility. In addition, a proposed simulation lab would enhance Massasoit’s position as a leader in regional health care training programs. Third, backfilling the Allied Health spaces in the Humanities Building with Liberal Arts department programs (offices and general purpose classrooms) can be accomplished with relatively low investment and provide adequate replacement space for the LA department, co-located with the Humanities Department without a major renovation. The project will provide needed upgrades to specialized instructional spaces as well as remedy existing deferred maintenance, accessibility, and hazardous materials issues. The renovations will serve every credit program, and thus, almost every student at the college. It should be noted that this plan will address over \$6.5 million of deferred maintenance and over \$1.7 million in ADA compliance projects.</p> <p>This project, if funded, will be DCAMM managed. The estimated total project cost is \$41.1 million.</p>
<b>RECOMMENDATION:</b>	The President, Provost/VP of Academic and Student Affairs, and Vice President for Administration/CFO recommend approval of this action.
<b>MOVED:</b>	<p>A motion was made by Trustee Andrade and Seconded by Trustee Silvera to approve the Division of Capital Asset Management and Maintenance (DCAMM) Higher Education Capital FY23 Funding Proposal – Massasoit Community College Science, Nursing and Allied Health Renovation Project.</p> <p>Trustee Andrade - yes Trustee Blackler - yes Vice Chair Carroll - yes Trustee Chakrabarti - yes Trustee Silvera - yes Trustee Spitz - yes Chair Sullivan - yes</p>

Trustee Welch -yes

**VOTED:**

The motion was unanimously approved by the Board of Trustees on 12/01/2021.

A handwritten signature in blue ink, appearing to read "Ann Sullivan", is centered on the page. The signature is fluid and cursive, with the first name "Ann" and last name "Sullivan" clearly distinguishable.

Ann Sullivan  
Chair, Massasoit Community College Board of Trustees



28 State Street  
Boston, MA 02109-1775  
p: 617-345-9000 f: 617-345-9020  
hinckleyallen.com

Jay Gonzalez  
(617) 378-4256  
jgonzalez@hinckleyallen.com

October 7, 2021

Edward H. Adelman  
Executive Director  
Massachusetts State College Building Authority  
253 Summer Street, Suite 300  
Boston, Massachusetts 02210

Re: Borrowing Authority for Massasoit Community College Project

Dear Ed:

I understand that Massasoit Community College (the "College") has requested that the Massachusetts State College Building Authority (the "Authority") issue bonds or notes to finance a portion of the cost of a project to be owned by the Commonwealth of Massachusetts (the "Commonwealth") and constructed by the Division of Capital Asset Management and Maintenance ("DCAMM"). You have asked for our opinion as bond counsel to the Authority as to whether the Authority has the statutory authority to issue bonds or notes for that purpose.

The College plans to renovate three existing buildings for science, nursing and allied health, and other academic purposes (the "Project"). The total estimated cost of the Project is \$41,100,000. The plan of financing for the Project is as follows: a) \$30,000,000 to be funded by the Commonwealth from the proceeds of bonds issued in whole or substantial part pursuant to Chapter 258 of the Acts of 2008 ("Chapter 258"), which authorizes the issuance of bonds to pay costs of the Project; b) \$6,100,000 to be funded by the College from available funds and/or the proceeds of the sale of property; and c) \$5,000,000 to be funded from the proceeds of bonds or notes issued by the Authority.

Pursuant to Section 156 of Chapter 131 of the Acts of 2010 ("Section 156"), any project authorized under Chapter 258 which has undergone a project study by DCAMM is eligible for financing by the Authority as a project within the meaning of Chapter 703 of the Acts of 1963 (the "Authority Enabling Act"). Pursuant to Section 7 of the Authority Enabling Act, the Authority may issue bonds or notes to pay for all or any part of the cost of projects.



Edward H. Adelman

October 7, 2021

Page2

Therefore, based on my understanding of the Project as described above, assuming that the Project has undergone or will undergo a project study by DCAMM, and assuming that the Authority, the Board of Higher Education and certain other state officials provide the necessary approvals required by the Authority Enabling Act, the Authority has the statutory authority to issue bonds or notes to finance the Authority's share of the costs of the Project.

Very truly yours,



Jay Gonzalez

VOTE OF THE  
MASSACHUSETTS STATE COLLEGE BUILDING AUTHORITY  
APPROVING A PROJECT FOR  
**MASSASOIT COMMUNITY COLLEGE**

DECLARATION OF OFFICIAL INTENT

**ALLIED HEALTH AND SCIENCE FACILITIES**  
MSCBA PROJECT NO. MSCC-0211-21

VOTED:

1. The Massachusetts State College Building Authority (the “Authority”) hereby approves the undertaking by the Authority of the project for Massasoit Community College (the “College”) described on Exhibit A attached hereto, and as such project may be modified from time to time pursuant to approval of or power granted by the Authority (such project as so described and as it may be so modified being called the “Project”).
2. It is hereby declared to be the official intent of the Authority, as referred to in Section 1.150-2 of the Treasury Regulations promulgated under the Internal Revenue Code of 1986, as amended (the “Code”), that the Authority be reimbursed from the proceeds of tax-exempt bonds reasonably expected to be issued to fund a project fund not to exceed **\$5,000,000** for expenditures for the Project (or the projects described in Exhibit A attached hereto) paid from available funds of the Authority, the Department of Higher Education or the College or other sources on or after the date which is 60 days prior to the effective date of this declaration of official intent (except for certain “preliminary expenditures” as defined in Section 1.150-2 of the Code which are not subject to such time limitation.)

Approved in Public Meeting of the Authority  
November 17, 2021

## MASSACHUSETTS STATE COLLEGE BUILDING AUTHORITY

## EXHIBIT A

**MASSASOIT COMMUNITY COLLEGE  
ALLIED HEALTH AND SCIENCE FACILITIES  
MSCBA PROJECT NO. MSCC-0211-21**

**Project Description**

- (a) The Authority is authorized to implement this project by Chapter 703 of the Acts of 1963, as amended; by Section 156 of Chapter 131 of the Acts of 2010; and by Section 2 of Chapter 258 of the Acts of 2008;
- (b) The carrying out of preliminary work, including obtaining cost estimates, revenue estimates, preliminary design specifications, feasibility studies, surveys, and site analyses to determine the feasibility, approximate size, scope, purposes, location and other characteristics of any building, structure, or facility the Authority is authorized to provide; and
- (c) The funding of site preparation, building design and construction, furniture, fixtures, and equipment, and enabling and related projects to support the Project.

**Project Overview**

- The Project is the improvements to allied health and science facilities at Massasoit Community College.
- The Project is funded principally by the Commonwealth. The Authority is authorized, and has been requested, to fund the difference between the State capital appropriation and the current estimated total project cost (see below).
- The project revenue source will be operating budget revenues.

**Project Budget**

Total Project Cost	\$41,100,000
Commonwealth Funding	30,000,000
Campus Contribution	6,100,000
<b>Bond Funding</b>	<b>5,000,000</b>

MASSACHUSETTS STATE COLLEGE BUILDING AUTHORITY

MEMORANDUM

November 12, 2021

To: Members of the Authority  
From: Edward Adelman  
Subject: November Board Meeting Packet

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In preparation for our remote meeting on Wednesday, November 17<sup>th</sup> at 1:00 PM, I am pleased to provide you with the attached Board packet. The following is a summary of the major items to be taken up at this meeting. Links for connecting to the meeting are on the Agenda.

**ACTION ITEMS**

Series 2022 Bond Issue

*This vote will authorize the application for a waiver from the presumption of a competitive transaction from the State Finance and Governance Board. We believe the upcoming bond issuance, likely to price in January 2022, which could include two refunding series of up to \$200 million, will require a negotiated method of sale.*

Project Approvals/Declaration of Official Intent

Fitchburg State University

*This vote will approve improvements to Elliot Field, including the replacement of the sports turf.*

Massachusetts Maritime Academy

*This vote will approve improvements to the pier for the new training ship.*

Westfield State University

*This vote will approve improvements to the dish room and equipment serving Tim and Jeanne's Dining Commons, the main food service facility for the University; the issuance of debt to fund the work will require a separate vote, likely in December 2021.*

Massasoit Community College

*This vote will approve improvements to Allied Health and Science Facilities, identified in the 2008 Higher Education Bond Bill, for future supplemental funding by the Authority; the issuance of any debt will require a separate vote in the future.*

Team Selection/Contract Authorization

Framingham State University

*These votes will approve the selection of the architect/construction manager team for the renovation of Linsley Hall and the Warren Conference Center, along with contract authorizations for design services (Lavallee Bresinger Architects) and pre-construction services (Whiting-Turner Contracting Company).*

Approval of Revised Employee Handbook

*This vote incorporates the Authority's policy regarding background checks and COVID-19 vaccination.*

Defeasance of Debt and Disposition of Property

Salem State University: Project BOLD

*This vote will confirm that the Bates Complex is no longer required for student housing and that the Executive Director is authorized to defease the debt associated with the Bates Complex and*

*to dispose of the Authority's interest in the Project, including the execution and delivery of all documents necessary to effect the transaction.*

**PRESENTATION**

Capital Renewal Update

**INFORMATION ITEM**

Confirmed Meeting Schedule, Calendar Year 2021

*We Look Forward to Seeing You*

**MASSACHUSETTS STATE COLLEGE BUILDING AUTHORITY**  
**REGULAR (REMOTE) MEETING AGENDA**  
**WEDNESDAY, NOVEMBER 17, 2021 1:00 PM**

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Join Zoom Meeting  
Meeting ID: 883 1412 9971 Passcode: 674188

Option 1: Best for Computer/Mobile App Use  
<https://us02web.zoom.us/j/88314129971?pwd=dnJpczNaajNCSmxPTENUaVlEU0NPQT09>

Option 2: Best for Landline Use (No Video Capabilities)

Find your local number:

Find your local number: <https://us02web.zoom.us/u/ksdPjKzb>

---

**I. For Approval**

Minutes of Regular Meeting, October 13, 2021 . . . . . **Attachment 1 (1)**

**II. Reports**

Chair: Michael Fallon

Design and Construction Committee: James M. Karam . . . . . **Attachment 2 (6)**

Finance and Audit Committee: John J. Burns

Treasurer: John J. Burns

Board of Higher Education: James M. Peyser

General Counsel: Bowditch and Dewey

Executive Director: Edward H. Adelman

**III. Action Items**

A. Series 2022 Bond Issue – Waiver Request . . . . . **Attachment 3 (60)**

B. Project Approvals:

Fitchburg State University: Elliot Field . . . . . **Attachment 4 (61)**

Massachusetts Maritime Academy: Pier Project . . . . . **Attachment 5 (63)**

C. Project Approval/Declaration of Official Intent:

Westfield State University: Dish Machine Replacement . . . . . **Attachment 6 (65)**

Massasoit Community College: Allied Health and Science Facilities . . . . . **Attachment 7 (67)**

D. Team Selection and Contract Authorization:

Framingham State University: Linsley Hall and Warren Center Renovations . . . . . **Attachment 8 (69)**

E. Approval of Employee Handbook: Background Checks and COVID Policy . . . . . **Attachment 9 (72)**

F. Approval of Defeasance of Debt & Disposition Property – Salem State University. . . . **Attachment 10**

**[To Be Distributed at Meeting]**

**IV. Presentations**

Capital Renewal Update

**V. Informational Items**

Confirmed Meeting Schedule, Calendar Year 2021. . . . . **Attachment 11 (77)**



The background of the slide is a photograph of the Massasoit Community College entrance. It features a large, rounded green hedge in the foreground with several small flower beds containing pink, yellow, and white flowers. Behind the hedge is a low stone wall with the words "MASSASOIT COMMUNITY COLLEGE" engraved on it. Two tall flagpoles stand behind the wall; the left one has the American flag, and the right one has a white flag. The scene is surrounded by lush green trees and a clear blue sky with light clouds.

# Science, Nursing and Allied Health Renovations

**MAJOR PROJECT CAPITAL REQUEST  
Massasoit Community College  
Board of Trustees Update  
October 20, 2021**



# The Opportunity

- One of the fastest growing regions in Massachusetts
- 24% of population will be over age 65 by 2035
- Regional workforce occupation priorities:
  - Medical Laboratory Technician
  - Radiologic Technology
  - Health Technologists & Technicians\*
  - Nursing, Psychiatric, and Home Health Aids\*
  - Other Healthcare Support Occupations\*
- Massasoit can position itself to be the leader in skilled workforce development



\* Greater Boston Region



# The NEED

1972



2021



# PROJECT OVERVIEW | Transformation through Renovation

## \$41M Total Project Cost

Addresses:

- 30% of campus buildings
- \$6.5m deferred maintenance including ADA compliance

<b><u>Task 1</u></b>	Renovation of Liberal Arts Building to Science	26,000 gsf
<b><u>Task 2</u></b>	Renovation of Science Building to Nursing and Allied Health	26,000 gsf
<b><u>Task 3</u></b>	Backfill of vacated Allied Health spaces with Liberal Arts	11,000 gsf
		<hr/> 63,000 gsf
		<i>gsf = gross square feet</i>



## **Programs**

Liberal Arts Transfer – Science  
Biology  
Mathematics  
Respiratory Care  
Engineering Transfer – Chemical  
Liberal Arts Transfer  
Nursing Education  
Radiologic Technology  
Computer Science Transfer  
Chemistry

## **Partners & Collaborators**

Brockton Neighborhood  
Health Center  
VA Brockton  
South Shore Hospital  
Brockton Hospital  
Good Samaritan Hospital  
Sinai Hospital  
Morton Hospital  
Mass General  
Brigham and Women's  
Beth Israel  
Boston Medical Center  
Franciscan Children's  
South Coast Health  
Falmouth Hospital  
Cape Cod Hospital  
Martha's Vineyard Hospital

Brockton Public Schools  
Randolph Public Schools  
Stoughton Public Schools  
New Heights Charter School  
  
Curry College: RN-BS  
Emmanuel College: RN-BSN  
Fisher College: Nursing Transfer  
Laboure  
UMass Boston: RN-BSN to MSN  
Salve Regina: RN-BSN  
  
CONNECT  
MCC2BSU  
National Science Foundation  
STEM Starter Academy



# WHY?

## Science Building Current Conditions

- Built in 1972, original infrastructure is still in place
- Designed for fixed, direct instruction, limited ability for collaborative work
- Dedicated labs and prep space (2 chem /2bio /1 micro /1 physics 2 A&P )
- Limited flexibility to adjust to enrollment needs
- Dated infrastructure makes it challenging to deliver modern, high quality lab experiences
- Building does not support the teaching of the skills needed for the modern workplace



# WHY?

## Science Building Renovation

### Proposed new science building

- Lab spaces are discipline agnostic to allow repurposing as enrollment demands change
- Centralized prep space services all lab spaces
- Improves security and eliminates redundancies
- Flexible lab space will support the integration of remote instruction
- Includes collaborative space for student work, and co-curricular activities

### Growth in Massasoit Science offerings

- Massasoit launched 3 new programs in fall 2019
- New science program enrollment has grown to 180 students
- Increased enrollment in upper-level science courses (Organic Chemistry)
- Diverse enrollment in programs (26% black, 10% Hispanic)
- Programs coupled with co-curricular offerings to enhance learning (MassasoitSTEM.com)
- STEM research internship, In-house research opportunities, 75% in program transfer to 4-year school

### Workforce needs

- Massachusetts has the largest life science cluster in the world (3.6x more concentrated in MA than US)
- By 2024, 20,000 more jobs expected to be created in the life science sector (Employment gap of 3,000). 89% will require bachelors degree or higher

# WHY?

## Nursing & Allied Health Spaces Current Conditions

### Opportunities for interprofessional education

The current healthcare setting is patient focused. Providers work in interdisciplinary teams to support patient care. Our students need to be trained to work in this environment starting at the college level. Our current physical space does not support interdisciplinary education and team building.



# WHY?

## Nursing & Allied Health Building

### Workforce Needs

- 19% of all workers in the South Shore region work in health care and Social Assistance, representing the largest industry cluster within the region.
- The industry is projected to add 5,000 new workers on the South Shore by 2025
- Close to 18,000 new health care positions have been established in Southeastern Massachusetts since 2012

### Microcredentialing

### K-12 initiatives and Curricular Innovation

We have recently launched a new certificate program with Brockton High School. Students completing this program are workforce ready with stackable college credit credentials which provide advanced standing in Medical Assisting.

### Reimagining Massasoit as the training and innovation solution for local healthcare training needs

A state-of-the-art facility will provide an opportunity to train the local workforce in current practice methods. This is also an opportunity for local healthcare providers to upskill their entry level workforce and meet the increasing demand for skilled healthcare workers.

# Advancement

- \$2 million capital campaign target for private philanthropy to supplement other sources of project funds
- Seek expressions of interest from donors prior to DCAMM decision
  - Donor imperatives include investment in workforce development and regional economic vitality, marketing & brand image, support for educational access and equity.
- Once approval is received, obtain firm indications and pledges for funding:
  - Likely candidates are donors familiar with Massasoit and businesses with a focus on health, science, or technology
  - Nursing sim labs and science labs modernization would have great appeal
  - Funding or gifts-in-kind for equipment and technology
- Work with architects on schematic designs to share with donors seeking major naming rights
- Obtain Board of Trustee approvals for naming rights



# Financial Plan

Financing for the Science, Nursing & Allied Health FY23 Major Capital Project Request		<u>Balance</u>
Total Project Cost		\$ 41,000,000
State Capital Funding (DCAMM)	\$ 30,000,000	\$ 11,000,000
MSCBA* <i>MA State College Building Authority</i>	\$ 5,000,000	\$ 6,000,000
MCC CDs	\$ 1,000,000	\$ 5,000,000
Philanthropic	\$ 2,000,000	\$ 3,000,000
MCC Cash **	\$ 3,000,000	\$ -
*20 years at 4.5% annual debt payment of:		\$ (496,721.54)
Cash as of 6/30/21		\$ 11,184,275
Investments as of 6/30/21		\$ 22,427,359

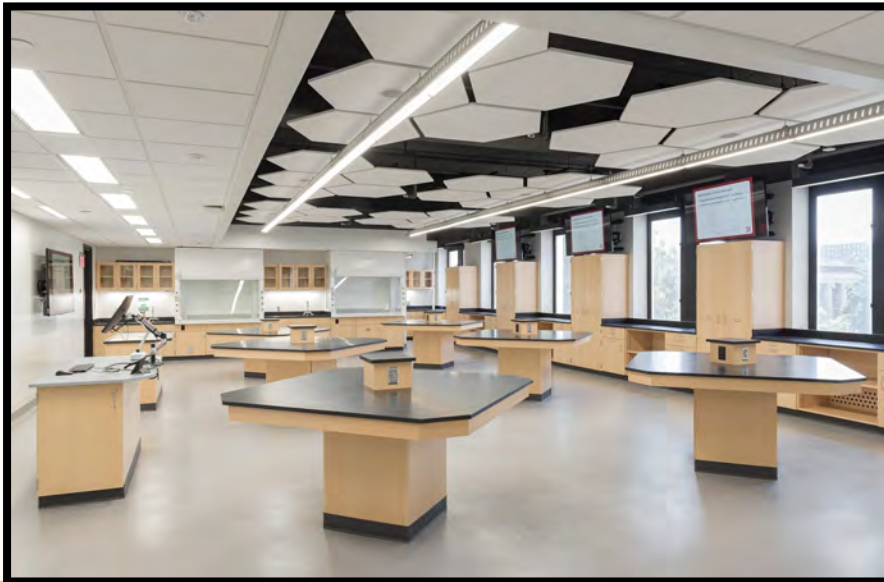
Note 1: Dedicate 5% of investment income to satisfy annual debt payment

Note 2: Cash not needed until FY24

\*\* Accumulate investment income over next 3 years to contribute to MCC Cash

# Timeline

- September 15, 2021: Massasoit Community College Board of Trustees Major Project Capital Request Update
- October 13, 2021: Massasoit Audit & Finance Committee Major Project Capital Request Update (Finance Plan)
- October 20, 2021: Massasoit Community College Board of Trustees Major Project Capital Request Update
- October 28, 2021: Peer Review with representatives from EOE, DHE, DCAMM and peer institutions
- December 1, 2021: Board Action: Approval to submit project proposal to DCAMM
- December 23, 2021: Major Project Capital Request Final Submittal to DCAMM
- May/June 2022: Decision Notification from DCAMM
- June 2022: Board Action: Board of Trustees vote to move forward with Capital Project and funding plan



Questions?

## PART G - PROJECT IMPLEMENTATION & SCHEDULE

**Objective:** Describe project phasing required and estimated schedule

### G.1 Estimated Project Schedule

Indicate a preliminary project schedule assuming funding in FY23 below. Include all enabling projects, designer selection (if applicable), design, bidding, and construction.

Project Tasks	Estimated Time (Months)	Remarks
Project Prep/Scope Confirmation (1-2 months)		
DSB Ad / Designer Selection (If through DCAMM – 3 months)		
Study & Schematic Design (DCAMM guideline – 9 months)		
Certification (DCAMM Guideline - 1 month)		
Design (DCAMM guideline – 9 months)		
Bidding (If through DCAMM – 3 months)		
Construction (including enabling & backfill projects)		

**G.2 Anticipated occupancy (and use) date** (assume a July 15, 2022 project start date)

Format: mm/dd/yyyy

## FY23 Applicants: (untitled)

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**Primary Contact Email Address**

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**Primary Institution Name / Organization**