

Annual Report 2024-25



ROCHESTER
JOINT SCHOOLS
CONSTRUCTION
BOARD

TOM RICHARDS: CHAIRMAN • JACOB SCOTT: VICE-CHAIRMAN • KIM D. JONES: TREASURER • JESSE DUDLEY: MEMBER
KABUTEY OCANSEY: MEMBER • SHAWN FARR: MEMBER • RON GAITHERS: MEMBER • BRIAN SANVIDGE: NON-VOTING MEMBER



Page Number

Program Overview	4	Program Timeline	27
• Rochester Joint Schools Construction Board	6	The Role of the ICO	29
• RJSCB General Information	7	• Bid & Award Stage	30
• RSMP Management Team	8	• Construction Stage: Ongoing Monitoring Process	31
• Phase I Overview	9	• Diversity Plan Compliance	32
Metrics	10	SEQRA	33
Phase II Overview	11	Economic Development	33
Phase III Overview	15		
• Strategic Plan Components	22		
• Phase III Implementation	24		
• Fiscal Overview	25		



Program Overview

The Rochester City School District (RCSD or District) committed to a 20-year plan to address long deferred maintenance in a comprehensive, prioritized, and thus strategic manner. By definition and in a phase-by-phase manner, the 'plan' balances updated demographic projections with the best sites to determine which of the District's 46 school buildings will be proposed as a project to be reconstructed. That obligation, however, must overcome profound statutory limits on the City of Rochester's bonding capacity. The inability to sustain the needed maintenance is compounded by needed updates to each of the learning environments to 21st century standards comparable to the neighboring suburban districts.

The RCSD currently operates 46 school buildings currently or 30 elementary schools, 14 secondary campuses, one (1) Montessori school, one (1) adult/family learning center, and several alternative education programs. Nearly half of these buildings exceeding well over 75 years of age. Given the number and average age of the RCSD building portfolio, there is a real Operations & Maintenance demand on the RCSD annual budget. While none of the schools present dangerous conditions to students or the community, the RCSD has an obligation to assure the long-term maintenance as a public investment and the delivery of a quality education for each student. At the conclusion of the Rochester Schools Modernization Program (RSMP) those facilities determined to be either non-serviceable or unnecessary, will be candidates for permanent retirement.

The RSMP is the legacy of enabling special legislation passed in 2007 by the State of New York to provide the City of Rochester and the RCSD with the flexibility to achieve school facility needs via alternative financing mechanisms. The multi-year school reconstruction program, commonly known as RSMP, has completed two (2) phases that have significantly impacted 25 schools to date.

The special State legislation designated the Rochester Joint Schools Construction Board (RJSCB or Board) as the agent to undertake all RSMP Projects on behalf of the City and the District. Formed in 2008, the RJSCB is comprised of three appointees by the RCSD Superintendent of Schools, three appointed by the Mayor, and the seventh member is jointly appointed.



Following two orientation sessions in late fall 2008, the RJSCB initiated its official proceedings in January 2009. The RJSCB began by completing many organizational tasks, including the adoption of RJSCB Bylaws, the election of officers, and the establishment of a committee system. Currently, former City of Rochester Mayor (2011-2013), Tom Richards, is the RJSCB Chairman, the RCSD Chief of Operations, Jacob Scott, is Vice Chairman, and the City's Director of Finance, Kim D. Jones, is the RJSCB Treasurer. The Independent Compliance Officer (ICO) is a non-voting member hired by the RJSCB. The established working relationship has the RJSCB Program Manager meeting weekly with the RCSD Chiefs of Finance and Operations to review the Program progress and updates. The

RCSD Facilities Design Group is the operational liaison to the RSMP in addition to the RCSD Finance Department, and coordination meetings have been initiated on a regular basis with the Program Manager. The Board-appointed Records Access Officer, has been incorporated in the Program Manager's contract to work directly with the Board General Counsel to support the RJSCB and the RCSD in responding to public FOIL requests as well as procedural and potentially sensitive matters.

The Rochester Schools Modernization Program (RSMP) is a collaborative—or joint – initiative between the State of New York, the City of Rochester, and the Rochester City School District (RCSD). The public school system in Rochester is one of the 'Big Five', which denotes the largest urban districts in the State. Specifically, those districts are in a unique category where they are dependent upon the State for annual operating budget assistance. The State created the RSMP with the authority to serve as the City's and District's agent; managing all fiduciary and capital construction aspects of the comprehensive reconstruction of the RCSD in a phase-by-phase manner as approved by the State Education Department (SED)

Rochester Joint Schools Construction Board



Tom Richards
CHAIRMAN



Jacob Scott
VICE CHAIRMAN



Kim D. Jones
TREASURER



Jesse Dudley
MEMBER



Shawn Farr
MEMBER



Kabutey Ocansey
MEMBER



Ron Gaither
MEMBER



Brian Sandvige
INDEPENDENT COMPLIANCE OFFICER



Kimberly Mitchell
BOARD CLERK

RJSCB General Information

Meetings

Monthly RJSCB business meetings are open to the public. The Board, along with the M/WBE and Services Procurement Committee and the Finance Committee, meet on the second Monday of the month. Those meetings take place at 4:00 pm.

Due to restrictions posed by the COVID-19 pandemic, meetings were conducted in a hybrid fashion, both virtually and in-person. Monthly meetings are held at the Program Office located at 70 Carlson Road, Suite 200, Rochester, NY 14610. For scheduling, agendas, minutes and other details, visit the Board's website at www.rcsdk12.org/rsmp.

Bylaws & Organizational Documents

- By-Laws (Revised August 2024)
- Responsibilities of Board Members (Revised August 2024)
- Confidentiality Agreement (Revised August 2024)
- Code of Ethics Policy (Revised August 2024)
- Communications Policy (Revised August 2024)
- Procurement Disclosure Policy (Created August 2024)
- Purchasing and Procurement Policy (Revised August 2024)
- Consent Agenda Policy (Revised August 2024)
- Pay Requisition Approval Procedures (Revised August 2024)

Website

- Agendas
- Minutes
- Resolutions
- Committee Reports
- Program Manager's Reports
- ICO's Monthly Reports
- RJSCB's Annual Reports
- Program Background
(i.e. Cooperative Agreement, Strategic Plans, SEQRA Clearances, Project Labor Agreement)

The Enabling Legislation created the Rochester Joint Schools Construction Board (RJSCB) to undertake the RSMP projects by designating the RJSCB as agent for the City and the District. The powers granted to the RJSCB enable a more efficient approach to the reconstruction of the District's school facilities.

RSMP Management Team



P  pin Accilien, P.E.
PROGRAM DIRECTOR



Roland A. Coleman, II
DEPUTY DIRECTOR



Terry LoConte
OPERATIONS MANAGER



Richard Stoffel
SR. PROGRAM MANAGER



Brian Pinnock
SR. PROGRAM MANAGER



Robert Skeelee
SR. PROGRAM MANAGER



Shiobion Williams
ASSISTANT
PROGRAM MANAGER

The RSMP team also includes:

Junior Sainvil
Dean Sproch
Justin Salgot
Parmis Arfania



Phase I Overview

Phase I included renovations and alterations to 12 schools, plus a District-Wide Technology project (integrated digital system upgrades within those 12 buildings) with a total value of \$325 million. The RSMP Phase I consisted of approximately \$237 million in budgeted ‘hard’ construction costs, and \$88 million in design, management, financing, District-Wide Technology, and other “soft” incidental program expenses. The anticipated Building Reimbursement Aid, as calculated by the SED Maximum Cost Allowance (MCA) formulas, was approximately \$287 million, with the balance of \$38 million in EXCEL aid and local costs.

Please see the following page for the summary of Phase I costs and State Aid, as well as a summary of minority business and workforce participation.



Metrics

RSMP Phase I: Summary of Total Project Costs & Anticipated State Reimbursement Aid

School Project Name	Hard & Soft Costs (All Dollars in Millions)	Anticipated State Aid Cost Allowance	Current Project Status	Construction Start	Construction Complete
Williams School 5	\$21.6	\$19.8	Complete	Summer '13	Summer '14
Anna Murray-Douglass School 12	\$25.5	\$21.4	Complete	Fall '14	Summer '16
Enrico Fermi School 17	\$28.6	\$26.4	Complete	Summer '12	Summer '13
Henry Hudson School 28	\$23.9	\$20.2	Complete	Summer '13	Summer '14
Helen B. Montgomery School 50	\$27.0	\$23.4	Complete	Summer '12	Summer '13
Helen B. Montgomery School 50 (site)	\$3.4	\$3.29	Complete	Summer '12	Fall '19
World of Inquiry School 58	\$44.4	\$28.7	Complete	Fall '12	Winter '14
Charlotte High School	\$28.6	\$27.8	Complete	Summer '12	Summer '13
Thomas Jefferson High School	\$00.324	\$00.324	Complete	Summer '15	Summer '15
Monroe High School	\$29.8	\$28.2	Complete	Summer '15	Spring '18
Edison Educational Campus	\$26.4	\$24.9	Complete	Summer '13	Summer '14
East Upper & Lower School	\$18.9	\$17.8	Complete	Summer '13	Summer '14
Benjamin Franklin High School (added Auditorium Project)	\$11.3	\$11.1	Complete	Summer '12	Summer '14
District Wide Technology Project (includes program wide expenses)	\$38.9	\$37.0	Complete	2013	2016
TOTALS	\$325.0	\$287.0 (88.3%)	N/A	N/A	N/A

Note: EXCEL Aid (\$16.3M) was applied to the Phase I projects to reduce the bonded amounts, thus reducing the local share.

Phase I: Business Utilization Program Goals/Actual

CATEGORY	GOAL	ACTUAL
MBE	15%	15.74%
WBE	5%	7.42%
SBE	5%	3.77%
DBE	2%	2.33%
TOTALS	27%	29.26%

Phase I: Workforce Participation Goals/Actual

CATEGORY	GOAL	ACTUAL
Minorities	20%	22.88%
Women	6.9%	7.22%
TOTALS	26.9%	30.10%

Phase II Overview

The RJSCB broadened the search to select the Phase II Independent Program Manager in accordance with the enabling special legislation by NY State.

Savin Engineers, P.C. (a New York State Certified MBE), in association with Gilbane Building Company, was selected for the critical role of overall Program Manager (PM). The shared objective during the selection process was to exceed the RJSCB goals and expectations for the successful delivery of all projects in terms of time, budget, quality and overall diversity. The Savin/ Gilbane team's selection also assured the gap would be minimal between Phases I and II of the RSMP. Among others, the RCSD's goals for student- based program initiatives included:

- Standardizing small class sizes more consistently by grade level;
- Providing Pre-Kindergarten classrooms (and removing portable/temporary classroom facilities);
- Providing flexible computer & technology lab spaces (i.e., Career Technical Education including STEM) at the primary and secondary grade levels.
- Expanding Special Education classrooms and required resource spaces;
- Providing facilities for school-based health centers, as well as student and family support services by outside agencies as a safety net.

To overcome the financial disconnect between the RCSD programmatic needs and infrastructure deferred maintenance priorities in a cost-effective manner, the SED agreed there were clear benefits if the traditional Reimbursement Aid process was modified. The proposal was to double the Maximum Cost Allowances (MCA) for elementary school projects, and the trade- off was the typical 5-year reset would be extended to 10-years. The requested extended MCA Aid amendment to the enabling special legislation was approved by the State Senate on June 6, 2016, followed by the Assembly on June 16, 2016, and finally signed by the Governor on July 5, 2016, which allowed the Phase II to proceed. The enabling special legislation required active promotion of Eligible Business Enterprises (EBEs) to participate in the RSMP. Thus, aggressive EBE participation goals continue as an integral part of RJSCB policies to promote diversity and equity in contracting on all RSMP projects.





The RJSCB and its Consultants actively embraced public contracting opportunities for minority and women entrepreneurs in the City of Rochester as well as the 9-county surrounding area served by the County of Monroe Industrial Development Agency (COMIDA, from which the Phase II bonds were sold). An initiative by the Savin PM Team called the Business Opportunity Program, or BOP, was created with the goal to build capacity for small, minority owned and women owned businesses in the community. It was in that spirit that the Savin PM Team donated \$100,000 as seed funds to underwrite an interest-free, revolving loan program administered by the Rochester Economic Development Corporation (REDCO) to provide upstart EBEs with working capital for which all loans were fully repaid. The BOP initiative involved 3 other strategic components, namely Community Engagement, the Instructional Series, and the Mentor/ Protégé Program. The highlights of the innovative BOP delivery process included:

- A no cost open admission instructional series with a curriculum of 7 building block modules, and 36 classroom format sessions requiring 80% minimum attendance to graduate;
- Pro-Active outreach to the community via open forums, social media and public ceremonies;
- Engagement of real-world working professionals (i.e., architects, engineers, construction managers, lawyers, accountants and prime trade contractors) for facilitating the BOP classes, while also serving as experienced resources for the hands-on, team based mini- projects with BOP students;
- Eligibility for BOP participants completing the Instructional Series to receive one-on-one Mentor-Protégé assistance to address their special/unique business plan needs.

The RSMP Phase II Program enabling special legislation was signed by the Governor in December 2014. Phase II was authorized for up to 26 projects, including an associated District-Wide Technology Project to standardize digital systems. The total budget was \$435 million, with approximately \$315 million allocated for hard 'brick-and-mortar' costs, and \$120 million for soft costs such as management, A/E design, construction management, ICO, legal, and financing expenses.

At the request of the RJSCB Chair, the Instructional Series was extended an additional semester (a total of 9 complete cycles were delivered) due to BOP's success. An entirely new dimension was also developed and implemented as the Business Accelerator, to further assist the BOP graduates with sustaining and growing their emerging business as they secured larger and more complex contracts. A total of 111 Eligible Business Enterprises completed the BOP Instructional Series. The evidence is clear that pathways were being created where the combination of coordinated outreach, education and hands-on training have provided opportunities to diversify and build the entrepreneurial capacity in the greater Rochester community as the RJSCB's (and State) Diversity Goals were exceeded in the process!

The RJSCB continued through the remainder of 2016 with procurement of design and other professional services using a staggered RFP process. Overall,



the professional services, beyond the Savin PM team, required to implement the Phase II Projects in a consistent and methodical manner included:

- Independent Compliance Officer (ICO)
- Program Legal Counsel
- Bond Underwriting
- Insurance Underwriting
- Professional PR and Photography
- Architectural, Engineering, Environmental, and Food Service Design Consultants
- Construction Management, Inspection/ Testing, & Commissioning
- Site and Building Security during construction
- Move Management (i.e., into temporary Swing Spaces, and then the re-occupancy of the completed Projects)

Phases 2A and 2B Projects: Seven major reconstruction projects were the first group of schools starting with the Monroe 2A early project completed in August 2017. Accordingly, students from the Monroe Campus 2B, followed by Grissom School 7, Spencer School 16, Dr. Freddie Thomas Learning Center, School Without Walls, and the Children's School of Rochester (School 15 relocated to the reconstructed/enlarged School 1) all returned to their home school on time and on budget in September 2018 from temporary Swing Spaces to complete Phase 2B.



Phase 2C Projects: This sub-phase was comprised of three projects, starting with Abraham Lincoln School 22 (formerly School 6), completely reconstructed and enlarged to be back on-line for re-occupancy in September 2019. Barton School 2 and Forbes School 4 were similarly reconstructed/expanded with completion in December 2019. The Dr. Cooper School 10 was re-budgeted, re-designed, and completed in Summer 2020. It is important to note that the originally approved mid-year move into Schools 2 and 4 was later felt to be too disruptive, which deferred the formal 'repossession' by the RCSD of those schools until July 2020.

The Phase 2D Projects: The final sub-phase included two projects, with Flower City School 54 (formerly School 30) completed in September 2020 per the originally approved Phase 2D RSMP Master Schedule, but not occupied until 2021 due to COVID-19 pandemic.

RCSD requested re-opening for Additional Work Scope the SED Final Cost Reports for four projects, that had completed their original base scope as approved for bidding and had been reoccupied. The first was the Edison Campus (Phase 2B) project, which had been completed on schedule in September 2019. However, major building components (e.g., replacements of roofs, windows, corridor fire doors, site drainage, etc.) continued to approach the end of their life cycles and could not wait for Phase III. Accordingly, that new/ additional scope extended the schedule to August 2020.

The Forbes School 4 and Flower City School 54, both completed in 2020, were then slated for new land acquisitions as Additional Scope for their transformations into Urban Campuses. The goal was to make those elementary schools more compliant with SED's minimum usable site area criteria. As major undertakings, the acquisition/ relocations/ abatement/demolition process for the total of nine former residential properties to date extended the Close-Out process for those respective projects. The East Campus Project had its sequentially phased base reconstruction work completed on schedule in August 2021. The East Project had to be re-planned and became the longest in duration for Phase II, respecting the requirement of the Educational Partnership Organization's (i.e., the University of Rochester) strong preference to retain all of the school's students on-site despite the complicated reconstruction and infrastructure replacement work. The project was closed out in 2023.



Phase III Overview

The New York State Legislature authorized the RSMP Phase III Act as Chapter 614 of the laws of 2021, which was signed into law by Governor Kathy Hochul on 15 November 2021. The Rochester Schools Modernization Program (RSMP) Phase III Strategic Plan was developed under the direction of the Superintendent of Rochester City School District (RCSD).

The Rochester Joint Schools Construction Board (RJSCB) as the authorized agent for RCSD and the City of Rochester, assisted the District with the selections through comprehensive Requests for Proposals (RFPs) of the key professional service consultants starting with the Master Plan Architect. The Strategic Planning process involved the District's overarching Educational Plan required by the State Education Department (SED), the evaluation of all schools in the District, as well as the selection of the six (6) schools proposed for the actual RSMP Phase III Projects. The respective 'base scope priorities', Total Project Budgets were also determined by RCSD.

The RCSD and RJSCB conducted three (3) public meetings in the Spring of 2023 for the purpose of seeking public comments and incorporating said comments into the Draft Phase III Strategic Plan. It should be noted that the RSMP Phase III Projects are each much larger in scope and budget than had been the case for prior Phases I and II. As required by law, the RJSCB engaged the services of a consulting firm to assist with the State Environmental Quality Review Act (SEQRA) documentation.

The RJSCB next selected Savin Engineers as the Program Manager (PM), who assisted in the RFP process for the selections of the Independent Compliance Officer (ICO), General Counsel, Financial Advisor, and Bond Underwriter to implement and coordinate the comprehensive work scope to reconstruct the six (6) proposed Phase III Projects.

The RJSCB and its PM developed a detailed Master Schedule with clearly identified "key" tasks, including specific SED submission/review and approval milestones that are required in order to comply with the date stipulated in the Special Legislation for providing the fiscal and pedagogical results of all RSMP Phase III Projects by 30 June 2031. The proposed RSMP Phase III Strategic Plan was subsequently approved by the Board of Education on 25 April 2024, the RJSCB on 13 May 2024, and formally submitted to SED and the Office of the State Comptroller.





The RCSD and RJSCB requested a work session with SED, prior to the submission of the Phase III Strategic Plan, to assure conformance with SED expectations, policies, and procedures specific to the RSMP, also per the Legislation. The SED ultimately approved the RSMP Phase III Strategic Plan on 2 August 2024. The circumstances made it apparent that the RJSCB had to consider a “fast-track” approach to the selection of Architect/Engineer (A/E) Teams for the initial Phases 3A and 3B Projects as the best path to address the very challenging mandates in the time that remained. A Project Labor Agreement (PLA) feasibility study has been conducted and submitted to RJSCB.

The PLA study analyzed the Master Schedule, the available labor force in the near-term marketplace, and the likelihood of potential economic savings to the Projects in relation to the enabling Special Legislation’s goal for the RJSCB to encourage a diverse business and workforce participation across all aspects of the Program. The economic and scheduling issues are clearly complex with multi-billion-dollar projects underway just to the east and west of Rochester.

The expectation is the RJSCB will make its official decision to move forward with a PLA over the summer of 2025 well before any RSMP Phase III actual construction would start. In the meantime, introductory meetings with the Project Labor Agreement (PLA) consultant and the Rochester Building Trades and Construction Council leadership were held to review a proposed agreement.

The following key points summaries provide an overview synopsis on the status of the four (4) RSMP Phase III Projects currently in active design, as shown in the overall Master Schedule exhibit provided for reference following the Edison Campus project summary.

Phase 3A. Martin Luther King, Jr. School 9 Project:

- **Project Current Work Stage** - The design schedule and approvals are under discussion with SED.
- **SED Submissions** - Program Verification (PV, courtesy copy submitted 22 Nov 2024), Preliminary Submission Schematic Design (SDs), 25% Complete CDs are all on-hold pending confirmation of Building Aid Units Calculations by SED’s Office of Facilities Planning.
- **Building Advisory Committee Design Charette Work Session** - 23 Sept 2024. Note, this format re-familiarizes stakeholders on a Project-by-Project basis regarding:
 - The approved Phase III Final Strategic Plan (i.e., scope/budget revisions occurred to align each Project’s cash flow, bonding and aid with the overall Financial Plan);
 - The RCSD Base Scope priorities remained for each building’s infrastructure (i.e., mechanical, electrical, plumbing, roofs, exterior masonry and windows), along with major SED required Building Condition Survey needs too long deferred;

- The RCSD approved Total Project Budget;
- The RJSCB Master Schedule for implementation in the most cost effective manner;
- Input/feedback on ‘major missing desirables’ from the perspectives of School Administrators and other stakeholders not previously involved in the planning process to date.
- **Schedule Status** - delayed by prolonged efforts to secure SED initial meeting date (6 May 2025), and RCSD authorization of ISR Form required by SED. The actual on-site Construction Start deferred to Summer 2026 (along with move into Swing space).
- **Next Milestone(s)** - SED Submission target for 50% CDs originally set for 22 May 2025 is still to be determined.
- **Budget Status** - priority Base Scope reduced (including adjacent/attached Jackson Recreational Center operated by the City, and shares some outdated building-wide mechanical/electrical/fire alarm infrastructure) to comply with the approved Total Construction Budget as revised per SED’s initial determination the Project would not be considered a total ‘gut’ reconstruction. Accordingly, the Project will not be able to include any furniture (Fixtures, Furniture and Equipment - FF&E) replacement as eligible for reimbursement aid. Additional scope required by RCSD for an integrated room door electronic ‘lock-down’ hardware interconnected to the building’s public address system (i.e., new technology that has been

requested as the Program-wide standard, and in this case must also include the Rec Center as an adjoining facility for overall public safety) has been added by RCSD, pending the cost reconciliation of the progress set Detailed Estimate.

- **Design Status** - Upon a closer evaluation, the PV Stage devised a more functional floor plan that produced two (2) additional PK classrooms (CRs), and two (2) special education self-contained CRs as enhancements beyond the approved Strategic Plan. The net results were a ‘win/win’ in terms of aidability, a balanced grade re-configuration with four (4) classrooms for each grade, as well as Special Education CRs on each floor level for a more efficient educational delivery to all students. The strategy is in development with the CM to accommodate the Project’s major reconstruction while the adjacent Rec Center remains operational as a critical community resource even during the Construction Stage.
- **SED Commissioner’s Approval for Construction Start** - Tentatively September 2026.
- **Master Schedule Construction Completion for Re-Occupancy** - Tentatively October 2028.





Phase 3A. Wilson Commencement High School Project:

- **Project Current Work Stage** - The design schedule and approvals are under discussion with SED
- **SED Submissions** - Program Verification (PV, courtesy copy submitted 12 Dec. 2024). Preliminary Submission Schematic Design (SD) and 25% Complete CDs: all on-hold by SED.
- **Building Advisory Committee Design Charette Work Session - 17 Sept. 2025.**
- **Schedule Status** - delayed similar to that previously noted for the MLK, Jr. Project.
- **Next Milestone(s)** - SED Submission target for 50% CDs is still to be determined.
- **Budget Status** - priority Base Scope reduced despite increased funds transferred from Dr. MLK, Jr. Project (i.e., non-gut reconstruction eligibility). Additional scope required by RCSD for a new freight elevator and loading dock addition.
- **Design Status** - The Strategic Plan envisioned relocating two (2) science labs from the lower floor to the 3rd floor to consolidate all of the sciences as a department. The gesture proved to be too costly, and the School and District Leadership agreed with the Program's recommendation to instead renovate the labs in place as a major cost saving measure. The RCSD original priority to replace the heavy timber wood framed attic roof structure (an existing non-conformance) with steel framing also proved cost prohibitive, and instead replacing the dedicated dry sprinkler system will proceed. The Swing Space design concept is on-hold pending the resolution of the Rochester International Academy (i.e., RIA as the 'host' school role it has served in prior RSMP Phases, but it currently has unknown space capacity pending the Federal policy determination on deporting immigrant families). The Wilson Project stakeholders, however, remain enthused with the much-needed New Main Entry (i.e., to provide security and ADA accessibility) Addition as the feature highlight of Phase III.
- **SED Commissioner's Approval for Construction Start** - Tentatively November 2026.
- **Master Schedule Construction Completion for Re-Occupancy** - Tentatively April 2029.



Phase 3B. Padilla High School at Franklin Project:

- **Project Current Work Stage** - The design schedule and approvals are under discussion with SED
- **SED Submissions** - Program Verification (PV courtesy copy submitted 14 Jan. 2024). Preliminary Submission Schematic Design (SD) is on-hold by SED.
- **Building Advisory Committee Design Charette Work Session - 21 Oct. 2024.**
- **Schedule Status** - delayed similar to that previously noted for the MLK, Jr. Project, but design work continues in order to comply with the Master Schedule.
- **Next Milestone(s)** - SED Submission target for 25% CDs is still to be determined.
- **Budget Status** - priority Base Scope reduced to comply with allocated budget (note, also SED has initially designated Project to be ineligible for gut reconstruction consideration, which also makes any new furniture non-aidable. The potential add-alternates list totals over \$12M, and awaits the next reconciliation of costs with the 25% CD Detailed Estimate for re-prioritization with the RCSD.
- **Design Status** - The Architect and Engineers at this time are in the early stages of developing the base scope of work items, and the Swing Space design concept is progressing with the RCSD Facilities Group included in all meetings (RJSCB policy).
- **SED Commissioner's Approval for Construction Start** - Tentatively April 2027.
- **Master Schedule Construction Completion for Re-Occupancy** - Tentatively August 2030.





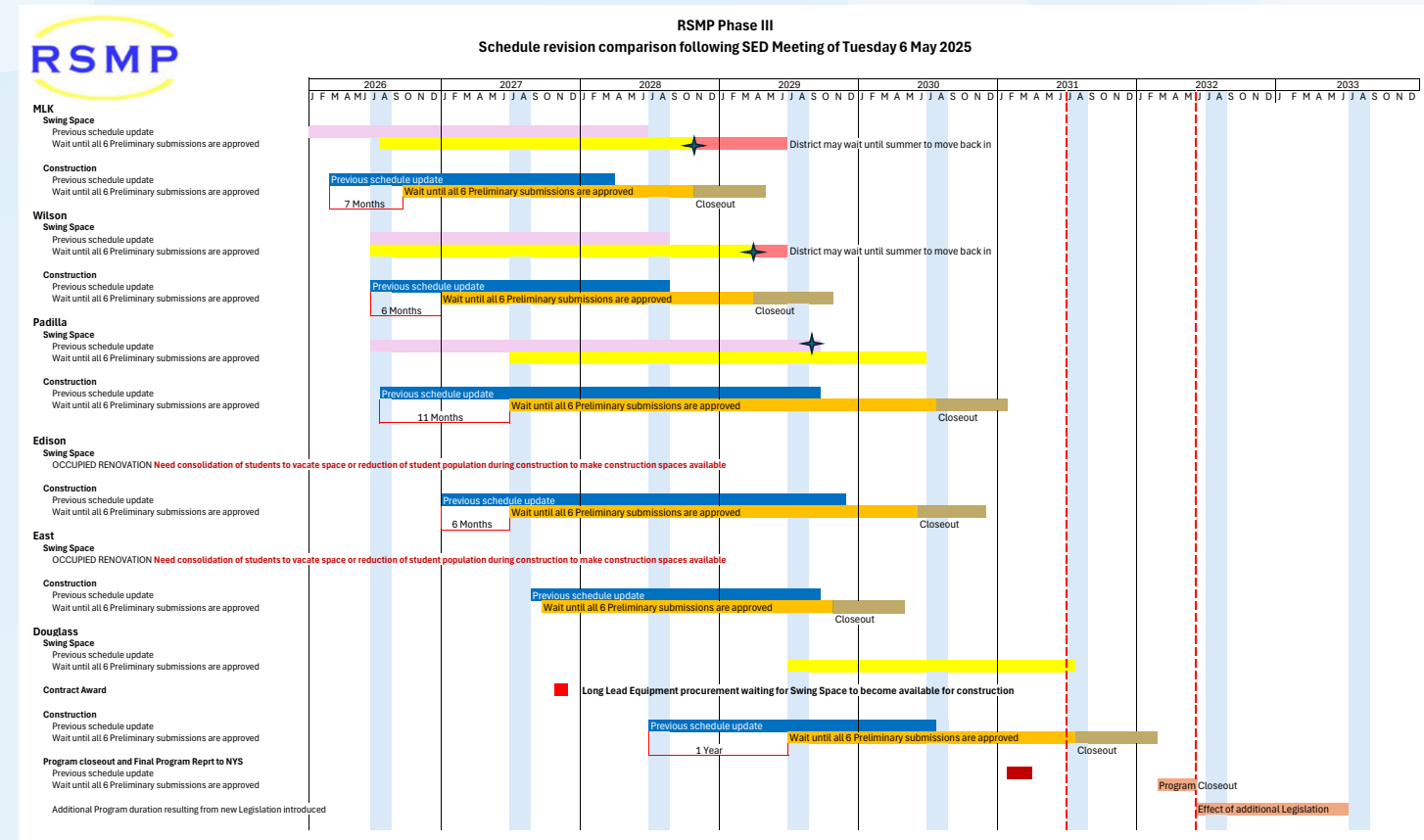
Phase 3C. Edison Technical High School Project:

- **Project Current Work Stage** - Program Verification (PV)
- **SED Submissions** - The design schedule and approvals are under discussion with SED
- **Building Advisory Committee Design Charette Work Session** - 17 April 2025 and proved to be very engaging/informative primarily due to the significant additional scope the RCSD has authorized.
- **Schedule Status** - delayed by significant RCSD additional scope requirements that required the Architect-of-Record (AoR) to develop an aggressive 'recovery plan' to maintain the Program's Master Schedule.
- **Next Milestone(s)** - Review target for Preliminary Submission Schematic Design (SD) is still to be determined.
- **Budget Status** - over \$27M has been transferred from the East Campus Project to Edison for the District's new/additional scope priorities. It is important to note the Edison Project is eligible for a 'double Maximum Cost Allowance (i.e., MCA, as is the case for all of the RSMP Phase III Projects), however, it is still not planned as a full 'gut' reconstruction leaving it ineligible for FF&E as an aidable cost.
- **Design Status** - The RCSD required new athletic fields (approximately \$16.5M in added Construction costs) and the structural reconstruction (approximately \$10.9M per the assessment study by an independent engineering firm with expertise in complex post tensioned 'waffle slab' structural

systems such as that at Edison) as additional scope priorities. The AoR is currently incorporating that new scope with the approved Strategic Plan to assess the alignment, and thus 'do-ability' of all the major improvements slated to occur in the Edison Project.

- **SED Commissioner's Approval for Construction Start** - on pace for tentatively May 2027.
- **Master Schedule Construction Completion for Re-Occupancy** - Tentatively May 2030.

The A/E and CM selections for the East Educational Campus and Frederick Douglass Educational Campus Phase 3C/3D Projects will occur in July 2025 to expedite those respective Preliminary Submissions. A summary revised schedule follows for purposes of comparing the impacts of the SED new review process upon the original Master Schedule submitted by the RSMP..





Phase III Implementation

Building Advisory Committees (BACs) were formed for the first four (4) Phase III schools that are currently in design. Each BAC includes representation from the RJSCB, the District, the school principal, City staff, school parents and community/neighborhood groups. These BACs were identified as a significant component of the design process to ensure that any potential environmentally significant design elements were addressed. In addition, each BAC also provides a vehicle for reviewing, discussing and providing recommendations for any changes or alterations to the approved Core Model programming and design. Each design firm assigned to a Phase III school meets with the BAC to initiate the Program Verification Stage. Additional details and information regarding each school are gathered as the design process advances, resulting in several program refinements to the Test Fit concept that becomes the final design.

In the spirit of partnering, the RJSCB has assumed “face-to-face interim and final reviews” will occur for all of the Phase III Project submissions to SED. It is critical, and the benefits are immeasurable as a result of architects and project managers having meetings in Albany with the SED staff as appropriate, to receive review comments real-time from the onset of the design process, and then to incorporate those comments/changes as stipulations for the next required submittal to SED. The results of such a review methodology were proven to be highly successful in the RSMP Phases I and II because they clearly expedited the overall approval time for RJSCB projects, eliminating the normal lengthy and uncertain timeframe for approvals, given SED’s backlog. More importantly, this type of ‘partnering for success’ between SED and RJSCB will be essential to the cost-effective/ escalation minimizing completion of all Phase III Projects by 30 June 2031, as required by the Special Legislation.

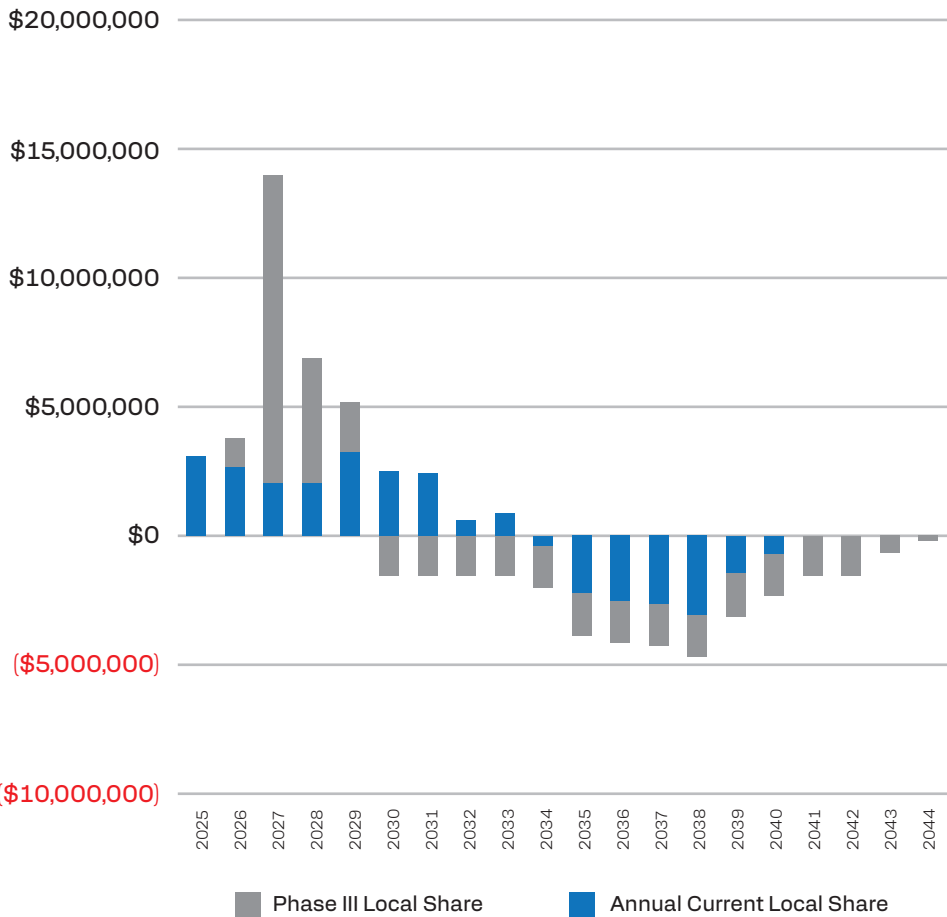


Phase III Fiscal Overview

The RCSD has reviewed the projected local share requirements of the Financial Plan, and adopted a resolution on 25 April 2024 acknowledging that the District could have a local share contribution of up to \$6-8M along with the Capitalized Interest cost(s) in connection with the financing of the Phase III

Projects. Pending the approval process of the RSMP Phase III Financial Plan (Volume 2) by the Office of the State Comptroller, the following cost matrix and Local Share bar chart may require further updating based upon any review comments received by RJSCB.

Series	School Project	Assumed SED Commissioner Approval Date	Capitalized Interest Cost	Total Project Cost Current Estimate	Assumed Aided Cost Allowance	Percent Aided to be Confirmed
Phase 3A	Dr. MLK, Jr. School No. 9	September 2026	-	40,409,876	38,938,620	96%
Phase 3A	Wilson Commence-ment Campus	November 2026	-	91,306,246	91,306,246	100%
Phase 3B	Padilla High School at Franklin	April 2027	-	143,275,509	143,275,509	100%
Sub-Total			-	274,991,631	273,520,375	99%
Phase 3C	Edison Educational Campus	May 2027	-	114,157,547	114,157,547	100%
Phase 3C	East Campus	August 2027	-	10,078,950	10,078,950	100%
Sub-Total			-	124,236,497	124,236,497	100%
Phase 3D	Frederick Douglass Campus	October 2027	-	75,771,872	75,011,544	99%
Sub-Total			-	75,771,872	75,011,544	99%
TOTAL			-	475,000,000	472,768,416	



The RJSCB has responded to a new set of questions from the Office of State Comptroller (OSC) regarding the local share contribution and payment of capitalized interest by the school district on the long-term debt. The revised Financial Plan submitted to SED and the OSC on 22 November 2024 still awaits approval.

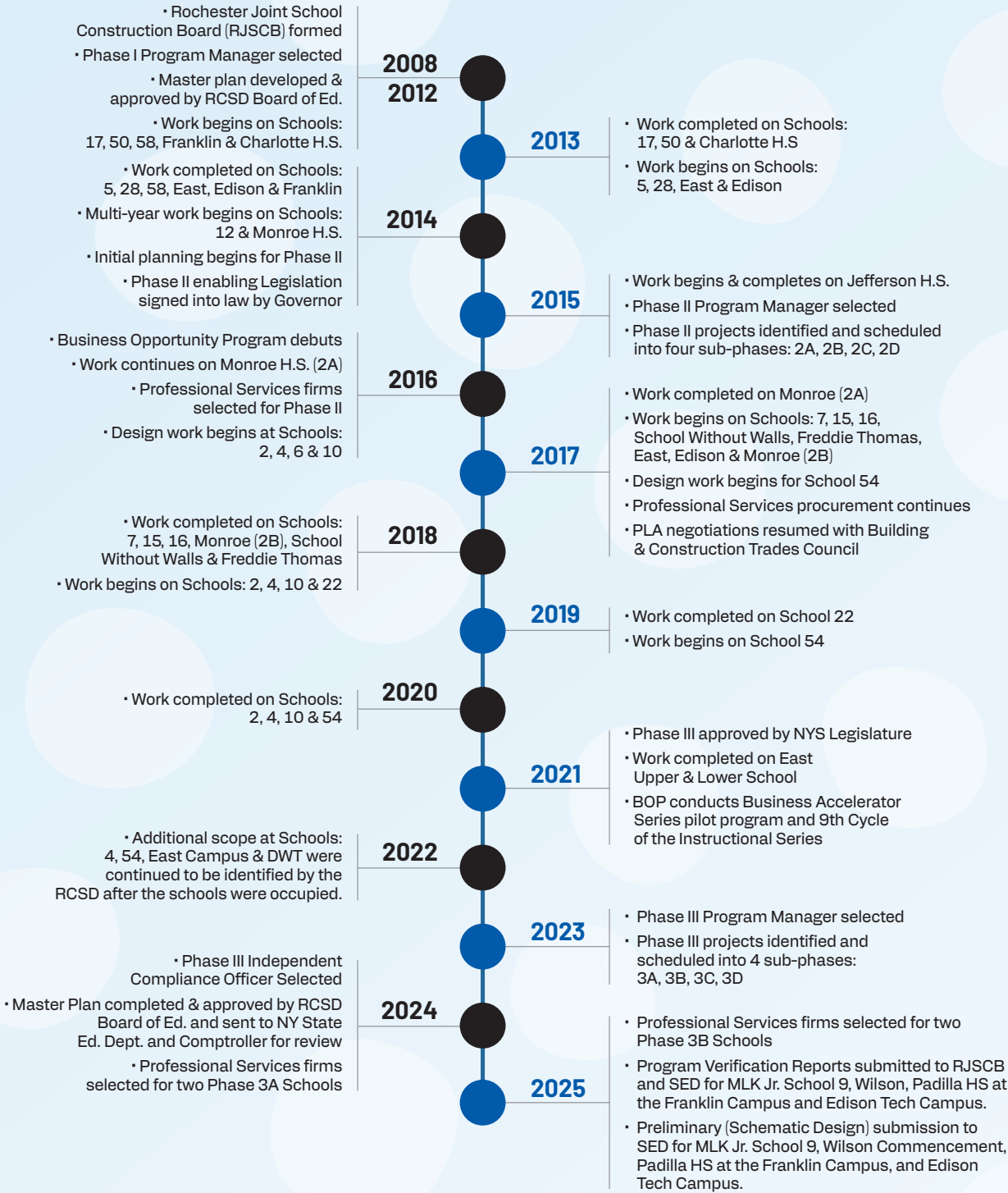
On 29 April 2025, the RCSD Board of Education authorized issuance of Bond Anticipation Notes (BANs) up to \$55 million for interim financing to cover Program expenses through maturity in July 2026.

The first BAN will be issued in July 2025 along with the City's BAN issuance, to include a BAN in the amount

of \$30 million (\$14,635,000 to reimburse the CSD for the temporary advances to date plus \$15,365,000 of additional new money funding). Please note the \$30 million amount is less than the \$35 million estimate as provided in the Financial Plan to the OSC.

A second BAN is expected to be issued in In February 2026, along with the City's BAN issuance, to include \$25 million of new money to also mature on July 30, 2026. This would be an increase of \$20 million, vs. the OSC Plan, with an estimated additional interest expense of \$300,000 vs. the amount included in the Revised Financial Plan submitted to the OSC.

Program Timeline



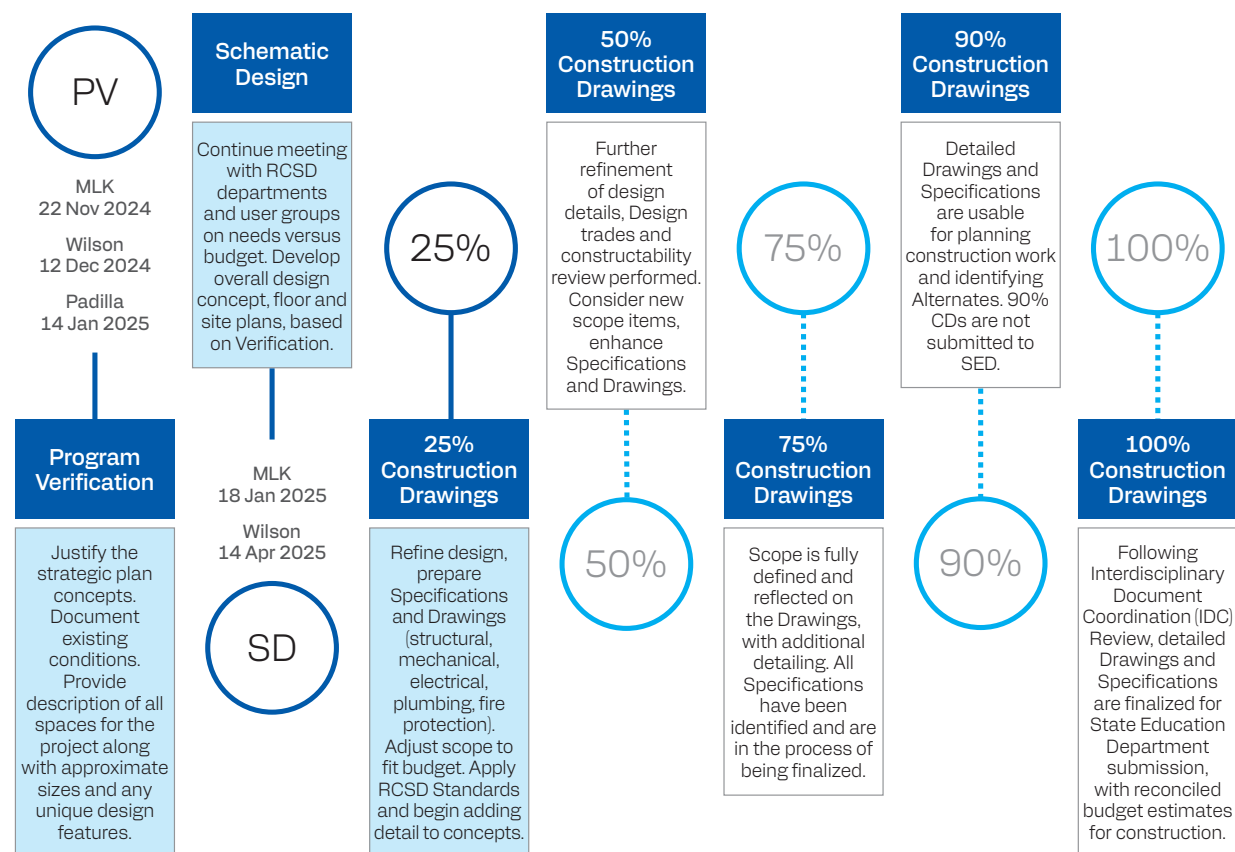


Phase III – Key Milestone

Phase III School milestone reports have been submitted or are anticipated for submission as shown by dates in the diagram below, which summarizes the design approval and submission process to the

NYS State Education Department. Each percentage shown is on development of Construction Drawings. Submissions are currently on-hold per SED request.

Statutory Design Approval & Submission Process



A project cost estimate is completed at each milestone.

The Role of the ICO

On December 11, 2023, Anchin was engaged to maintain their role as the ICO for Phase III of the RSMP. The Anchin team had developed and implemented successful monitoring procedures through the first and second phases of the program. The team has continued to expand their protocols to enhance diverse participation and transparency throughout the RSMP.

Anchin has conducted a capacity study to recommend diversity goals for Phase III of the program. The team utilized their experience, knowledge of market trends, and local contractor capacity to determine realistic goals to include in the diversity plan.

Anchin first acquired the Phase III construction schedule from program management. This allowed their team to compare anticipated schedules of other high value projects throughout the state, focusing on Western New York.

Next, Anchin reviewed the 303 MBE, WBE, and DBE certified firms that were active during the first and second phases of the RSMP to confirm their current certification status. They found that 163 of those firms were still currently certified. Anchin notes that the SBE certification for this project is a self-certification and cannot be measured at this time. They will continue to require each self-identifying SBE firm to complete a certification form prior to each contract.

Lastly, the ICO analyzed the potential impacts of other prominent construction projects in New York State. This allowed the ICO to reaffirm the capacity of certified firms throughout the state and recommend goals for Phase III.

Anchin recommended, and the RJSCB approved the Phase III business goals as follows:

- MBE: 18.00%
- WBE: 12.00%
- DBE: 2.00%
- SBE: 2.00%
- Total Business Utilization: 34.00%

It should be noted that this is an increase from total business utilization on Phases I and II. Furthermore, Anchin has recommended the following workforce utilization goals:

- Minority Participation: 23.00%
- Female Participation: 7.00%
- Total Workforce Utilization: 30.00%

The following narratives provide a brief overview for some key procedures the ICO has previously implemented to monitor all aspects of the Phase III Diversity Plan.



Bid & Award Stage

When a low bidder is identified, Anchin staff examines the bid to ensure that all required documentation was provided, and the Prime Contractor (PC) is fully informed of their compliance obligations. This includes:

- Develop and recommend strategies to create and coordinate efforts to ensure a more diverse business utilization and workforce prior to the bidding.
- Ensure the documentation included the EBE Utilization Plan (DP-1), EBE Assurance Statement, Promise of Non-Discrimination Checklist and Good Faith Efforts Checklist.
- Plan and conduct educational outreach sessions to increase consultant and contractor awareness and interest in the project. These sessions are aimed to act as project informational sessions, training, and networking opportunities.
- Apply the team's Executive Law Article 15-A: Participation by Minority Group Members and Women with Respect to State Contracts expertise to ensure that the bid meets or exceeds the diversity plan established by the RJSCB pursuant to section five of the Enabling Legislation.
- Verify that the EBE subs listed on the DP-1 had been contacted by the PC regarding the proposed work scope and price quote.
- Verify that the EBE subs maintain an active certification and possess the required commodity codes to complete the proposed scope of work and receive credit.
- Ensure that if a sub acted as a supplier or broker, the PC understands the correct credit to be received.
- Ensure that the ICO understands each sub's role, and that each sub is performing a commercially useful function. If there were any issues with the proposed goals or quality of the documentation received, Anchin contacts the PC.
- Offer assistance to any PC having difficulty finding EBE subs in order to meet the goals.
- Aid contractors in collecting, maintaining, and submitting necessary good faith efforts supporting documentation to comply with Empire State Development standards.
- Assist contractors by providing electronic templates for the compliance forms, to ensure that the forms are completed in a neat, timely, and legible manner.
- Issue recommendation letters for firms that were determined to have made a good faith effort in meeting all the business participation goals.
- Assist potential professional service consultants and contractors in the certification application process in accordance with New York State Empire State Development and New York State Unified Program Certification requirements.

- Once a firm is awarded a contract, Anchin requests copies of the Letter of Intent to Perform (DP-2) and executed sub-contracts for each EBE sub to verify that the PC fulfilled their commitment satisfy all of the RJSCB Diversity goals.

The RJSCB is committed to the successful implementation of the Diversity Plan in a manner consistent with the independence of the ICO required by the legislation.

Construction Stage: Ongoing Monitoring Process

The ICO will collect copies of workforce utilization reports, business utilization reports, certified payrolls and proof of payment to EBE subs (and corresponding invoices) on a monthly basis. The Prime Trade Contractor (PC) is required to submit the certified payroll to validate the hours reported on the workforce utilization report, each worker's reported gender, ethnicity, city residence status, trade classification, and verify the correct wages were being paid. The ICO utilizes the proof of payment (with the corresponding invoices) to validate the fulfillment of the subcontract and accurately monitor EBE participation including:

- Sending letters to EBE subs to confirm their sub-contract balance, the services provided were

within the EBE firm's certification and capacity, and on a random basis letters to employees to validate their address and hours worked;

- Conduct unannounced site visits to observe the active workforce and test the commercial useful function of EBE subs.
- Review the business utilization reports for changes to the use of EBE subs, any new sub-contracts were initiated, that all subs are certified for both the work scope and respective EBE goal proposed by the PC, and that they would be serving a commercially useful function;
- Integrate the payment applications and cost reports to summarize the PCs and subs who were active in each month. The ICO uses this data as a monthly checklist required of documents to confirm compliance with the certified EBE's, or investigate any irregularities;
- Provide all PCs with access to a digital library on Huddle, a secure cloud-based document storage tool, to ensure that they have an efficient means of providing the ICO with the compliance documents for their firm and their subs on a timely basis for retrieval whenever the Program, City or COMIDA may require.





Diversity Plan Compliance

RJSCB has not only met its EBE business and workforce Diversity goals, but has exceeded them for most diversity categories. The following tables demonstrate the success of the RSMP Phase III:

The RJSCB continuously works to meet its EBE business and workforce Diversity goals and, at this stage in the program, has exceeded them for some of the diversity categories.

Phase III: Business Participation Utilization

Certification	SMP Phase 3 Total Contract Value	EBE Total Contract Value	Actual Percentage	Goal
MBE	66,523,261	21,101,894	31.72%	18.00%
WBE	66,523,261	3,189,068	4.79%	12.00%
SBE	66,523,261	2,711,721	4.08%	2.00%
DBE	66,523,261	1,020,476	1.53%	2.00%

Phase III: Comparison To Goals Overall Work Hours - Traditional

Category	Percentage Goal	Workforce Participation Realized (Work Hours)
Minorities (Male and Female)	23.00%	45.49%
Women (Non-Minority Only)	7.00%	10.47%

SEQRA

The RJSCB has served for the prior Phases and will continue to serve as State Environmental Quality Review Act (SEQRA) Lead Agency for the Phase III Strategic Plan. In Phase II, the RJSCB through its SEQRA consultant, has conferred with the New York State Office of Parks, Recreation and Historic Preservation (SHPO) and with other involved or interested agencies to provide the rationale supporting the SEQRA Negative Declaration, and determined that the action, as proposed, will not result in any significant adverse environmental impacts. In addition, the RJSCB has incorporated comments and correspondence received from involved and interested agencies to address any potentially significant adverse impacts in this Type II Action that required mitigation measures. The final determination of no significant adverse impacts for the Phase III SEQRA process was completed in March 2024.

On June 20, 2016, the RJSCB, as the duly designated Lead Agency for the RSMP - Phase II 'Strategic Plan', formally issued a Negative Declaration of environmental significance. This Determination included supporting documentation outlining specific reasons for the Negative Declaration for 14 schools within the Rochester City School District. A number of these schools were chosen to advance from the initial concepts outlined in the Strategic Plan to proceed with subsequent development of construction documents.

In Phase III, the formal environmental determinations for the six (6) schools were based on the conceptual designs and recommendations contained within the Strategic Plan.

Economic Development

The anticipated cost to complete all phases of the Program is currently estimated to be approximately \$1.7 billion. To date, \$1.2 billion has been authorized, and will be updated according to future needs.

Due to economic uncertainties and new NYSED administrative requirements that will impact the outcomes of the Phase III Plan, the New York State Legislature has approved amending the Phase III Legislation to bring authorized funding to \$600M and extend the completion date for all six (6) projects to Year 2033.



Phase III: Architect & Construction Manager Assignments

School Project Name	Architect / Engineer	Construction Manager
Dr. MLK Jr. School	Watts Architecture & Engineering	LeChase Construction Services
Joseph C. Wilson High School	SWBR Architects & Engineers	LeChase Construction Services
Padilla HS at Franklin Campus	LaBella Associates, D.P.C.	Pike Construction Services
Edison Career & Technology HS	CJS Architects	Buffalo Construction Consultants
East Educational Campus	TBD	TBD
Douglass Educational Campus	TBD	TBD



Phase III: Other Professional Service Firms

Professional Service Firm	Description of Service	MWBE
Savin Engineers, P.C.	Program Management	Yes
Gilbane Building Company	Program Management	No
Ujoozi Company	RJSCB Administration	Yes
Bond Schoeneck & King, PLLC	RJSCB General Counsel	No
Anchin Block & Anchin	RJSCB Independent Compliance Officer	No
Lawley Services	RJSCB Insurance Consultancy	No
Capital Markets Advisors	Fiscal Advisor	No
Wells Fargo Municipal Finance	Bond Underwriting Senior Manager	No
Hawkins Delafield & Wood, LLP	Bond Underwriting Counsel	No
Loop Capital Markets	Bond Underwriting Co-Manager	Yes
Siebert Williams Shank & Co.	Bond Underwriting Co-Manager	Yes
Drescher & Malecki, PPL	RJSCB External Auditor	No
Seeler Engineering	PLA Consultant	No
Erdman Anthony	Commissioning Authority	No
Simpson Gumpertz & Heger (SGH)	Structural Engineer (post-tension)	No



The RJSCB thanks the Legislative Sponsors, the Stakeholders and all Program Participants for the heartfelt dedication throughout the planning, financing and implementation of the Rochester Schools Modernization Program.



Rochester Joint Schools Construction Board

ANNUAL REPORT
FISCAL YEAR 2024-25