Hardy, Hunnewell & Upham Project

Feasibility Studies & Next Steps

Selectmen and School Committee
Presentation
April 13, 2017

Joseph F. McDonough, P.E., Facilities Director

Agenda

- Design & Construction Process Overview
- Massachusetts School Building Authority (MSBA)
- School Building Committee (SBC)
- Feasibility Studies
- Updated Project Schedule
- Important Next Steps

DESIGN & CONSTRUCTION PROCESS OVERVIEW

Design & Construction Process Overview

- Master Planning – *just completed by HHU MPC*
- Feasibility Studies
- Construction Manager (CM) @ Risk Selection
- Design
  - Schematic Design (20%)
  - Design Development (25%)
  - Final Design (55%)

  } *Permitting Occurs Concurrently*

- Bidding
- Construction

MSBA CONSIDERATIONS

MSBA Considerations

- SOIs Submitted annually for HHU since 2013
- 2017 Submittals made on April 7th
- *Very unlikely* to be invited into grant program:
  - 2015: 15 of 108 SOIs invited = *14%*
  - 2016: 17 of 89 SOIs invited = *19%*
- MSBA notification expected in December 2017
- Eight *Priority* Categories on MSBA SOI Forms
- MSBA considers "*greatest and most urgent needs*"
  - Two most critical *Priority* categories:
    1. Structurally unsound or jeopardizing health & safety
    2. Severe overcrowding
- Feasibility studies not eligible for retro-active reimbursement if performed w/out MSBA approval

SCHOOL BUILDING COMMITTEE (SBC)

School Building Committee (SBC)

- MSBA requirement
- Town should consider regardless of MSBA funding
- WHS Project had SBC (13 members)
- Roles and responsibilities need to be established
- Relationship with School Committee, PBC and BOS
- Should be established prior to hiring architect for feasibility

School Building Committee (SBC)

MSBA make-up of SBC:

1. MCPPO Certified (procurement)
2. Local Chief Executive
3. Town Administrator or Manager
4. School Committee member
5. School Superintendent
6. Building Maintenance Official
7. Rep from group authorized to build schools
8. School principal
9. Knowledgeable in education mission and bldg. function
10. Local budget official or finance com. member
11. Member w/arch., engin., construct. experience
12. Other

FEASIBILITY STUDIES

Feasibility Studies – Hiring Architect

- Procedures Governed by MGL Chapter 7
- *Qualifications-based* selection process (not a "bid")
- Proposal Review Committee established
- Request for Proposals (RFP) prepared, which includes:
  - Project background http://www.wellesleyma.gov/Pages/WellesleyMA_HHU/index
  - Scope of Services
  - Available budget
  - Schedule
  - Selection Procedures
  - Submission Requirements
  - Guidelines for Proposal Review Committee
- Proposals reviewed and ranked by Committee
- Top submissions invited to interview
- Interview finalists (3 to 5) and perform final ranking
- Negotiate with top ranked firm and award contract

Feasibility Studies – Hiring Architect

WELLESLEY FACILITIES MAINTENANCE DEPARTMENT
REQUEST FOR PROPOSALS #WFMD-RFP-FY17-001
WELLESLEY TOWN HALL - BUILDING ENVELOPE FEASIBILITY STUDY

AUTHORITY
Town of Wellesley
Facilities Maintenance Department
888 Worcester Street, Suite 370
Wellesley, MA 02482

PROJECT
Perform a *Building Envelope Feasibility Study* at the Wellesley Town Hall for the purpose of evaluating restoration, repair and discreet replacement options.

Requests for Proposals (RFP)
Available April 8, 2016 at:
Facilities Maintenance Department
888 Worcester Street, Suite 370
Wellesley, MA 02482, or online at:
http://www.wellesleyma.gov/pages/wellesleyma_facilities/bids

Estimated Construction Costs
N/A

Study Fe
Not-to-exceed amour

Briefing Session and Tours
April 13, 2016 at Wellesley Town Hall at 10:00 am

Time Period for Compl
See Project Sch

Specific Designer Services
Architectural/engineering/building envelope study and design

Scope of W
Perform architectural/engi
envelope services at the T
recommend roofing and e
or replacements.

Submissions
Deadline:
April 21, 2016 before 11:00 am

Location:
Town of Wellesley
Facilities Maintenance Department
888 Worcester Street, Suite 370
Wellesley, MA 02482
Clearly marked:
"Proposal for Building Envelope Feasibility Study"

Contact Infor
Joseph Murray, Project M
Telephone: (781) 489-425
Email: jmurray@wellesle
Facsimile: (781) 489-426

Request for Proposals No. WFMD-RFP-FY17-001 – Town Hall Building Envelope
Page 1 of 18

SECTION VII - GUIDELINES FOR PROPOSAL REVIEW COMMITTEE

The Town of Wellesley will determine an appropriate Selection Committee comprised of representatives from various departments, including the Facilities Maintenance Department, Historical Commission, Permanent Building Committee and the Selectmen's Office. Each Committee member is responsible for independently ranking each proposal in accordance with point system below:

1. Experience, past performance and qualifications — 40 points maximum
2. Personnel to be utilized on project — 20 points maximum
3. Project Approach — 40 points maximum
4. Supplementary Material — No point for this section
5. Adjustment for Experience with Candidate Firm
   a. For a firm with which a contacted reference has had a particularly favorable experience — Add up to 10 points
   b. For a firm with which a contacted reference has had a particularly negative experience — Deduct up to 20 points
   c. For a firm with which a contacted reference has had no experience or average to good experience — Make no adjustment

TOTAL POINT — **100 points maximum**

Feasibility Studies – Hiring Architect

- Key Aspects of Proposal Review:
  - Firm Experience, past performance & qualifications
  - Staff Experience - Particularly Project Manager/Architect
  - Project Approach
  - Firm Stability

- Scope and Fee to be negotiated
  - Scope: Usually follows RFP
  - Fee: Not-to-exceed established in RFP

- Estimated HHU Studies Cost: **$1 million per study ($3m Total)**

- *Selected study architect can continue with design and construction!*

Feasibility Studies – Scope of Work

Feasibility Study Phase

1. Attend bi-weekly SFC/PBC meetings

2. Perform the following investigation at each Site:

   - Detailed Traffic Assessment
   - Topographical Survey
   - Wetlands and Riverfront Flagging, Flood Plain Determination
   - Hydrant Flow Test
   - Hazardous Materials, including mercury, lead, lead paint, PCBs, radon, mold and asbestos
   - Preliminary Geotechnical Investigation
   - GeoEnvironmental Phase I Investigation
   - File MHC PNF
   - Site Utility and Infrastructure, including service providers

3. Meet with Administration, Teachers and Staff to develop detailed Educational Program aligning with MSBA guidelines

4. Confirm final Design Enrollments with Administration

5. Perform Green Design Charrette to establish Project Goals

Feasibility Studies – Scope of Work (Cont)

6. Develop the following:
   - A Base Code Upgrade-Only Option per MSBA Guidelines
   - A Base Code and Repair-Only Option per MSBA Guidelines
   - Multiple Conceptual Site Plans, including building placement, drives, parking and playfields
   - Multiple Floor Plan Options, including parking structures, adjacencies, number of floors
   - Narrative for MEP and Structural Systems for each Option
   - Construction and Phasing Impact for each Option
   - Traffic Impact for each Option
   - Site and Environmental Permitting Impact for each Option
   - Site Utility and Infrastructure Impact for each Option
   - Sustainable Design Achievement for each Option
   - Design and Construction Schedule for each Option
   - Cost Models for each Option

7. Assist the SFC/PBC with presentations to Town Boards and Committees

8. Assist the SFC/PBC with presentations to the Community and Neighborhoods

9. Assist the SFC/PBC in selecting the Preferred Option

Environmental Considerations: MSBA

Sustainable Building Design Policy

TO:	James A. MacDonald, First Deputy Treasurer, Interim Chief Executive Officer John K. McCarthy, Executive Director, Deputy Chief Executive Officer
FROM:	Karl Brown, Senior Architect John Jumpe Jr., Director of Project Management Mary Pichetti, Director of Capital Planning
SUBJECT:	Update on Sustainable Building Design Guidelines and Policy Recommendations
DATE:	February 8, 2017

Introduction

Federal and state standards continue to require increasing levels of energy efficiency within the energy code and building code used in the design of educational facilities in Massachusetts. Staff is monitoring recent changes to these standards, and is recommending revisions to the current practices associated with its Sustainable Building Design Guidelines. This memorandum provides a background of current policy requirements and presents a recommendation for consideration related to the recent energy code updates.

Summary

Since its formation, the Massachusetts School Building Authority ("MSBA") has been an

Environmental Considerations: MSBA

Sustainable Building Design Policy – Project Advisory 41

Minimum Requirements

Minimum Requirements

Current 2015 Policy	New 2017 Policy
Using LEED-S V4, for no additional reimbursement, achieve a minimum of "Certified" (40 points), including a minimum of 3 points in EA Credit "Optimize Energy Performance." OR; Using NE-CHPS 3.0, for no additional reimbursement, achieve a minimum of "Verified" (110 points for new construction or 85 points for addition / renovation), including 6 points in EE Prerequisite #1.0.	Using LEED-S, for no additional reimbursement, achieve a minimum of "Certified", OR; Using NE-CHPS, for no additional reimbursement, achieve a minimum of "Verified". AND; Exceed the level of energy efficiency required in the current Massachusetts (base) energy code by 10%, using the LEED-S EA "Optimize Energy Performance" credit submittal or the NE-CHPS "Energy Efficiency" credit submittal to demonstrate that performance.

LEED: Leadership in Energy and Environmental Design

NE-CHPS: Northeast Collaboration for High Performance Schools

Environmental Considerations: MSBA

Sustainable Building Design Policy – Project Advisory 41

Additional Reimbursement

Additional Reimbursement	
Current 2015 Policy	**New 2017 Policy**
Using LEED-S V4, for 2% additional reimbursement points, achieve a minimum of "Silver" (50 points), including a minimum of 6 points in EA Credit "Optimize Energy Performance." OR; Using NE-CHPS 3.0, for 2% additional reimbursement, achieve a minimum of "Verified" (110 points for new construction or 85 points for addition / renovation), including a minimum of 9 points in EE Credit #1.1.	In addition to the minimum requirements described above, projects must exceed the level of energy efficiency required in the current Massachusetts (base) energy code by 20%, using the LEED-S EA "Optimize Energy Performance" credit submittal or the NE-CHPS "Energy Efficiency" credit submittal to demonstrate that performance.

Environmental Considerations: LEED v4

Project Checklist

LEED v4 for BD+C: New Construction and Major Renovation
Project Checklist

Project Name:
Date:

Y	?	N			
			Credit	Integrative Process	1

0	0	0	**Location and Transportation**	16
			Credit	LEED for Neighborhood Development Location	16
			Credit	Sensitive Land Protection	1
			Credit	High Priority Site	2
			Credit	Surrounding Density and Diverse Uses	5
			Credit	Access to Quality Transit	5
			Credit	Bicycle Facilities	1
			Credit	Reduced Parking Footprint	1
			Credit	Green Vehicles	1

0	0	0	**Sustainable Sites**	10
Y			Prereq	Construction Activity Pollution Prevention	Required
			Credit	Site Assessment	1
			Credit	Site Development - Protect or Restore Habitat	2
			Credit	Open Space	1
			Credit	Rainwater Management	3
			Credit	Heat Island Reduction	2
			Credit	Light Pollution Reduction	1

0	0	0	**Water Efficiency**	11
Y			Prereq	Outdoor Water Use Reduction	Required
Y			Prereq	Indoor Water Use Reduction	Required
Y			Prereq	Building-Level Water Metering	Required
			Credit	Outdoor Water Use Reduction	2
			Credit	Indoor Water Use Reduction	6
			Credit	Cooling Tower Water Use	2
			Credit	Water Metering	1

0	0	0	**Energy and Atmosphere**	33
Y			Prereq	Fundamental Commissioning and Verification	Required
Y			Prereq	Minimum Energy Performance	Required
Y			Prereq	Building-Level Energy Metering	Required
Y			Prereq	Fundamental Refrigerant Management	Required
			Credit	Enhanced Commissioning	6
			Credit	Optimize Energy Performance	18
			Credit	Advanced Energy Metering	1
			Credit	Demand Response	2

0	0	0	**Materials and Resources**	13
Y			Prereq	Storage and Collection of Recyclables	Required
Y			Prereq	Construction and Demolition Waste Management Planning	Required
			Credit	Building Life-Cycle Impact Reduction	5
			Credit	Building Product Disclosure and Optimization - Environmental Product Declarations	2
			Credit	Building Product Disclosure and Optimization - Sourcing of Raw Materials	2
			Credit	Building Product Disclosure and Optimization - Material Ingredients	2
			Credit	Construction and Demolition Waste Management	2

0	0	0	**Indoor Environmental Quality**	16
Y			Prereq	Minimum Indoor Air Quality Performance	Required
Y			Prereq	Environmental Tobacco Smoke Control	Required
			Credit	Enhanced Indoor Air Quality Strategies	2
			Credit	Low-Emitting Materials	3
			Credit	Construction Indoor Air Quality Management Plan	1
			Credit	Indoor Air Quality Assessment	2
			Credit	Thermal Comfort	1
			Credit	Interior Lighting	2
			Credit	Daylight	3
			Credit	Quality Views	1
			Credit	Acoustic Performance	1

0	0	0	**Innovation**	6
			Credit	Innovation	5
			Credit	LEED Accredited Professional	1

0	0	0	**Regional Priority**	4
			Credit	Regional Priority: Specific Credit	1
			Credit	Regional Priority: Specific Credit	1
			Credit	Regional Priority: Specific Credit	1
			Credit	Regional Priority: Specific Credit	1

0	0	0	**TOTALS**	Possible Points:	110

Certified: 40 to 49 points, **Silver:** 50 to 59 points, **Gold:** 60 to 79 points, **Platinum:** 80 to 110

Feasibility Studies – RFP Schedule

- June 23, 2017 School Building Committee Established
- July 7, 2017 Proposal Review Committee Established
- August 4, 2017 RFP completed by SBC
- August 8, 2017 Submit Advertisements
- August 16, 2017 Notices Published and RFP Available
- August 23, 2017 Project Briefing and Tours
- September 15, 2017 RFP Submissions Due

Feasibility Studies – RFP Schedule (Cont.)

• October 6, 2017	Finalists Selected
• October 27, 2017	Interviews & recommended award
• November 10, 2017	Award letter issued
• November, 2017	STM request for feasibility funds
• December 4, 2017	Contract Executed & NTP
• December 7, 2018	All 3 studies completed (1 year)
• March/April 2019	ATM Request for Design Funds

UPDATED PROJECT SCHEDULE

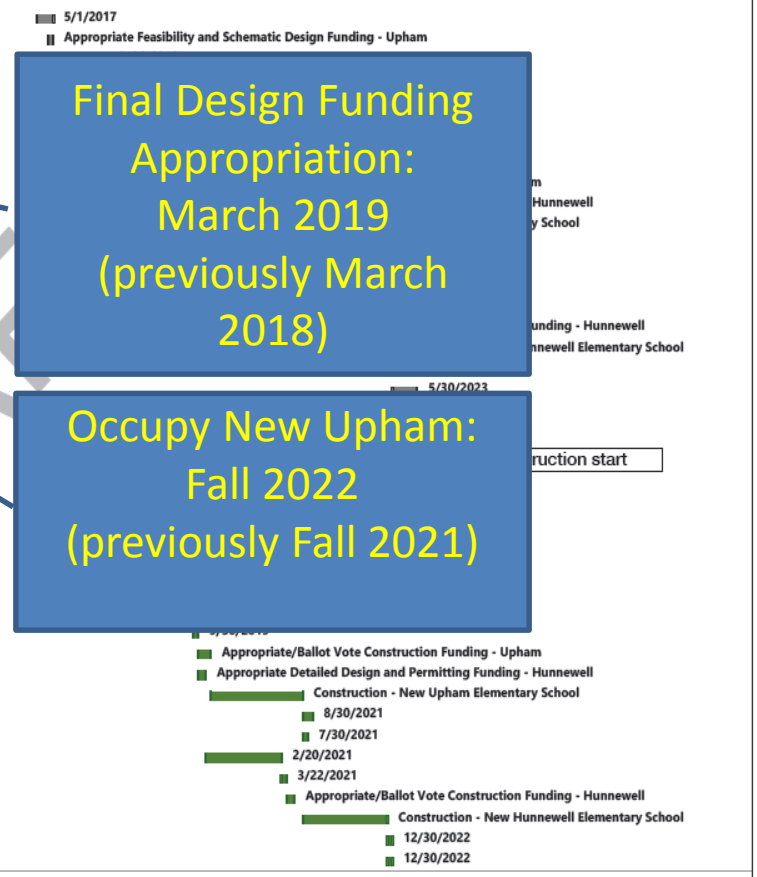
12/21/16 SMMA Schedule

Date: December 21, 2016

WELLESLEY PUBLIC SCHOOLS
HARDY, HUNNEWELL AND UPHAM ELEMENTARY SCHOOLS STUDY
WELLESLEY, MASSACHUSETTS

PRELIMINARY PROJECT SCHEDULE

ID	Task Name	Start	Finish
1	SCENARIO A1: New 21 Upham on Hill, New 21 Hunnewell, Close Hardy	1/16/2017	5/30/2023
2	RFP/Designer Selection for Feasibility/Schematic Design	1/16/2017	5/1/2017
3	Appropriate Feasibility and Schematic Design Funding - Upham	3/27/2017	4/25/2017
4	Feasibility and Schematic Design - Upham	5/1/2017	3/26/2018
5	Appropriate Detailed Design and Permitting Funding - Upham	3/26/2018	4/24/2018
6	Appropriate Feasibility and Schematic Design Funding - Hunnewell	3/26/2018	4/24/2018
7	Detailed Design and Permitting - Upham	5/2/2018	8/30/2019
8	Feasibility and Schematic Design - Hunnewell	5/2/2018	8/30/2019
9	Bidding / GMP - Upham	8/30/2019	9/30/2019
10	Appropriate/Ballot Vote Construction Funding - Upham	10/1/2019	12/16/2019
11	Appropriate Detailed Design and Permitting Funding - Hunnewell	10/1/2019	11/15/2019
12	Construction - New Upham Elementary School	12/16/2019	6/30/2021
13	Occupy New Upham	7/1/2021	8/30/2021
14	Relocate Hunnewell Students to New Upham, Current Upham Students Remain in existing Upham	7/1/2021	7/30/2021
15	Detailed Design and Permitting - Hunnewell	11/15/2019	2/20/2021
16	Bidding / GMP - Hunnewell	2/20/2021	3/22/2021
17	Appropriate/Ballot Vote Construction Funding - Hunnewell	3/29/2021	5/11/2021
18	Construction - New Hunnewell Elementary School	7/1/2021	11/29/2022
19	Occupy New Hunnewell	12/1/2022	12/30/2022
20	Demolish old Upham/Complete Site Work	12/30/2022	5/30/2023
21	Close Hardy	12/1/2022	12/30/2022
22			
23	SCENARIO A2.1: New 21 Upham on current footprint, New 21 Hunnewell, Close Hardy	1/16/2017	12/30/2022
24	RFP/Designer Selection for Feasibility/Schematic Design	1/16/2017	5/1/2017
25	Appropriate Feasibility and Schematic Design Funding - Upham	3/27/2017	4/25/2017
26	Feasibility and Schematic Design - Upham	5/1/2017	3/26/2018
27	Appropriate Detailed Design and Permitting Funding - Upham	3/26/2018	4/24/2018
28	Appropriate Feasibility and Schematic Design Funding - Hunnewell	3/26/2018	4/24/2018
29	Detailed Design and Permitting - Upham	5/2/2018	8/30/2019
30	Feasibility and Schematic Design - Hunnewell	5/2/2018	8/30/2019
31	Bidding / GMP - Upham	8/30/2019	9/30/2019
32	Appropriate/Ballot Vote Construction Funding - Upham	10/1/2019	12/16/2019
33	Appropriate Detailed Design and Permitting Funding - Hunnewell	10/1/2019	11/15/2019
34	Construction - New Upham Elementary School	12/16/2019	6/30/2021
35	Occupy New Upham	7/1/2021	8/30/2021
36	Relocate Hunnewell Students to New Upham	7/1/2021	7/30/2021
37	Detailed Design and Permitting - Hunnewell	11/15/2019	2/20/2021
38	Bidding / GMP - Hunnewell	2/20/2021	3/22/2021
39	Appropriate/Ballot Vote Construction Funding - Hunnewell	3/29/2021	5/11/2021
40	Construction - New Hunnewell Elementary School	7/1/2021	11/29/2022
41	Occupy New Hunnewell	12/1/2022	12/30/2022
42	Close Hardy	12/1/2022	12/30/2022



Final Design Funding Appropriation: March 2019 (previously March 2018)

Occupy New Upham: Fall 2022 (previously Fall 2021)

Project: 14015
Date: December 21, 2016

SMMA

IMPORTANT NEXT STEPS

Important Next Steps

1. School Committee deliberates on MPC Recommendation
2. School Building Committee Established
3. Feasibility Studies Funding Requested
4. Hire Architect

HHU Next Steps

QUESTIONS?