MSBA PROJECT

HARDY / UPHAM

Presentation to Advisory Committee
for
Article 2 – Special Town Meeting
October 2, 2018

School Committee  Board of Selectmen

MSBA Project: Feasibility & Schematic Design - 2018 STM
Article 2

• Request for $2,500,000 to fund the Feasibility Study and Schematic Design modules for the MSBA project to address the needs of the Upham Elementary School

• Solution may include, but not be limited to, renovation or rebuilding of the Upham School, renovation or rebuilding of the Hardy School, or building a new school at another site
Feasibility Study and Schematic Design

• Feasibility study is a search for the preferred solution to a problem
• Schematic design provides sufficient detail to establish the scope, budget, and schedule for the preferred solution
• Town Meeting and voter approval will come after a proposed solution is selected and fleshed out in sufficient detail for evaluation
• No final decisions made in this phase
Overview

• Goals and Planning
• Conditions of the Buildings
• Massachusetts School Building Authority (MSBA)
• Feasibility and Schematic Design
• Cost Estimates and Tax Impact
Project Goals

• Support our K-5 learners academically, socially, and emotionally
• Address critical systems needs
• Provide facilities that meet 21st Century educational needs in a fiscally responsible manner
School Facilities Long-Term Management

- Current cycle of facilities management underway since late 1990s
- Sprague renovated and expanded in 2002
- Deficiencies at Bates, WMS, WHS, Fiske, and Schofield have been addressed or are being addressed
- Hardy, Hunnewell, and Upham remain to be addressed
- Hunnewell feasibility study funded at June 2018 STM and currently in progress
HHU Master Plan Committee

- New construction needed to meet educational needs
- Build 19-classroom schools
- Build two schools now, third school when enrollment rises
- Proceed to feasibility studies on Hardy, Hunnewell, and Upham schools
School Committee Position Statement

• Maintain neighborhood school model
• Rebuild two schools now with enrollment trigger ("to exceed 2,350 students on a trending basis") for third school
• Schools should be 19 classrooms each and meet MSBA standards
• Build at Hunnewell and either Hardy or Upham, in an order to be determined after further study
• Commitment to retain control of the building and land of any closed school for eventual future reuse as a K-5 school
Current Elementary School Locations
Elementary School Capacities

- Bates: 19
- Sprague: 19
- Fiske: 18
- Schofield: 18
- Hardy: 15
- Hunnewell: 15
- Upham: 12
Hardy Building Deficiencies

- Plumbing/electrical/windows
- 20+ year old wooden modular classrooms (1993, 1997)
- Lack of life safety systems (sprinklers)
- Indoor air quality not ideal (old HVAC systems)
- Significant asbestos
- Accessibility/ADA issues
- Site limitations: parking, pickup/drop off and traffic
- Building circulation and room adjacencies
Upham Building Deficiencies

- Built 1957, additions in 1967 and 1993
- Plumbing/electrical/windows
- Lack of life safety systems (sprinklers)
- 25-year-old wooden modular classrooms
- Indoor air quality not ideal (old HVAC systems)
- Significant asbestos
- Accessibility/ADA issues
- Site limitations: parking, pickup/drop off and traffic
- Building circulation and room adjacencies
Hardy Educational Deficiencies

• Lacks specialized spaces for delivery of services and professional collaboration
  • Converted storage rooms with no ventilation
  • Staff working in hallways and corners of the library
• Lacks appropriate spaces for ELL magnet program
• Undersized classrooms, some dating to 1920s
• Inefficient floor plan
• Lacks adequate space to accommodate special equipment, appropriate furnishings, and mobility needs of students
Upham Educational Deficiencies

- Lacks specialized spaces for delivery of services and professional collaboration
  - Converted storage rooms with no ventilation
- Lacks appropriate spaces for district-wide SKILLS program (autism spectrum program)
- Undersized classrooms
- Inefficient floor plan
- Lacks adequate space to accommodate special equipment, appropriate furnishings, and mobility needs of students
- Deficiencies inherent in a two-section school
Massachusetts School Building Authority

- Established by the legislature in 2004
- Funds capital improvement projects for public schools
- Revenue comes from 1% of state sales tax
- “Partner with Massachusetts communities to support the design and construction of educationally appropriate, flexible, sustainable, and cost-effective public school facilities”
Partnership with the MSBA

- Project phases are similar to the typical Town process
  - Feasibility, Design, Construction
- Choosing consultants
  - Owner’s Project Manager is chosen by the Town, with MSBA approval
  - Designer is chosen by an MSBA selection committee, with Town participation
  - Construction Manager is chosen by the Town, with Inspector General approval (assuming CM @ Risk)
MSBA Process

- Highly structured, prescribed process
  - Requires adherence to MSBA standards developed and refined over the past 10+ years
- Along the way:
  - Documentation of progress is submitted to MSBA
  - SBC works closely with MSBA technical staff at every step
  - Approval is required from the MSBA Board of Directors at certain milestones
MSBA Reimbursement

• Certain expenses from feasibility, design, and construction are eligible for reimbursement
• Reimbursement rates vary from town to town
  • Base percentage: 31%
  • Plus ability to pay percentage (0% for Wellesley)
  • Plus incentive percentage points: 0-18%
    • Superior maintenance practices (up to 2%, average 1.4%)
    • Energy efficient / sustainable design and construction (up to 2%)
    • Others
MSBA Invitation

• Submitted SOIs for all three HHU schools every year since 2014
• Did not expect invitation, based on lower prioritization of Wellesley’s needs
• Upham invited into program in December 2017
  • Validated needs of Upham building and students
  • MSBA has confirmed our ability to study both the Upham site and the Hardy site
• If we build at Hardy, we cannot continue to use Upham in its current condition as a K-5 school
Role of the SBC in an MSBA Project

- Body responsible for development of project
- Works in consultation with SC and BOS
- SBC, SC, and BOS must agree on preferred solution to move to Schematic Design phase
- Feasibility:
  - SBC has primary responsibility
- Schematic Design, Design Development, Construction:
  - PBC has primary responsibility (per Town Bylaw)
Community Engagement

• Critical for both project success and MSBA approval
  • Project has already evolved based on community feedback
  • Feasibility study will include focus groups and community presentations
• SBC to engage with broader community and specific constituencies (Parents, Sustainability, Historical, Neighbors, Playing Fields/Gym Space)
• MSBA Board will want to know how community has been engaged
• Continued commitment to transparency and working hard to reach consensus
MSBA Process Phases or “Modules”

- Module 1 – Eligibility Period
- Module 2 – Forming the Project Team
- Module 3 – Feasibility Study
- Module 4 – Schematic Design
- Module 5 – Funding the Project
- Module 6 – Detailed Design
- Module 7 – Construction
- Module 8 – Completing the Project
Where We Are Now: Eligibility Period

✓ Initial Compliance Certification (up to 30 days)
✓ Creation of SBC (up to 60 days)
✓ Educational profile (up to 90 days)
✓ Enrollment projections (up to 90 days)
  • Maintenance practices summary (up to 180 days)
  • Enrollment certification (up to 180 days)
  • Funding for Feasibility Study and Schematic Design (up to 270 days)

• Deadline for completion: December 28, 2018
Enrollment Certification

• MSBA develops its own enrollment projections, based on:
  • Female population data (historical and projected)
  • Birth data and fertility rates
  • Historical enrollment data
  • Potential housing development
• Develops design enrollment from 10-year average of projected enrollments
• Reviews data, process, and result with Town
• Town and MSBA reach agreement on design enrollment
Design Enrollment

• Final certification not yet available
• Discussions indicate close agreement between MSBA and Town on target capacity

• Scenario 1:
  • Renovation/addition or new construction of a three section school
• Scenario 2:
  • Renovation of Upham at its current capacity
What’s Next

• Module 2: Form the project team
  • OPM and designer selection
• Module 3: Feasibility Study
  • Define the scope
  • Conduct the study
  • Deliverables:
    • Preliminary Design Program
    • Preferred Schematic Report
• Module 4: Schematic Design
Feasibility Study – Module 3

• Develop feasibility study scope, with MSBA approval
• Generate and study potential solutions
  • Renovation or new construction
  • Evaluate multiple sites (Hardy/Upham/Others?)
• Evaluate potential solutions to narrow and select short list
• Determine preferred solution
  • Community engagement
  • SBC, SC, BOS vote
  • MSBA Board approval
Schematic Design – Module 4

• Permanent Building Committee assumes primary responsibility
• Perform schematic design on preferred solution
• Sufficient detail to establish scope, budget, and schedule
What’s Down the Road

• Module 5: Funding the Project
  • Approval of proposed solution and funding
    • Town Meeting deliberation and vote
    • Town-wide debt exclusion vote

• Module 6: Detailed Design
  • Design development
  • Construction documents
  • Bidding

• Module 7: Construction

• Module 8: Completing the project
## Project Timing – Best Guess

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 2018</td>
<td>Complete Eligibility Period</td>
</tr>
<tr>
<td>May 2019</td>
<td>Form project team</td>
</tr>
<tr>
<td>May 2020</td>
<td>Complete Feasibility Study</td>
</tr>
<tr>
<td>November 2020</td>
<td>Complete Schematic Design</td>
</tr>
<tr>
<td>March 2021</td>
<td>Town Meeting and debt exclusion votes</td>
</tr>
<tr>
<td>May 2022</td>
<td>Complete Detailed Design</td>
</tr>
<tr>
<td>May 2024</td>
<td>Complete construction</td>
</tr>
<tr>
<td>September 2024</td>
<td>Open new school</td>
</tr>
</tbody>
</table>
# Hardy/Upham Appropriation (Feasibility)

<table>
<thead>
<tr>
<th>Service</th>
<th>Amount</th>
<th>Description</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner’s Project Manager</td>
<td>$200,000</td>
<td>Swing Space Study</td>
<td>$50,000</td>
</tr>
<tr>
<td>Basic Architectural Services</td>
<td>$350,000</td>
<td>Cost Estimating</td>
<td>$40,000</td>
</tr>
<tr>
<td>Topographical Survey</td>
<td>$90,000</td>
<td>Board Presentations</td>
<td>$15,000</td>
</tr>
<tr>
<td>Wetlands Flagging</td>
<td>$20,000</td>
<td>Community Presentations</td>
<td>$15,000</td>
</tr>
<tr>
<td>Hydrant Flow Test</td>
<td>$10,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hazardous Materials</td>
<td>$40,000</td>
<td>Subtotal</td>
<td>$980,000</td>
</tr>
<tr>
<td>Traffic Assessment</td>
<td>$50,000</td>
<td>Feasibility Contingency (15%)</td>
<td>$147,000</td>
</tr>
<tr>
<td>Geotechnical</td>
<td>$40,000</td>
<td>Feasibility Total</td>
<td>$1,127,000</td>
</tr>
<tr>
<td>Environmental Phase 1</td>
<td>$40,000</td>
<td>Project Contingency</td>
<td>$123,000</td>
</tr>
<tr>
<td>Sustainability</td>
<td>$20,000</td>
<td>Total</td>
<td>$1,250,000</td>
</tr>
</tbody>
</table>

**Total: $1,250,000**
<table>
<thead>
<tr>
<th>Service</th>
<th>Budget</th>
<th>Notes</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner’s Project Manager</td>
<td>$200,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Architectural / Engineering</td>
<td>$500,000</td>
<td>Focus Groups (Charettes)</td>
<td>$20,000</td>
</tr>
<tr>
<td>Final Traffic Assessment</td>
<td>$40,000</td>
<td>FF&amp;E Planning</td>
<td>$15,000</td>
</tr>
<tr>
<td>Final Geotechnical</td>
<td>$20,000</td>
<td>OPM’s Estimates</td>
<td>$20,000</td>
</tr>
<tr>
<td>Final Environmental Phase 1</td>
<td>$20,000</td>
<td>Printing/Submittal Exch/Other</td>
<td>$13,000</td>
</tr>
<tr>
<td>Sustainability</td>
<td>$40,000</td>
<td><strong>Subtotal</strong></td>
<td>$973,000</td>
</tr>
<tr>
<td>Cost Estimating</td>
<td>$20,000</td>
<td>Schematic Contingency (18%)</td>
<td>$176,000</td>
</tr>
<tr>
<td>Board Presentations</td>
<td>$10,000</td>
<td><strong>Schematic Total</strong></td>
<td>$1,149,000</td>
</tr>
<tr>
<td>Community Presentations</td>
<td>$20,000</td>
<td>Escalation</td>
<td>$101,000</td>
</tr>
<tr>
<td>Reimbursables</td>
<td>$20,000</td>
<td><strong>Total</strong></td>
<td>$1,250,000</td>
</tr>
</tbody>
</table>
HHU: Estimated Impact to Median Tax Bill

• Assuming $40 million net cost to Town of the Hardy/Upham project in partnership with the MSBA
• “Early Hunnewell” scenario in combination with H/U:
  • Total cost to Town = $95 million
  • Peak impact on median tax bill = $619 in FY24
• “Late Hunnewell” scenario in combination with H/U:
  • Total cost to Town = $101.5 million
  • Peak impact on median tax bill = $644 in FY27
  (FY18 actual median tax bill = $12,599, for a home valued at $1,051,000)
Questions?