MSBA PROJECT

HARDY / UPHAM

Article 2, Motion 1 – Special Town Meeting
October 2, 2018

School Committee  Board of Selectmen

MSBA Project: Feasibility & Schematic Design - 2018 STM
Article 2, Motion 1

• 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
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 Committee Guiding Principles

• New or substantially rebuilt facilities needed to meet educational needs of Hardy, Hunnewell, and Upham students
• Build 19-classroom schools
• Maintain neighborhood school model
• Build two schools now, third school when enrollment rises
• Perform feasibility studies on all three sites
Elementary School Capacities

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

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Hardy Building Deficiencies

• Built 1924 with additions in 1925, 1957, 1993 & 1997
• 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
Hardy Building Conditions
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 School
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
- Split level school with no elevator
Upham Building Conditions
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 one penny of state 6.25% sales tax

Mission Statement:
“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
  • School Building Committee (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

- Town submitted Statements of Interest (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
Role of the School Building Committee

• Body responsible for development of MSBA projects
• Works in consultation with the SC and BOS
• SBC, SC, and BOS must agree on preferred solution

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
• SBC to engage with broader community and specific constituencies
• MSBA Board requires information on how community has participated
• Continued commitment to transparency and working to reach consensus
## MSBA Process: Eight Stages or “Modules”

<table>
<thead>
<tr>
<th>Module 1</th>
<th>• Eligibility Period</th>
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<tbody>
<tr>
<td>Module 2</td>
<td>• Forming the Project Team</td>
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<td>Module 8</td>
<td>• Completing the Project</td>
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MSBA Project: Feasibility & Schematic Design - 2018 STM
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)
- Feasibility Study Agreement (up to 270 days)

*Deadline for completion: December 28, 2018*
Design Enrollment

- MSBA design enrollment is developed from 10-year average of projected enrollment
- MSBA’s 10-year average for Wellesley: 2,180 students
- SC, BOS and MSBA have agreed on design enrollment

<table>
<thead>
<tr>
<th>Scenario 1</th>
<th>Scenario 2</th>
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<tr>
<td>• 365 students</td>
<td>• 240 students</td>
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<tr>
<td>• Renovation/addition or new construction of three-section school</td>
<td>• Renovation of Upham at its current capacity</td>
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<tr>
<td>• 6-school scenario</td>
<td>• 7-school scenario</td>
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MSBA Project: Feasibility & Schematic Design - 2018 STM
What’s Next

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
Forming the Project Team – Module 2

• SBC’s work on project officially begins
• OPM selected by SBC and approved by MSBA
• Designer selected by MSBA panel from pool of eligible firms, with Town participation
• Process likely to take about six months to complete
Feasibility Study – Module 3

- Develop feasibility study scope, with MSBA approval
- Develop and document educational program
- Generate and study potential solutions
- Evaluate potential solutions and narrow to short list
- Determine preferred site and solution for new school
  - Community engagement
  - SBC, SC, BOS vote
  - MSBA Board approval
Feasibility Study – Town Priorities

• Supporting educational programming
• Fiscal responsibility
• School size
• Study both Hardy and Upham sites
• Sustainability and environmental considerations
• Study potential reuse or preservation of 1924-25 portion of Hardy
• Playing fields and gym space
Schematic Design – Module 4

• Permanent Building Committee assumes primary responsibility
• Perform schematic design on preferred solution
• Sufficient detail to establish scope, budget, and schedule
## Down the Road: Modules 5-8

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Funding the Project – Module 5

• After Schematic Design complete, Project Scope and Budget Agreement signed by MSBA and Town
• Town Meeting votes to fund project via debt exclusion
• Voters approve debt exclusion
• MSBA and Town enter into Project Funding Agreement
# Project Timing – Best Guess

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<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>
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## Hardy/Upham Appropriation (Feasibility)

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<th>Service</th>
<th>Cost</th>
<th>Service</th>
<th>Cost</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>
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<tr>
<td>Topographical Survey</td>
<td>$90,000</td>
<td>Board Presentations</td>
<td>$15,000</td>
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<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>
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<tr>
<td>Hazardous Materials</td>
<td>$40,000</td>
<td><strong>Subtotal</strong></td>
<td><strong>$980,000</strong></td>
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<tr>
<td>Traffic Assessment</td>
<td>$50,000</td>
<td>Feasibility Contingency (15%)</td>
<td><strong>$147,000</strong></td>
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<tr>
<td>Geotechnical</td>
<td>$40,000</td>
<td><strong>Feasibility Total</strong></td>
<td><strong>$1,127,000</strong></td>
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<tr>
<td>Environmental Phase 1</td>
<td>$40,000</td>
<td>Project Contingency</td>
<td><strong>$123,000</strong></td>
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<tr>
<td>Sustainability</td>
<td>$20,000</td>
<td><strong>Total</strong></td>
<td><strong>$1,250,000</strong></td>
</tr>
</tbody>
</table>
# Hardy/Upham Appropriation (Schematic Design)

<table>
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<tr>
<th>Service</th>
<th>Cost</th>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner’s Project Manager</td>
<td>$200,000</td>
<td>Technology</td>
<td>$15,000</td>
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<tr>
<td>Architectural / Engineering</td>
<td>$500,000</td>
<td>Focus Groups (Charrettes)</td>
<td>$20,000</td>
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<tr>
<td>Final Traffic Assessment</td>
<td>$40,000</td>
<td>FF&amp;E Planning</td>
<td>$15,000</td>
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<tr>
<td>Final Geotechnical</td>
<td>$20,000</td>
<td>OPM’s Estimates</td>
<td>$20,000</td>
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<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>Subtotal</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>Schematic Total</td>
<td>$1,149,000</td>
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<tr>
<td>Community Presentations</td>
<td>$20,000</td>
<td>Escalation</td>
<td>$101,000</td>
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<td>Reimbursables</td>
<td>$20,000</td>
<td>Total</td>
<td>$1,250,000</td>
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**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)
The School Committee and Board of Selectmen request your favorable action on Article 2, Motion 1.