

MSBA PROJECT

HARDY / UPHAM

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

School Committee



Board of Selectmen

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

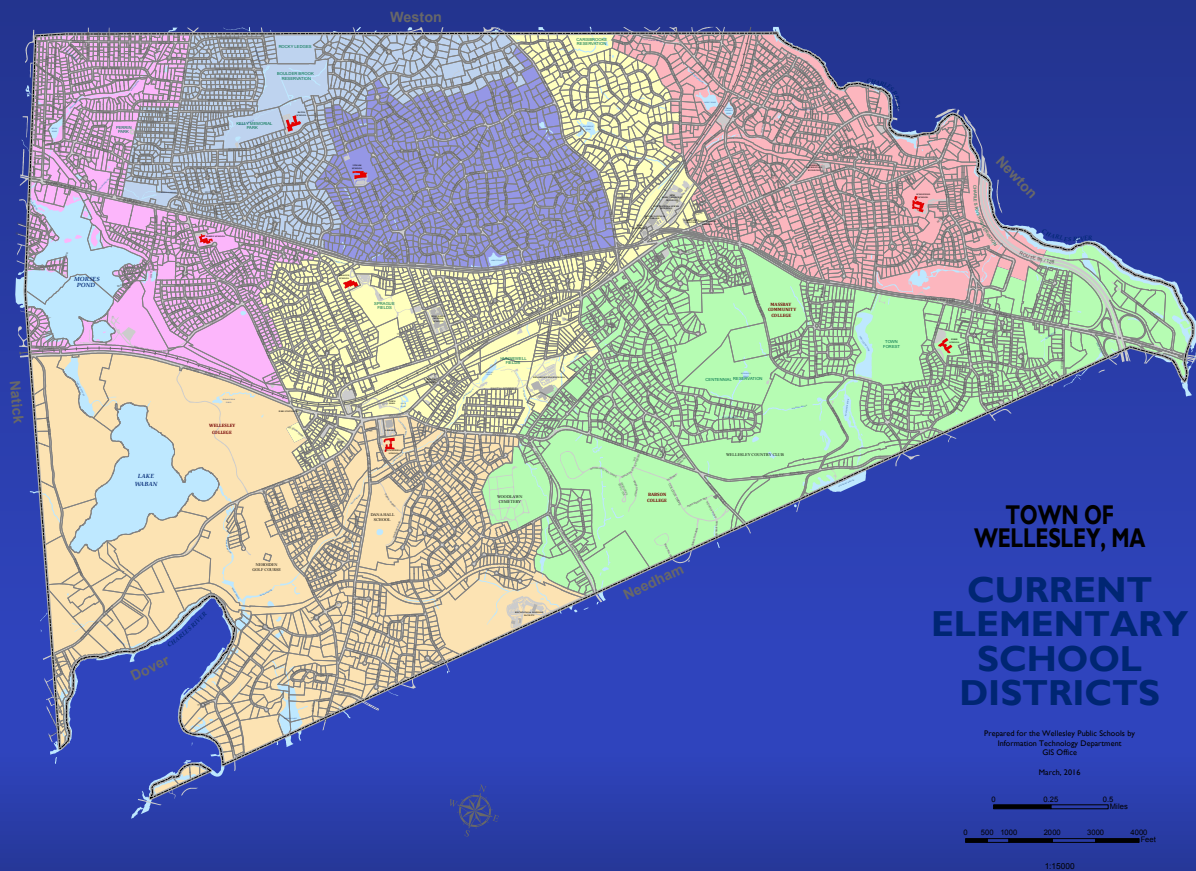
HHU Master Plan Committee

- 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



MSBA Project: Feasibility & Schematic Design - 2018 STM

Elementary School Capacities



MSBA Project: Feasibility & Schematic Design - 2018 STM

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

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

November 2018	Complete Eligibility Period
May 2019	Form project team
May 2020	Complete Feasibility Study
November 2020	Complete Schematic Design
March 2021	Town Meeting and debt exclusion votes
May 2022	Complete Detailed Design
May 2024	Complete construction
September 2024	Open new school

Hardy/Upham Appropriation (Feasibility)

Owner's Project Manager	\$200,000	Swing Space Study	\$50,000
Basic Architectural Services	\$350,000	Cost Estimating	\$40,000
Topographical Survey	\$90,000	Board Presentations	\$15,000
Wetlands Flagging	\$20,000	Community Presentations	\$15,000
Hydrant Flow Test	\$10,000		
Hazardous Materials	\$40,000	Subtotal	\$980,000
Traffic Assessment	\$50,000	Feasibility Contingency (15%)	\$147,000
Geotechnical	\$40,000	Feasibility Total	\$1,127,000
Environmental Phase 1	\$40,000	Project Contingency	\$123,000
Sustainability	\$20,000	Total	\$1,250,000

Hardy/Upham Appropriation (Schematic Design)

Owner's Project Manager	\$200,000	Technology	\$15,000
Architectural / Engineering	\$500,000	Focus Groups (Charettes)	\$20,000
Final Traffic Assessment	\$40,000	FF&E Planning	\$15,000
Final Geotechnical	\$20,000	OPM's Estimates	\$20,000
Final Environmental Phase 1	\$20,000	Printing/Submittal Exch/Other	\$13,000
Sustainability	\$40,000	Subtotal	\$973,000
Cost Estimating	\$20,000	Schematic Contingency (18%)	\$176,000
Board Presentations	\$10,000	Schematic Total	\$1,149,000
Community Presentations	\$20,000	Escalation	\$101,000
Reimbursables	\$20,000	Total	\$1,250,000

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?