

TOWN OF WELLESLEY UPHAM (AND HARDY) SCHOOL PROJECT

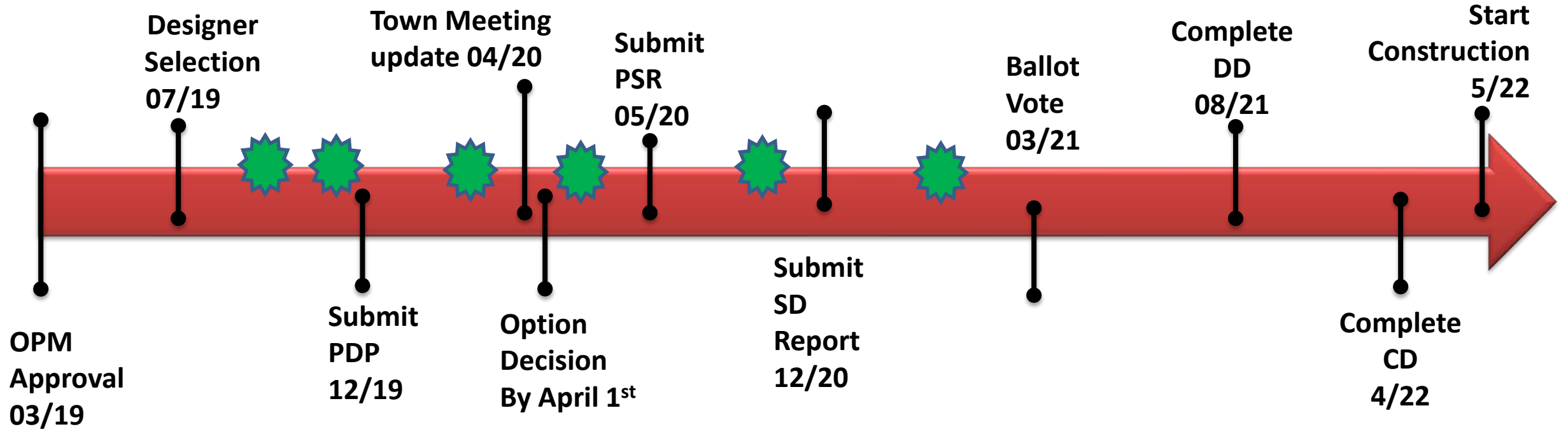
- Timeline
- MSBA Process
- Work Plan
- SBC Role
- MSBA Reimbursement



APPROACH TIMELINE



Community Forum



PDP: Preliminary Design Plan | PSR: Preferred Schematic Report | SD: Schematic Design Report



MSBA Process – Feasibility / SD Phase

Preliminary Design Program (PDP)

- Educational Program
- Initial Space Summary
- Evaluation of Existing Conditions
- Site Development Requirements
- Preliminary Evaluation of Alternatives

Preferred Schematic Report

- Evaluation of Existing Conditions
- Final Evaluation of Alternatives
- Preferred Solution

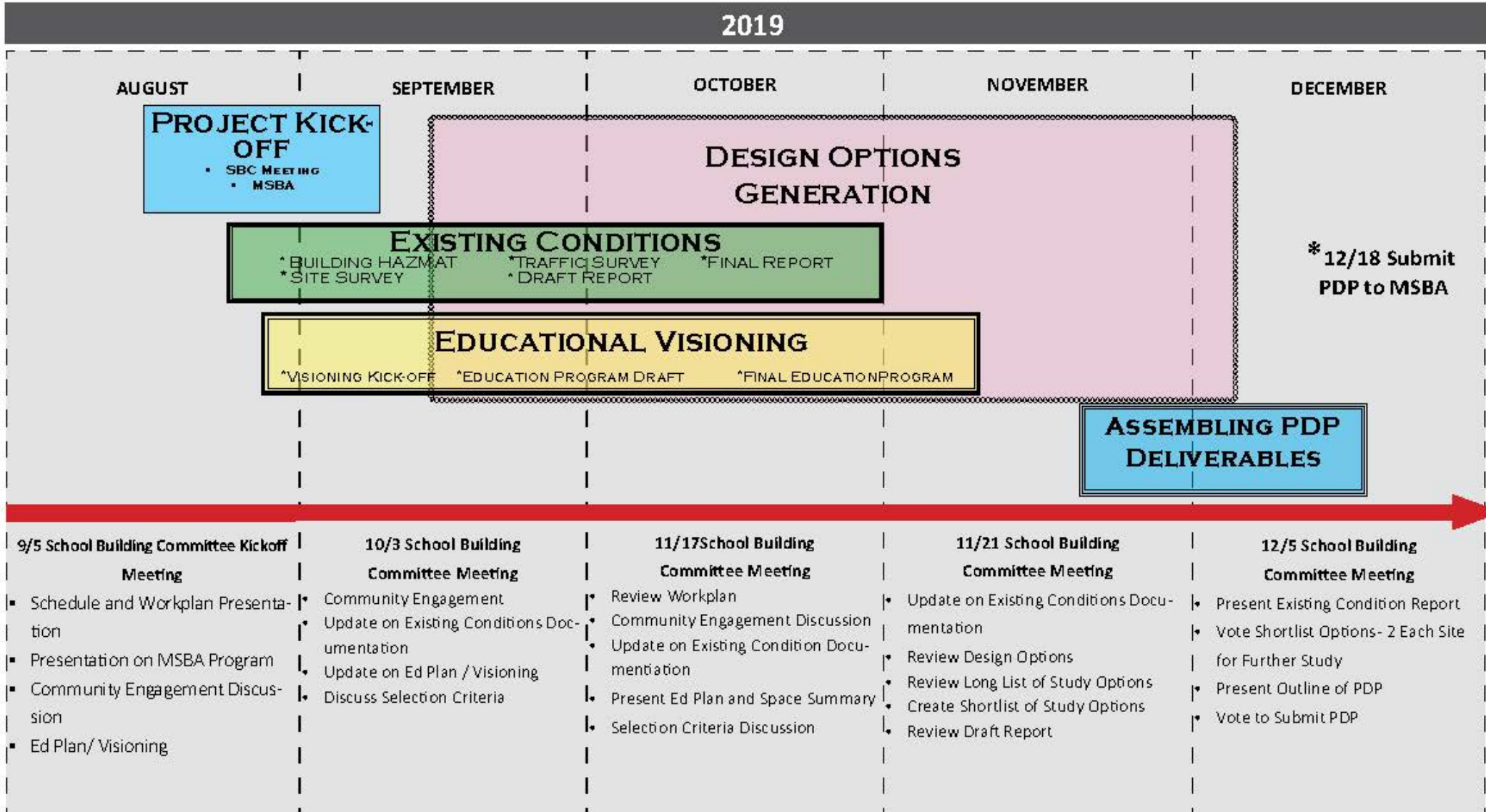
Schematic Design Report

- Schematic Design (30%)
- Final Design Program
- Traffic Analysis
- Environmental Assessment
- Geotechnical
- Code Analysis
- Sustainability
- ADA / MAAB Analysis
- Room Data Sheets
- Project Delivery System
- Construction Estimates
- Total Project Budget
- Maximum Reimbursement
- Project Schedule

Project Challenges



Resolve Grade Configuration	Wellesley has been approved to study both a 6 school and 7 school Elementary school configuration. A critical early step in the feasibility process is addressing that issue.
Selecting the Best Site	Thorough exploration of both school site options to determine the best placement for a new or renovated school in Town.
Community Buy-in	Creating an open and transparent process that has credibility town-wide is critical to project success. Launch a new project specific website.
Schedule	Must maintain the schedule with integrated MSBA submission deadlines
Ed Plan	Wellesley already has a great start with Educational plan, and will look to build on that foundation built in the Hunnewell Project





SBC –Responsibility Matrix - FS

Deliverable	Review/ Comment	SBC Vote	Comment
MSBA Submissions		X	SC & BOS vote (for PSR & SD)
Design Alternatives	X		
Education Plan / Space Summary	X		SC Vote
Shortlist of Options = PDP Report		X	
Evaluation Criteria		X	
Sustainability Approach	X		
Instructional Technology	X		
Design Elements	X		
Community Outreach	X		
Final Preferred Option = PSR Report		X	SC & BOS vote
Project Budget / Schedule/ Scope = SD Report		X	PBC, SC & BOS vote

*assumes Designer Selected 7/19 – all time frames Q4 2019 – Q4 2020



MSBA Process – Reimbursement

MSBA Cost Caps / Exclusions

The MSBA has several types of costs which are ineligible for reimbursement. They fall into three general categories.

- **Categorically Ineligible**
 - Costs that are not core to the educational program
 - Costs for items that are not part of the permanent building and grounds
 - costs beyond the project scope
- **Costs that Exceed MSBA Caps**
- **Costs for Spaces that Exceed Guidelines (sometimes)**
 - Costs for spaces that are eligible but exceed the MSBA guidelines and not approved by MSBA staff



MSBA Process – Reimbursement

MSBA Cost Caps / Exclusions

The following costs are categorically ineligible for reimbursement

- Land Acquisition
- Legal Fees
- Off site Improvements
- Synthetic Turf; Spectator Amenities; Stadiums
- Utility Company Charges
- Swing Space
- Building Permits / Local Board Costs
- Financing Costs
- Site Remediation
- Asbestos Containing Floor Tiles
- Auditorium (although a cafetorium would be eligible)



MSBA Process – Reimbursement

MSBA Cost Caps / Exclusions

Costs that exceed the following caps are ineligible

- ▶ **Soft Costs exceeding 20% of construction costs**
- ▶ **OPM costs exceeding 3.5% of construction costs; Architect costs exceeding 10% of construction costs**
- ▶ **Building costs exceeding \$333/SF (periodically updated)**
- ▶ **Site costs that exceed 8% of the building costs**
- ▶ **Furnishings and Technology Equipment that exceed \$2,400/student based on approved enrollment**
- ▶ **Change Orders exceeding 1% of construction cost**



MSBA Process – Reimbursement

Wellesley's reimbursement percentage is currently 31%

Potential Additional Reimbursement Points

- Base line reimbursement is 31.0% (+/-)
- Incentive points for energy efficient schools 2%
- Incentive points for maintenance score from MSBA 0 - 2%
- Incentive points for renovation existing school 0 - 5%
- Incentive point for overlay district, potential 0 - 1.5% TBD
- **Potential reimbursement rate prior to exclusions XX.XX%**
- **Effective reimbursement rate for final option after exclusions and caps could be between XX - XX%**