

District: Town of South Hadley  
 School Name: Plains Elementary School  
 Recommended Category: Project Scope and Budget  
 Date: November 7, 2012

**Recommendation**

That the Executive Director be authorized to enter into a Project Scope and Budget Agreement and a Project Funding Agreement with the Town of South Hadley for the replacement of the Plains Elementary School with a new elementary school facility on the existing site.

| <b>District Information</b> |                                                                                                                                                                                                                                                                                                                                             |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| District Name               | Town of South Hadley                                                                                                                                                                                                                                                                                                                        |
| Elementary School(s)        | Plains Elementary School (PK-1)<br>Mosier Elementary School (2-4)                                                                                                                                                                                                                                                                           |
| Middle School(s)            | Michael E. Smith Middle School (5-8)                                                                                                                                                                                                                                                                                                        |
| High School(s)              | South Hadley High School (9-12)                                                                                                                                                                                                                                                                                                             |
| Priority School Name        | Plains Elementary School                                                                                                                                                                                                                                                                                                                    |
| Type of School              | Elementary School                                                                                                                                                                                                                                                                                                                           |
| Grades Served               | PK-1                                                                                                                                                                                                                                                                                                                                        |
| Year Opened                 | 1932                                                                                                                                                                                                                                                                                                                                        |
| Existing Square Footage     | 47,495                                                                                                                                                                                                                                                                                                                                      |
| Additions                   | 1961: Addition and renovations<br>1989: Addition that filled in the courtyard to create a new media center<br>1990: Added two temporary portable classrooms                                                                                                                                                                                 |
| Acreage of Site             | 5.1 acres                                                                                                                                                                                                                                                                                                                                   |
| Building Issues             | The District identified deficiencies in the following areas: <ul style="list-style-type: none"> <li>- Mechanical systems</li> <li>- Electrical systems</li> <li>- Plumbing systems</li> <li>- Envelope</li> <li>- Windows</li> <li>- Accessibility</li> </ul> In addition to the physical plant issues, the District reported overcrowding. |
| Original Design Capacity    | Unknown                                                                                                                                                                                                                                                                                                                                     |
| 2011-2012 Enrollment        | 328                                                                                                                                                                                                                                                                                                                                         |
| Agreed Upon Enrollment      | 270                                                                                                                                                                                                                                                                                                                                         |
| Enrollment Specifics        | The Town of South Hadley and MSBA have mutually agreed upon a design enrollment of 270 students for grades PK-1, for a project that will serve grades PK-1.                                                                                                                                                                                 |

| <b>MSBA Board Votes</b>           |                    |
|-----------------------------------|--------------------|
| Invitation to Feasibility Study   | September 30, 2009 |
| Preferred Schematic Authorization | June 6, 2012       |

|                                        |                                                                               |
|----------------------------------------|-------------------------------------------------------------------------------|
| Project Scope and Budget Authorization | On November 14, 2012 Board agenda                                             |
| Reimbursement Rate Before Incentives   | 59.21%                                                                        |
| Incentive Points                       | 1.48 – Maintenance<br>2.00 – Energy Efficiency – “Green Schools” <sup>1</sup> |
| Total Reimbursement Rate <sup>1</sup>  | 62.69%                                                                        |

<sup>1</sup> The MSBA has provisionally included two (2) incentive points for energy efficiency, subject to the District meeting certain sustainability requirements for the project. If the District does not meet the requirements for energy efficiency, the District will not qualify for these incentive points, and the MSBA will adjust the reimbursement rate accordingly.

|                         |                              |
|-------------------------|------------------------------|
| <b>Consultants</b>      |                              |
| Owner’s Project Manager | Arcadis US, Inc.             |
| Designer                | Margo Jones Architects, Inc. |

## Discussion

MSBA staff reviewed the documents provided by the District and met with the District and its consultants to discuss scope and budget. The District has provided a Total Project Budget of \$28,183,801, which includes an estimated construction cost of \$21,563,821 (\$340/sf). The basis of the estimated maximum Total Facilities Grant would be \$22,131,143, which excludes OPM fees in excess of 3.5% of construction costs, ineligible costs associated with abatement of asbestos-containing floor materials, site costs in excess of 8% of total building cost, costs associated with mailing and moving, furnishings and equipment cost above the \$2,400 per student, construction costs in excess of \$275 per square foot, and owner’s and construction contingency costs.

The District also is proposing three alternates totaling \$524,695, which the District will pursue only if they can be done within the existing construction budget. Therefore, the estimated cost for these alternates is not included in either the Total Project Budget or the basis for the estimated maximum Total Facilities Grant. The MSBA will not participate in any costs associated with the three alternates. All costs associated with these alternates are ineligible for reimbursement and would be 100% borne by the District.

|                                                             |                                    |
|-------------------------------------------------------------|------------------------------------|
| <b>Project Scope and Budget Agreement</b>                   |                                    |
| Enrollment: 270<br>Total Square Feet: 63,377                | District’s Proposed Project Budget |
| Project Budget <sup>1</sup>                                 | \$25,918,550                       |
| Scope Exclusions/Ineligible Costs                           | \$3,787,407                        |
| Estimated Basis of Total Facilities Grant                   | \$22,131,143                       |
| Reimbursement Rate                                          | 62.69%                             |
| Estimated Maximum Total Facilities Grant <sup>2</sup>       | \$13,874,014                       |
| Potentially eligible owner’s and construction contingencies | \$2,265,251                        |

| <b>Project Scope and Budget Agreement</b>                                                       |              |
|-------------------------------------------------------------------------------------------------|--------------|
| Potential additional grant funds for eligible owner's and construction contingency expenditures | \$1,420,086  |
| Total Project Budget                                                                            | \$28,183,801 |
| Maximum Total Facilities Grant <sup>3</sup>                                                     | \$15,294,099 |

<sup>1</sup> Does not include owner's or construction contingencies.

<sup>2</sup> Does not include any grant funds for potentially eligible owner's or construction contingency expenditures; subject to MSBA review and audit.

<sup>3</sup> Includes maximum possible owner's and construction contingency grant funds, the final amount of which, if any, shall be determined by the MSBA in its sole discretion. The MSBA does not anticipate that the District will expend all of its contingency funds on expenses that are eligible for MSBA reimbursement.

MSBA staff recommends an estimated maximum Total Facilities Grant of \$13,874,014; however, the District may be eligible for up to an additional \$1,420,086 in grant funds, subject to the MSBA's review and audit of the District's owner's and construction contingency expenditures. Accordingly, staff recommends a maximum Total Facilities Grant of \$15,294,099 for the Project Scope and Budget Agreement and Project Funding Agreement for the replacement of the Plains Elementary School with a new elementary school facility on the existing site.