

District: Town of Braintree  
 School Name: South Middle School  
 Recommended Category: Project Scope and Budget  
 Date: August 21, 2019

**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 Braintree (the “District”) to replace the existing South Middle School with a new grades 5-8 facility on the existing site.

<b>District Information</b>	
District Name	Town of Braintree
Elementary Schools	Archie T. Morrison Elementary School (K-5) Donald Ross Elementary School (K-5) Highlands Elementary School (K-5) Hollis Elementary School (K-5) Liberty Elementary School (K-5) Mary E. Flaherty Elementary School (K-5) Monatiquot Kindergarten Center (K)
Middle Schools	East Middle School (6-8) South Middle School (6-8)
High School	Braintree High School (9-12)
Priority School Name	South Middle School
Type of School	Middle School
Grades Served	6-8
Year Opened	1956
Existing Square Footage	79,264
Additions	2001 – two modular classrooms 2017 – two modular classrooms
Acreage of Site	21.9 acres
Building Issues	The District identified deficiencies in the following areas: <ul style="list-style-type: none"> <li>– Overcrowding</li> <li>– Roof</li> <li>– Building Envelope</li> <li>– Accessibility</li> </ul> In addition to the physical plant issues, the District reported that the existing facility does not support the delivery of its educational program as well as existing and projected overcrowding.
Original Design Capacity	Unknown
2018-2019 Enrollment	704
Agreed Upon Enrollment	800
Enrollment Specifics	The District and MSBA have mutually agreed upon a design enrollment of 800 students serving grades 5-8.
Total Project Budget – Debt Exclusion Anticipated	No

<b>MSBA Board Votes</b>	
Invitation to Eligibility Period	February 15, 2017
Invitation to Feasibility Study	December 13, 2017
Preferred Schematic Authorization	April 10, 2019
Project Scope & Budget Authorization	On August 28, 2019 Board agenda
Reimbursement Rate Before Incentives	50.58%
Incentive Points	1.38 – Maintenance 2.00 – Energy Efficiency – “Green Schools” <sup>1</sup>
Total Reimbursement Rate <sup>1</sup>	53.96%

<sup>1</sup>The MSBA also 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 the 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 (the “OPM”)	Hill International, Inc.
Designer	Miller Dyer Spears, 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 \$86,585,919, which includes an estimated construction cost of \$69,181,416 (\$474/sq. ft.). The Estimated Basis of Total Facilities Grant would be \$57,458,219 which excludes the OPM and Designer fees associated with ineligible Health and Physical Education spaces, site costs in excess of 8% of total building cost, construction costs in excess of \$333/sq. ft. plus eligible demolition and abatement, construction costs associated with ineligible square footage, costs associated with mailing and moving, construction contingency costs, and other ineligible costs.

Costs associated with the commissioning of ineligible square footage will result in the recovery of a portion of the overall commissioning cost. The MSBA has calculated this recovery of funds to be \$7,167 and this amount has been deducted from the Estimated Maximum Total Facilities Grant and the Maximum Total Facilities Grant. Additionally, the MSBA is working with the District to fully understand the District’s proposed repurposing plan for the existing Braintree South Middle School facility, which will be taken offline as a middle school with the completion of the new 5-8 facility. Depending on the District’s reuse plan, the MSBA may recover a portion of the grant that the District received for a Green Repair project that was completed in 2011 at the existing Braintree South Middle School. If the MSBA determines that a portion of the Green Repair project grant will be recovered, the amount will be deducted from the grant for the new 5-8 facility prior to project closeout.

<b>Project Scope and Budget Agreement</b>	
Enrollment: 800	District’s Proposed Project Budget
Proposed Total Square Feet: 145,846	
Project Budget <sup>1</sup>	\$81,708,629
Scope Exclusions/Ineligible Costs	-\$24,250,410
Estimated Basis of Total Facilities Grant	\$57,458,219
Reimbursement Rate	53.96%

Estimated Maximum Total Facilities Grant before Cost Recovery <sup>2</sup>	\$31,004,455
Cost Recovery	-\$7,167
Estimated Maximum Total Facilities Grant <sup>2</sup>	\$30,997,288
Potentially Eligible Owner's and Construction Contingencies	\$2,455,940
Potential Additional Grant Funds for Eligible Owner's and Construction Contingency Expenditures	\$1,325,225
Total Project Budget	\$86,585,919
Maximum Total Facilities Grant <sup>3,4</sup>	\$32,322,513

<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 its contingency funds on expenses that are eligible for MSBA reimbursement.

<sup>4</sup>Maximum Total Facilities Grant will be allocated in part to the current Grant Cap, and in part to future available Grant Cap space.

MSBA staff recommends an Estimated Maximum Total Facilities Grant of \$30,997,288 however, the District may be eligible for up to an additional \$1,325,225 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 \$32,322,513 for the Project Scope and Budget Agreement and Project Funding Agreement to replace the existing South Middle School with a new grades 5-8 facility on the existing site.