

District: City of Lawrence
 School Name: Oliver Partnership School
 Recommended Category: Project Scope and Budget
 Date: February 4, 2020

Recommendation

That the Executive Director be authorized to enter into a Project Scope and Budget Agreement and a Project Funding Agreement with the City of Lawrence (the “District”) for an addition and renovation project at the Oliver Partnership School to serve grades K-8 on the existing site contingent upon the District gaining full ownership, control, and exclusive use of the site.

District Information	
District Name	City of Lawrence
Elementary School(s)	Community Day Arlington (K-4) Edward F. Parthum (PK-3) Francis M. Leahy (1-5) Gerard A. Guilmette (1-4) James F. Hennessey (PK-2) John Breen School (PK-K) John K. Tarbox (1-5) Lawlor Early Childhood Center (K) Lawrence Family Public Academy (PK-K) Oliver Partnership School (1-5) Robert Frost (K-3) Rollins Early Childhood Center (PK-K) South Lawrence East Elementary School (1-5)
Middle School(s)	Alexander B. Bruce (3-8) Arlington Middle School (5-8) Emily G. Wetherbee (K-8) Frost Middle School (5-8) Guilmette Middle School (5-8) Parthum Middle School (5-8) Spark Academy (6-8) UP Academy Leonard Middle School (6-8) UP Academy Oliver Middle School (6-8)
High School(s)	High School Learning Center (9-12) Lawrence High School (9-12) School for Exceptional Studies (1-12)
Priority School Name	Oliver Partnership School
Type of School	Elementary School
Grades Served	1-5
Year Opened	1917
Existing Square Footage	69,157
Additions	An elevator was added in the early 1980’s
Acreage of Site	1.33 acres
Building Issues	The District identified deficiencies in the following areas: – Mechanical systems

District Information	
	<ul style="list-style-type: none"> - Electrical systems - Plumbing systems - Windows - Roof - Interior finishes - Accessibility <p>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.</p>
Original Design Capacity	Unknown
2020-2021 Enrollment	462
Agreed Upon Enrollment	1,000
Enrollment Specifics	The District and MSBA have mutually agreed upon a design enrollment of 1,000 students serving grades K-8
Total Project Budget – Debt Exclusion Anticipated	No

MSBA Board Votes	
Invitation to Eligibility Period	February 15, 2017
Invitation to Feasibility Study	February 14, 2018
Preferred Schematic Authorization	June 24, 2020
Project Scope & Budget Authorization	On February 11, 2021 Board agenda
Reimbursement Rate Before Incentives	80.00%
Incentive Points	1.29 – Maintenance 0.65 – Major reconstruction or renovation/reuse 2.00 – Energy Efficiency – “Green Schools” ¹
Total Reimbursement Rate ¹	80.00%

¹By statute, 80.00% is the District’s maximum reimbursement rate and the District’s base reimbursement rate is 80.00% before applying any incentive points. Therefore, the District is not eligible to receive any incentive points as the base reimbursement rate results in a maximum reimbursement rate of 80.00%.

Consultants	
Owner’s Project Manager (the “OPM”)	Pinck & Co., Inc. dba Anser Advisory, Inc.
Designer	Symmes Maini & McKee Associates, 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 \$132,300,000 which includes an estimated construction cost of \$104,899,839 (\$648/sq. ft.). The Estimated Basis of Total Facilities Grant would be \$72,870,956, which excludes OPM fees in excess of 3.5% of construction costs, Designer fees in excess of 10% of construction cost, costs associated with abatement of asbestos-containing floor materials, removal of contaminated soils and underground fuel storage tanks, construction costs in excess of \$333/sq. ft. plus eligible

demolition and abatement, costs associated with swing space, costs associated with mailing and moving, costs in excess of the \$1,200 per student allowance for fixtures, furniture, and equipment, costs in excess of the \$1,200 per student allowance for technology, and owner's and construction contingency costs.

Also, 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 commissioning-related funds to be \$6,009 which has been deducted from the Estimated Maximum Total Facilities Grant and the Maximum Total Facilities Grant.

Project Scope and Budget Agreement	
Enrollment: 1,000	District's Proposed
Proposed Total Square Feet: 162,000	Project Budget
Project Budget ¹	\$127,055,008
Scope Exclusions/Ineligible Costs	-\$54,184,052
Estimated Basis of Total Facilities Grant	\$72,870,956
Reimbursement Rate	80.00%
Estimated Maximum Total Facilities Grant before Cost Recovery ²	\$58,296,765
Cost Recovery	-\$6,009
Estimated Maximum Total Facilities Grant ²	\$58,290,756
Potentially Eligible Owner's and Construction Contingencies	\$4,195,994
Potential Additional Grant Funds for Eligible Owner's and Construction Contingency Expenditures	\$3,356,795
Total Project Budget	\$132,300,000
Maximum Total Facilities Grant ^{3,4}	\$61,647,551

¹Does not include Owner's or Construction Contingencies.

²Does not include any grant funds for potentially eligible Owner's or Construction Contingency Expenditures; subject to MSBA review and audit.

³Includes 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.

⁴Maximum 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 \$58,290,756 however, the District may be eligible for up to an additional \$3,356,795 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 \$61,647,551 for the Project Scope and Budget Agreement and Project Funding Agreement for an addition and renovation project at the Oliver Partnership School to serve grades K-8 on the existing site.