

District: Town of Medfield
 School Name: Dale Street Elementary School
 Recommended Category: Project Scope and Budget
 Date: October 20, 2021

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 Medfield (the “District”) to replace the existing Dale Street Elementary School with a new facility serving grades 4-5 on the Wheelock Elementary School site.

District Information	
District Name	Town of Medfield
Elementary School(s)	Memorial Elementary School (PK-1) Ralph Wheelock Elementary School (2-3) Dale Street Elementary School (4-5)
Middle School(s)	Thomas A. Blake Middle School (6-8)
High School(s)	Medfield Senior High School (9-12)
Priority School Name	Dale Street Elementary School
Type of School	Elementary School
Grades Served	4-5
Year Opened	1942
Existing Square Footage	63,729
Additions	1962 Addition to 1942 structure, 1997 office conversion to educational space and modular classroom installation in 2000.
Acreage of Site	17 acres (shared with Memorial Elementary School)
Building Issues	The District identified deficiencies in the following areas: <ul style="list-style-type: none"> – Structural integrity – Mechanical systems – Electrical systems – Plumbing systems – Envelope – Windows – Roof – Accessibility 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
2020-2021 Enrollment	407
Agreed Upon Enrollment	575
Enrollment Specifics	The District and MSBA have mutually agreed upon a design enrollment of 575 students serving grades 4-5.
Total Project Budget – Debt Exclusion Anticipated	Yes

MSBA Board Votes	
Invitation to Eligibility Period	December 13, 2017
Invitation to Feasibility Study	December 12, 2018
Preferred Schematic Authorization	February 11, 2021
Project Scope & Budget Authorization	On October 27, 2021 Board agenda
Reimbursement Rate Before Incentives	41.32%
Incentive Points	1.58 – Maintenance 2.00 – Energy Efficiency – “Green Schools” ¹
Total Reimbursement Rate ¹	44.90%

¹ 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 the energy efficiency, the District will not qualify for these incentive points, and the MSBA will adjust the reimbursement rate accordingly.

Consultants	
Owner’s Project Manager (the “OPM”)	Leftfield LLC
Designer	Arrowstreet Inc.

Discussion

MSBA staff reviewed the documents provided by the District and met with the District and its consultants to discuss the scope and budget. The District has provided a Total Project Budget of \$81,893,664, which includes an estimated construction cost of \$64,525,190 (\$673/sq. ft.). The Estimated Basis of Total Facilities Grant would be \$42,694,303, which excludes OPM and Designer fees in excess of MSBA funding limits, costs associated with offsite traffic mitigation, site costs in excess of 8% of total building cost, construction costs in excess of \$360/sq. ft. plus eligible demolition and abatement, 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, costs associated with the commissioning of ineligible square footage, and owner’s and construction contingency costs.

Project Scope and Budget Agreement	
Enrollment: 575 Proposed Total Square Feet: 95,828	District’s Proposed Project Budget
Project Budget ¹	\$77,548,900
Scope Exclusions/Ineligible Costs	-\$34,854,597
Estimated Basis of Total Facilities Grant	\$42,694,303
Reimbursement Rate	44.90%
Estimated Maximum Total Facilities Grant before Cost Recovery ²	\$19,169,742
Cost Recovery	-\$4,324
Estimated Maximum Total Facilities Grant ²	\$19,165,418
Potentially Eligible Owner’s and Construction Contingencies	\$967,878
Potential Additional Grant Funds for Eligible Owner’s and Construction Contingency Expenditures	\$434,577
Total Project Budget	\$81,893,664
Maximum Total Facilities Grant ^{3,4}	\$19,599,995

¹*Does not include Owner's or Construction Contingencies.*

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

³*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.*

⁴*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 \$19,165,418; however, the District may be eligible for up to an additional \$434,577 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 \$19,599,995 for the Project Scope and Budget Agreement and Project Funding Agreement to replace the existing Dale Street Elementary School with a new facility serving grades 4-5 on the Wheelock Elementary School site.