

District: Town of Norwood
 School Name: Dr. Philip O. Coakley Middle School
 Recommended Category: Project Scope and Budget
 Date: February 18, 2022

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 Norwood (the “District”) to replace the existing Dr. Philip O. Coakley Middle School with a new facility serving grades 5-8 on the existing site.

District Information	
District Name	Town of Norwood
Elementary School(s)	George F. Willett School (PK-K) Cornelius M. Callahan Elementary School (1-5) F. A. Cleveland Elementary School (1-5) John P. Oldham Elementary (1-5) Charles J. Prescott Elementary (1-5) Balch Elementary School (1-5)
Middle School(s)	Dr. Philip O. Coakley Middle School (6-8)
High School(s)	Norwood High School (9-12)
Priority School Name	Dr. Philip O. Coakley Middle School
Type of School	Middle School
Grades Served	6-8
Year Opened	1972
Existing Square Footage	128,000
Additions	Four modular classrooms added in 2005 Two modular classrooms added in 2006
Acreage of Site	69 acres
Building Issues	The District identified deficiencies in the following areas: <ul style="list-style-type: none"> – 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
2021-2022 Enrollment	727
Agreed Upon Enrollment	1,070
Enrollment Specifics	The District and MSBA have mutually agreed upon a design enrollment of 1,070 students serving grades 5-8.
Total Project Budget – Debt Exclusion Anticipated	Yes

MSBA Board Votes	
Invitation to Eligibility Period	December 12, 2018
Invitation to Feasibility Study	February 13, 2020
Preferred Schematic Authorization	August 25, 2021
Project Scope & Budget Authorization	On March 2, 2022 Board agenda
Reimbursement Rate Before Incentives	50.58%
Incentive Points	1.76 – Maintenance 2.00 – Energy Efficiency – “Green Schools” ¹
Total Reimbursement Rate ¹	54.34%

¹The 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”)	Compass Project Management, Inc.
Designer	Ai3 Architects LLC

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 \$150,028,844, which includes an estimated construction cost of \$113,847,205 (\$636/sq. ft.). The Estimated Basis of Total Facilities Grant would be \$83,441,750, which excludes legal fees, scope excluded OPM and Designer fees associated with the auditorium, Designer fees in excess of MSBA funding limits, ineligible costs associated with permitting, ineligible costs associated with an allowance for additional commissioning scope beyond what is covered by the MSBA, ineligible costs associated with abatement of asbestos-containing floor materials, ineligible costs associated with the removal of fuel storage tanks, ineligible costs associated with concession buildings, site costs in excess of 8% of total building cost, construction costs in excess of \$360/sq. ft. plus eligible demolition and abatement, ineligible costs associated with an alternate included in the total project budget, 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: 1,070	District’s Proposed
Proposed Total Square Feet: 187,840	Project Budget
Project Budget ¹	\$141,133,101
Scope Exclusions/Ineligible Costs	-\$57,691,351
Estimated Basis of Total Facilities Grant	\$83,441,750
Reimbursement Rate	54.34%
Estimated Maximum Total Facilities Grant before Cost Recovery ²	\$45,342,247
Cost Recovery	-\$10,965
Estimated Maximum Total Facilities Grant ²	\$45,331,282
Potentially Eligible Owner’s and Construction Contingencies	\$1,707,708

Potential Additional Grant Funds for Eligible Owner's and Construction Contingency Expenditures	\$927,969
Total Project Budget	\$150,028,844
Maximum Total Facilities Grant ^{3,4}	\$46,259,251

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 \$45,331,282; however, the District may be eligible for up to an additional \$927,969 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 \$46,259,251 for the Project Scope and Budget Agreement and Project Funding Agreement to replace the existing Dr. Philip O. Coakley Middle School with a new facility serving grades 5-8 on the existing site.