

District: Town of Hopkinton  
 School Name: Elmwood Elementary School  
 Recommended Category: Project Scope and Budget  
 Date: October 18, 2023

**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 Hopkinton (the “District”) to replace the existing Elmwood Elementary School with a new facility serving grades 2-4 on an alternative site referred to as the Hayden Rowe Street site.

The District's Preferred Schematic and Hayden Rowe Street site are subject to the review of the Massachusetts Environmental Policy Act Office ("MEPA Review"). Therefore, the MSBA Board's authorization to enter a Project Scope and Budget Agreement and a Project Funding Agreement will be conditioned upon the District fulfilling the applicable MEPA requirements associated with the MEPA Review.

<b>District Information</b>	
District Name	Town of Hopkinton
Elementary Schools	Hopkinton Pre-School (PK) Marathon Elementary School (K-1) Elmwood Elementary School (2-3) Hopkins Elementary School (4-5)
Middle School	Hopkinton Middle School (6-8)
High School	Hopkinton High School (9-12)
Priority School Name	Elmwood Elementary School
Type of School	Elementary School
Grades Served	2-3
Year Opened	1964
Existing Square Footage	78,957
Additions	1989 – a 2-story addition with additional classrooms, a music room, and a large storage room 2000 – 2 modular classrooms added
Acreage of Site	23 acres
Building Issues	The District identified deficiencies in the following areas: <ul style="list-style-type: none"> <li>– Programmatic deficiencies</li> <li>– Structural integrity</li> <li>– Electrical systems</li> <li>– Plumbing systems</li> <li>– Fire Alarm systems</li> <li>– 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, the existing light fixtures are inefficient and produce glare on marker boards

<b>District Information</b>	
	and computer screens, heat is uneven, with some rooms too hot and others too cold, and ventilation is below standard and is altogether lacking in some spaces.
Original Design Capacity	Unknown
2022-2023 Enrollment	627 students
Agreed Upon Enrollment	1,195 students
Enrollment Specifics	The District and MSBA have mutually agreed upon a design enrollment of 1,195 students serving grades 2-4.
Total Project Budget – Debt Exclusion Anticipated	Yes

<b>MSBA Board Votes</b>	
Invitation to Eligibility Period	April 14, 2021
Invitation to Feasibility Study	December 15, 2021
Preferred Schematic Authorization	April 26, 2023
Project Scope & Budget Authorization	On October 25, 2023 Board agenda
Reimbursement Rate Before Incentives	43.42%
Incentive Points	1.65 – Maintenance 4.00 – Energy Efficiency – “Green Schools” <sup>1</sup>
Total Reimbursement Rate <sup>1</sup>	49.07%

<sup>1</sup> The MSBA has provisionally included three (3) incentive points for energy efficiency, and one (1) incentive point for indoor quality, subject to the District meeting certain sustainability requirements for the project. If the District does not meet the requirements of the Green Schools Program, the District will not qualify for some or all of these incentive points, and the MSBA will adjust the reimbursement rate accordingly.

<b>Consultants</b>	
Owner’s Project Manager (the “OPM”)	The Vertex Companies, LLC
Designer	Perkins Eastman Architects

## **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 \$158,422,394 which includes an estimated construction cost of \$124,954,689 (\$714/sq. ft.). The Estimated Basis of Total Facilities Grant would be \$123,515,434, which excludes costs associated with a District-wide study, OPM and Designer fees beyond MSBA funding limits, costs associated with legal fees, costs associated with permitting, and costs associated with recording fees, construction costs associated with off-site improvements, construction costs beyond MSBA funding limits plus eligible demolitions and abatement, costs associated with mailing and moving, costs in excess of \$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 building area, and owner’s and construction contingency costs.

<b>Project Scope and Budget Agreement</b>	
Enrollment: 1,195 Proposed Total Square Feet: 175,002	District's Proposed Project Budget
Project Budget <sup>1</sup>	\$148,426,119
Scope Exclusions/Ineligible Costs	-\$24,910,685
Estimated Basis of Total Facilities Grant	\$123,515,434
Reimbursement Rate	49.07%
Estimated Maximum Total Facilities Grant before Cost Recovery <sup>2</sup>	\$60,609,023
Cost Recovery	-\$1,148
Estimated Maximum Total Facilities Grant <sup>2</sup>	\$60,607,875
Potentially Eligible Owner's and Construction Contingencies	\$1,874,320
Potential Additional Grant Funds for Eligible Owner's and Construction Contingency Expenditures	\$919,729
Total Project Budget	\$158,422,394
Maximum Total Facilities Grant <sup>3,4</sup>	\$61,527,604

<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.

<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 \$60,607,875; however, the District may be eligible for up to an additional \$919,729 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 \$61,527,604 for the Project Scope and Budget Agreement and Project Funding Agreement to replace the existing Elmwood Elementary School with a new facility serving grades 2-4 on an alternative site referred to as the Hayden Rowe Street site, which said MSBA Board authorization shall be conditioned upon the District fulfilling the applicable MEPA requirements associated with the MEPA Review.