

District: City of Holyoke  
 School Name: William R. Peck Middle School  
 Recommended Category: Project Scope and Budget  
 Date: June 14, 2023

**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 Holyoke to replace the existing middle school facility with a new William R. Peck Middle School on the existing site, as part of the MSBA’s Model School Program.

<b>District Information</b>	
District Name	City of Holyoke
Elementary Schools	H.B. Lawrence School (PK-3) Dr. Marcella R. Kelly Elementary School (PK-4) Morgan Community Elementary School (PK-4) E.N. White Elementary School (PK-5) Maurice A. Donahue Elementary School (PK-5) Joseph Metcalf School (PK-7) Lt. Clayre Sullivan Elementary School (PK-8) Lt. Elmer J. McMahon Elementary School (PK-8)
Middle Schools	William R. Peck School (4-8) Holyoke STEM Academy (6-8) at William J. Dean Vocational Technical High School
High Schools	Holyoke High School (9-12) William J. Dean Vocational Technical High School (9-12)
Priority School Name	William R. Peck Middle School
Type of School	Middle School
Grades Served	4-8
Year Opened	1973
Existing Square Footage	177,015
Additions	N/A
Acreage of Site	16 acres
Building Issues	The District identified deficiencies in the following areas: <ul style="list-style-type: none"> <li>– Mechanical systems</li> <li>– Electrical systems</li> <li>– Plumbing systems</li> <li>– Envelope</li> <li>– Windows</li> <li>– Roof</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.
Original Design Capacity	1,000
2022-2023 Enrollment	192

<b>District Information</b>	
Agreed Upon Enrollment	550
Enrollment Specifics	The District and MSBA have mutually agreed upon a design enrollment of 550 students serving grades 6-8.
Total Project Budget – Debt Exclusion Anticipated	No

<b>MSBA Board Votes</b>	
Invitation to Eligibility Period	April 14, 2021
Invitation to Feasibility Study	April 27, 2022
Preferred Schematic Authorization	April 27, 2022
Project Scope & Budget Authorization	On June 21, 2023 Board agenda
Reimbursement Rate Before Incentives	80.00%
Incentive Points	1.40 – Maintenance
Total Reimbursement Rate <sup>1</sup>	80.00% <sup>1</sup>

<sup>1</sup> By 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%.

<b>Consultants</b>	
Owner's Project Manager (the "OPM")	Anser Advisory, LLC (formerly Pinck & Co., Inc.)
Designer	Mount Vernon Group Architects, 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 \$85,504,592, which includes an estimated construction cost of \$70,580,780 (\$657/sq. ft.). The Estimated Basis of Total Facilities Grant would be \$57,381,140, which excludes OPM fees associated with feasibility study and schematic design, OPM fees in excess of 3.3% of construction costs in accordance with the Model School Program, Designer fees in excess of 4.75% of construction costs in accordance with the Model School Program, ineligible costs associated with abatement of asbestos-containing floor materials, site costs in excess of MSBA's site work cost funding limit of \$39 per eligible square foot, building construction costs in excess of MSBA's building cost funding limit of \$393 per eligible square foot, ineligible 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, and owner's and construction contingency costs.

<b>Project Scope and Budget Agreement</b>	
Enrollment: 550	District's Proposed Project Budget
Proposed Total Square Feet: 107,475	
Project Budget <sup>1</sup>	\$82,681,361
Scope Exclusions/Ineligible Costs	-\$25,300,221
Estimated Basis of Total Facilities Grant	\$57,381,140

Reimbursement Rate	80.00%
Estimated Maximum Total Facilities Grant before Cost Recovery <sup>2</sup>	\$45,904,912
Cx Costs associated with Ineligible Building Area	\$0
Cost Recovery associated with Prior Projects	\$0
Estimated Maximum Total Facilities Grant <sup>2</sup>	\$45,904,912
Potentially Eligible Owner's and Construction Contingencies	\$1,058,712
Potential Additional Grant Funds for Eligible Owner's and Construction Contingency Expenditures	\$846,970
Total Project Budget	\$85,504,592
Maximum Total Facilities Grant <sup>3,4</sup>	\$46,751,882

<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 \$45,904,912; however, the District may be eligible for up to an additional \$846,970 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 \$46,751,882 for the Project Scope and Budget Agreement and Project Funding Agreement to replace the existing middle school facility with a new William R. Peck Middle School on the existing site, as part of the MSBA's Model School Program.