

District: City of Newton
 School Name: Countryside Elementary School
 Recommended Category: Project Scope and Budget
 Date: December 6, 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 Newton (the “District”) to replace the existing Countryside Elementary School with a new facility serving kindergarten through grade 5 on the existing site.

District Information	
District Name	City of Newton
Elementary Schools	A.E. Angier Elementary School (K-5) Bowen Elementary School (K-5) Burr Elementary School (K-5) Cabot Elementary School (K-5) Countryside Elementary School (K-5) Franklin Elementary School (K-5) Horace Mann Elementary School (K-5) John Ward Elementary School (K-5) Lincoln-Eliot Elementary School (K-5) Mason-Rice Elementary School (K-5) Memorial Spaulding Elementary School (K-5) Peirce Elementary School (K-5) Underwood Elementary School (K-5) Williams Elementary School (K-5) Zervas Elementary School (K-5)
Middle Schools	Bigelow Middle School (6-8) Charles E Brown Middle School (6-8) FA Day Middle School (6-8) Oak Hill Middle School (6-8)
High School(s)	Newton North High School (9-12) Newton South High School (9-12)
Priority School Name	Countryside Elementary School
Type of School	Elementary School
Grades Served	K-5
Year Opened	1953
Existing Square Footage	56,100
Additions	1955: 6-classroom annex addition 1986: 2-classroom annex addition 1991, 1999, 2000: addition of 4 modular classrooms and 2 offices
Acreage of Site	7.39 acres
Building Issues	The District identified deficiencies in the following areas: – Structural integrity

District Information	
	<ul style="list-style-type: none"> – Mechanical systems – Electrical systems – Plumbing systems – Envelope – Windows – Roof – 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.</p>
Original Design Capacity	Unknown
2022-2023 Enrollment	372 students
Agreed Upon Enrollment	465 students
Enrollment Specifics	The District and MSBA have mutually agreed upon a design enrollment of 465 students serving grades K-5.
Total Project Budget – Debt Exclusion Anticipated	No

MSBA Board Votes	
Invitation to Eligibility Period	April 14, 2021
Invitation to Feasibility Study	December 15, 2021
Preferred Schematic Authorization	June 21, 2023
Project Scope & Budget Authorization	On December 13, 2023 Board agenda
Reimbursement Rate Before Incentives	31.00%
Incentive Points	1.79 – Maintenance 3.00 – Energy Efficiency – “Green Schools” ¹ 1.00 – Indoor Air Quality – “Green Schools” ¹
Total Reimbursement Rate ¹	36.79%

¹ The MSBA has provisionally included three (3) incentive points for energy efficiency, and one (1) incentive point for indoor air 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.

Consultants	
Owner’s Project Manager (the “OPM”)	Dore & Whittier Management Partners, LLC
Designer	DiNisco Design, 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 \$75,980,950, which includes an estimated construction cost of \$60,315,100 (\$794/sq. ft.). The Estimated Basis of Total Facilities Grant would be \$54,946,943, which excludes OPM and Designer fees beyond MSBA’s funding limits, costs associated with asbestos-containing floor material and ceiling tile abatement, construction costs beyond MSBA funding limits plus eligible demolition and abatement, costs associated with mailing and moving, costs in excess of \$1,200 per

student allowance for furniture, fixtures, and equipment, costs in excess of \$1,200 per student allowance for technology, costs associated with the commissioning of ineligible building area, and owner's and construction contingency costs.

Project Scope and Budget Agreement	
Enrollment: 465 Proposed Total Square Feet: 76,000	District's Proposed Project Budget
Project Budget ¹	\$72,802,950
Scope Exclusions/Ineligible Costs	- \$17,856,007
Estimated Basis of Total Facilities Grant	\$54,946,943
Reimbursement Rate	36.79%
Estimated Maximum Total Facilities Grant before Cost Recovery ²	\$20,214,980
Cost Recovery	-\$525
Estimated Maximum Total Facilities Grant ²	\$20,214,455
Potentially Eligible Owner's and Construction Contingencies	\$904,727
Potential Additional Grant Funds for Eligible Owner's and Construction Contingency Expenditures	\$332,849
Total Project Budget	\$75,980,950
Maximum Total Facilities Grant ^{3,4}	\$20,547,304

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 \$20,214,455; however, the District may be eligible for up to an additional \$332,849 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 \$20,547,304 for the Project Scope and Budget Agreement and Project Funding Agreement to replace the existing Countryside Elementary School with a new facility serving kindergarten through grade 5 on the existing site.