

District: Town of Stoughton  
 School Name: South Elementary School  
 Recommended Category: Project Scope and Budget  
 Date: April 17, 2024

**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 Stoughton (the “District”) to consolidate the student population of the existing South Elementary School and the Richard L. Wilkins Elementary School and construct a new facility serving grades K-5 on an alternative site referred to as the “Line Lumber” site.

Additionally, it should be noted that the District's proposed project is subject to the review of (1) the Massachusetts Environmental Policy Act Office ("MEPA Review"), (2) Notice of Intent (“NOI”) to Stoughton Conservation Commission regarding the bridge/site access/utilities through wetlands and the remaining site, and (3) an ecological study to Mass Wildlife’s Natural Heritage & Endangered Species (“NHESP”). 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 all applicable MEPA requirements associated with a MEPA Review, and any compliance with Stoughton Conservation Commission and Mass Wildlife’s Natural Heritage & Endangered Species’ reviews.

<b>District Information</b>	
District Name	Town of Stoughton
Elementary School(s)	Edwin A. Jones Early Childhood Center (PK) Helen Hansen Elementary School (K-5) Joseph H Gibbons Elementary School (K-5) Joseph R. Dawe Jr. Elementary School (K-5) Richard L. Wilkins Elementary School (K-5) South Elementary School (K-5)
Middle School(s)	O’Donnell Middle School (6-8)
High School(s)	Stoughton High School (9-12)
Priority School Name	South Elementary School
Type of School	Elementary School
Grades Served	K-5
Year Opened	1957
Existing Square Footage	40,000
Additions	Addition - 1966
Acreage of Site	22 acres
Building Issues	The District identified deficiencies in the following areas: <ul style="list-style-type: none"> <li>• Structural integrity</li> <li>• Mechanical systems</li> <li>• Electrical systems</li> <li>• Plumbing systems</li> <li>• Envelope</li> <li>• Windows</li> </ul>

<b>District Information</b>	
	<ul style="list-style-type: none"> <li>• Roof</li> <li>• Accessibility</li> </ul> <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
2023-2024 Enrollment	293
Agreed Upon Enrollment	515
Enrollment Specifics	The District and MSBA have mutually agreed upon a design enrollment of 515 students serving grades K-5.
Total Project Budget – Debt Exclusion Anticipated	Yes

<b>MSBA Board Votes</b>	
Invitation to Eligibility Period	April 14, 2021
Invitation to Feasibility Study	March 2, 2022
Preferred Schematic Authorization	October 25, 2023
Project Scope & Budget Authorization	On April 24, 2024 Board agenda
Reimbursement Rate Before Incentives	60.51%
Incentive Points	1.47 – Maintenance 3.00 – Energy Efficiency – “Green Schools” <sup>1</sup> 1.00 – Indoor Air Quality – “Green Schools” <sup>1</sup>
Total Reimbursement Rate <sup>1</sup>	65.98%

<sup>1</sup>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.

<b>Consultants</b>	
Owner’s Project Manager (the “OPM”)	The Vertex Companies, LLC
Designer	Drummey Rosane Anderson, 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 \$114,407,877, which includes an estimated construction cost of \$91,839,476 (\$907/sq. ft.). The Estimated Basis of Total Facilities Grant would be \$71,269,941, which excludes the following: legal fees; OPM and Designer fees associated with excluded scope; OPM and Designer fees beyond MSBA’s funding limits; costs associated with permitting; costs associated with other administrative costs; costs associated with recording fees; construction costs for building and site work beyond MSBA funding limits, which includes scope associated with ineligible building area; costs associated with alternates included in the Total Project Budget; costs associated with mailing and moving; costs exceeding the \$1,200 per student allowance for furniture, fixtures, and equipment; costs associated with the commissioning of ineligible building area; and owner’s and construction contingency costs.

<b>Project Scope and Budget Agreement</b>	
Enrollment: 515 Proposed Total Square Feet: 101,550	District's Proposed Project Budget
Project Budget <sup>1</sup>	\$108,982,340
Scope Exclusions/Ineligible Costs	-\$37,712,399
Third Party Funding	-\$0
Estimated Basis of Total Facilities Grant	\$71,269,941
Reimbursement Rate	65.98%
Estimated Maximum Total Facilities Grant before Cost Recovery <sup>2</sup>	\$47,023,907
Commissioning Costs Associated with Ineligible Building Area	-\$2,437
Cost Recovery Associated with Prior Projects	-\$0
Estimated Maximum Total Facilities Grant <sup>2</sup>	\$47,021,470
Owner's and Construction Contingencies	\$5,425,537
Ineligible Owner's and Construction Contingencies	-\$4,047,945
Potentially Eligible Owner's and Construction Contingencies	\$1,377,592
Potential Additional Grant Funds for Eligible Owner's and Construction Contingency Expenditures	\$908,935
Total Project Budget	\$114,407,877
Maximum Total Facilities Grant <sup>3,4</sup>	\$47,930,405

<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 \$47,021,470; however, the District may be eligible for up to an additional \$908,935 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 \$47,930,405 for the Project Scope and Budget Agreement and Project Funding Agreement for a new construction project for consolidation of the existing South Elementary school and the existing Richard Wilkins Elementary on the "Line Lumber" site, which said MSBA Board authorization shall be conditioned upon the District fulfilling: (1) any applicable MEPA requirements associated with a MEPA Review and any applicable requirements for filing, (2) Notice of Intent ("NOI") to Stoughton Conservation Commission regarding the bridge/site access/utilities through wetlands and the remaining site, and (3) any applicable requirements with an ecological study to Mass Wildlife's Natural Heritage & Endangered Species ("NHESP").