

District: City of Boston  
 School Name: William E. Carter School  
 Recommended Category: Project Scope and Budget  
 Date: August 18, 2021

**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 Boston (the “District”) to replace the existing William E. Carter School with a new facility serving students in grades PK-12 on the existing site. MSBA staff accepts the District’s Schematic Design.

<b>District Information</b>	
District Name	City of Boston
Elementary Schools	7 Schools (Early Learners) 40 Schools (K-5) 33 Schools (K-8)
Middle Schools	6 Schools (6-8)
High Schools	6 Schools (K-12 Special Education) 4 Schools (6-12) 3 Schools (7-12) 20 Schools (9-12) 5 Alternative Schools (9-12)
Priority School Name	William E. Carter School
Type of School	Middle-High School
Grades Served	7-12
Year Opened	1971
Existing Square Footage	14,040
Additions	1979 addition, and replacement of HVAC and electrical systems in 2013
Acreage of Site	1.6 acres
Building Issues	The District identified deficiencies in the following areas: <ul style="list-style-type: none"> <li>– Mechanical systems</li> <li>– Envelope</li> <li>– Windows</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	Unknown
2020-2021 Enrollment	27 students
Agreed Upon Enrollment	60 students
Enrollment Specifics	The District and MSBA have mutually agreed upon a design enrollment of 60 students serving grades PK-12.
Total Project Budget – Debt Exclusion Anticipated	No

<b>MSBA Board Votes</b>	
Invitation to Eligibility Period	December 13, 2017
Invitation to Feasibility Study	April 10, 2019
Preferred Schematic Authorization	February 11, 2021
Project Scope & Budget Authorization	On August 25, 2021 Board agenda
Reimbursement Rate Before Incentives	60.42%
Incentive Points	1.89 – Maintenance 2.00 – Energy Efficiency – “Green Schools” <sup>1</sup>
Total Reimbursement Rate <sup>1</sup>	64.31%

<sup>1</sup>. *The MSBA also 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.*

<b>Consultants</b>	
Owner’s Project Manager (the “OPM”)	Hill International, Inc.
Designer	Perkins + Will 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 \$91,966,532, which includes an estimated construction cost of \$68,888,383 (\$800/sq. ft.). The Estimated Basis of Total Facilities Grant would be \$39,818,320, which excludes OPM and Designer fees in excess of MSBA funding limits, costs associated with abatement of asbestos-containing floor materials, costs associated with the abatement of an underground storage tank and associated contaminated soils, construction costs in excess of \$360/sq. ft. plus eligible demolition and abatement, costs associated with swing space, 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.

<b>Project Scope and Budget Agreement</b>	
Enrollment: 60	District’s Proposed
Proposed Total Square Feet: 86,130	Project Budget
Project Budget <sup>1</sup>	\$86,111,019
Scope Exclusions/Ineligible Costs	-\$46,292,699
Estimated Basis of Total Facilities Grant	\$39,818,320
Reimbursement Rate	64.31%
Estimated Maximum Total Facilities Grant before Cost Recovery <sup>2</sup>	\$25,607,162
Cost Recovery	-\$1,036
Estimated Maximum Total Facilities Grant <sup>2</sup>	\$25,606,126
Potentially Eligible Owner’s and Construction Contingencies	\$1,033,326
Potential Additional Grant Funds for Eligible Owner’s and Construction Contingency Expenditures	\$664,532

Total Project Budget	\$91,966,532
Maximum Total Facilities Grant <sup>3,4</sup>	\$26,270,658

<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 \$25,606,126; however, the District may be eligible for up to an additional \$664,532 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 \$26,270,658 for the Project Scope and Budget Agreement and Project Funding Agreement to replace the existing William E. Carter School with a new facility serving students in grades PK-12 on the existing site.