

District: Town of Burlington
 School Name: Fox Hill Elementary School
 Recommended Category: Project Scope and Budget
 Date: August 21, 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 Burlington (the “District”) to replace the existing Fox Hill Elementary School with a new facility designed for 325 students in kindergarten through grade 5 on the existing Fox Hill Elementary School site.

Additionally, the District's proposed project may be 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.

District Information	
District Name	Town of Burlington
Elementary School(s)	Memorial Elementary School (K-5) Fox Hill Elementary School (K-5) Francis Wyman Elementary School (K-5) Pine Glen Elementary School (K-5)
Middle School(s)	Marshall Simonds Middle School (6-8)
High School(s)	Burlington High School (PK, 9-12)
Priority School Name	Fox Hill Elementary School
Type of School	Elementary School
Grades Served	K-5
Year Opened	1967
Existing Square Footage	64,400
Additions	2010 – 3 modular classrooms
Acreage of Site	37.9 acres
Building Issues	The District identified deficiencies in the following areas: <ul style="list-style-type: none"> • Structural integrity • Mechanical systems • Electrical systems • Plumbing systems • Envelope • Windows • Roof • Accessibility In addition to the physical plant issues, the District reported that the existing facility does not support the delivery of its educational program as well as existing and projected overcrowding.
Original Design Capacity	Unknown
2023-2024 Enrollment	455 students

District Information	
Agreed Upon Enrollment	325 students
Enrollment Specifics	The District and MSBA have mutually agreed upon a design enrollment of 325 students for kindergarten through grade 5.
Total Project Budget – Debt Exclusion Anticipated	No

MSBA Board Votes	
Invitation to Eligibility Period	April 14, 2021
Invitation to Feasibility Study	April 27, 2022
Preferred Schematic Authorization	February 28, 2024
Project Scope & Budget Authorization	On August 28, 2024 Board agenda
Reimbursement Rate Before Incentives	41.94%
Incentive Points	1.47 – Maintenance 3.00 – Energy Efficiency – “Green Schools” ¹ 1.00 – Indoor Air Quality – “Green Schools” ¹
Total Reimbursement Rate ¹	47.41%

¹The 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, Inc.
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 \$100,484,141, which includes an estimated construction cost of \$80,269,500 (\$882/sq. ft.). The Estimated Basis of Total Facilities Grant would be \$65,222,294, which excludes the following: legal fees; OPM and Designer fees associated with excluded scope associated with the gymnasium; OPM and Designer fees beyond MSBA funding limits; costs associated with asbestos-containing floor material and ceiling tile abatement; construction costs for building and site work beyond MSBA funding limits, which includes scope associated with ineligible building area; costs associated with mailing and moving; costs exceeding the \$1,200 per student allowance for furniture, fixtures, and equipment; costs exceeding the \$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: 325 students	District’s Proposed Project Budget
Proposed Total Square Feet: 91,000	
Project Budget ¹	\$97,211,450
Scope Exclusions/Ineligible Costs	- \$31,989,156
Third Party Funding	-\$0
Estimated Basis of Total Facilities Grant	\$65,222,294
Reimbursement Rate	47.41%

Estimated Maximum Total Facilities Grant before Cost Recovery ²	\$30,921,890
Commissioning Costs Associated with Ineligible Building Area	- \$2,056
Cost Recovery Associated with Prior Projects	-\$0
Estimated Maximum Total Facilities Grant ²	\$30,919,834
Owner's and Construction Contingencies	\$3,272,691
Ineligible Owner's and Construction Contingencies	-\$2,068,648
Potentially Eligible Owner's and Construction Contingencies	\$1,204,043
Potential Additional Grant Funds for Eligible Owner's and Construction Contingency Expenditures	\$570,837
Total Project Budget	\$100,484,141
Maximum Total Facilities Grant ^{3,4}	\$31,490,671

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 \$30,919,834; however, the District may be eligible for up to an additional \$570,837 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 \$31,490,671 for the Project Scope and Budget Agreement and Project Funding Agreement to replace the existing Fox Hill Elementary School with a new facility designed for 325 students in kindergarten through grade 5 on the existing Fox Hill Elementary School site, which said MSBA Board authorization shall be conditioned upon the District fulfilling any applicable MEPA requirements associated with a MEPA Review.