

Massachusetts School Building Authority

Project Summary: Concord Thoreau Elementary School

July 20, 2009

Summary:

The Town of Concord proceeded with the design and construction of a new Elementary School during the legislatively mandated moratorium on school construction. The following is an analysis of the project, a comparison to MSBA guidelines and observations and recommendations.

1. Enrollment
2. Space Summary
3. MSBA Reimbursement Rate Calculation
4. Project Time Line
5. Project Budget and Recommended Total Facilities Grant

Enrollment:

Design Enrollment for the Elementary School: 450 Students (includes PK - 5)

This translates into approximately an average of 71 students per grade, and an average of 18 students per class with 4 classes/groups per grade (plus 20 students in Pre-K).

Current Enrollment (2008-2009) is very close to the design enrolment at an average of 71 students per grade (total of 428 for grades K-5) plus 16 Pre-K students for a total of 444.

The MSBA enrollment projection currently coincides with the average enrollment projection of the District (~68 students per grade per school – Alcott, Thoreau, Willard).

Space Summary:

The design of the new building differs from the MSBA space guidelines as follows:

- **Elementary Classroom Size:** The average classrooms size is approximately 1,050 square feet which is slightly higher than the MSBA guideline range of 900-1000. Overall the core academic space is slightly more than the guideline by 1,600 square feet.
- **Auditorium:** The District built a separate auditorium. MSBA guidelines do not allow for an auditorium for an elementary school. MSBA guidelines do however allow for a cafeterium which adds a stage to the cafeteria to allow for dual use. This results in a net excess of 2,585 square feet when compared to the guideline.
- **Gym Space:** The District has a smaller than guideline Gym (by 2,605 square feet).

- Overall the District is approximately 2,800 square feet over the MSBA guidelines, most of which relates to the Auditorium space. This is approximately 3.5% over the total guideline of 80,250 square feet for this size Elementary School.

(See attached MSBA Space Summary Template and Analysis)

MSBA Reimbursement Rate Calculation:

Base Rate

The base rate for the Town of Concord is 31%, the statutory formula does not add any points based on Property Wealth, Income Wealth or Poverty (free lunch).

Incentive Points

Green School: This school was not MA-CHPS Verified but designed according to the MA-CHPS green school guidelines. If verified this project may be eligible for an additional 2% for conforming to that level of green school points.

Maintenance: The district would be eligible for an additional 1% for maintenance.

Given that the school is mostly new construction, (renovated space: 9,113 square feet, new space: 73,945 square feet), they are not eligible for Renovation/Reuse incentive points (4% points).

The project was not a CM-at-risk project nor does it have any MGL C.40R/40S overlay zoning. There are no other categories of Incentive Points that this project was eligible to receive.

Final Rate

Concord's reimbursement rate is 40%. Even with the addition of all eligible categories of Incentive Points, the district would not exceed the minimum 40% threshold as required by the former statute. MGL C.70B has since been changed, there is no longer a 40% required minimum rate. This change in statute will not apply to this project, but will apply to future projects for the Concord School District.

Project Time Line:

The District started master planning activities in 1999 and programming and schematic design activities span from 2000 – 2002, just prior to SBA moratorium. Construction started in 2004 and completed in the summer of 2006.

When the MSBA board voted to accept the project to review their Scope and Budget on November 2007, construction had already been completed and occupancy achieved. At that time, the District had already taken steps towards starting the construction of the new Willard School.

Project Budget, Rate and Recommended Total Facilities Grant:

Total project budget	\$17,521,827
Total Square Footage	83,058
Cost per Square Foot	\$211

Square Footage in excess of MSBA Guidelines:	2585 (Auditorium)
Excess SQFT Adjustment to Budget:	\$545,435*
Basis for Total Facilities Grant:	\$16,976,392
Reimbursement Rate:	40% (see rate calculation)
Maximum Total Facilities Grant:	\$6,790,557

(note: This amount may be adjusted downward to account for ineligible project costs as determined during the MSBA Audit Process)

Ineligible Project Scope:

Legal, Sewer improvements	\$34,000 **
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(note: this is as of July 15,2009, additional costs may be deemed ineligible upon final audit):

* Recommended adjustment is based on excess square footage for the Auditorium in an elementary school taken at the average cost per square foot.

** Includes costs that are ineligible pursuant to MSBA regulations and guidelines. This figure may be adjusted during the final audit process to reflect additional ineligible costs or to reverse ineligible costs with appropriate support.