

District: Town of Lexington  
 School Name: Joseph Estabrook Elementary School  
 Recommended Category: Project Scope and Budget  
 Date: March 21, 2012

**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 Lexington to replace the existing Joseph Estabrook Elementary School facility with a new elementary school on the existing site.

<b>District Information</b>	
District Name	Town of Lexington
Elementary School(s)	Fiske Elementary School (K-5) Bowman Elementary School (K-5) Bridge Elementary School (K-5) Hastings Elementary School (K-5) Harrington Elementary School (K-5) Joseph Estabrook Elementary School (K-5)
Middle School(s)	Diamond Middle School (6-8) Clarke Middle School (6-8)
High School(s)	Lexington High School (9-12)
Priority School Name	Joseph Estabrook Elementary School
Type of School	Elementary School
Grades Served	K-5
Year Opened	1961
Total Square Footage	60,707
Additions	None – Three modulars are utilized
Acreage of Site	7.5 acres
Building Issues	The District noted deficiencies in the following areas: <ul style="list-style-type: none"> <li>- Exterior Walls and Windows</li> <li>- Roof</li> <li>- HVAC</li> <li>- Plumbing</li> <li>- Electrical</li> <li>- Fire protection</li> <li>- Airborne concentration of PCB's above EPA acceptable limits</li> </ul> In addition to the physical plant issues, the District reported that the existing layout inhibits delivery of its educational program. The building also lacks a cafeteria.
Original Design Capacity	Unknown
2011-2012 Enrollment	455
Agreed Upon Enrollment	540
Enrollment Specifics	The District and MSBA have mutually agreed upon a design enrollment of 540 students serving grades K-5.

<b>MSBA Board Votes</b>	
Invitation to Feasibility Study	February 9, 2011
Preferred Schematic Authorization	January 25, 2012
Project Scope & Budget Authorization	District is targeting March 28, 2012
Reimbursement Rate Before Incentives	32.47%
Incentive Points	1.80 – Maintenance 1.00 – CM @ Risk 2.00 – Energy Efficiency – “Green Schools”
* Total Reimbursement Rate	37.27%

*\* The MSBA has provisionally included one (1) incentive point for the Construction Manager at Risk construction delivery method, subject to the District receiving approval from the Office of the Inspector General to utilize this method. 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 receive approval for the Construction Manager at Risk delivery method and/or does not meet the requirements for energy efficiency, the District will not qualify for these incentive points, respectively, and the MSBA will adjust the reimbursement rate accordingly.*

<b>Consultants</b>	
Owner’s Project Manager	R.F. Walsh Collaborative Partners
Designer	DiNisco Design Partnership, Limited

## **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 \$40,792,248, which includes an estimated construction cost of \$31,145,045. The basis of the estimated maximum Total Facilities Grant would be \$32,870,241, which excludes legal fees, OPM fees in excess of 3.5% of construction costs, site costs in excess of 8% of total building cost, construction costs above \$275 per square foot, costs associated with mailing and moving, furnishing and equipment costs above \$2,400 per student, and owner’s and construction contingencies.

<b>Project Scope and Budget Agreement</b>		
Design Enrollment: 540 Total Gross Square Feet: 91,840	District's Proposed Total Project Budget	Basis of Total Facilities Grant
Total Project Budget	\$40,792,248	\$32,870,241
Project Cost per square foot	\$444	\$358
Total Construction Budget	\$31,145,045	\$26,436,614
Construction Cost per square foot*	\$339	\$288
Reimbursement Rate	37.27%	
Estimated Maximum Total Facilities Grant**	\$12,250,739	
Potential additional grant funds for eligible owner's and construction contingency expenditures	\$881,679	
Maximum Total Facilities Grant***	\$13,132,418	

\* Does not include construction contingency

\*\* Does not include any grant funds for potentially eligible owner's or construction contingency expenditures; subject to MSBA review and audit.

\*\*\* 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.

MSBA staff recommends an estimated maximum Total Facilities Grant of \$12,250,739; however, the District may be eligible for up to an additional \$881,679 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 \$13,132,418 for the Project Scope and Budget Agreement and Project Funding Agreement to replace the existing Joseph Estabrook Elementary School facility with a new elementary school on the existing site.