

District: Town of Lunenburg  
 School Name: Lunenburg High School  
 Recommended Category: Project Scope and Budget  
 Date: November 13, 2013

**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 Lunenburg for the replacement of the existing Lunenburg High School with a new 6-12 facility on the existing site.

<b>District Information</b>	
District Name	Town of Lunenburg
Elementary School(s)	Lunenburg Primary School (PK-3) Thomas C. Passios School (currently offline)
Middle School(s)	Turkey Hill Middle School (4-7)
High School(s)	Lunenburg High School (8-12)
Priority School Name	Lunenburg High School
Type of School	High School
Grades Served	8-12
Year Opened	1957
Existing Square Footage	98,000
Additions	1960
Acreage of Site	52 acres
Building Issues	The District identified deficiencies in the following areas: <ul style="list-style-type: none"> <li>- Mechanical</li> <li>- Electrical</li> <li>- Fire Protection</li> <li>- Envelope (windows and 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 and that there is existing and projected overcrowding.</p>
Original Design Capacity	Unknown
2012-2013 Enrollment	582
Agreed Upon Enrollment	820
Enrollment Specifics	The District and MSBA have mutually agreed upon a design enrollment of 820 students serving grades 6-12.

<b>MSBA Board Votes</b>	
Invitation to Feasibility Study	November 18, 2009
Recategorization from Feasibility Study to Eligibility Period	January 25, 2012
Invitation to Feasibility Study	July 25, 2012

Preferred Schematic Authorization	July 31, 2013
Project Scope & Budget Authorization	On November 20, 2013 Board agenda
Reimbursement Rate Before Incentives	52.89%
Incentive Points	1.72 – Maintenance 1.00 – CM @ Risk (Received IG Approval on June 12, 2013) 1.00 – Overlay Zoning 40R and 40S 0.50 – Overlay Zoning 100 Units or 50% of Units 1, 2, or 3 family structures 2.00 – Energy Efficiency – “Green Schools” <sup>1</sup>
Total Reimbursement Rate <sup>1</sup>	59.11%

<sup>1</sup>. The MSBA has provisionally included two (2) incentive points for energy efficiency, subject to the District meeting certain sustainability requirements for the project.

<b>Consultants</b>	
Owner’s Project Manager	Joslin, Lesser + Associates, Inc.
Designer	Tappe Associates, 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 \$72,975,321, which includes an estimated construction cost of \$59,570,728 (\$352/sf). The basis of the Estimated Maximum Total Facilities Grant would be \$58,378,108, which excludes Designer fees and construction costs associated with the proposed greenhouse, , ineligible costs associated with abatement and removal of asbestos-containing flooring material, site costs in excess of 8% of total building cost, costs associated with mailing and moving, and owner’s and construction contingency costs.

The proposed demolition of the existing Lunenburg High School and discontinuance of the Thomas C. Passios School as a public K-12 facility will result in the MSBA recovering a portion of state funds previously paid to the District for the renovation project at the existing facilities completed in 2004. The MSBA has calculated this recovery of funds to be \$431,702 and this amount has been deducted from the Estimated Maximum Total Facilities Grant and the Maximum Total Facilities Grant.

<b>Project Scope and Budget Agreement</b>	
Enrollment: 820 Total Square Feet: 169,018	District’s Proposed Project Budget
Project Budget <sup>1</sup>	\$69,396,785
Scope Exclusions/Ineligible Costs/Cost Recovery	-\$11,450,379
Basis of Estimated Total Facilities Grant	\$58,378,108
Reimbursement Rate	59.11%
Estimated Maximum Total Facilities Grant (before cost recovery) <sup>2</sup>	\$34,252,120

<b>Project Scope and Budget Agreement</b>	
Cost Recovery	-\$431,702
Estimated Maximum Total Facilities Grant <sup>2</sup>	\$34,075,598
Potentially eligible owner's and construction contingencies	\$3,578,536
Potential additional grant funds for eligible owner's and construction contingency expenditures	\$2,115,273
Total Project Budget	\$72,975,321
Maximum Total Facilities Grant <sup>3</sup>	\$36,190,870

<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, approval, 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.

MSBA staff recommends an Estimated Maximum Total Facilities Grant of \$34,075,598; however, the District may be eligible for up to an additional \$2,115,273 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 \$36,190,870 for the Project Scope and Budget Agreement and Project Funding Agreement for the replacement of the existing Lunenburg High School with a new 6-12 facility on the existing site.