

TO: Board of Directors, Massachusetts School Building Authority
FROM: Maureen G. Valente, Chief Executive Officer
John K. McCarthy, Executive Director, Deputy Chief Executive Officer
SUBJECT: Massachusetts School Building Authority (“MSBA”) Space Guidelines
Discussion for Pilot Program for potential policy revision on Auditorium and
Gymnasium spaces in excess of MSBA Guidelines at the District’s sole expense
DATE: March 23, 2016

At the March 16, 2016 Board of Directors meeting, staff presented an overview of policies and practices applied in the review of proposed projects for conformance with the MSBA space guidelines. As a result of that discussion, staff were requested to provide additional information regarding the potential to revise the policies to allow for requests by districts for spaces in excess of the MSBA’s guidelines at the district’s sole expense.

Staff recognize that there may be requests from communities to add multiple types of spaces to a school project. In addition, based upon the information provided at the March 16, 2016 Board of Directors meeting, staff note that there are multiple issues to be addressed prior to implementing a policy change of this magnitude, including a discussion as to whether this would apply to the Model School Program. Staff believe that additional discussion and review by the Board is needed to provide further direction and further time to review any potential changes.

In this memorandum, staff have reviewed two types of potential requests and have proposed suggestions for a potential Pilot Program for Board discussion;

- 1) For a high school, requests for space in excess of the MSBA guidelines for the auditorium or gymnasium
- 2) For an elementary or middle school, requests for spaces in excess of the MSBA guidelines for the gymnasium or to include an auditorium that is a space not included in the MSBA guidelines

This Pilot Program could be effective for districts entering into a project scope and budget agreement with the MSBA on or after May 25, 2016. As a pilot program, these changes would be monitored from May 25, 2016 to June 30, 2017 with a review of the benefits and challenges to be conducted in the summer of 2017. The following current policies will continue:

- 1) Staff will continue to work with districts and their designers to encourage the most cost effective, sustainable solutions that focus on buildings with multi-functional uses to

create efficient facilities that assist districts with their ongoing challenge to operate and maintain their facilities for the long term.

- 2) The current policy to hold to guidelines remains for the following areas: core academic, art, music, vocations and technology, administration and guidance, and medical, unless justified by the education plan.
- 3) The current policy to hold to guidelines remains for the following areas: media center, dining and food, custodial and maintenance.
- 4) The current policy remains for review by the Department of Elementary and Secondary Education for the amount and types of spaces needed to support the district's Special Education program.

The following are suggestions for potential new policies for further discussion by the Board of Directors:

- 5) The potential new policy would be specific to the school type (e.g. elementary, middle or high school).
- 6) The potential new policy would define upper limits for the auditorium and the gymnasium dependent upon the school type.
- 7) The revised policy for a high school would include the following provisions:
 - a. The MSBA will continue to participate in the auditorium and gymnasium as follows:
 - i. an auditorium up to a maximum of 10 nsf per student up to the lower of 2/3 of the design enrollment or 750 students for a combined maximum of 10,400 for all of the spaces in the Auditorium/Drama category. If the design enrollment is a number less than 1,125 students, the total net square foot eligible for reimbursement would be less than 10,400 net square feet; and
 - ii. a gymnasium up to a maximum of 12,000 net square feet for a design enrollment of up to 1,000 students. Staff reserve the right to adjust this amount downward if the design enrollment is less than 600 students or adjust this amount upward if the design enrollment is substantially higher than 1,000 students. Any adjustment by staff would be based upon a review of the district's educational plan for the design enrollment and could result in an additional 3,000 net square feet for a Physical Education Alternative Space or additional net square footage in the gymnasium for every 250 students over 1,000 students. In no event, would the gymnasium exceed 18,000 net square feet.
 - b. If a district wishes to build an auditorium or a gymnasium larger than set forth in the MSBA's guidelines, the MSBA will limit its participation as follows:
 - i. The MSBA will find these costs categorically ineligible. The costs of all additional square footage in excess of guidelines are the sole responsibility of the district. This includes the construction cost as well as any and all project costs associated with the construction cost including but not limited to the designer's fee, owner's project manager fee, any FF&E costs, commissioning costs, etc.
 - ii. A district may choose to build the auditorium and stage in excess of the maximum allowed by MSBA guidelines for the Auditorium/Drama

Category up to a total net square footage of no more than 13,300 net square feet.

- iii. A district may choose to build additional square footage in the Health and Physical Education category in excess of the maximum allowed by MSBA guidelines up to 6,000 net square feet. In no event, would the gymnasium exceed 18,000 net square feet.

8) The revised policy for an elementary and middle school would include the following provisions:

- a. The MSBA will continue to participate in the following:
 - i. The net square footage associated with a stage located in the cafeteria or the gymnasium up to a maximum net square footage of 1000 net square feet for an elementary school and up to a maximum net square footage of 1600 net square feet in a middle school.
 - ii. The net square footage associated with a gymnasium up to a maximum net square footage of 6,000 net square feet for an elementary school or for a middle school.
- b. If a district wishes to build an auditorium or a larger gymnasium, the MSBA will limit its participation as follows:
 - i. The MSBA will find these costs categorically ineligible. The costs of all additional square footage in excess of guidelines are the sole responsibility of the district. This includes the construction cost as well as any and all project costs associated with the construction cost including but not limited to the designer's fee, owner's project manager fee, any FF&E costs, commissioning costs, etc.
 - ii. A district may choose to build an auditorium rather than a stage located in either the cafeteria or the gymnasium. If so, the MSBA will not participate in any of the costs for the auditorium, including the stage, and the Auditorium/Drama category may not exceed 13,300 net square feet.
 - iii. A district may choose to build the gymnasium in excess of the maximum allowed by MSBA guidelines up to a total net square footage of no more than 12,000 net square feet for the gymnasium.

9) Staff will calculate the construction cost of the ineligible square feet by calculating the amount of net square feet above the guidelines and multiplying that by the district's submitted grossing factor to calculate the total gross square feet. This amount will be further multiplied by the construction cost per gross square foot of the proposed project. This formula will be utilized whether the proposed overage increases the gross square foot of the building or not.

- a. Ineligible construction cost equals the (net square foot over guidelines X the grossing factor of the project) X the cost per gross square foot of the building.
- b. Ineligible project costs equals (ineligible net square footage/eligible net square footage) X the total designer fee, owner's project manager fee and commissioning costs.

- c. Any amounts billed to the FF&E category for the additional space will be categorically ineligible and must be identified by the district in seeking its reimbursement.
 - d. These ineligible amounts will be determined at the establishment of the Project Funding Agreement and will not change over the term of the grant. Even if the bids come in at a lower amount than estimated at schematic design, the ineligible amount will not decrease.
- 10) Staff will require additional time to review the standard documents and process flow currently being utilized in the grant program to determine what, if any, changes would be required and/or if new documents need to be developed to implement a potential policy change. Several changes recommended based on a preliminary review include:
- a. Staff suggest that a district would need to request additional spaces above guidelines for an auditorium and/or a gymnasium as part of its preferred schematic submittal.
 - b. A new form that a district would submit to note its intentions to build spaces beyond the MSBA guidelines. This form would include a narrative describing the need for this additional space, a list of comparable spaces within the district, and its intended use and evidence of community support. This form would require the signature of the Chief Executive Officer, Superintendent and the Chair of the School Committee.
 - c. The new form would note the agreement between the community and the district for responsibility for the ongoing operational and maintenance costs for the spaces beyond the MSBA guidelines. The MSBA would encourage communities to provide additional, long-term, financial support for the operational and maintenance costs for these spaces beyond guidelines.
 - d. Vote for local appropriation – Staff recommend that the MSBA standard language for the vote for local appropriation be revised to clearly identify what scope is eligible for MSBA reimbursement and what scope is not. The vote language should clearly identify all spaces that the district chose to include that are in excess of MSBA guidelines, delineate the differences in sizes between those spaces and MSBA guidelines, and succinctly explain the reason(s) for such excess.
 - e. Failed vote policy – Staff will need to review the existing failed vote policy to address what would be required if the local vote fails due to the inclusion of larger spaces. A revision to the policy may be needed to address what the district's steps and timeline are if the vote failed and the district then chose to remove the larger spaces.
 - f. Staff will multiply the cost per square foot for commissioning costs times any ineligible net square footage multiplied by the project's grossing factor. The total amount will be applied against the total project budget and correspondingly subtracted from the estimated maximum total facilities grant.

Included with this memorandum is the PowerPoint presentation on MSBA space guidelines presented at the March 16, 2016 Board of Directors meeting, Attachment A.



Discussion on MSBA Space Guidelines

Attachment A



MSBA Space Guidelines

Where we started

- Oversized buildings with grander spaces
- Underutilized facilities
- Declining enrollment – school closings
- Failed operational overrides and school staff layoffs
- School projects paired with senior centers and other non-school projects
- Failed votes
- School moratorium creating pent-up demand – 428 Statements of Interest filed in 2007



MSBA Space Guidelines

Guideline Development

- Spaces and square footage developed in conversations with superintendents and architects
- Square foot per student for each project type (ES, MS and HS)
- Square foot per student for each program area

Right-sized buildings

- Creation of MSBA enrollment tool
- Early agreement on design enrollment
- Focus on student-centered spaces
- Focus on proven utilization of spaces
- Adherence to minimum classroom sizes



MSBA Space Guidelines

2007 to 2010

- Held to Gross Square Footage and to Net Square Footage within program areas
- Community feedback on gymnasium size and need for a Chorus room

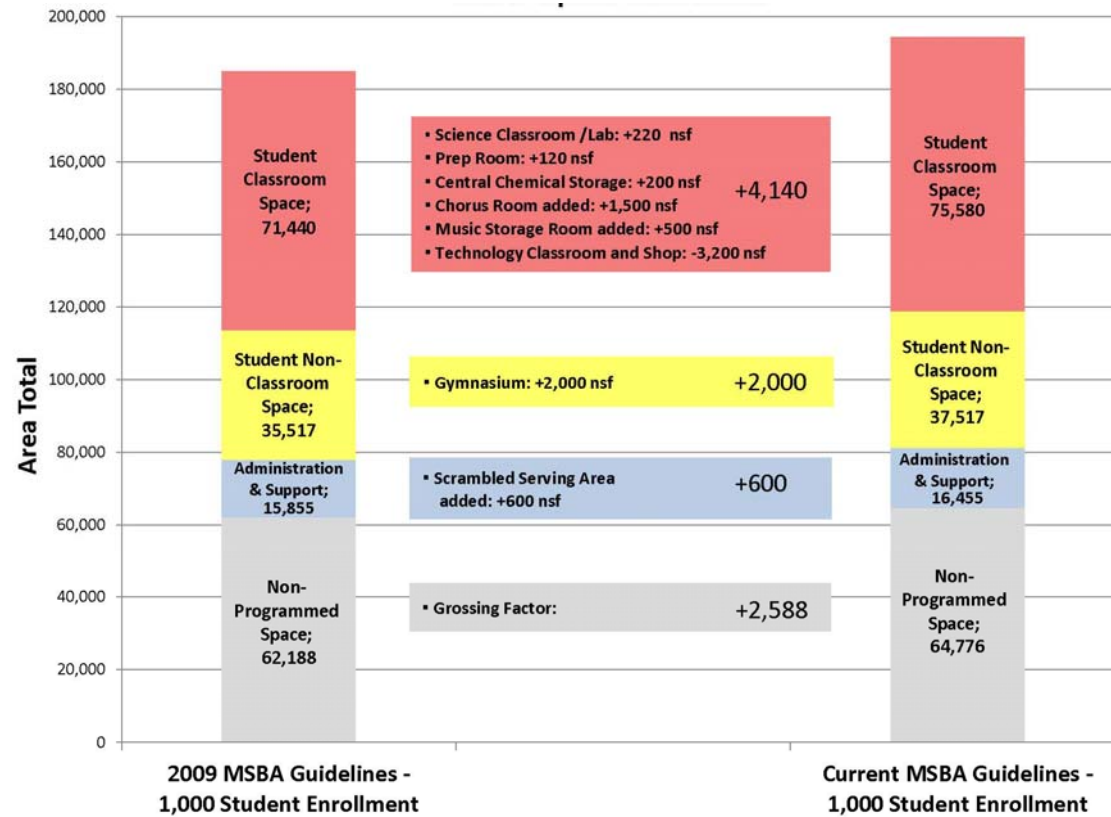
2009 to 2010

- Changes to guidelines in multiple areas with a net increase in the Gross Square Footage / Student



MSBA Space Guidelines

- Core Academics
 - Special Education
 - Art, Music, Vocations & Technology
- Health & Physical Education
 - Media Center
 - Auditorium /Drama
- Dining & Food Service
 - Medical
 - Admin. & Guidance
 - Custodial & Maintenance
- Grossing Factor





MSBA Space Guidelines

2010 to present

- Educational Program as driver of design and justification for variations to the guidelines
- Facilities Assessment Subcommittee to vet Educational plan and Proposed plans
- Flexible in core academic, art, music, vocations and technology and administration and guidance
- Special education reviewed and approved by Department of Elementary and Secondary Education
- Space above guidelines not supported includes media center, health and physical education (except as enrollment-based), auditorium, dining and food, medical custodial and maintenance.
- Educational Profile Questionnaire in Eligibility Period
- Educational Plan Templates and sample educational plans, sample learning environments (break-out spaces) and prototypical plans for science labs and best practices



Conformance with MSBA Guidelines

Benefits

- Focus on educational spaces
- Consistent evaluation between projects
- Controls size of facility and cost to construct
- Controls cost of long-term operations and maintenance
- Supports efforts of school and town administrators with their stakeholders to right-size the educational building
- Mitigates excessive disparity in funding for new schools
- Allows districts to spread their money across all their schools

Challenges

- Communities may not be able to create a stand-alone facility for pools, field houses, ice rinks or large performance spaces
- Community desire to keep an existing facility may not result in the “best” alternatives study for the school project



Projects in excess of MSBA Guidelines

Challenges

- What types of community spaces are allowable? Student-related or non-student-related
- Define the upper limit – how much is too much?
- MSBA will not be able to parse out the cost of eligible and ineligible spaces with certainty
- MSBA will not be able to endorse the project as the most cost-effective and right-sized
- Potential for confusion by local voters as to school spaces versus community spaces
- Increases long-term operational and maintenance costs
- Potential for increased disparity in facilities funded through the grant program
- Potential for inconsistent evaluations between projects
- Increased gap between statutory reimbursement rate and effective reimbursement rate
- Increased administration of commissioning contracts to exclude paying for ineligible spaces



MSBA Space Guidelines

Where are we now

- Strong focus on educational plan and student centered spaces
- Strong focus on flexible and adaptable buildings with plan for changes to address future changes in educational delivery
- Hold to minimum class sizes to address changes in enrollment over time and to ensure long-term flexibility of the building
- Adjusting gym size dependent upon the enrollment and need for teaching spaces
- Careful review for spaces that could be undersized – special education, classrooms, cafeteria
- Concentration on multifunctional spaces with high versatility



MSBA Space Guidelines

Under discussion | Spaces needed for schools of the future

Technology

- Impact of distance learning, one to one technology, flipped classrooms

Media Center

- Reduced book storage
- Centralized vs. distributed space
- The role of the professional librarian

Changing educational trends

- Collaboration spaces vs. dedicated classrooms
- Project based learning spaces – how many and of what size

Further definition of the non-programmed space

- Ubiquitous learning



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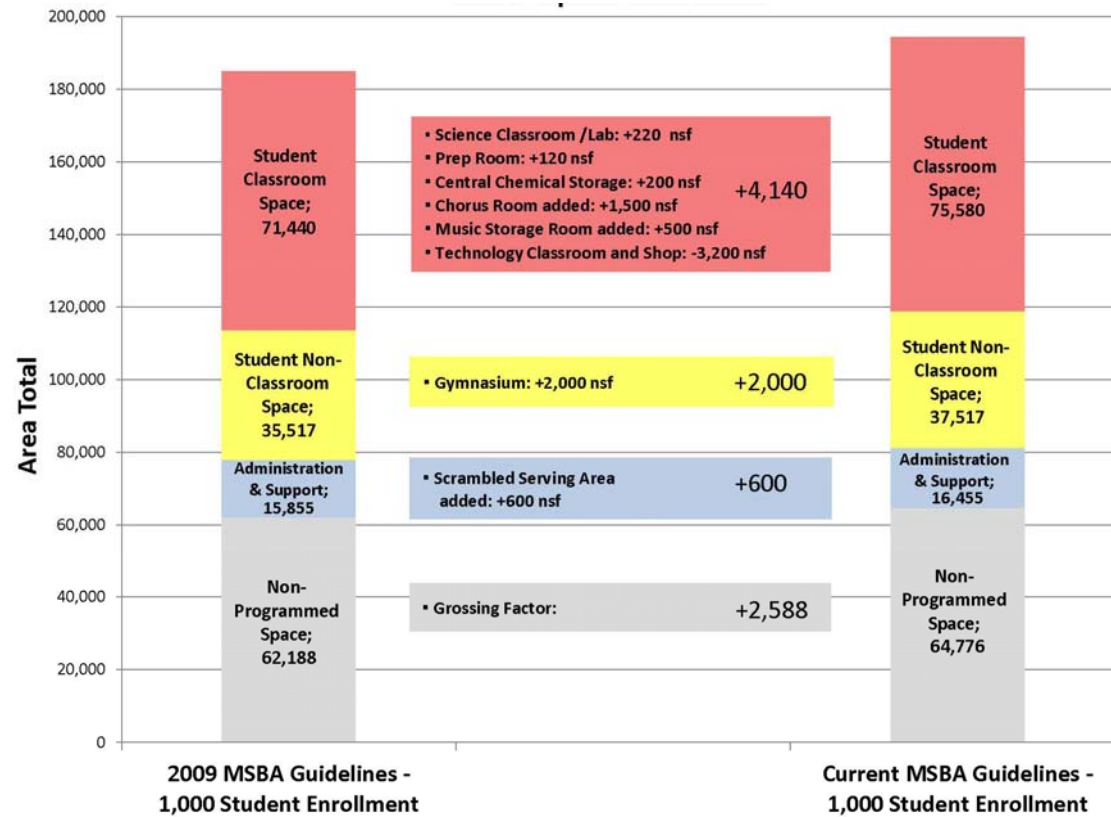
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