

District: Town of Ashland  
 School Name: David Mindess Elementary School  
 Recommended Category: Project Scope and Budget  
 Date: October 21, 2020

**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 Ashland (the “District”) to replace the existing David Mindess Elementary School with a new facility serving grades 3-5 on the existing site.

<b>District Information</b>	
District Name	Town of Ashland
Elementary School(s)	William Pittaway Elementary School (PK) Henry E. Warren Elementary School (K-2) David Mindess Elementary School (3-5)
Middle School(s)	Ashland Middle School (6-8)
High School(s)	Ashland High School (9-12)
Priority School Name	David Mindess Elementary School
Type of School	Elementary School
Grades Served	3-5
Year Opened	1954
Existing Square Footage	100,375
Additions	1956 – Addition 1995 –Repairs to meet code requirements 2004 and 2010 – Roof Repairs
Acreage of Site	28 acres
Building Issues	The District identified deficiencies in the following areas: <ul style="list-style-type: none"> <li>– Structural integrity</li> <li>– Mechanical systems</li> <li>– Electrical systems</li> <li>– Plumbing systems</li> <li>– Envelope</li> <li>– Windows</li> <li>– 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 as well as existing and projected overcrowding.</p>
Original Design Capacity	Unknown
2019-2020 Enrollment	659
Agreed Upon Enrollment	Study Enrollment includes the following configurations: 635 students in grades 3-5 (Preferred Schematic) 845 students in grades 2-5
Enrollment Specifics	The District and MSBA have mutually agreed upon a design enrollment of 635 students serving grades 3-5.

<b>District Information</b>	
Total Project Budget – Debt Exclusion Anticipated	Yes

<b>MSBA Board Votes</b>	
Invitation to Eligibility Period	December 13, 2017
Invitation to Feasibility Study	October 31, 2018
Preferred Schematic Authorization	June 24, 2020
Project Scope & Budget Authorization	On October 28, 2020 Board agenda
Reimbursement Rate Before Incentives	52.26%
Incentive Points	1.31 – Maintenance 2.00 – Energy Efficiency – “Green Schools” <sup>1</sup>
Total Reimbursement Rate <sup>1</sup>	55.57%

<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. If the District does not meet the requirements for the energy efficiency, the District will not qualify for these incentive points, and the MSBA will adjust the reimbursement rate accordingly.

<b>Consultants</b>	
Owner’s Project Manager (the “OPM”)	Compass Project Management, Inc.
Designer	Flansburgh Architects

**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 \$84,387,000, which includes an estimated construction cost of \$67,725,296 (\$646/sq. ft.). The Estimated Basis of Total Facilities Grant would be \$47,950,023, which excludes legal fees, OPM and Designer fees associated with scope excluded building costs, permitting fees, recording fees, costs associated with abatement of asbestos-containing floor materials, costs associated with the removal of fuel storage tanks, site costs in excess of 8% of total building cost, construction costs in excess of \$333/sq. ft. plus eligible demolition and abatement, costs associated with mailing and moving, costs in excess of the \$1,200 per student allowance for fixtures, furniture, and equipment, costs in excess of the \$1,200 per student allowance for technology, and owner’s and construction contingency costs.

Additionally, the MSBA will recover a portion of state funds previously paid to the District for the David Mindess Elementary School Roof project (200900140015G) and the David Mindess Elementary School ADA/Roof project (W200334381). The MSBA has calculated this recovery of funds to be \$372,273 and this amount has been deducted from the Estimated Maximum Total Facilities Grant and the Maximum Total Facilities Grant.

Also, costs associated with the commissioning of ineligible square footage will result in the recovery of a portion of the overall commissioning cost. The MSBA has calculated this recovery of commissioning-related funds to be \$3,368, which has been deducted from the Estimated Maximum Total Facilities Grant and the Maximum Total Facilities Grant.

<b>Project Scope and Budget Agreement</b>	
Enrollment: 635 Proposed Total Square Feet: 104,885	District's Proposed Project Budget
Project Budget <sup>1</sup>	\$80,823,179
Scope Exclusions/Ineligible Costs	-\$32,873,156
Estimated Basis of Total Facilities Grant	\$47,950,023
Reimbursement Rate	55.57%
Estimated Maximum Total Facilities Grant before Cost Recovery <sup>2</sup>	\$26,645,828
Cost Recovery	-\$375,641
Estimated Maximum Total Facilities Grant <sup>2</sup>	\$26,270,187
Potentially Eligible Owner's and Construction Contingencies	\$1,329,074
Potential Additional Grant Funds for Eligible Owner's and Construction Contingency Expenditures	\$738,566
Total Project Budget	\$84,387,000
Maximum Total Facilities Grant <sup>3,4</sup>	\$27,008,753

<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 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.

<sup>4</sup>Maximum 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 \$26,270,187; however, the District may be eligible for up to an additional \$738,566 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 \$27,008,753 for the Project Scope and Budget Agreement and Project Funding Agreement to replace the existing David Mindess Elementary School with a new facility serving grades 3-5 on the existing site.