

City of Quincy & MSBA: Quantum Elementary School

Facilities, Security & Transportation Subcommittee
May 25, 2022

Working with the MSBA

- Module 1: Eligibility Period
- Module 2: Forming the Project Team
- Module 3: Feasibility Study
- Module 4: Schematic Design
- Module 5: Funding the Project
- Module 6: Detailed Design
- Module 7: Construction

- Module 8: Completing the Project
- Module 9: Post-Occupancy Evaluation



Module 1 Eligibility Period (began 7/1/21)

Deliverables:

- | | | |
|--------------------------|---------------------------------------|-----------|
| <input type="checkbox"/> | Initial Compliance Certification | COMPLETED |
| <input type="checkbox"/> | School Building Committee | COMPLETED |
| <input type="checkbox"/> | Educational Profile Questionnaire | COMPLETED |
| <input type="checkbox"/> | Online Enrollment Projections | COMPLETED |
| <input type="checkbox"/> | Enrollment/Certification Executed | COMPLETED |
| | <i>* 380 students Grades K-5</i> | |
| <input type="checkbox"/> | Maintenance & Capital Planning Info | COMPLETED |
| <input type="checkbox"/> | Feasibility Study Local Authorization | COMPLETED |
| <input type="checkbox"/> | MSBA Board Meeting: April 27, 2022 | COMPLETED |
| <input type="checkbox"/> | Feasibility Study Agreement | COMPLETED |

Module 2 - Forming the Project Team

(began 4/27/2022)

Utilizing the MSBA procurement processes, the City of Quincy will select the Owner's Project Manager and Project Designer.

- The Request for Services (RFS) for the Owner's Project Manager is due to be published by **July 28**, with proposals due **August 17**.
- Interviews will be completed by **September 7**. The Building Committee will meet to determine the subgroup of members who will participate in the OPM interview process.
- The MSBA will review/approve the selected OPM at the **October 3** OPM Review Panel meeting and a contract can be executed.
- Once under contract, the OPM will assist with the Designer selection process on a similar timeline/process.

Module 3 - Feasibility Study

In this module, the District and its team collaborate with the MSBA to document their educational program and existing building conditions, generate an initial space summary, establish design parameters, develop and evaluate alternatives, and recommend the most cost-effective and educationally appropriate preferred solution.

At the conclusion of this module, the Owner's Project Manager will submit on behalf of the District a *Preliminary Design Program* and a *Preferred Schematic Report*. Approval by the MSBA Board of Directors is required for all projects to proceed into the next module.

Module 4 - Schematic Design

Based upon the completed *Feasibility Study*, the District and its team, in collaboration with the MSBA, develop a robust schematic design of sufficient detail to establish the scope, budget, and schedule for the proposed project.

Schematic Design approval by the MSBA Board of Directors is required for all projects in order for the MSBA to enter into a *Project Scope and Budget Agreement* and a *Project Funding Agreement* with the District.

Module 5 - Funding the Project

Based upon the completed *Feasibility Study* and *Schematic Design*, the District and MSBA staff establish the project scope, budget, schedule, and MSBA financial participation to forward to the MSBA Board of Directors for their approval.

Upon Board approval of a proposed project, the District and the MSBA enter into a *Project Scope and Budget Agreement*. Once the District secures community authorization and financial support, the MSBA and the District enter into a *Project Funding Agreement*, which defines the scope, budget and schedule for the project.

Module 6 - Detailed Design

The District and its team continue to advance the project through *Design Development*, *Construction Documentation*, and *Bidding*. The MSBA continues to monitor the project to ensure it remains on track and meets the expectation of both the District and the MSBA as defined in the *Project Funding Agreement*.

Additionally, the MSBA assigns a Commissioning Agent to the project who facilitates an intensive quality assurance process and ensures that the new or renovated building operates efficiently and as the owner intended.

Module 7 - Construction

During construction, the District and its team continue to collaborate with the MSBA to report on the progress of the project and to confirm that it remains on schedule and within budget, and meets the expectation of both the District and the MSBA as defined in the *Project Funding Agreement*.

Module 8 - Completing the Project

Once the MSBA has reimbursed the district up to 95% of the estimated grant, the MSBA will place the remaining payments to the district on hold until such time as the district has submitted all materials required, an audit has been completed and the Board of Directors has approved the audit.

Elementary School MSBA Projects

	New Doors & Windows	New Roofs	New Boilers
Atherton Hough			2017 <ul style="list-style-type: none"> • \$967,121 • 66.12% reimbursement
Beechwood Knoll	2018 <ul style="list-style-type: none"> • \$4,736,236 • 68.96% reimbursement 	2017 (costs included in New Doors & Windows)	2017 <ul style="list-style-type: none"> • \$723,785 • 66.12% reimbursement
Lincoln Hancock	2015 <ul style="list-style-type: none"> • \$2,521,000 • 71.16% reimbursement 		
Merrymount	2015 <ul style="list-style-type: none"> • \$880,000 • 69.74% reimbursement 	2016 <ul style="list-style-type: none"> • \$2,015,909 • 68.96% reimbursement 	2017 <ul style="list-style-type: none"> • \$994,133 • 66.12% reimbursement
Parker	2015 <ul style="list-style-type: none"> • \$1,310,000 • 71.16% reimbursement 		
Wollaston	2015 <ul style="list-style-type: none"> • \$963,000 • 69.74% reimbursement 		2017 <ul style="list-style-type: none"> • \$856,976 • 66.12% reimbursement

Middle & High School MSBA Projects

	Core Projects (New)	New Doors & Windows	New Roofs (Partial)
Central	New building opened October 2013 <ul style="list-style-type: none"> • \$50,000,000 • 80% reimbursement 		
Sterling/South~West	New building opened June 2019 <ul style="list-style-type: none"> • \$59,000,000 • 73.22% reimbursement 		
NQHS		2015 <ul style="list-style-type: none"> • \$4,076,000 • 69.74% reimbursement 	2018 <ul style="list-style-type: none"> • \$1,774,617 • 68.33% reimbursement
QHS	New building opened 2010 <ul style="list-style-type: none"> • \$127,000,000 • 90% reimbursement 		

Feasibility Study Budget

(appropriated by City Council 3/7/2022)

\$1.5 million total

- ❑ \$400,000 for Owner's Project Manager (27%)
- ❑ \$750,000 for Design/Architect (50%)
- ❑ \$300,000 for Environmental & Site Testing (20%)
- ❑ \$ 50,000 Other (3%)

(% breakdown based on South~West MS cost reconciliation)

MSBA Reimbursement Rate Factors

Reimbursement rates are calculated using a formula from Massachusetts General Law, Chapter 70B section 10.

All districts start at a Base Rate of 31 percentage reimbursement points which may be adjusted based on three factors:

- ❑ Community Income: the district's per capita income as a percent of statewide average per capita income.
- ❑ Community Property Wealth: the district's per capita equalized property valuations as a percent of statewide average per capita valuations.
- ❑ Community Poverty: measured by the district's proportion of low income students, as defined by federal eligibility for free or reduced price lunch, as a percent of the statewide average proportion of low income students.

The last step in the reimbursement rate calculation process is for the MSBA to determine eligibility for Incentive Points:

- ❑ High Efficiency Green School Program
- ❑ Best Practices for Routine and Capital Maintenance
- ❑ Overlay Zoning (MGL 40R or 40S)
- ❑ Renovation/Re-use of Existing Facilities
- ❑ Establishing a Maintenance Trust

The sum of the Base Rate, plus additional points, if any, from the three community socioeconomic factors, plus Incentive Points, results in the MSBA's reimbursement rate for a project.

Sustainable Building with the MSBA

- ❑ The MSBA has established several sustainable green programs for all MSBA-funded projects, with an increased emphasis on reducing energy and water consumption for new and major renovation/addition projects. The MSBA also requires and pays for the entire cost of building commissioning for all MSBA-funded projects to ensure that these buildings operate efficiently and as designed.
- ❑ The MSBA's Green Schools Program provides incentives to increase the energy efficiency and sustainability, by exceeding Massachusetts Energy base code by 20% for 2 additional reimbursement points. All projects are required to register for the most recent version of LEED-S or NE-CHPS and exceed Massachusetts Energy base code by 10%.