

Andover West Elementary School

OWNER'S PROJECT MANAGEMENT SERVICES



PMA Consultants

May 13, 2019

MEET THE TEAM



Chris Carroll – Project Executive

Executive oversight.



Natalie Robichaud – Assistant Project Manager

OPM, project and document controls.



Steve Rusteika – Project Director

Project Team lead and oversight.



John Arena – Project Representative

Site management during construction.



Brian DeFilippis – Project Manager

Main point-of-contact & cost control.



Schedule Control – PK Varma

In-house schedule support.

OUR SCHOOL OPM EXPERIENCE

Arlington Cyrus E. Dallin Elementary
 Bridgewater-Raynham Regional High
 Swampscott High & Playing Fields
Hull Lillian M. Jacobs Elementary
Rochester Memorial Elementary

Arlington Stratton Elementary Green Repair
Belmont Roger E. Wellington Elementary
 Foxborough Regional Charter
 Pentucket Green Repair Program
Shrewsbury Spring St. Elementary Green Repair

Hanover High
West Barnstable Elementary Green Repair
 Tahanto Berlin-Boylston Regional Middle/High
East Somerville Community School
Weymouth William Seach Accelerated Repair

Arlington Thompson Elementary
 Easton Middle Accelerated Repair
Sudbury Nixon Elementary Accelerated Repair
 Shrewsbury Sherwood Middle
 Hudson David J. Quinn Middle

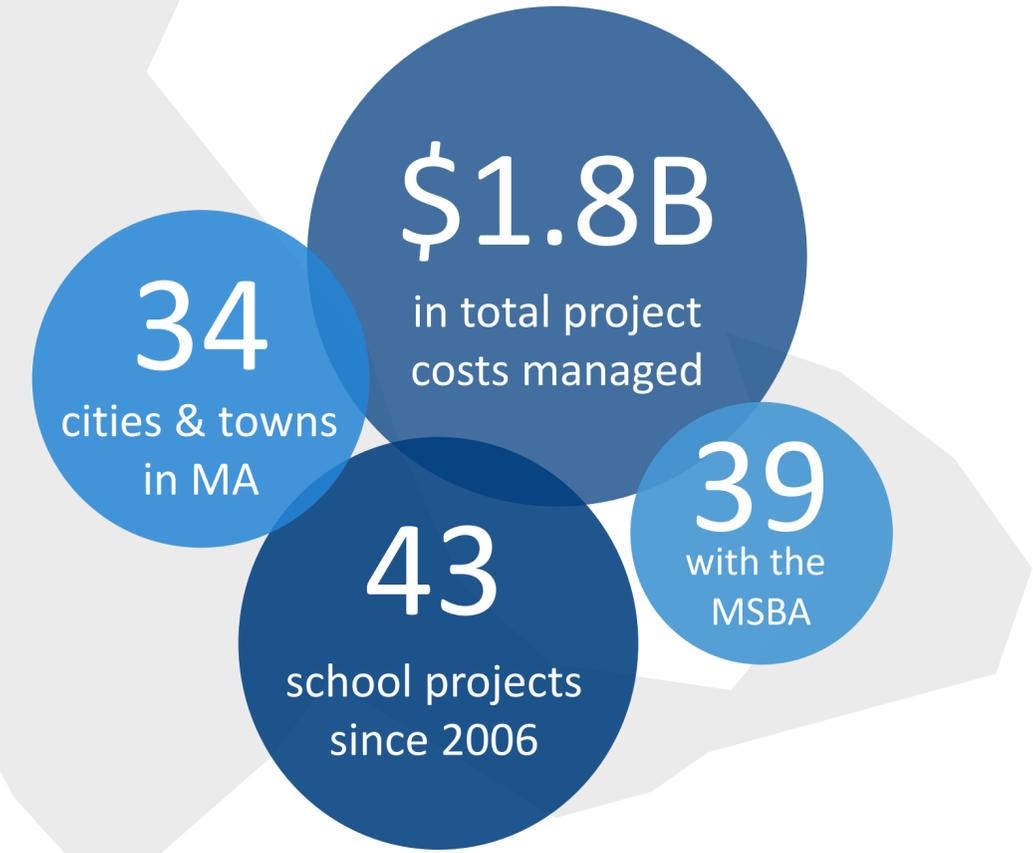
Framingham Keefe Reg. Tech High Acc. Repair
 Essex Technical High in Danvers
Norwood Callahan Elementary Acc. Repair
Quincy Francis-Parker & Lincoln-Hancock Acc. Repairs
 North Reading Middle/High

Lawrence Junior High Accelerated Repair
 Falmouth Morse Pond School
Carver Elementary
Ipswich Winthrop Elementary
 Saugus High

Somerville High
 Boston Arts Academy
Arlington Thompson Elementary Addition
 Catholic Memorial School in Boston
 Dennis-Yarmouth Mattacheese Middle

Danvers Ivan G. Smith Elementary
Shrewsbury Beal Early Childhood Center
Wareham Minot Forest Elementary
East Bridgewater Central Elementary Acc. Repair
Rockland Jefferson Elementary

Sharon High
Easton Center Elementary
Norfolk H. Olive Day Acc. Repair



TOWN OF ANDOVER RELATIONSHIP



Andover Municipal
Services Facility



Andover Ballardvale
Fire Station

WORKING WITH THE MSBA

MSBA MODULES OVERVIEW

- MSBA approval enables project to move on to next phase
- MSBA Board Dates determine project schedule prior to construction

MBSA GRANT PROGRAM

- Town Reimbursement Rate
- Cost Caps
- Ineligible Project Costs
- Certified Enrollment Agreement(s)

MONTHLY MSBA SUBMITTALS (ALL PHASES)

- Progress Payment “ProPay” System Requests
- OPM Reports



WORKING WITH THE MSBA



MSBA REIMBURSEMENT RATE

All projects start with **Base Points** (31), plus points from three **Socioeconomic Factors** for the District, plus any applicable **Incentive** points. The sum of these points = **MSBA Reimbursement Rate Calculation**.

COMMUNITY INCOME FACTOR

The district's per capita income as a percent of statewide average per capita income.

COMMUNITY PROPERTY WEALTH FACTOR

The district's per capita equalized property valuations as a percent of statewide average per capita valuations.

COMMUNITY POVERTY FACTOR

The district's per capita income as a percent of statewide average per capita income.

**These socioeconomic factors are derived using information from the Department of Revenue (DOR) or the Department of Education for each District.*

<u>MSBA Reimbursement Rate Calculation</u>	
Base Points	31.00
Income Factor	0.63
Property Wealth Factor	8.84
Poverty Factor*	-
<i>Subtotal: Reimbursement Rate Before Incentives</i>	40.47

MSBA REIMBURSEMENT RATE = **40.47%**
(Before Incentive points)

MSBA REIMBURSEMENT RATE

INCENTIVE POINTS

Andover likely eligible for the following:

- Best Practices for Routine and Capital Maintenance (1-2 points)
- Major Reconstruction or Reno/Reuse (1-5 points)
- Energy Efficiency “Green Schools” (1-2 points)

Potential Incentive Points = 3-9 points

<u>Incentive Points</u>		
	Maintenance (0-2)	TBD -
Only projects invited to Capital Pipeline prior to 1/2/17	CM @ Risk (0-1)	N/A -
	Newly Formed Regional District (0-6)	N/A -
	Major Reconstruction or Reno/Reuse (0-5)	TBD -
	Overlay Zoning 40R & 40S (0-1)	N/A -
Overlay Zoning 100 units or 50% of units for 1, 2 or 3 family structures (0-0.5)		N/A -
	Energy Efficiency - "Green Schools" (0 or 2)	TBD -
Only projects invited to Capital Pipeline prior to 1/2/16	Model Schools (5)	N/A -
	Total Incentive Points	3-9 -
	MSBA Reimbursement Rate	40.47

MSBA ELIGIBLE COSTS

The MSBA reimbursement rate is based on *eligible costs* versus *ineligible costs*. **Ineligible costs** are any costs that are not core to the Education Program.

Examples of Ineligible Costs*

- \$333/SF Current Reimbursable Cost Cap
- Site Costs over 8% of Building Cost
- SF Exceeding Net to Gross Ratio
- Asbestos Floor Tile Abatement
- Moving or Swing Space Costs
- Legal Fees
- Land Acquisition & Permitting Costs
- Offsite Costs (e.g. demo on separate site)
- Furniture/Tech over \$2400/student
- Soft Costs over 20% of Construction Cost
- Auditoriums
- Gymnasiums over 6,000SF & athletic equipment
- OPM Basic Services Costs over 3.5% of Construction Cost
- Designer Basic Services Costs over 10% of Construction Cost



The Authority reserves its right to disallow any costs associated with any change order that deviates from the scope of the project, as determined by the Authority pursuant to the Project Scope and Budget Agreement.

Any costs determined by the Authority to be ineligible pursuant to M.G.L. c. 70B, St. 2004, c. 208, 963 CMR 2.00, the MSBA Audit Guidelines, or any other policy, rule, or guideline of the Authority.

**This is not an inclusive list of all ineligible costs.*

MSBA DESIGN ENROLLMENT

Maximum Enrollment = 925 K-5 Students

- MSBA Assumes 8% SPED
- MSBA assumes 85% Space Utilization
- Space Summary includes Growth Opportunities
- Space Summary assumes full-day Kindergarten (reimbursable space) unless other specified in Education Program

Pre-K enrollment is not included in design enrollment for options studied during Feasibility Study and is based on current Pre-K enrollment.

Pre-K space is reimbursable up to the current enrollment (not inclusive of net-to-gross ratio and FF&E/IT of \$2400/student).

- *If Andover decides to increase Pre-K enrollment from current enrollment, the cost will be on the District.*



In addition to significant building issues related to outdated building systems and inadequate educational space, enrollment projections completed by MSBA indicate a significant growth in elementary enrollment district-wide and the need for West Elementary School to absorb this growth in enrollment. The MSBA and the Town agreed that the design enrollment of the proposed project at West Elementary School shall be based on **an enrollment of no more than 925 students in grades K-5 with the potential of a preK addition** to the building design and construction.

MONTHLY MSBA SUBMITTALS

PROGRESS PAYMENT “PROPAY” SYSTEM

- MSBA’s online “pay-as-you-go” system
- Only 1 request can be submitted monthly for reimbursement on eligible project costs
- Budget Revision Requests submitted to ProPay as well
- Invoices may need to be submitted multiple times for reconsideration of eligibility

ONLINE OPM REPORTS

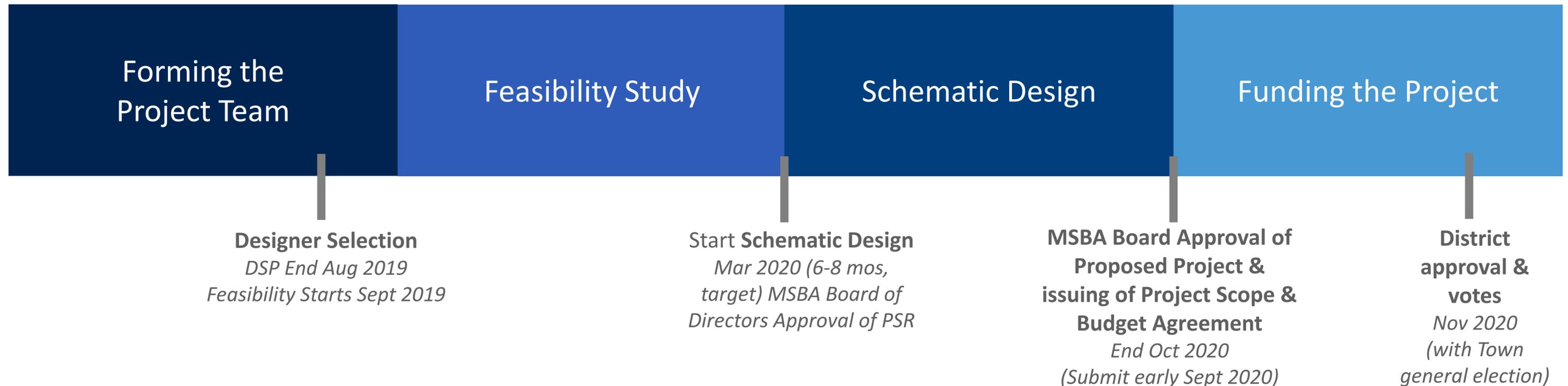
PMA will submit monthly Online OPM Reports to the MSBA, containing the following:

- Budget Info
- Cash Flow Data
- Schedule Updates
- OPM/Designer/CM Activities
- ***Access Request Forms*** signed/submitted to MSBA



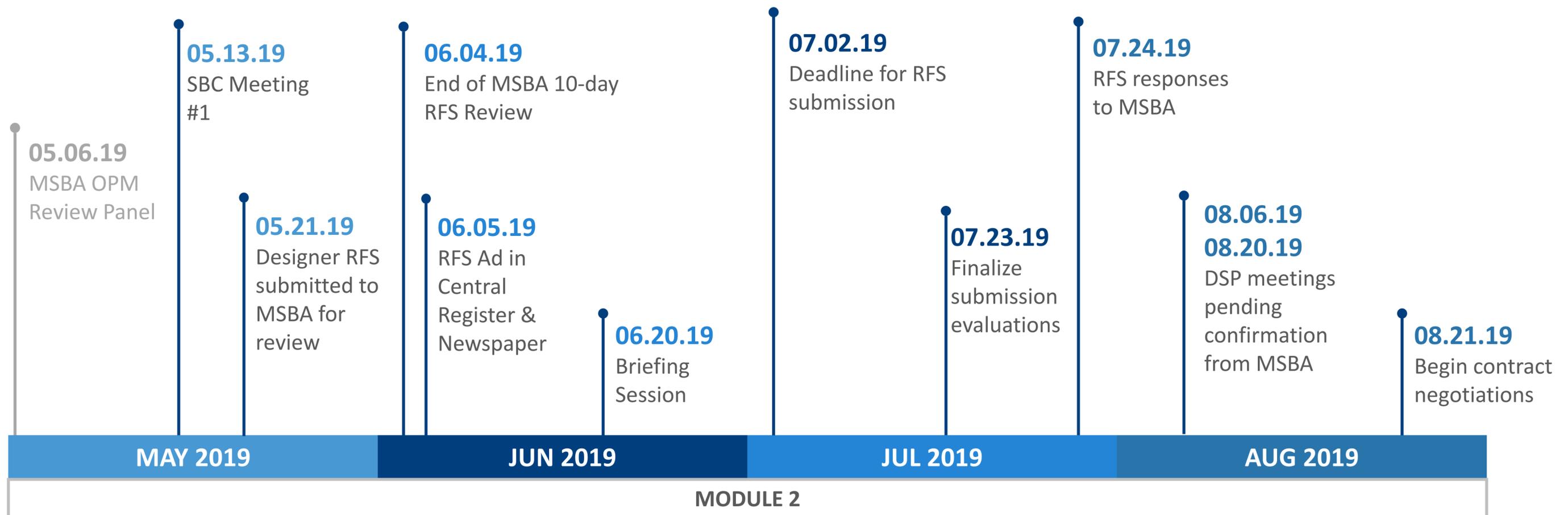
NEXT STEPS FOR WEST ELEMENTARY

Feasibility Study 8-10 months



**All dates are tentative and subject to change based on district and MSBA schedules.*

DESIGNER RFS TIMELINE



**All dates are tentative and subject to change based on district and MSBA schedules.*

DESIGNER SELECTION

We're here to assist the Town of Andover with the selection of the right design team for the Educational Program and Community.



Developing the Designer RFS

We'll work with you to ensure key project elements and needs are captured in the RFS, including the potential for model school eligibility



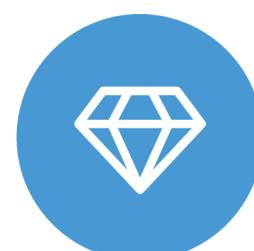
Evaluate Respondents

Each design firm will be evaluated to highlight the pros and cons of each & through reference checks will be completed



Designer Selection Panel (DSP)

We'll work to prepare Town Representatives (3) for their participation in the MSBA DSP process



The Right Fit

The best firm will have the most applicable experience and be responsive to your RFP

DESIGNER SELECTION

	Designer 1	Designer 2	Designer 3	Designer 4	Designer 5	Designer 6	Designer 7	Designer 8
K-12 MSBA Experience	●	●	●	●	●	●	●	●
Active MSBA Projects	●	●	●	●	●	●	●	●
MGL 149/149a Experience	●	●	●	●	●	●	●	●
References	●	●	●	●	●	●	●	●
Lead Architect/Team Experience	●	●	●	●	●	●	●	●
MEPFP Consultant Experience	●	●	●	●	●	●	●	●
Office Location	●	●	●	●	●	●	●	●
Application Quality	●	●	●	●	●	●	●	●
Educational Planning	●	●	●	●	●	●	●	●
Alternate & Restricted Site	●	●	●	●	●	●	●	●
Elementary Experience	●	●	●	●	●	●	●	●
Similar Scope & Size Project Experience	●	●	●	●	●	●	●	●
Phasing & Occupied Site Experience	●	●	●	●	●	●	●	●
Grade Reconfiguration	●	●	●	●	●	●	●	●
Community Involvement Incorporated in Design	●	●	●	●	●	●	●	●
	(13) ● (5) ● (12) ● (15) ● (10) ● (14) ● (13) ● (9) ●							
	(2) ● (8) ● (2) ● 0 ● (3) ● 0 ● 0 ● (5) ●							
	0 ● (2) ● (1) ● 0 ● (2) ● (1) ● (2) ● (1) ●							

FEASIBILITY STUDY: IMPORTANT DOCUMENTS

01

The **Preliminary Design Program (PDP)** and **Preferred Schematic Report (PSR)** are submitted to the MSBA

03

A **master budget** and budget tracking document/reports are used from the start of the project through all project phases



ED PROGRAM



PDP & PSR



SCHEDULE



BUDGET

The **Education Program** is the first step in the feasibility study and will be the driving factor for the duration of the study

02

A **master schedule** and schedule control documents/reports are used from the start of the project through all project phases

04

EDUCATION PROGRAM

The **Education Program** will become a key tool for Feasibility Study through Design Development.

1

Assess Current Education Program

Review against projected enrollment

3

District drafts Education Program

ELT completes Draft by end of August (target)

2

Assign Educational Leadership Team (ELT)

If applicable; include Department Heads from various School Departments

4

Work with Designer & Educational Planner

ELT works with Designer (& educational planner) to refine Education Program during Feasibility Study

MSBA MODEL SCHOOL PROGRAM



Sherwood Middle School is one of the schools PMA worked on that became a model school.

MSBA MODEL SCHOOLS

We understand your Bancroft Elementary School is a model school and you are looking at the potential for West Elementary School to also be a model school.

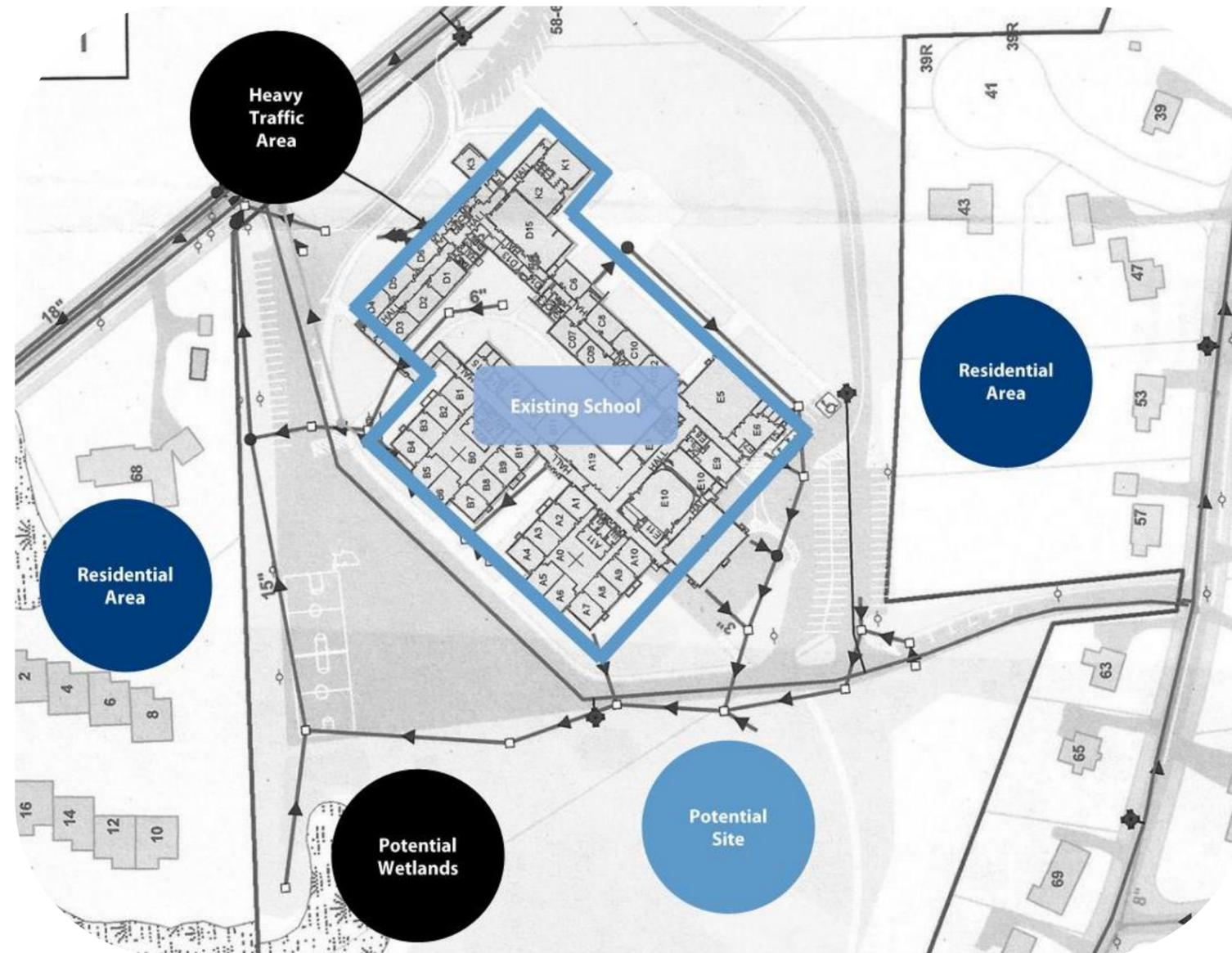
ANTICIPATED CHALLENGES

Site considerations, designer selection, integrating specific program needs in the Education Program, scaling design to meet future enrollment.

NEXT STEPS

- Reference the potential for a model school in Designer RFS; Include model school experience in Evaluation Criteria.
- Work with MSBA to determine how the current model school criteria can support West Elementary's projected enrollment (+/- 20% enrollment of model school).

WEST ELEMENTARY SITE CHALLENGES



SITE CHALLENGES ANTICIPATED

- Potential site bound by residential areas
- Possible wetlands in the site vicinity & site grading
- Site located on a busy street – traffic management & parking concerns
- Construction impacts to abutters and proximity to existing school (minimize disruption)
- Maintain safe project site for students, faculty, staff, and community
- Location of building entrance and student safety



PMA Consultants



Questions?

Thank you!

Chris Carroll

Project Executive

PMA Consultants

781.964.9260

ccarroll@pmaconsultants.com

Steve Rusteika

Project Director

PMA Consultants

508.725.7666

srusteika@pmaconsultants.com

Brian DeFilippis

Project Manager

PMA Consultants

617.756.6727

bdefilippis@pmaconsultants.com