

Massachusetts School Building Authority

Deborah B. Goldberg
Chairman, State Treasurer

James A. MacDonald
Chief Executive Officer

John K. McCarthy
Executive Director / Deputy CEO

June 7, 2018

The Honorable Dr. Yvonne M. Spicer, Mayor
City of Framingham
150 Concord Street, Room 121
Framingham, MA 01702

Re: City of Framingham, Fuller Middle School

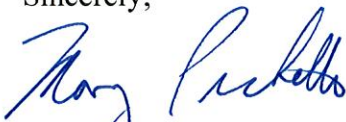
Dear Mayor Spicer:

The Massachusetts School Building Authority (the "MSBA") is forwarding review comments for the Module 3 Feasibility Study Preferred Schematic Report submission for the Fuller Middle School project, received by the MSBA on May 9, 2018.

Responses to the attached comments shall be forwarded to the assigned Project Coordinator, Allison Jones (Allison.Jones@MassSchoolBuildings.org), through the Owner's Project Manager. Please review and return responses within 14 days of receipt of this letter.

If you have any questions or comments, please do not hesitate to contact Fenton Bradley (Fenton.Bradley@MassSchoolBuildings.org).

Sincerely,



Mary Pichetti
Director of Capital Planning

Attachments:

Attachment 'A' Preferred Schematic Report Review Comments

Attachment 'B' Preferred Schematic Report Space Summary Review Comments

Cc: Legislative Delegation
Dennis L. Giombetti, Chair, City Councilor
Jennifer A. Pratt, Assistant Chief Financial Officer, City of Framingham
Adam Freudberg, Chair, Framingham School Committee

Page 2
June 7, 2018
Fuller Middle School

Dr. Robert A. Tremblay, Superintendent, Framingham Public Schools
Dr. Frank Tiano, Assistant Superintendent for Community Development and
Engagement, Framingham Public Schools
Nancy Piasecki, Executive Director of the Office of the Superintendent,
Framingham Public Schools
Matthew Torti, Director of Buildings and Grounds, Framingham Public Schools
Carol Brodeur, Executive Assistant, Office of Building and Grounds,
Framingham Public Schools
Joel G. Seeley, Owner's Project Manager, Symmes Maini & McKee Associates
Jonathan Levi, Jonathan Levi Architects, LLC
File: 10.2 Letters (Region 4)

ATTACHMENT A
MODULE 3 – PREFERRED SCHEMATIC REPORT REVIEW COMMENTS

District: City of Framingham
School: Fuller Middle School
Owner’s Project Manager: Symmes Maini & McKee Associates, Inc.
Designer Firm: Jonathan Levi Architects, LLC
Submittal Due Date: May 9, 2018
Submittal Received Date: May 9, 2018
Review Date: May 9- June 5, 2018
Reviewed by: F. Bradley, C. Alles, J. Jumpe

MSBA REVIEW COMMENTS

The following comments¹ on the Preferred Schematic Report submittal are issued pursuant to a review of the project submittal document for the proposed project presented as a part of the Feasibility Study submission in accordance with the MSBA Module 3 Guidelines.

3.3 PREFERRED SCHEMATIC REPORT

Overview of Preferred Schematic Submittal	Complete	Provided; <i>Refer to comments following each section</i>	Not Provided; <i>Refer to comments following each section</i>	Receipt of District’s Response; <i>To be filled out by MSBA Staff</i>
OPM Certification of Completeness and Conformity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Table of Contents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.3.1 Introduction	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.3.2 Evaluation of Existing Conditions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.3.3 Final Evaluation of Alternatives	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.3.4 Preferred Solution	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.3.5 Local Actions and Approval Certification	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

¹ The written comments provided by the MSBA are solely for purposes of determining whether the submittal documents, analysis process, proposed planning concept and any other design documents submitted for MSBA review appear consistent with the MSBA’s guidelines and requirements, and are not for the purpose of determining whether the proposed design and its process may meet any legal requirements imposed by federal, state or local law, including, but not limited to, zoning ordinances and by-laws, environmental regulations, building codes, sanitary codes, safety codes and public procurement laws or for the purpose of determining whether the proposed design and process meet any applicable professional standard of care or any other standard of care. Project designers are obligated to implement detailed planning and technical review procedures to effect coordination of design criteria, buildability, and technical adequacy of project concepts. Each city, town and regional school district shall be solely responsible for ensuring that its project development concepts comply with all applicable provisions of federal, state, and local law. The MSBA recommends that each city, town and regional school district have its legal counsel review its development process and subsequent bid documents to ensure that it is in compliance with all provisions of federal, state and local law, prior to bidding. The MSBA shall not be responsible for any legal fees or costs of any kind that may be incurred by a city, town or regional school district in relation to MSBA requirements or the preparation and review of the project’s planning process or plans and specifications.

3.3.1 INTRODUCTION

Provide the following Items		Complete; <i>No response required</i>	Provided; <i>District's response required</i>	Not Provided; <i>District's response required</i>	Receipt of District's Response; <i>To be filled out by MSBA Staff</i>
1	Overview of the process undertaken since submittal of the Preliminary Design Program that concludes with submittal of the Preferred Schematic Report, including any new information and changes to previously submitted information	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Summary of updated project schedule, including				
	a) Projected MSBA Board of Directors Meeting for approval of Project Scope and Budget Agreement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) Projected Town/City vote for Project Scope and Budget Agreement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c) Anticipated start of construction	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d) Target move in date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Summary of the final evaluation of existing conditions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Summary of final evaluation of alternatives	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Summary of District's preferred solution	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	A copy of the MSBA Preliminary Design Program project review and corresponding District response	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MSBA Review Comments:

4) Although a detailed "Concept Options Evaluation Matrix" was included, it is noted that subsequent to receiving this submittal, the MSBA requested additional information that further describes and summarizes the Final Evaluation of Options. Information was requested for each option identified in the preferred schematic phase including a detailed narrative that clearly documents the reason(s) why each option was eliminated from further consideration. Please acknowledge.

No further review comments for this section.

3.3.2 EVALUATION OF EXISTING CONDITIONS

Provide the following Items		Complete; <i>No response required</i>	Provided; <i>District's response required</i>	Not Provided; <i>District's response required</i>	Receipt of District's Response; <i>To be filled out by MSBA Staff</i>
1	A narrative of any changes resulting from new information that informs the conclusions of the evaluation of the existing conditions and its impact on the final evaluation of alternatives	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Provide the following Items		Complete; <i>No response required</i>	Provided; <i>District's response required</i>	Not Provided; <i>District's response required</i>	Receipt of District's Response; <i>To be filled out by MSBA Staff</i>
2	If changes are substantive, provide an updated Evaluation of Existing Conditions and identify as final. Identify additional testing that is recommended during future phases of the proposed project and indicate when the investigations and analysis will be completed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MSBA Review Comments:

No review comments for this section.

3.3.3 FINAL EVALUATION OF ALTERNATIVES

Include at least three potential alternatives, with at least one renovation and/or addition option. Include the following for each alternative where appropriate:

Provide the following Items		Complete; <i>No response required</i>	Provided; <i>District's response required</i>	Not Provided; <i>District's response required</i>	Receipt of District's Response; <i>To be filled out by MSBA Staff</i>
1	An analysis of each prospective site including:				
	a) Natural site limitations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) Building footprint(s)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c) Athletic fields	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d) Parking areas and drives	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	e) Bus and parent drop-off areas	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	f) Site access and surrounding site features.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Evaluation of the potential impact that construction of each option will have on students and measures recommended to mitigate impact	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Conceptual architectural and site drawings that satisfy the requirements of the education program	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	An outline of the major building structural systems	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	The source, capacities, and method of obtaining all utilities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	A narrative of the major building systems	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	A proposed total project budget and a construction cost estimate using the Uniformat II Elemental Classification format (to as much detail as the drawings and descriptions permit, but no less than Level 2)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Permitting requirements and associated approval	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Provide the following Items		Complete; <i>No response required</i>	Provided; <i>District's response required</i>	Not Provided; <i>District's response required</i>	Receipt of District's Response; <i>To be filled out by MSBA Staff</i>
	schedule				
9	Proposed project design and construction schedule including consideration of phasing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	Completed Table 1 – MSBA Summary of Preliminary Design Pricing spreadsheet	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MSBA Review Comments:

No further review comments for this section.

3.3.4 PREFERRED SOLUTION

Provide the following Items		Complete; <i>No response required</i>	Provided; <i>District's response required</i>	Not Provided; <i>District's response required</i>	Receipt of District's Response; <i>To be filled out by MSBA Staff</i>
1	Educational Program				
	a) Summary of key components and how the preferred solution fulfills the educational program	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) Design responses including desired features and/or layout considerations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c) Proposed variances to, and benefits of, any changes to the current grade configuration (if any) and a related transition plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Preferred Solution Space Summary				
	a) Updated MSBA Space Summary spreadsheet	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) Itemization and explanation of variations from the initial space summary (and MSBA review) included in the Preliminary Design Program	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Preliminary NE-CHPS or LEED-S scorecard	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Conceptual floor plans of the preferred solution, in color that are clearly labeled to identify educational spaces	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Clearly labeled site plans of the preferred solution including, but not limited to:				
	a) Structures and boundaries	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) Site access and circulation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c) Parking and paving	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d) Zoning setbacks and limitations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Provide the following Items		Complete; <i>No response required</i>	Provided; <i>District's response required</i>	Not Provided; <i>District's response required</i>	Receipt of District's Response; <i>To be filled out by MSBA Staff</i>
	e) Easements and environmental buffers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	f) Emergency vehicle access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	g) Safety and security features	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	h) Utilities	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	i) Athletic fields and outdoor educational spaces (existing and proposed)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	j) Site orientation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	An overview of the Total Project Budget and local funding including the following:				
	a) Estimated total construction cost	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) Estimated total project cost	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c) Estimated funding capacity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d) List of other municipal projects currently planned or in progress	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	e) District's not-to-exceed Total Project Budget	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	f) Brief description of the local process for authorization and funding of the proposed project	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	g) Estimated impact to local property tax, if applicable	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	h) Completed MSBA Budget Statement	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Updated Project Schedule including the following projected dates:				
	a) Massachusetts Historical Commission Project Notification Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) MSBA Board of Directors meeting for approval to proceed into Schematic Design	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c) MSBA Board of Directors meeting for approval of project scope and budget agreement and project funding agreement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d) Town/City vote for project scope and budget agreement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	e) Design Development submittal date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	f) MSBA Design Development Submittal Review (include required 21-day duration)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	g) 60% Construction Documents submittal date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	h) MSBA 60% Construction Documents Submittal Review (include required 21-day duration)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	i) 90% Construction Documents submittal date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Provide the following Items		Complete; No response required	Provided; District's response required	Not Provided; District's response required	Receipt of District's Response; To be filled out by MSBA Staff
j)	MSBA 90% Construction Documents Submittal Review (include required 21-day duration)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k)	Anticipated bid date/GMP execution date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
l)	Construction start	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
m)	Move-in date	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
n)	Substantial completion	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MSBA Review Comments:

1a) *The submittal indicates the District may develop a new school scheduling method as the school transitions to a S.T.E.A.M. model. Please note that modifying the school scheduling method may change the building's utilization rate. In response to these review comments, please list alternative scheduling methods that may be proposed as the school transitions to a S.T.E.A.M. model.*

The information provided also indicates that the nine ELL classrooms and nine science classrooms proposed by the District will be occupied for classroom instruction four out of the six scheduling blocks. It appears that based on the information provided, this may result in a utilization rate of 66% for these spaces. The MSBA notes that the overall utilization associated with the proposed program is approximately 64% inclusive of academic classrooms, art room, and the three vocations and technology spaces. Further, if one of two gym stations and one of the two music rooms is in use, and a class is conducting research in the media center, then the overall utilization drops below 60%. Please note the MSBA targets an overall utilization rate of 85%. Please seek additional opportunities to increase efficiencies by reducing the overall number of classrooms; and increase flexibility and utilization by furnishing 'Maker Space' features into the science classrooms and reducing project areas in the common areas by providing larger science classrooms; in addition, indicate the average class sizes that will be anticipated for the English Second Language and Transitional Bilingual Education classes.

2a) *Please refer to detailed comments in "Attachment B". Additionally, MSBA staff has updated its space summary template to include a new section titled Non-Programmed Spaces, which includes the following categories:*

- *Other occupied rooms;*
- *Unoccupied MEP spaces;*
- *Unoccupied closets, supply rooms, and storage rooms;*
- *Toilet rooms;*
- *Circulation, which includes: corridors, stairs, ramps, and elevators; and*
- *Remaining areas, which includes exterior walls, interior partitions, chases, and other areas not listed above.*

Areas associated with the 'non-programmed spaces' are required for schematic design and all subsequent submittals that include a space summary. Please see Project Advisory 52 for additional information. Please acknowledge.

3) *The submittal indicates a total goal of 43 credits using USGBC LEED-V4, including 6 credits in the Energy & Atmosphere "Optimize Energy Performance" category. Note that 43 points in LEED-V4*

reaches the minimum required for all MSBA core projects. The proposed credits in ‘Optimize Energy’ are below the apparent threshold to achieve the minimum requirements (exceeding code by 20%) required applying additional (provisional) incentives to the District’s reimbursement rate, additional information is required. If the District intends that MSBA provide a grant that includes the 2% additional reimbursement in the following project Scope and Budget phase of the study, please provide detailed information that illustrates how the minimum thresholds intend to be achieved.

Refer to MSBA Project Advisory #41 “Update to the MSBA’s Sustainable Building Design Policy” for more information. Acknowledge and confirm the District’s intent and that the proposed project will be designed to meet or exceed the criteria set forth in project Advisory #41.

5e) In response to these review comments, please confirm whether or not easements exist on the site that may impact further site development for a potential project.

5h) Not provided. Please submit.

5i) Provide information associated with the proposed outdoor education spaces in subsequent submissions. Please acknowledge.

6a, b) Subsequent to receiving this submittal, the MSBA requested additional information associated with the increased estimated project costs from the Preliminary Design Program (PDP) phase to the Preferred Schematic Report (PSR) phase, including, but not limited to a high level description and summary of any changes in project scope, square footage, and site development. It is noted MSBA received the requested information on May 18, 2018 by email. Please incorporate this information as part of the response to these review comments.

6h) A budget statement was included with this submittal; however the post-construction budget column has not been completed. Please complete and submit to MSBA.

7m) Not provided. Please submit.

No further review comments for this section.

3.3.5 LOCAL ACTIONS AND APPROVALS

Provide the following Items		Complete; No response required	Provided; District’s response required	Not Provided; District’s response required	Receipt of District’s Response; To be filled out by MSBA Staff
1	Certified copies of the School Building Committee meeting notes showing specific submittal approval vote language and voting results, and a list of associated School Building Committee meeting dates, agenda, attendees and description of the presentation materials.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Signed Local Actions and Approvals Certification(s):				
	a) Submittal approval certificate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) Grade reconfiguration and/or redistricting approval certificate (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Provide the following to document approval and public notification of school configuration changes associated with the proposed project:				

Provide the following Items		Complete; <i>No response required</i>	Provided; <i>District's response required</i>	Not Provided; <i>District's response required</i>	Receipt of District's Response; <i>To be filled out by MSBA Staff</i>
a)	A description of the local process required to authorize a change to the existing grade configuration or redistricting in the district	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b)	A list of associated public meeting dates, agenda, attendees and description of the presentation materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c)	Certified copies of the governing body (e.g. School Building Committee) meeting notes showing specific grade reconfiguration and/or redistricting, vote language, and voting results if required locally	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d)	A certification from the Superintendent stating the District's intent to implement a grade configuration or consolidate schools, as applicable. The certification must be signed by the Chief Executive Officer, Superintendent of Schools, and Chair of the School Committee.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MSBA Review Comments:

No review comments for this section.

- *The MSBA offers the following information to assist the District and its Owner's Project Manager in completing the total project budget template that is required as part of its Schematic Design submittal.*
 - *The MSBA issues project advisories from time to time, as informational updates for Districts, Owner's Project Managers ("OPM"), and Designers in an effort to facilitate the efficient and effective administration of proposed projects currently pending review by the MSBA. The advisories can be found on the MSBA's website. In response to these review comments, please confirm that the District's consultants have reviewed all project advisories and they have been incorporated into the proposed project as applicable.*
 - *The PSR indicates District is targeting MSBA approval of its proposed project scope and budget at the October board meeting. The District's reimbursement rate before incentives for calendar year 2018 is 57.83%. Please note that the MSBA updates District reimbursement rates annually and applies the reimbursement in effect at the time the MSBA Board of Directors approves a District's proposed project scope and budget. The reimbursement rate is established based on statutory requirements and information provided by the Department of Revenue and the Department of Elementary and Secondary Education and is non-negotiable.*

- *Maintenance (0-2) – 1.48% This value is based on MSBA review of district provided materials regarding routine and capital maintenance programs during Eligibility Period at which time the value is finalized.*
 - *CM@Risk (0 or 1) – 1.00%. Because the District was invited to the MSBA Capital Pipeline before January 2, 2017 it would be eligible to conditionally receive one incentive point subject to the approval of the Office of the Inspector General for the District’s use of the Construction Manager at Risk construction delivery method for the Proposed Project and that the District actually used that construction delivery method for the Proposed Project.*
 - *Newly Formed Regional School District (0-6) – The District is not a newly formed or expanded regional school district as a result of working with the MSBA, therefore these incentive points do not apply.*
 - *Major Reconstruction or Reno/Reuse (0-5) – The District’s preferred solution is for new construction therefore these incentive points do not apply.*
 - *Overlay Zoning 40R & 40S (0 or 1) – Refer to Module 4, appendix 4E to review documentation requirements and to determine if this incentive point may be applicable. Please note that required authorizations must be documented prior to MSBA approval of the District’s proposed project scope and budget to be eligible to receive this incentive point.*
 - *Overlay Zoning 100 units or 50% of units for 1, 2 or 3 family structures (0 or 0.5) – Refer to Module 4, appendix 4E to review documentation requirements and to determine if this incentive point may be applicable. Please note that required authorizations must be documented prior to MSBA approval of the District’s proposed project scope and budget to be eligible to receive this incentive point.*
 - *Energy Efficiency – “Green Schools” (0 or 2) – The PSR indicates the District’s intent to achieve the 2% additional reimbursement through the MSBA Green School Program. Please note, subject to the District’s intention to meet certain energy efficiency sustainability requirements for the Proposed Project, the MSBA will provisionally include two (2) incentive points, however if the District does not ultimately qualify for some or all of these incentive points the MSBA will adjust the District’s reimbursement rate, accordingly.*
 - *The District must include negotiated costs for OPM and Designer fees for the remainder of the project as part of their Total Project Budget. In response to these review comments, please confirm that the District and its consultants will negotiate fees for the remainder of the project that are to be included in the District’s Schematic Design documents to the MSBA.*
- *Please refer to MSBA’s email dated June 1, 2018 regarding discussion at the Facilities Assessment Subcommittee meeting on May 23, 2018.*

End

MEMORANDUM

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: Staff Recommendation for policy revisions to allow for auditorium and
gymnasium spaces in excess of the MSBA Space Summary Guidelines at the
district's sole expense
DATE: November 2, 2016

Based upon review of project data and discussions with the Board of Directors, staff is recommending a policy revision to the Massachusetts School Building Authority (the "MSBA") space guidelines specifically for Auditorium and Gymnasium related spaces that are in excess of those included in the MSBA space summary guidelines.

Background

Based on project reviews in late fall 2015, the Board of Directors requested that staff provide information regarding the potential to revise the policies for space guidelines to allow for requests by districts for spaces in excess of the MSBA's guidelines at the district's sole expense. Staff presented an overview of current policies and practices at the March 16, 2016 Board of Directors meeting and followed with additional information regarding potential revisions at the March 30, 2016 Board of Directors meeting.

Based on the discussions and input received from the Board members, staff has prepared a Potential Revised Policy, included as Attachment A, which will allow districts to include spaces in excess of the MSBA's space summary guidelines at the district's sole expense for two program areas: auditorium and gymnasium. Staff has received favorable feedback regarding this proposed revision to the MSBA's policies, and as noted at the September 29, 2016 Board of Directors meeting and further reviewed at the October 19, 2016 Facilities Assessment Subcommittee meeting, staff have prepared this recommendation to revise the MSBA's policy for the Board of Directors approval.

Recommendation

Specific details are set forth in Attachment A: Potential Revised Policy – Auditorium and Gymnasium spaces above guidelines requested to support community use at district's sole expense.

Key features of the policy revision include:

- Areas in excess of the MSBA guidelines will be at the sole expense of the district;
- Community support must be demonstrated prior to MSBA approval of a district’s proposed project scope and budget;
- The MSBA will exclude from its grant the cost of the total gross square foot (“gsf”) above guidelines for these areas as shown below in the sample calculation. This amount will not change over the term of the grant even if the bids come in at a lower amount.

- High Schools:
 - Upper limits on allowable nsf in excess of guidelines include:
 - The district may choose to build an auditorium in excess of MSBA guidelines, but no more than 13,300 net square foot (“nsf”) (based upon an upper limit of 1,000 seats). The MSBA funding limit will vary depending on the agreed-upon design enrollment but will not exceed 10,400 nsf; and
 - The district may choose to build a gymnasium and related spaces in excess of MSBA guidelines, but in no event shall the gymnasium exceed 18,000 nsf. The MSBA will participate in a gymnasium of up to 12,000 nsf unless adjusted by the MSBA to increase teaching stations for enrollment and/or the educational plan.

- Middle Schools/Elementary Schools:
 - Upper limits on allowable nsf in excess of guidelines include:
 - The district may choose to build an auditorium even though the MSBA space guidelines do not include an auditorium and no portion of the design and construction of an auditorium will be reimbursed, including the stage, regardless of whether the district chooses not to include a stage in its cafetorium or gymnasium. If the district chooses to build an auditorium, the auditorium cannot be larger than 13,300 nsf; and
 - The district may choose to build a gymnasium and related spaces in excess of MSBA guidelines, but in no event shall the gymnasium itself exceed 12,000 nsf. The MSBA will participate in a gymnasium up to no more than 6,000 nsf, unless adjusted by the MSBA to increase teaching stations for enrollment and/or the education plan.

 - Sample Calculation for Auditorium space in a high school in excess of guidelines at the district’s sole expense:

Total net square footage (nsf) requested by the District	13,300 nsf
Total nsf for Auditorium Category allowed as eligible by MSBA space guidelines	10,400 nsf
Excess net square footage equals District request minus net	2,900 nsf

square footage allowable by MSBA space guidelines	
Gross square foot (gsf) exclusion = Excess net square feet times the project's grossing factor. For illustration purposes, project's sample grossing factor is 1.5	2,900 nsf x 1.5 = 4,350 gsf
Total cost of exclusion = Gross square foot times the project's total construction cost/square foot. For illustration purposes, project's total construction cost/square foot is \$375 per square foot.	4,350 gsf x \$375/gsf = \$1,631,250
Total cost of exclusion	\$1,631,250

Recommendation

MSBA staff is recommending a policy revision to the MSBA space guidelines specifically for Auditorium and Gymnasium related spaces that are in excess of those included in the MSBA space summary guidelines. This recommendation would be effective for districts that are approved to proceed into schematic design on or after January 1, 2017.

ATTACHMENT B
MODULE 3 – PREFERRED SCHEMATIC SPACE SUMMARY REVIEW

District: City of Framingham

School: Fuller Middle School

Owner’s Project Manager: Symmes Maini & McKee Associates, Inc.

Designer Firm: Jonathan Levi Architects, LLC

Submittal Due Date: May 9, 2018

Submittal Received Date: May 9, 2018

Review Date: May 9- June 5, 2018

Reviewed by: F. Bradley, C. Alles, J. Jumpe

The Massachusetts School Building Authority (the “MSBA”) has completed its review of the proposed space summary of the preferred alternative as produced by Jonathan Levi Architects and its consultants. This review involved evaluating the extent to which the Fuller Middle School’s proposed space summary conforms to the MSBA guidelines and regulations.

The MSBA considers it critical that the Districts and their Designers aggressively pursue design strategies to achieve compliance with the MSBA guidelines for all proposed projects in the new program and strive to meet the gross square footage allowed per student and the core classroom space standards, as outlined in the guidelines. The MSBA also considers its stance on core classroom space critical to its mission of supporting the construction of successful school projects throughout the Commonwealth that meet current and future educational demands. The MSBA does not want to see this critical component of education suffer at the expense of larger or grander spaces that are not directly involved in the education of students.

MSBA recognizes the benefits and the challenges associated with saving or renovating existing spaces, and may consider variations in the guidelines for renovation projects beyond those included below. Please note that any spaces in new construction or substantially renovated spaces must be compliant with MSBA space standards for both allotted area and room quantity unless otherwise approved in writing by the MSBA.

The following review is based on the submitted District’s “Preferred Option” with an agreed upon design enrollment of 630 students in grades 6-8.

The MSBA review comments are as follows:

- **Core Academic** – The District is proposing to provide a total of 45,170 net square feet (nsf) which exceeds the MSBA guidelines by 13,590 nsf. The proposed area in this category decreased by 2,400 nsf since the Preliminary Design Program submittal.

The MSBA offers the following comments regarding the proposed program:

- (21) 900 nsf general classrooms, and (9) 900 nsf ELL classrooms which exceeds the MSBA guidelines by (8) classrooms and 6,100 nsf.

- (9) Science classrooms which is 3,150 nsf and (3) classrooms in excess of the guidelines.

Based on the information provided along with the District's reported high percentage of non-English speaking students, the MSBA understands the need to provide educational spaces to support delivery of this curriculum and student support services; however, the proposed program includes (39) academic classrooms, (11) beyond the (28) include in the guidelines. This significantly contributes to the 13,590 nsf overage proposed for this category, and to an overall program with a utilization rate below 65% (refer to Attachment A Section 3.3.4 for more information). Please review the proposed program and seek opportunities to increase the efficiency of the proposed program.

- (9) Science Prep rooms which is 240 nsf and (3) rooms in excess of the guidelines.
- (5) Science Teacher Planning rooms which is 450 nsf and (5) rooms in excess of the guidelines.

The MSBA looks to the district and its Designer to continue to explore opportunities to provide shared spaces that can support delivery of the science curriculum in a more efficient program.

- (7) Classroom Breakout spaces which is 2,100 nsf in excess of the guidelines. Based on the information provided the MSBA accepts this variation to the guidelines.
- (15) 90 nsf Teacher Planning rooms which is 1,350 nsf in excess of the guidelines. Based on the information provided the MSBA accepts this variation to the guidelines. (For clarification, please indicate where larger 'Teacher Workstations' are located on the conceptual plans and further describe how these spaces differ from the proposed Teacher Planning rooms).
- (3) Small Group Seminar/Resource spaces which is (1) space and 200 nsf beyond that included in the guidelines. Prior to the MSBA accepting this variation to the guidelines please provide additional information that demonstrates why purpose of these spaces could not be met in the media center, conference room, one of the three teacher workrooms, a classroom or one of the student cohorts when not in use by the students.

If the District and its consultants need additional time to address the items above provide a date by when the items could be addressed in the response to these review comments.

- **Special Education** – The District is proposing to provide a total of 8,820 nsf which is 1,270 nsf below the MSBA guidelines. The proposed area in this category has decreased by 270 nsf since the Preliminary Design Program submittal. Please note that the Special Education program is subject to approval by the Department of Elementary and Secondary Education (DESE). The District

should provide this information for this submittal with the Schematic Design Submittal. Formal approval of the District’s proposed Special Education program by the DESE is a prerequisite for executing a Project Funding Agreement with the MSBA.

- **Art and Music** – The District is proposing to provide a total of 3,650 nsf which exceeds the MSBA guidelines by 400 nsf. Based on the information provided, which documents and supports a high student participation in the music program, and the future combining of the concert band and orchestra, the MSBA accepts this variation to the guidelines. The District should continue to seek ways to reduce overall area to align with guidelines. Please note that in subsequent submissions the MSBA will consider area beyond 400 nsf in excess of guidelines as ineligible for reimbursement. Please acknowledge.
- **Vocations & Technology** – The District is proposing to provide a total of 4,150 nsf which is below the MSBA guidelines by 2,250 nsf. The proposed area in this category has not changed since the Preliminary Design Program submittal. Based on the information provided the District’s intent is to include (3) Cohort Commons spaces totaling 4,353 nsf in the Media Center category, and reducing the square footage in this category by 2,250 nsf. The MSBA accepts this variation to the guidelines. Please note that MSBA will consider area beyond 4,150 nsf in this category as ineligible for reimbursement. Please acknowledge.
- **Health and Physical Education** – The District is proposing to provide a total of 9,985 nsf which exceeds the MSBA guidelines by 1,585 nsf. The proposed area in this category has increased by 1,800 nsf since the Preliminary Design Program submittal. This submittal indicates that on April 14, 2018 the School Building Committee voted to increase the gymnasium size to 8,300 nsf. Although the MSBA does not object to including this additional square footage in the proposed project, please note all square footage in excess of MSBA guidelines will be considered ineligible for reimbursement. Refer to the attached memorandum which outlines MSBA’s policy regarding auditorium and gym spaces beyond those included in the guidelines.

Based on the estimated preliminary costs submitted as part of the Preferred Schematic Report, the MSBA is providing the following calculation that will be reevaluated again at schematic design that gives a preliminary estimated cost associated with the ineligible spaces:

Total net square footage (nsf) requested by the District	19,985 nsf
Total nsf for Health and Physical Education Category allowed as eligible by MSBA space guidelines	8,400 nsf
Excess net square footage equals District request minus net square footage allowable by MSBA space guidelines	11,585 nsf

Gross square foot (gsf) exclusion = Excess net square feet times the project's grossing factor	11,585 nsf x 1.50 = 17,378 gsf
Total cost of exclusion = Gross square foot times the project's total construction cost/square foot	17,378 gsf x \$565/gsf = \$9,818,570
Total cost of exclusion from the Estimated Basis of Grant	\$9,818,570

- Media Center** – The District is proposing to provide a total of 6,250 nsf which exceeds the MSBA guidelines by 2,247 nsf. The proposed area in this category has increased by 4,350 nsf since the Preliminary Design Program submittal. This increase is due to the District moving (3) Cohort Commons spaces from the core academic category. The MSBA does not object to the District combining the 2,250 not used under the vocations and technology category with area allocated to this category to allow for the proposed cohort common spaces. Square footage in excess of the 6,250 nsf will be considered ineligible for reimbursement. Refer to vocations and technology above for additional information. Do not adjust MSBA guidelines in future space summary submittals just indicate the District's intent. Please acknowledge.
- Dining and Food Service** – The District is proposing to provide a total of 8,923 nsf which meets the MSBA guidelines. The proposed area in this category has not changed since the Preliminary Design Program submittal. No further action required.
- Medical** – The District is proposing to provide a total of 610 nsf which meets the MSBA guidelines. The proposed area in this category has not changed since the Preliminary Design Program submittal. No further action required.
- Administration and Guidance** – The District is proposing to provide a total of 4,940 nsf which exceeds the MSBA guidelines by 1,510 nsf. The proposed area in this category has not changed since the Preliminary Design Program submittal. As previously noted and acknowledged by the District and Design Team, based on the information provided, the MSBA does not object to the District including these spaces however square footage in excess of guidelines will be ineligible for reimbursement. No further action required.
- Custodial and Maintenance** – The District is proposing to provide a total of 2,105 nsf which meets the MSBA guidelines. The proposed area in this category has not changed since the Preliminary Design Program submittal. No further action required.
- Other** - The District is proposing to provide 10,000 nsf of auditorium and support spaces. The proposed area in this category has increased by 7,000 nsf since the Preliminary Design Program submittal. This increase is primarily due to the inclusion of the auditorium, partially offset by eliminating 3,000 nsf of existing Adult ESL offices from the scope of the project. As previously noted and acknowledged by the District and Design Team, the District may choose to build

an auditorium even though the MSBA space guidelines do not include an auditorium for middle schools and no portion of the design and construction of an auditorium will be considered eligible for reimbursement, including the stage, regardless of whether the District chooses not to include a stage in its cafetorium. If the District chooses to build an auditorium, the auditorium must not exceed 13,300 nsf. No further action required. Please see the attached memorandum for additional information.

- **Total Building Net Floor Area** –The District is proposing to provide a total of 102,603 nsf which exceeds the MSBA guidelines by 28,353 nsf. The proposed area has increased by 5,980 nsf since the Preliminary Design Program submittal. Based on the comments provided above, the MSBA will continue to work with the District and its consultants to establish an acceptable square footage that will be used to determine the limits of MSBA’s participation.
- **Total Building Gross Floor Area** – The District is proposing to provide a total of 153,905 gsf which exceeds the MSBA guidelines by 46,625 gsf. The proposed area has increased by 8,970 gsf since the Preliminary Design Program submittal. Based on the comments provided above, the MSBA will continue to work with the District and its consultants to establish and acceptable square footage that will be used to determine the limits of MSBA’s participation.

Please note the MSBA released an updated space summary template Project Advisory #52. This new template will be required to be used for the Schematic Design submittal. Please acknowledge.

Please note that upon moving forward into subsequent phases of the proposed project, the Designer will be required to provide, with each submission, a signed, updated space summary that reflects the design and demonstrates that the design remains, except as agreed to in writing by the MSBA, in accordance with the guidelines, rules, regulations and policies of the MSBA. Should the updated space summary demonstrate changes to the previous space summary include a narrative description of the change(s) and the reason for the proposed changes to the project.