



Massachusetts School Building Authority

Deborah B. Goldberg
Chairman, State Treasurer

James A. MacDonald
Chief Executive Officer

John K. McCarthy
Executive Director / Deputy CEO

October 4, 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

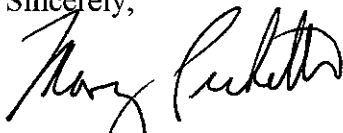
Dear Mayor Spicer:

The Massachusetts School Building Authority (the "MSBA") is forwarding review comments of the Schematic Design submission for the Fuller Middle School project, which was received by the MSBA on September 12, 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' Schematic Design Review Comments
Attachment 'B' Schematic Design Space Summary Review Comments
Space Summary Guidelines Revision Recommendation Memorandum

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October 4, 2018
Fuller Middle School

Cc: Legislative Delegation
Dennis L. Giombetti, Chair, Framingham City Council
Jennifer A. Pratt, Assistant Chief Financial Officer, City of Framingham
Adam Freudberg, Chair, Framingham School Committee
Dr. Robert A. Tremblay, Superintendent, Framingham Public Schools
Joseph Corazzini, Assistant Superintendent for Equity, Diversity, and Community
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 4 – SCHEMATIC DESIGN 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: September 12, 2018
Submittal Received Date: September 12, 2018
Review Date: September 12-26, 2018
Reviewed by: F. Bradley, C. Alles, K. Brown

MSBA REVIEW COMMENTS

The following comments¹ on the Schematic Design submittal are issued pursuant to a review of the project submittal document for the new construction of the proposed project and presented as a Schematic Design submission in accordance with the MSBA Module 4 Guidelines.

4.1 SCHEMATIC DESIGN SUBMITTAL

Overview of the Schematic Design 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>
Schematic Design Submittal Notification	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OPM Certification of Completeness and Conformity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.1.1 DESE Submittal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.1.2 Schematic Design Binder	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.1.3 Schematic Design Project Manual	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.1.4 Schematic Design Drawings	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Note that Module Four states that “MSBA will not accept incomplete submittals, submittals that have not been reviewed by the OPM or submittals for which the estimated project costs exceed the District’s project budget. Updates to the Total Project Budget that do not reflect the scope and schedule represented in the Schematic Design submittal will not be accepted. All value engineering activities must be complete, and the results incorporated into the Schematic Design documentation prior to being submitted to the MSBA.”

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.

4.1.1 DESE SUBMISSION

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	Cover Letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Special Education Delivery Methodology Letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Signed Educational Space Summary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Floor Plans	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Special Education Adjacency Table	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MSBA Review Comments:

Please note the Special Education information has been forwarded to DESE for review and approval.

No further review comments for this section.

4.1.2 SCHEMATIC DESIGN BINDER

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	Introduction				
	a) Summary of the MSBA approved Preferred Schematic	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) Community outreach overview	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c) The District's Total Project Budget for the proposed project	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d) Updated description of the project	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	e) Site Plan, Floor Plans, and Elevations	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	f) A copy of the MSBA Preferred Schematic Report review and corresponding District response	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Final Design Program				
	a) General and specific architectural characteristics desired	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) Educational space summary spreadsheets	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c) Narrative of how the proposed educational space summary supports the educational program	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d) Instructional technology (existing and proposed)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	e) Functional relationships and critical adjacencies that informed the basis of design	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	f) Security and visual access requirements	<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>
	g) Site development requirements	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	h) Description of desired features of the school	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Traffic Analysis	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Environmental and Existing Building Assessment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Geotechnical and Geo-environmental Analysis	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Code Analysis and List of Permitting and other Regulatory Filing Requirements	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Utility Analysis and Soils Analysis for on-site septic/sewage treatment facilities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Massing Study	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Narrative Building Systems Descriptions				
	a) Sustainable design elements	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) Building structure	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c) Plumbing and HVAC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d) Fire Protection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	e) Verify adequate water capacity for new system	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	f) Confirm if a fire pump will be required	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	g) Electrical	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	h) Information Technology	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	Sustainable Building Design Guideline Documents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Analysis of the design's compliance with ADA and the MAAB	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	Timeline associated with filing the Project Notification Form with Massachusetts Historical Commission ("MHC") and obtaining MHC approval prior to construction bids.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13	Room Data Sheets	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14	Proposed construction methodology (DBB / CMR)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15	District's anticipated reimbursement rate w/ incentive points	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16	Total Project Budget spreadsheet and summary of cost reconciliation of the Designer's and OPM's estimates.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17	Designer's Construction Cost Estimate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18	Independent OPM Construction Cost Estimate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19	Updated Project Work Plan – indicating changes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	a) Project Directory	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) Roles and Responsibilities	<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
	c) Communications and Document Control Procedures	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d) Designer's Work Plan Project Schedule	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20	Local Actions and Approvals Certification				
	a) Completed and signed certification	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) SBC meeting dates, agendas, and attendees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c) Certified SBC meeting notes with vote language and vote results	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d) Description of materials presented at such SBC meetings and where those materials may be viewed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MSBA Review Comments:

1e) *The information provided appears to indicate the storage area for the cafeteria is located in excess of 100 feet from the cafeteria. It is noted this proposed layout may have the potential to increase maintenance care for the District as well as increase the time required for cafeteria set-up. In response to these review comments, please clarify and confirm the location of the cafeteria storage and provide additional information associated with the daily maintenance and operation of the cafeteria.*

2b) *Refer to 'Attachment B' for detailed review comments.*

6) *It should be noted all permitting requirements and approvals must be obtained prior to construction bidding, including the release of early construction packages. Please acknowledge.*

9e,f) *The fire protection narrative provided indicates a flow test will be performed to determine if there is adequate water to serve the project without a fire pump. It is noted that the schematic design drawings indicate a fire pump room located on the first floor. MSBA notes that the project budget, including the associated MSBA grant, is determined by information in the District's Schematic Design submittal. Therefore, any costs associated with a potential fire pump should be identified prior to MSBA establishing its grant. Unidentified scope of work, additional space requirements in the building, and any costs associated with this fire pump that are not accounted for in the total project budget will not be eligible for MSBA reimbursement. Please acknowledge.*

9h) *The technology systems narrative indicates that all work installed under section 270000 shall comply with the Massachusetts State Building Code, IBC 2009. In response to these review comments, please confirm that all proposed work in this section has been designed and estimated using the latest version of the Massachusetts State Building Code.*

13) *The educational program provided indicates the makerspace and fabrication labs will be provided with both woodworking and metalworking equipment, 3-D printing, laser cutting machines, and overhead electric power drops. In response to these review comments, provide updated room data sheets that include all safety features associated with these technology spaces, including but not limited to; fire protection, emergency eyewash stations, instructor water*

controls, and automatic shutoff switches to specialized equipment. Additionally, please confirm that adequate ventilation has been provided for all specialized equipment including 3-D printers.

14) The information provided indicates the District has selected to proceed with the chapter 149a construction methodology; and has budgeted \$400,000 for pre-construction services to be provided by the selected construction management firm. It is noted by the MSBA that this proposed budget item is significantly higher than recent projects that have received a project scope and budget Board approval vote. In response to these review comments, please confirm that these costs have been reviewed by the District, provide a narrative that describes how the budget was developed, and indicate the project specific cost drivers for these estimated pre-construction management fees.

16) The proposed total project budget continues to be reviewed and will be further discussed leading up to the Project Scope and Budget Conference between the project team and MSBA staff.

No further review comments for this section.

4.1.3 SCHEMATIC DESIGN PROJECT MANUAL

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	Outline specifications in Uniformat Divisions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Itemization of all proprietary items (if any) with an explanation of each, explanation of the public interest for each item, and certification of local authorization that each item complies with state and local regulations, policies and guidelines.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

MSBA Review Comments:

1) The information provided in section 1.6 of this submittal indicates that no alternates are being proposed in the project, however, the outline specification section 011002 indicates there will be an "Add/Alternate" that may add subsurface irrigation once the existing building is demolished. Additionally, no Add/Alternates are indicated in the total project budget spreadsheet. In response to these review comments, please clarify and coordinate.

2) It is noted this submittal does not appear to include a list of proprietary items or indicate that no proprietary items are anticipated. In response to these review comments, please confirm and provide a narrative that indicates if proprietary items are being proposed in the project. Additionally, please update the MSBA in each subsequent submittal when/if this changes. Please acknowledge.

No further review comments for this section.

4.1.4 SCHEMATIC DESIGN DRAWINGS

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	Existing site plan	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Site development plan	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Schematic building floor plans	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Interior elevations of a typical general classroom, and typical Pre-K/K Classroom and typical Science Classroom/Lab as applicable.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Schematic exterior building elevations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

MSBA Review Comments:

No review comments for this section.

Additional Comments:

- *On June 27, 2018 the MSBA Board of Directors approved the District's Preferred Option C.2 for a 153,905 square foot new construction option with an estimated total project cost of \$110,556,454. This Schematic Design submittal under review shows this same option currently as a 136,790 square foot construction option with an estimated total project cost of \$98,276,878. This represents a decrease of 17,115 square feet and a decrease of \$12,279,576. In subsequent phases of the project, the Owner's Project Manager must communicate significant variation to the scope, budget, and schedule to the MSBA project team in advance of submissions. Please acknowledge.*

End

ATTACHMENT B
MODULE 4 – SCHEMATIC DESIGN 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: September 12, 2018

Submittal Received Date: September 12, 2018

Review Date: September 12-26, 2018

Reviewed by: A. Waldron, F. Bradley, C. Alles, K. Brown

The following comments¹ on the Schematic Design submittal are issued pursuant to a review of the project submittal document for the new construction of the proposed project and presented as a Schematic Design submission in accordance with the MSBA Module 4 Guidelines.

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.

The following review is based on a new construction project 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 36,000 net square feet (nsf) which exceeds the MSBA guidelines by 6,420 nsf. The proposed area in this category has decreased by 7,170 nsf since the Preferred Schematic Report submittal.

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.

The following spaces are proposed in this category:

- (21) 900 nsf General Classrooms; no change from PSR and is (1) classroom below MSBA guidelines.
- (6) ELL Classrooms; This is a reduction of (3) ELL Classrooms or 2,700 nsf since the PSR.
- (6) Science Prep rooms; This is a reduction of (3) rooms or 240 nsf since the PSR.
- (3) Science Teacher Planning rooms; This is a reduction of (3) rooms or 180 nsf since the PSR.
- (6) Science Labs; This is a reduction of (3) Science Labs or 3,180 nsf since the PSR.
- (15) 90 nsf Teacher Planning rooms; no change from PSR and is 1,350 nsf in excess of guidelines.
- (7) 290 nsf Classroom Breakout areas; no change from PSR and is 1,350 nsf in excess of guidelines.
- (1) 400 nsf Small Group Seminar areas; no change from PSR and is (1) classroom and 600 nsf below MSBA guidelines.

For the items listed above, please confirm the proposed spaces and square footage are sufficient to deliver the District's educational program. Please note, in subsequent submittals, any increase in square footage in this category will be considered ineligible for reimbursement. Please acknowledge.

- **Special Education** – The District is proposing to provide a total of 9,150 net square feet (nsf) which exceeds the MSBA guidelines by 1,600 nsf. The proposed area in this category has increased by 330 nsf since the Preferred Schematic Report submittal. Please note that the Special Education program is subject to approval by the Department of Elementary and Secondary Education (DESE) and that formal approval of the District's proposed Special Education program is a prerequisite for executing a Project Funding Agreement with the MSBA.
- **Art & Music** – The District is proposing to provide a total of 3,675 nsf which exceeds the MSBA guidelines by 425 nsf. The proposed area in this category has increased by 25 nsf since the Preferred Schematic Report submittal. As previously noted and acknowledged, any area in excess of the 400 nsf over MSBA guidelines will be considered ineligible for reimbursement. No further action required.
- **Vocations & Technology** – The District is proposing to provide a total of 3,170 nsf which is 3,230 nsf below the MSBA guidelines. The proposed area in this category has decreased by 980 nsf since the Preferred Schematic Report submittal. This decrease in square footage is primarily due to the removal of the Tech Classroom. In response to these review comments, please confirm the proposed square footage is sufficient to deliver the District's educational program.
- **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 not changed since the Preferred Schematic Report submittal. As

previously noted and acknowledged, all area in excess of MSBA guidelines will be considered ineligible for reimbursement. No further action required.

- **Media Center** – The District is proposing to provide a total of 6,280 nsf which exceeds the MSBA guidelines by 2,277 nsf. The proposed area in this category has increased by 30 nsf since the Preferred Schematic Report submittal. Based on the information provided, including the reduction offset of square footage in the Vocational Technology category, the MSBA accepts this variation to the guidelines. No further action required.
- **Dining & Food Service** – The District is proposing to provide a total of 8,960 nsf which exceeds the MSBA guidelines by 38 nsf. The proposed area in this category has increased by 38 nsf since the Preferred Schematic Report submittal. Please note, area in excess of MSBA guidelines will be considered ineligible for reimbursement. 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 Preferred Schematic Report submittal. No further action required.
- **Administration & Guidance** – The District is proposing to provide a total of 5,250 nsf which exceeds the MSBA guidelines by 1,820 nsf. The proposed area in this category has increased by 310 nsf since the Preferred Schematic Report submittal. As previously noted and acknowledged, all area in excess of MSBA guidelines will be considered ineligible for reimbursement. Additionally, the floor plans provided indicate there is a “Workspace” located in the administration suite that is labeled as a core academic space and is not clearly identified in the space summary. In response to these review comments, please clarify and provide an updated space summary if necessary.
- **Custodial & Maintenance** – The District is proposing to provide a total of 2,140 nsf which exceeds the MSBA guidelines by 35 nsf. The proposed area in this category has increased by 35 nsf since the Preferred Schematic Report submittal. Please note, area in excess of MSBA guidelines will be considered ineligible for reimbursement. No further action required.
- **Other** – The District is proposing a total of 6,700 nsf which includes the following spaces, which are ineligible for reimbursement:
 - (1) 4,200 nsf Auditorium;
 - (1) 1,600 nsf Stage;
 - (1) 400 nsf Audition Storage area;
 - (2) 250 nsf Make-up/Dressing Rooms totaling 500 nsf;

The area in this category has decreased by 3,300 nsf since the Preferred Schematic Report submittal. As noted in MSBA’s Preferred Schematic Report review comments, the MSBA guidelines do not include square footage associated with auditoriums for

elementary or middle school projects, and all costs associated with an auditorium will be considered ineligible for reimbursement. The MSBA will exclude from its grant the cost of the total gross square footage (gsf) in excess of the MSBA guidelines for these areas. Refer to the attached memorandum which outlines MSBA's policy regarding auditorium and gym spaces beyond those included in the guidelines.

- **Total Building Net Floor Area** – The District is proposing to provide a total of 91,920 nsf which exceeds the MSBA guidelines by 17,670 nsf. The proposed area has decreased by 10,683 nsf since the Preferred Schematic Report submittal. Based on the comments provided above, the MSBA accepts this variation to the guidelines. However, certain square footage will be considered ineligible for reimbursement. No further action required.
- **Total Building Gross Floor Area** – The District is proposing to provide a total of 136,790 gsf which exceeds the MSBA guidelines by 29,510 gsf. The proposed area has decreased by 17,115 gsf since the Preferred Schematic Report submittal. Based on the comments provided above, the MSBA accepts this variation to the guidelines. However, certain square footage will be considered ineligible for reimbursement. No further action required.

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.

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.