

PRELIMINARY DRAFT FOR DISCUSSION PURPOSES

Preliminary Evaluation of Alternatives - Hillside Elementary School		DRAFT				9/21/2015		
Weight	Option A	Option B1	Option C3	Option E1A	Option E2A	Option H3	Option J3	
30 Points	CIP Only	Addition/ Renovation @ Hillside with Swing Space	New 3 Story School on hillside Site with Parcels F, G, H & Swing Space	New ES @ DeFazio East	New C6 School @ DeFazio East with Option H	Add/ Reno for ES @ High Rock, Detention Basin area expansion, Extg. Gym & Café to remain	New ES @ Central Ave	
5.1	Total Project Costs	* \$ 12,516,000	\$ 86,495,000	\$ 61,036,000	\$ 81,545,000	\$ 14,794,000	\$ 62,047,000	
		** \$ 13,086,000						
		* Does not include renovation to extg modular classrooms	Includes Modular building at DeFazio and moving to and from swing space but not land acquisition costs	Does not include replacement of Fields	Does not include replacement of Fields	Included in E2A	Does not include Land Acquisition Cost	
		** Includes renovation to modular classrooms		Comprehensive redistricting required	Comprehensive redistricting required			
5.2	Total Construction Costs	\$ 7,920,000	\$ 46,812,000	\$ 43,549,000	\$ 47,678,000	\$ 9,830,000	\$ 44,284,000	
	Modular School Const/ Phasing/ Mover/ Added Transport	Phased over 8-10 years may require swing space due to code issues						
5.3	Cost to maintain Hillside as Swing Space (note #5)	NA	NA	\$ 125,000	\$ 14,919,000	\$ 125,000	\$ 125,000	
5.4	Total Cost to Town (Notes #1, #2 & #3)	\$ 9,160,200	\$ 66,509,900	\$ 42,850,200	\$ 72,000,500	Included in E2A	\$ 13,086,000	
		Does not meet Educational Program	Land Acquisition issue with parcels	Jurisdictional Transfer required	Jurisdictional Transfer required	Included in E2A	(Note #4)	
5.6	Time to Complete	8-10 years	5 Years	5 Years	5 Years	5 Years	5 Years	
5.7	Raw Score							
	Weighted Score							
	Notes	1 Reimbursement rates are conservatively projected at 30% of total project - actual reimbursement will vary by Option						
		2 Hillside base rate is 32.47% - more detailed breakdown at Schematic Design Stage and Project Funding Agreement						
		3 Potential additional reimbursement opportunities include: Maintenance (0-2 points) - Based upon enhanced routine and capital maintenance program Construction Manager @ Risk (CMR) (0 or 1 point) Energy Efficiency - "Green Schools" -LEED Silver rating (up to 2 Points); Overlay Zoning District (0 or 1 point)						
		4 Building Demolition Costs are not likely reimbursable - but to be confirmed						
		5 Cost to maintain Hillside School for swing space anticipates reuse for 10-15 years to accommodate future Mitchell, Pollard, Emery Grover and other projects.						

APPENDIX 4E

MSBA Reimbursement Rate Calculation

M.G.L. c. 70B, §10 ("Chapter 70B") establishes the calculation of the reimbursement percentage to be used by the Massachusetts School Building Authority ("MSBA") to reimburse school districts for spending on approved school building projects.

Reimbursement Rate before Incentives

Pursuant to Chapter 70B, all approved projects are eligible for a base reimbursement rate of 31 percentage points. In addition to the base percentage points, the reimbursement formula includes the calculation of "ability-to-pay percentage points," which determines if a school district qualifies for any additional reimbursement percentage points being added to the base percentage, before any applicable incentive percentage points are factored into the reimbursement rate percentage. The ability-to-pay factors set forth in statute measure income (per capita income), property wealth (equalized property valuation per capita), and low income students (federal eligibility for free or reduced price lunch) in a district relative to the statewide average for each category. The ability-to-pay data is provided by the Department of Revenue (DOR) and the Department of Elementary and Secondary Education (DESE). Chapter 70B specifically allocates applicable reimbursement percentage points for the ability-to-pay factors, depending on the district's relation to the statewide average calculated for each category, as follows:

- EQV Property Wealth – between 0-28 percentage points (Source: DOR)
- Median Income Comparison – between 0-12 percentage points (Source: DOR)
- % of Students in Federal Free/Reduced Lunch – between 0-17 percentage points (Source: DOE)

The reimbursement rate included in the Feasibility Study Agreement is based on the reimbursement rate (not including any incentive points) in effect at the time the MSBA Board of Directors votes to invite the district to collaborate on a Feasibility Study for the proposed project.

Incentive Points

In addition to the base percentage and the "ability-to-pay percentage points," the MSBA, in its sole discretion, may award incentive percentage points in fractional amounts under one or more of the following categories as applicable:

- **Maintenance (0-2 points)** – Based on MSBA review of district provided materials regarding routine and capital maintenance programs. Contact the MSBA assigned Project Manager for incentive points associated with this category.
- **CM @ Risk (0 or 1 point)** – District will conditionally receive one (1) for the Construction Manager at Risk construction delivery method, subject to the District receiving approval from the Office of the Inspector General to utilize this method. If the project fails to secure this approval or elects to switch to the traditional Design-Bid Build Construction methodology, the MSBA will adjust the reimbursement amounts during its audit to reflect a reimbursement grant without the conditionally awarded point..

TARGET
2 POINTS

TARGET
1 POINT

- **Newly Formed Regional School District (0-6 points)** – Up to Six (6) incentive percentage points may be allocated for a project at the site of a school facility that is a member of a Regional School District that was either (a) newly created as a result of working with the MSBA or (b) whose membership changed as a result of working with the MSBA and the MSBA determines that a project was avoided as a result of either the newly created district or a change in a district's membership. Also, the MSBA may award one (1) incentive percentage point per grade, up to a maximum of three (3) incentive percentage points, for an existing Regional School District that adds grades to the existing regional grade structure. In order for the incentive points to be awarded all required authorizations must be documented.

NA

- **Major Reconstruction or Reno/Re - use (up to 5 points)** – Up to five (5) incentive percentage points may be allocated for a renovation project that requires no new construction. Less than five (5) incentive percentage points may be allocated on a sliding scale that relates the percentage of gross square feet of renovated space to the total gross square feet of the total project. For example, if 50% of the total gross square feet of the complete project is renovated area, 2.5 incentive percentage points would be awarded.

NA

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- **Overlay Zoning District (0 or 1 point)** - District will receive one (1) incentive percentage point if the proposed project is located in an area that the Community has adopted a "smart growth zoning district" pursuant to M.G.L. c. 40R or c. 40S. In order to confirm eligibility for 1 Overlay Zoning District incentive point, a district must submit to the MSBA copies of the following items within the Schematic Design Binder:

- A copy of the District's application, as submitted to the Department of Housing and Community Development pursuant to M.G.L. c.40R §4, seeking a Letter of Eligibility confirming eligibility for financial incentives prior to the pursuit of local votes on a proposed smart growth zoning ordinance or bylaw, and;
- A copy of the Letter of Eligibility (if applicable) as provided by the Department of Housing and Community Development pursuant to M.G.L. c.40R §4, and;
- A copy of the local vote approving the smart growth zoning ordinance or bylaw, and;
- A copy of the confirmation of approval of the smart growth zoning ordinance or bylaw as issued by the Department of Housing and Community Development pursuant to M.G.L. c.40R §4, and;
- A copy of the most recent Certificate of Compliance (if the smart growth zoning ordinance or bylaw was approved more than one year previous to the MSBA review for incentive point eligibility) as issued by the Department of Housing and Community Development pursuant to M.G.L. c.40R §7.

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- **Overlay Zoning 100 Units or 50% of units for one, two, or three family structures (0 or 0.5 point)** – One Half (0.5) incentive percentage point may be allocated if the zoning district provides 100 units or more of housing in one, two, or three family structures, or if 50% of the total housing units in the overlay zoning district are designated for one, two, or three family structures. To be eligible for the additional one half (0.5) incentive percentage point, a district must submit the following items within the Schematic Design Binder:

- A copy of the local vote authorizing the number of total number of units in one, two or three family structures within the smart growth zoning district having

- received both local and Dept. of Housing and Community Development approval under M.G.L. c. 40R, and;
- o The percentage of units that one, two and three family structures represent of the total number of housing units authorized pursuant to the local vote approving the smart growth zoning district, and;
- o A status update on construction activity within the approved smart growth zoning district, including, but not limited to, the status of construction or occupancy of completed residential units within the approved smart growth zoning district.
- **Energy Efficiency – “Green Schools” (up to 2 points)** – Two (2) incentive percentage points will be conditionally awarded if the project targets building sustainable design levels contained in the MSBA’s Sustainable Building Design Policy, refer to MSBA web site for current guidelines. If the project fails to achieve the stated goals, the MSBA will adjust the reimbursement amounts during its audit to reflect a reimbursement grant without the conditionally awarded points.
- **Model Schools (up to 5 points)** – Requires invitation and approval to participate in MSBA’s Model School Program by MSBA Board of Directors. Upon approval, a District may receive up to five (5) incentive percentage points for participating in the Model School Program.

TARGET
2 POINTS

NA

PROGRAM IS UNDER REVIEW BY MSBA

Anticipated Reimbursement Rate with Incentive Points

Provide the District’s anticipated reimbursement rate with incentive points in the following format. Incentive points are NOT applicable with repair projects.

Category	Reimbursement Points
Reimbursement Rate before Incentives (provided by the MSBA)	32.47%
Maintenance (provided by the MSBA)	2.0 ← TARGET
CM @ Risk	1.0 ← POSSIBLE
Newly Formed Regional School District	NA
Major Reconstruction or Reno/Reuse	NA
Overlay Zoning District – c. 40R or c. 40S	1.0? ← REVIEW w/ MSBA
Overlay Zoning 100 Units or 50% units for one, two, and three family units	0.5? ←
Energy Efficiency – “Green Schools”	2.0 ← TARGET
Model Schools	NA
Total Incentive Points	5.0
Anticipated MSBA Reimbursement Rate with Incentives	37.47%

WILL BE REVIEWED WITH MSBA DURING PSP & SCHEMATIC DESIGN STAGE PRIOR TO SCOPE & BUDGET AGREEMENT.