

PROJECT MINUTES

Project:	W. Edward Balmer Elementary School Feasibility Study	Project No.:	17020
Prepared by:	Joel Seeley	Meeting Date:	5/3/18
Re:	Joint Boards Meeting/School Building Committee Meeting	Meeting No:	2
Location:	High School Media Center	Time:	6:30pm
Distribution:	School Building Committee Members, Attendees (MF)		

Attendees:

PRESENT	NAME	AFFILIATION	VOTING MEMBER
✓	Joseph Strazzulla	Chairman, School Building Committee	Voting Member
✓	Melissa Walker	School Business Manager	Voting Member
✓	Thomas J. Melia	Representative of the Board of Selectmen	Voting Member
✓	Michael LeBrasseur	Chairman, School Committee	Voting Member
✓	Paul Bedigian	Representative of the Building, Planning, Construction Committee	Voting Member
✓	Steven Gogolinski	Representative of the Finance Committee	Voting Member
	Jeffrey Tubbs	Community Member with building design and/or construction experience	Voting Member
	Peter L'Hommedieu	Community Member with building design and/or construction experience	Voting Member
✓	Jeff Lundquist	Community Member with building design and/or construction experience	Voting Member
✓	Andrew Chagnon	Community Member with building design and/or construction experience	Voting Member
✓	Spencer Pollock	Parent Representative	Voting Member
✓	Adam Gaudette	Town Manager	Non-Voting Member
✓	Dr. Catherine Stickney	Superintendent of Schools	Non-Voting Member
	Steve Von Bargaen	Building Maintenance Local Official	Non-Voting Member
	Karlene Ross	Principal, W. Edward Balmer Elementary School	Non-Voting Member
	Jill Healy	Principal, Northbridge Elementary School	Non-Voting Member
	Kathleen Perry	Director of Pupil Personnel Services	Non-Voting Member
	Lee Dore	D & W, Architect	
	Thomas Hengelsberg	D & W, Architect	
	David Fontaine	Fontaine Bros, CM	
	David Fontaine, Jr	Fontaine Bros, CM	
✓	Joel Seeley	SMMA, OPM	

Item #	Action	Discussion
2.1	Record	Call to Order, 6:30 PM, meeting opened.
2.2	Record	J. Strazzulla recognized and thanked the members of the Board of Selectmen, Finance Committee, and School Committee, as well as Town Manager for attending.
2.3	Record	J. Strazzulla and J. Seeley presented a summary of the project design, cost and schedule, attached.
2.4	Record	<p>Joint Boards Questions:</p> <ol style="list-style-type: none"> Will the MSBA allow the local appropriation voting to be completed beyond the 120 day period after the 6/27/18 Board Meeting? <i>Yes, the MSBA will typically allow a reasonable amount of time beyond the 120 day period to accommodate recognized town meeting and election cycles.</i> Should the project's Debt Exclusion vote be on the 11/6/18 State Election date or on a separate Special Election date? <i>The amount of federal and state elections, as well as several potentially controversial referendums that may be on the 11/6/18 State Election may warrant scheduling a Special Election for just the Debt Exclusion vote on the project. Further discussion needed on this topic.</i> How is a Special Election date established? <i>A Special Election can be established by either a citizen's petition or Board of Selectmen vote.</i> What is the cost of a Special Election? <i>A Special Election costs approximately \$10,000.</i> Will there be any un-used funds returned to the Town from the Feasibility Study? <i>Yes, there will be a balance, the School Building Committee will provide.</i> Can the Architect provide a more detailed list of the work scopes and costs associated with the Repair Only Options? <i>Yes, the School Building Committee will request from the Architect.</i> Would the MSBA approve Balmer and NES for their Accelerated Repair program if the vote failed? <i>The town would need to submit a statement of interest to the MSBA for them to assess for invitation into the program. The Accelerated Repair program is limited to exterior windows, boilers and roof replacement with no educational improvements.</i> What should be the bond term? <i>The merits of a 20 year or 30 year term were discussed. The Board of Selectmen will decide. Many members of each committee advocated for the 30 year term.</i> When does the MSBA finalize the amount of their grant? <i>The MSBA will finalize their grant amount at the 6/27/18 Board meeting with the approval of the Project Scope and Budget Agreement, which will then be executed between the Town and MSBA. A Project Funding Agreement will be executed once the local appropriation voting is completed.</i> Does the project budget include contingencies? <i>Yes, the project budget includes design and estimating contingencies and construction contingencies.</i>

Item #	Action	Discussion
		<p>11. What is the MSBA procedure if the vote fails? <i>The MSBA would require the town to submit a plan to remedy the failed vote within 10 days of the failed vote. One remedy would be to go out to the voters again within a short period of time, however only minor changes would be allowed not impacting the educational program. The most likely outcome is that the town would need to start the process over again by submitting a new statement of interest.</i></p> <p>12. When would the tax increase be seen on the tax bill? <i>The tax increase would most likely show up on the 3rd or 4th quarter tax bill of FY 2020.</i></p> <p>13. How will the borrowing process work? <i>A meeting with UniBank is scheduled for 5/16/18 to discuss the process and expected interest rates for the bond. UniBank will assist the town in the bidding process for securing the bond.</i></p>
2.5	Record	<p>A Motion was made by J. Lundquist and seconded by S. Pollock to adjourn the meeting. No discussion, motion passed unanimous.</p>

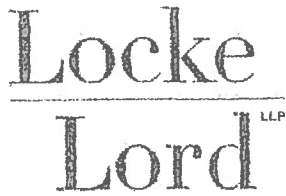
Attachments: Agenda, Powerpoint

The information herein reflects the understanding reached. Please contact the author if you have any questions or are not in agreement with these Project Minutes

Agenda

Project:	W. Edward Balmer Elementary School Feasibility Study	Project No.:	17020
Re:	Joint Meeting of Board of Selectmen, School Committee, Finance Committee, and School Building Committee	Meeting Date:	5/3/2018
Meeting Location:	Northbridge High School Media Center	Meeting Time:	6:30 PM
Prepared by:	Joel G. Seeley	Meeting No.	2
Distribution:	Committee Members (MF)		

1. Call to Order
2. Timeline for Entire Project
3. Borrowing Term
4. Election Cycle
5. Adjourn



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Fax: 617-227-4420
www.lockelord.com

Richard A. Manley, Jr.
Direct Telephone: 617-239-0384
Direct Fax: 866-658-1046
richard.manley@lockelord.com

November 21, 2017

Mr. Neil A. Vaidya, Town Accountant
Town of Northbridge
7 Main Street
Whitinsville, Massachusetts 01588

Dear Neil:

As bond counsel to Northbridge, I can confirm that a school project borrowing can now be repaid over a term of 30 years. Where this project is to receive MSBA funds, the borrowing authority for this term is set out in M.G.L. c. 70B, §6(d), which provides as follows:

(d) Any city, town or regional school district which has received, in accordance with subsections (b) and (c), notice of approval and an estimate of the amount of a school facilities grant, may borrow from time to time to finance that portion of the cost of the approved school project not being paid by such grant, in such amount approved by the board of selectmen, mayor or city manager of the city or town, or the regional district school committee of the regional school district, and may issue bonds or notes therefor which shall bear on their face the words "(name of city, town or regional school district) School Project Loan, chapter 70B. Each authorized issue shall constitute a separate loan, and the loans shall be paid in not more than 25 years from their dates or up to 30 years if consistent with the guidelines established in section 7 of chapter 44. Any city, town or regional school district which has received, in accordance with subsections (b) and (c), notice of approval and an estimate of the amount of a school facilities grant may issue and renew temporary notes. The authority shall issue regulations relative to issuance of temporary notes for school construction. Indebtedness incurred under this chapter shall be outside the statutory debt limit but shall, except as herein provided, be subject to chapter 44.

Please let me know if we can provide anything further in this regard.

Sincerely,

Richard A. Manley, Jr.

AM 67576161.1

Atlanta | Austin | Boston | Chicago | Cincinnati | Dallas | Hartford | Hong Kong | Houston | London | Los Angeles
Miami | Morristown | New Orleans | New York | Providence | San Francisco | Stamford | Washington DC | West Palm Beach



Joseph Strazzulla <jstrazzulla@nps.org>

Meeting Tonight

Adam Gaudette <agaudette@northbridgemass.org>

Thu, May 3, 2018 at 11:58 AM

To: Joseph Strazzulla <jstrazzulla@nps.org>

Cc: Tom Melia <tjmelia@charter.net>, Neil Vaidya <nvoidya@northbridgemass.org>, Michael Lebrasseur <mlebrasseur@nps.org>, "Seeley, Joel" <jseeley@smma.com>, Catherine Stickney <cstickney@nps.org>, Melissa Walker <mwalker@nps.org>

Joe,

1. See attached letter previously prepared by Bond Counsel. In accordance with MGL c. 70B, sec. 6(d), 30-year borrowing is permissible, and in a town, the Board of Selectmen would make that determination after the borrowing is authorized at Town Meeting, and in this case, also following an approved Ballot Question for a Debt Exclusion at an Election.
2. The Fall Town Meeting Date is determined by the Northbridge Code of Bylaws as the 4th Tuesday in October, which this year, falls on October 25, 2018.

In speaking with the Town Clerk, the cost for a Special Town Meeting is estimated at \$10,000. Required expenditures include: printing 10,000 ballots, paying election workers and police officers, feeding election workers as they are unable to leave, the cost of programming the tabulation/voting machines, automark ballots for visually impaired voters, extended voter registration hours (try to use Registrars but if not hourly staff), and miscellaneous set-up expenses.

Please note that on the November State Election Ballot, the State pays for the ballots and the Town is allowed to add questions to the ballot per their approval.

3. The Town can always schedule a Special Election. MGL c. 39 requires minimum 35-days notice by the Board of Selectmen to the Town Clerk of the date of the Special Election as well as the proposed Ballot Question(s).

Hope that helps.

See you tonight.

Adam

From: Joseph Strazzulla [mailto:jstrazzulla@nps.org]

Sent: Wednesday, May 02, 2018 8:36 PM

To: Adam Gaudette <agaudette@northbridgemass.org>

Subject: Meeting Tonight

[Quoted text hidden]

W. EDWARD BALMER SCHOOL

NORTHBRIDGE, MA
SCHEMATIC DESIGN

JOINT BOARDS MEETING

MAY 3, 2018

SMMA

Project Management



NORTHBRIDGE
PUBLIC SCHOOLS




Massachusetts School Building Authority

Funding Affordable, Sustainable, and Efficient Schools in Partnership with Local Communities



DORE & WHITTIER
ARCHITECTS, INC.

- 
- 1. Introductions**
 - 2. Process and Schedule**
 - 3. Design Update**
 - 4. Project Cost Update**
 - 5. Next Steps**
 - 6. Questions, Comments, Feedback**



INTRODUCTIONS

SCHOOL BUILDING COMMITTEE:

Joseph Strazzulla

Thomas Melia

Michael LeBrasseur

Adam Gaudette

Steven Gogolinski

Dr. Catherine Stickney

Melissa Walker

Steve Von Bargaen

Karlene Ross

Jill Healy

Kathleen Perry

Paul Bedigian

Jeffrey Tubbs

Peter L'Hommedieu

Jeff Lundquist

Andrew Chagnon

Spencer Pollock

Chair, School Building Committee

Member, Board of Selectmen

Chair, School Committee

Town Manager

Member, Finance Committee

Superintendent of Schools

School Business Manager

Director of Facilities & Operations

Principal, Balmer Elementary School

Principal, Northbridge Elementary School

Director of Pupil Personnel Services

Building, Planning, Construction Committee

Community Member w/ Construction Experience

Community Member w/ Construction Experience

Community Member w/ Construction Experience

Community Member w/ Construction Experience

Parent Representative

study team



OWNER'S PROJECT MANAGER (OPM)

Symmes Maini & McKee Associates

DESIGNER (Architect) and its team of CONSULTANTS

Dore & Whittier Architects

CONSTRUCTION MANAGER (CM)

Fontaine Brothers, Inc.

PUBLIC SCHOOL CONSTRUCTION PARTNER

Massachusetts School Building Authority (MSBA)

study team





PROCESS AND SCHEDULE

MASSACHUSETTS SCHOOL BUILDING AUTHORITY (MSBA) PROCESS:

Partners with the District to support the design and construction of public school facilities that are:

- Educationally Appropriate
- Flexible
- Sustainable
- Cost-Effective

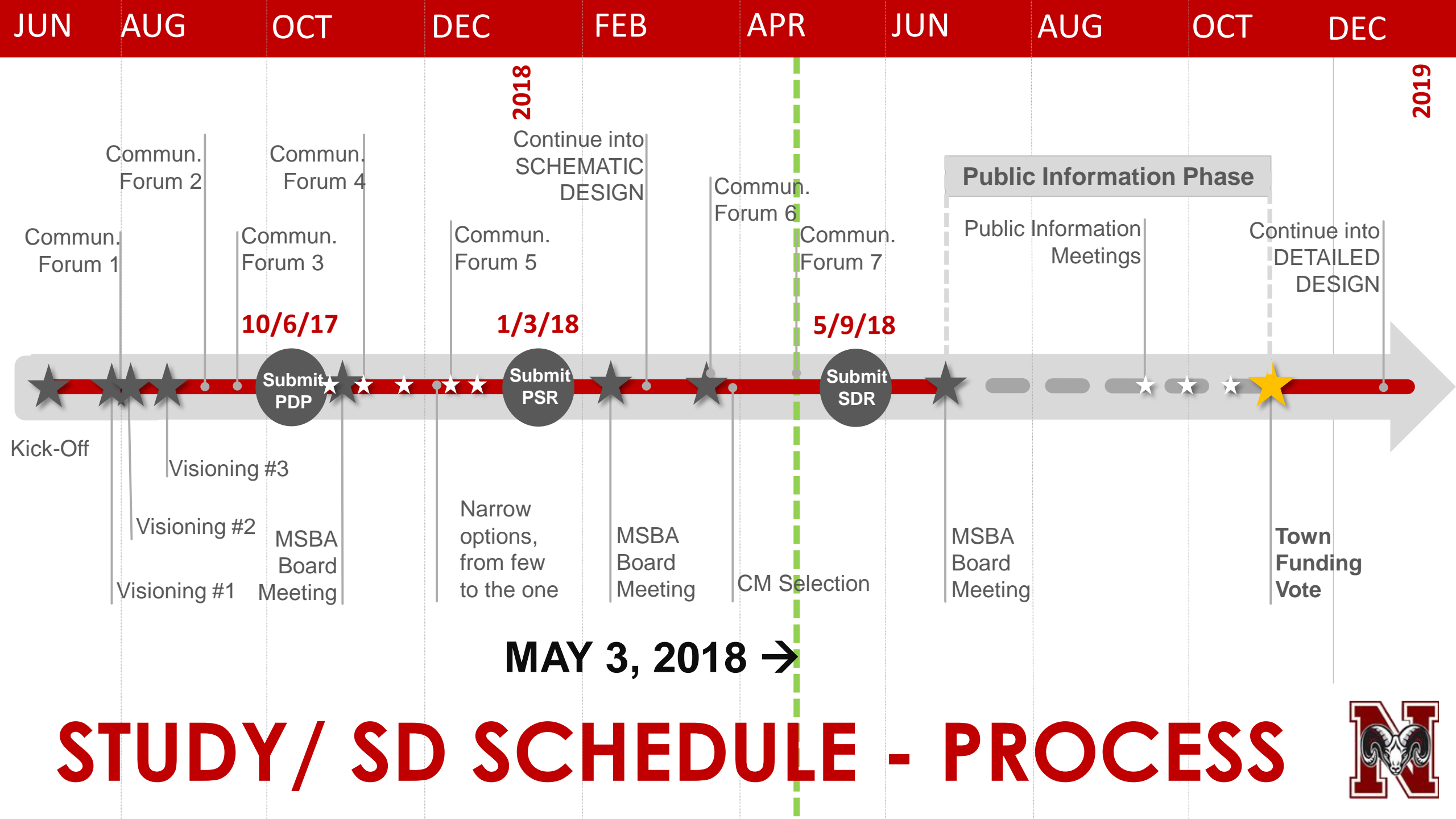
MSBA will fund 59.21% plus incentives of eligible project costs for an approved project if accepted by the voters of Northbridge.



FEASIBILITY STUDY PHASE SCOPE:

- Two grade configurations/enrollments/school sizes:
 - Grades 2-4 for 510 students – keep separate schools
 - Grades PK-5 for 1030 students – consolidate schools and return 5th grade to Elementary setting
- Conceptual design alternatives:
 - Renovation of existing (bring up to code)
 - Renovation/addition (like-new interiors)
 - New Construction





STUDY/ SD SCHEDULE - PROCESS



WHAT IS THE NEED

- Need a long-term solution to resolve deteriorating school buildings
- Provide educational spaces to meet MSBA standards
- Update the school to meet Educational Program
- Provide 21st century educational spaces
- Provide schools that are safe, code-compliant, and places Northbridge can be proud of



A SERIES (RENO ONLY)

A1
2 - 4

Balmer ES

- RENOVATIONS TO EXISTING BUILDINGS

A2
PK-1st

NES

- CODE AND DEFERRED MAINTENANCE UPGRADES

- NO EDUCATIONAL IMPROVEMENTS

Repair Only

B SERIES (GRADE 2-4)

B1
RENO/
ADD

Balmer ES

B2
NEW/
REAR

B3
NEW/
FRONT

Keep Separate
Schools

C SERIES (GRADE PK-5)

C1
RENO/ADD
DEMO CR

Balmer ES

C2
RENO/ADD
KEEP CR

Balmer ES

C3
NEW/
REAR

C4
NEW/
EAST-REAR

C5
NEW/
FRONT

Consolidate
Schools

DESIGN ALTERNATIVES



APPROXIMATE COST TO TOWN

A SERIES (RENO ONLY)

A1
2 - 4
Balmer ES
\$32.7M

- RENOVATIONS TO EXISTING BUILDINGS

- CODE AND DEFERRED MAINTENANCE UPGRADES

A2
PK-1st
NES
\$20.3M

- NO EDUCATIONAL IMPROVEMENTS

\$ 53.0M total

No MSBA
Reimbursement

B SERIES (GRADE 2-4)

B2
NEW/
REAR
\$40.5M

Plus \$20.3M for NES

After MSBA
Reimbursement

C SERIES (GRADE PK-5)

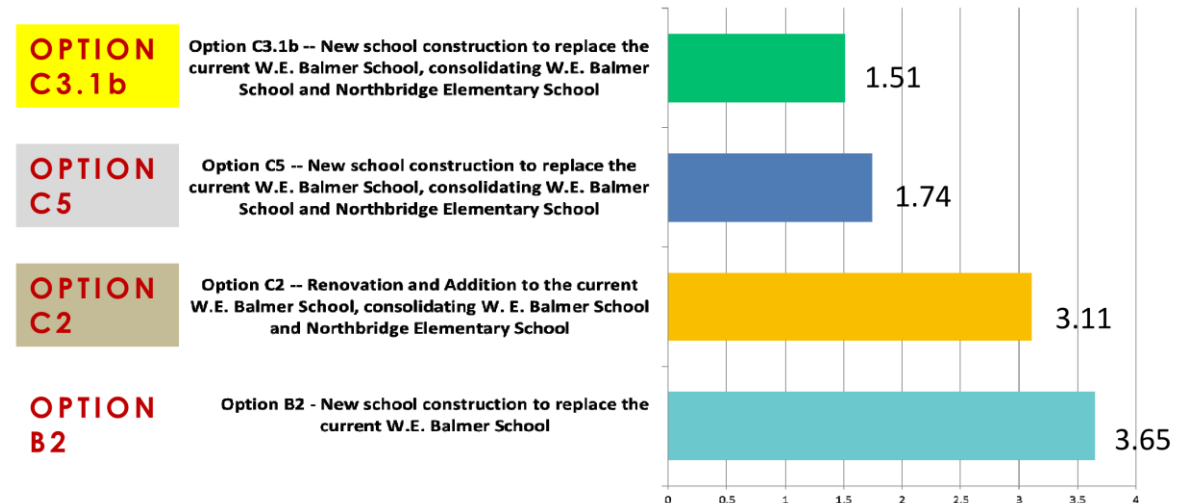
C3.1b
NEW/
REAR
\$53.4M

After MSBA
Reimbursement



WHY CONSOLIDATION

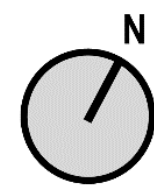
- **COST ADVANTAGE:** New PK-5 school close in cost to fixing up both old (with no educational improvements)
- **TIME ADVANTAGE:** one project, 5 years; versus two projects, 15+ years? Good borrowing rates now.
- **EDUCATIONALLY APPROPRIATE:** best curriculum alignment
- FREES UP N.E.S. SITE FOR OTHER TOWN USES
- PREFERRED OPTION IN TOWN-WIDE SURVEY





SITE &

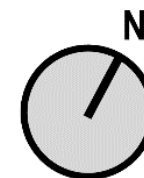
**BUILDING
DESIGN**



SITE PLAN



TOTAL PARKING: 245 SPACES

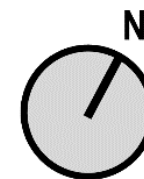
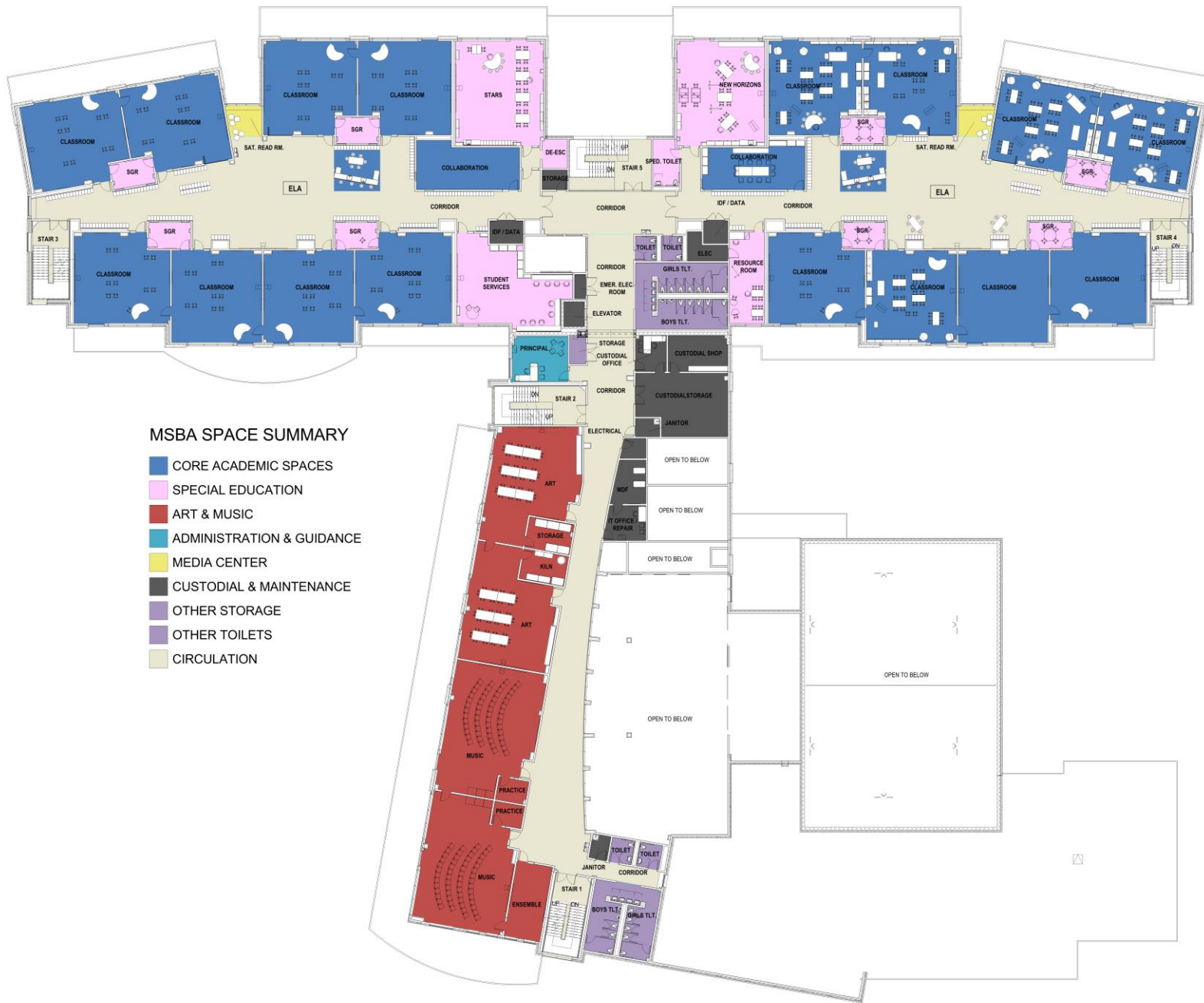


MSBA SPACE SUMMARY

- CORE ACADEMIC SPACES
- SPECIAL EDUCATION
- VOCATIONS & TECHNOLOGY
- HEALTH & PHYSICAL EDUCATION
- DINING & FOOD SERVICE
- ADMINISTRATION & GUIDANCE
- MEDIA CENTER
- CUSTODIAL & MAINTENANCE
- OTHER STORAGE
- OTHER TOILETS
- CIRCULATION

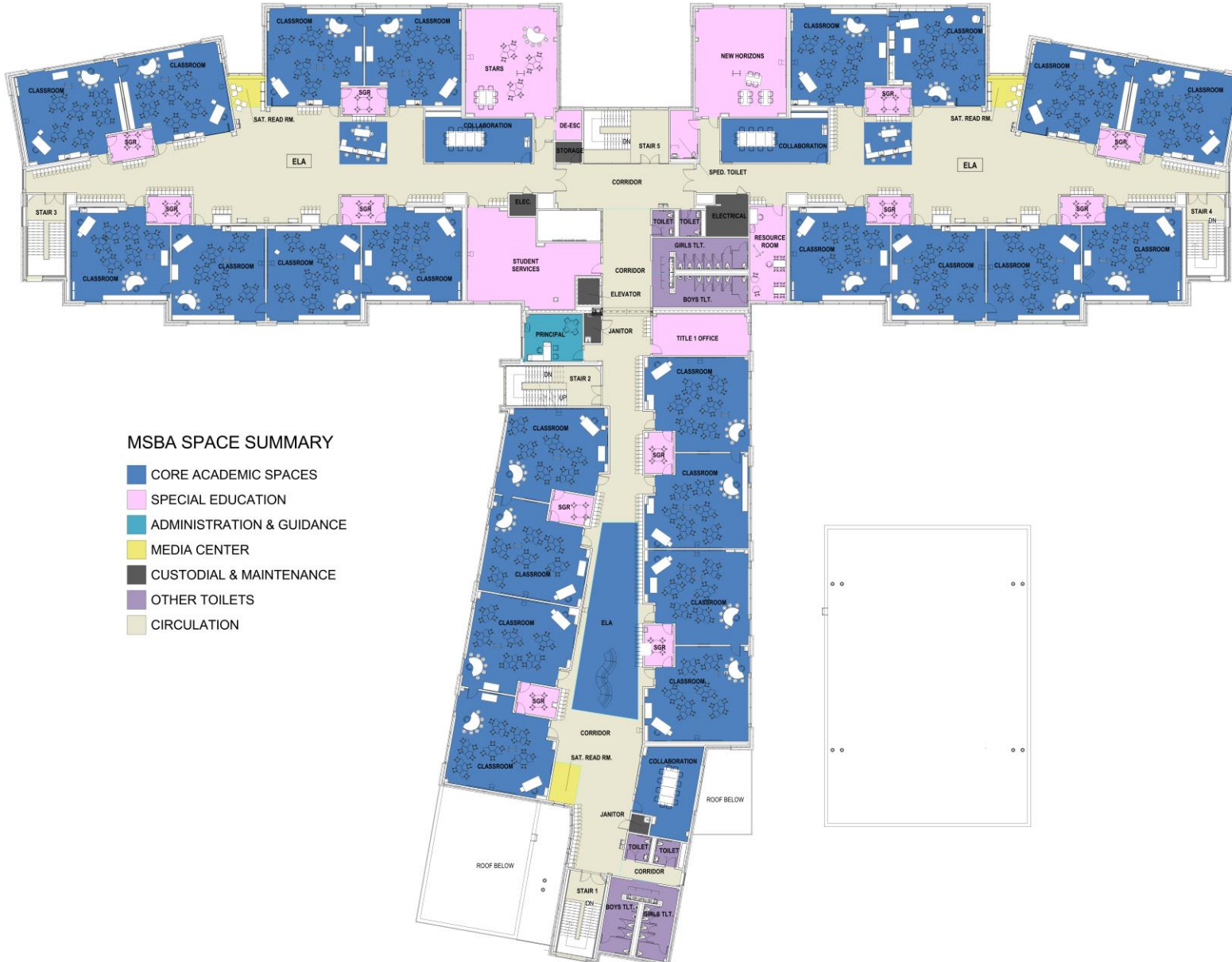
FIRST FLOOR PLAN





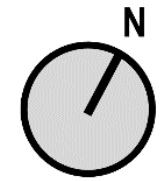
SECOND FLOOR PLAN





MSBA SPACE SUMMARY

- CORE ACADEMIC SPACES
- SPECIAL EDUCATION
- ADMINISTRATION & GUIDANCE
- MEDIA CENTER
- CUSTODIAL & MAINTENANCE
- OTHER TOILETS
- CIRCULATION





VIEW FROM SOUTHWEST SITE ENTRANCE

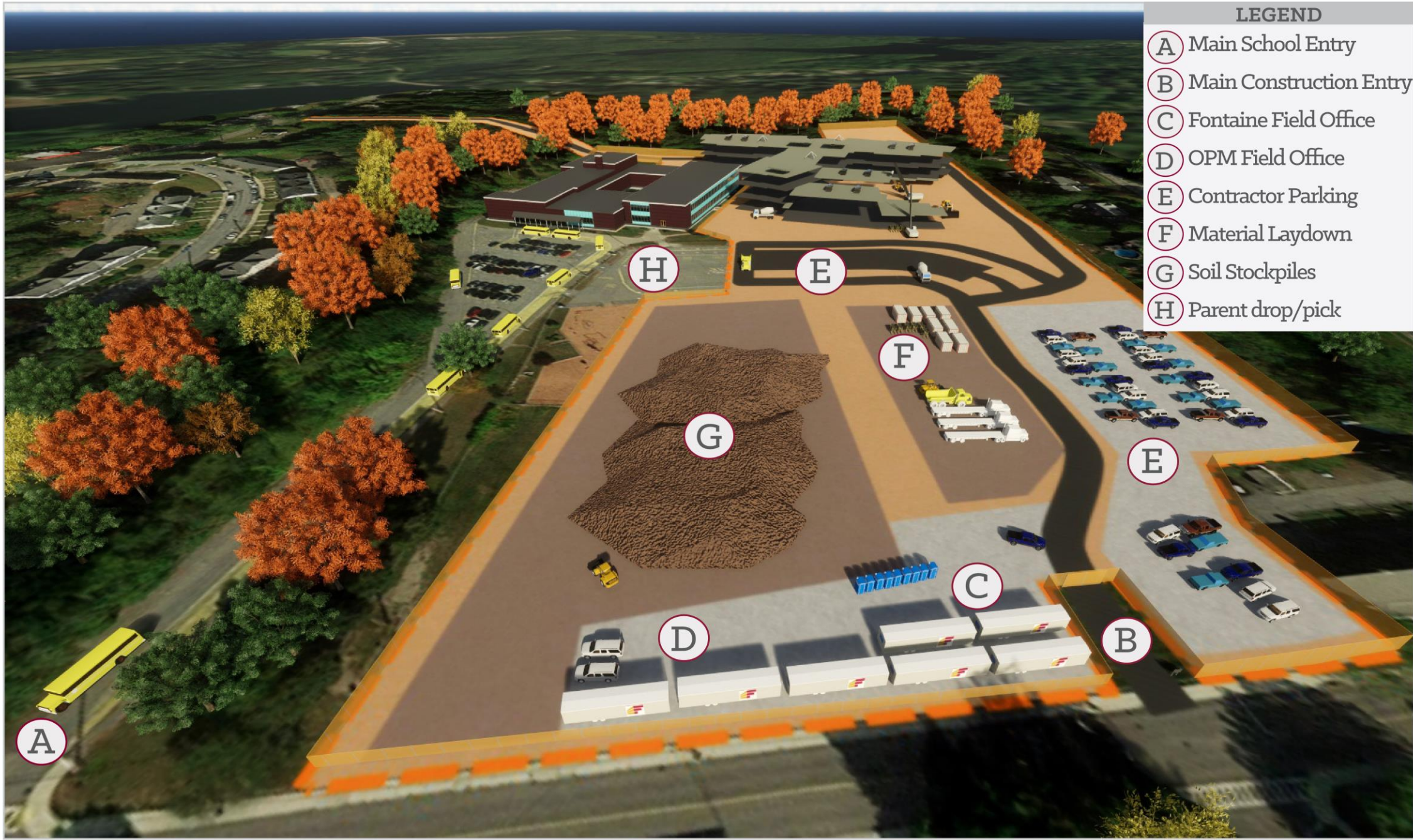


ENTRY VIEW FROM WEST PARKING LOT



AERIAL VIEW OF COURTYARD - EAST

PHASE I NEW BUILDING CONSTRUCTION | SEPT 2019 - JUNE 2021



LEGEND	
(A)	Main School Entry
(B)	Main Construction Entry
(C)	Fontaine Field Office
(D)	OPM Field Office
(E)	Contractor Parking
(F)	Material Laydown
(G)	Soil Stockpiles
(H)	Parent drop/pick



PHASE 2 DEMOLITION/SITework | JUNE 2021 - DEC 2021





PROJECT BUDGET

ESTIMATED CONSTRUCTION COST COMPARISON

	PSR PHASE OPTION C3.1B (PM&C)	SD PHASE FONTAINE BROS. INC (CM)
AREA (GSF)	171,530	167,352
BUILDING	\$48,129,015	\$51,248,307
SITE WORK	\$6,935,201	\$9,415,335
MARK-UPS	\$26,388,980	\$18,829,020
TOTAL	\$81,453,196	\$79,492,662

Estimated costs are preliminary and subject to change as the project is refined.



PROJECT REIMBURSEMENT COMPARISON

	PSR SUBMISSION OPTION C3.1B (2/15/18)	SD SUBMISSION Fontaine Bros. CM (4/20/18)
TOTAL PROJECT COST	\$105,148,101	\$100,968,194
CONSTRUCTION COST	\$81,453,196	\$79,492,662
FEES, TESTING, UTILITIES, EXPENSES	\$14,491,181	\$12,409,046
FF&E, TECHNOLOGY	\$3,502,000	\$3,502,000
CONTINGENCIES	\$5,701,724	\$5,564,486
APPROXIMATE MSBA REIMBURSEMENT	\$49,959,378	\$47,564,269
APPROXIMATE COST TO THE TOWN	\$55,188,723	\$53,403,925

Estimated costs are preliminary and subject to change as the project is refined.



PROJECT COST BENCHMARKING

TOWN	AREA (GSF)	YEAR START CONSTRUCT'N	PROJECT COST	ESCALATION YEARS	APPROX. ESCALATION @ 3.5 YRS	ESCALATED TOTAL COST	ESCALATED TOTAL COST/SF
LUDLOW – CHAPIN ST. ES	106,250	5/1/2019	57,451,421	0.0	1.000	57,451,421	541
TAUNTON – MULCAHY ES	119,693	1/1/2019	64,971,831	0.5	1.018	66,108,838	552
IPSWICH – CHAPIN ES	123,700	3/1/2019	69,789,269	0.5	1.018	71,010,580	574
AMHERST – WILDWOOD ES	122,272	10/1/2017	67,207,225	2.0	1.070	71,911,731	588
NORTHBRIDGE – BALMER ES	167,352	8/1/2019	100,968,194	0.0	1.000	100,968,194	603
HARVARD – HILDRETH ES	81,836	1/1/2019	48,618,000	0.5	1.018	49,468,815	604
LEXINGTON – HASTINGS ES	110,000	6/1/2018	65,339,418	1.0	1.035	67,626,298	615
TISBURY ES	75,390	5/1/2019	46,567,962	0.0	1.000	46,567,962	618
MILLIS – CLYDE BROWN ES	89,852	2/1/2018	53,365,857	1.5	1.053	56,167,564	625
MARLBOROUGH – RICHER ES	108,730	3/1/2019	67,525,253	0.5	1.018	68,706,945	632
NEEDHAM – HILLSIDE ES	90,702	6/1/2018	57,862,414	1.0	1.035	59,887,599	660



PROJECT ESTIMATED TAX IMPACT

Northbridge Share

Rate

Term (years)

Annual Debt Service - 20/30 yr Average

Average Home Value

Annual Tax Increase Average Home-20 yr Average

Annual Tax Increase per \$1,000 Valuation

Total Impact Average Home over 20/30 Years

Updated SD Estimate per CM Option C3.1b Grade PK-5 New Construction 20 YEAR TERM			Updated SD Estimate per CM Option C3.1b Grade PK-5 New Construction 30 YEAR TERM		
\$53,403,925	\$53,403,925	\$53,403,925	\$53,403,925	\$53,403,925	\$53,403,925
3.00%	4.00%	5.00%	3.00%	4.00%	5.00%
20	20	20	30	30	30
\$ 3,511,308	\$ 3,791,679	\$ 4,072,049	\$ 2,607,892	\$ 2,883,812	\$ 3,159,732
\$ 301,000	\$ 301,000	\$ 301,000	\$ 301,000	\$ 301,000	\$ 301,000
\$ 648.34	\$ 700.11	\$ 751.88	\$ 481.53	\$ 532.48	\$ 583.42
\$ 2.1540	\$ 2.3260	\$ 2.4980	\$ 1.6000	\$ 1.7690	\$ 1.9380
\$ 12,967	\$ 14,002	\$ 15,038	\$ 14,446	\$ 15,974	\$ 17,503

Assumptions: Tax rate based on Fiscal 2018 assessed valuation and AVERAGE house value of \$301,000.
Yearly impact will change based upon subsequent year tax rates and valuations.



NEXT STEPS

- **May 9, 2018 - Submit Schematic Design (SD) documents to MSBA**
- **June 27, 2018 – MSBA Board Meeting to approve project to bring to voters**
- **August 20, 2018 – Community Forum #8**
- **September 19, 2018 – Community Forum #9**
- **October 10, 2018 – Community Forum #10**
- **October 23, 2018 – Special Town Meeting Vote**
- **November 2018 – Debt Exclusion Vote**



COMMUNITY RESOURCES

Project Website:

<https://www.nps.org/sbc>

Project Email:

SBC@nps.org

