

The Whitman Middle School Project

School Building Committee // August 20, 2024

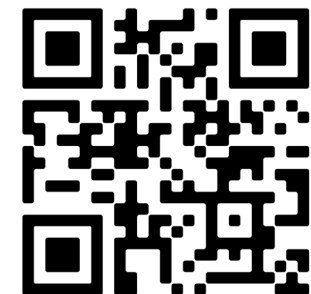


Agenda

- // Prequalification
- // Early Bid Package
- // CD Activities & Milestones
- // Design Update

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Whitman Middle School
Project Website



Prequalification & Early Package



GC/Filed Subcontractor Prequalification

OVERVIEW

- // Prequalification is required because the project's estimated construction cost is greater than \$10 million
- // M.G.L. c. 149A Section 8(b): The awarding authority shall establish a **prequalification committee** for the building project
- // The prequalification committee shall be comprised of (2) representatives from the District, (1) representative from the OPM firm, and (1) representative from the Design firm

ESTABLISHING A COMMITTEE

- // Awarding Authority (Town of Whitman)
 - / **Name** - Designated Chairperson
 - / **Name**
- // OPM (Colliers Project Leaders)
 - / **Shirley Ng** - Project Manager
- // Designer (Ai3 Architects)
 - / **Daren Sawyer** - Architect & Partner at Ai3

Tasks & Timeline		
Description	Start	End
Define Prequalification Committee	Aug. 2024	Aug. 2024
Approve RFQ Document	Aug. 2024	Sep. 2024
Public Posting	Sep. 2024	Sep. 2024
GC/FS Prepare & Submit SOQ's	Sep. 2024	Sep. 2024
Team Review & Assessment	Oct. 2024	Dec. 2024
SBC Vote to Approve	Dec. 2024	Dec. 2024
Notification of Qualification	Dec. 2024	Dec. 2024

The Prequalification Committee shall further refine the proposed timeline

VOTE

To establish a GC/Filed Subcontractor pre-qualification committee for the Whitman Middle School building project

Early Bid Package Activities

Electrical Switchgear & Generator

OVERVIEW

// **Jun. 11, 2024:** The SBC approved releasing an early bid package for:

/ **Electrical - Switchgear & Generator**

// Avoids delays during construction for equipment that typically has a long lead time

// Estimated release shall be early Oct. 2024

ONGOING

// Documentation from the electrical engineering team continues progress

// Colliers shall work with the District to prepare to advertise in/at:

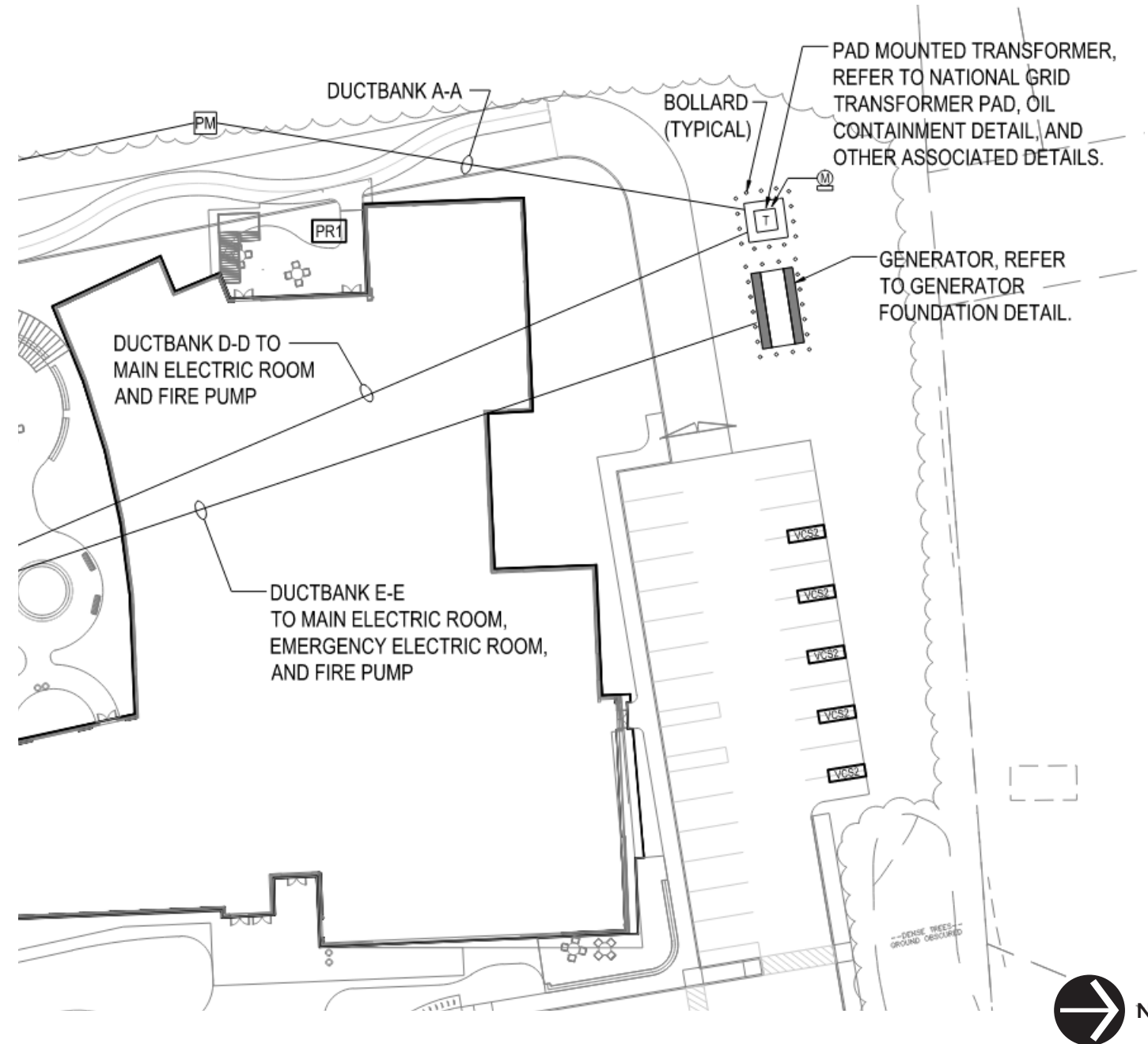
/ Whitman Town Hall

/ Local newspaper

/ COMMBUYS

/ Goods & Services Bulletin (cost >\$100K)

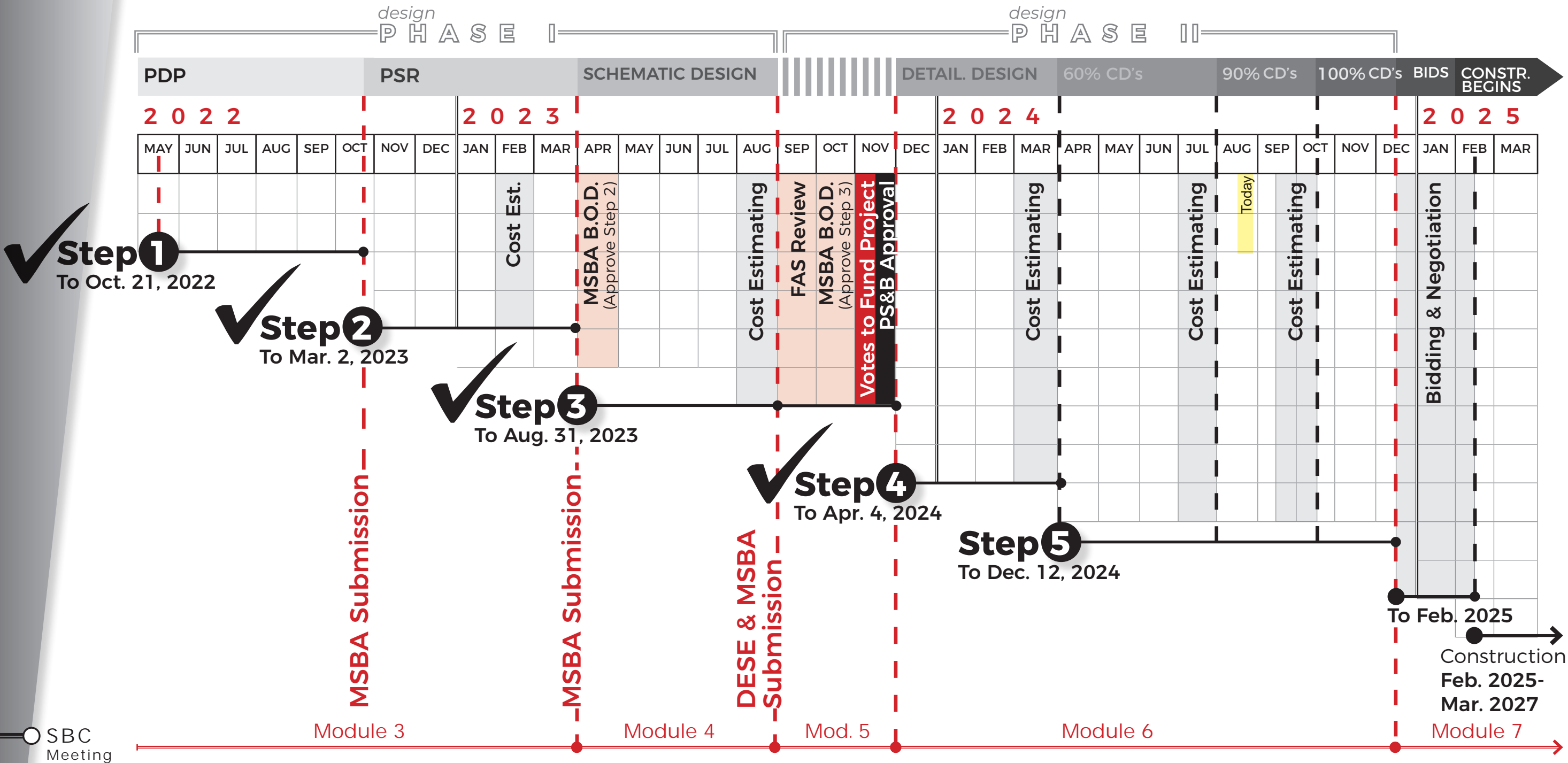
// Specifications will identify these items as owner furnished, contractor installed (OFCI)



CDs Activities & Milestones



WMS Project Schedule Overview



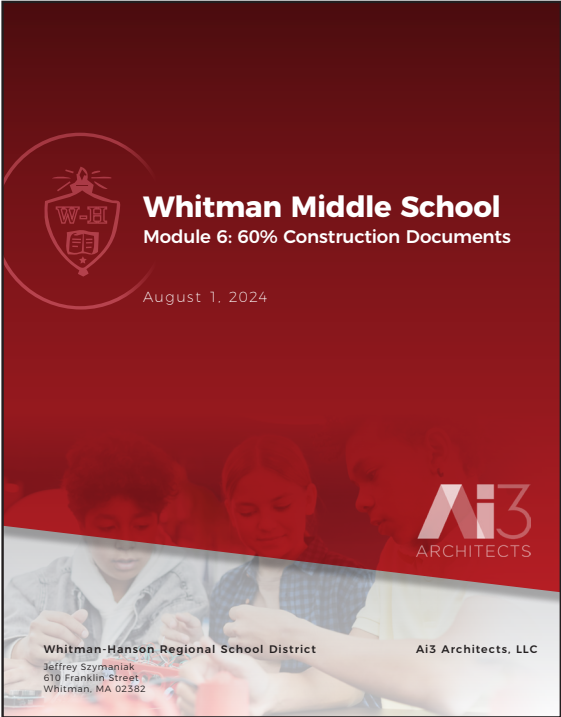
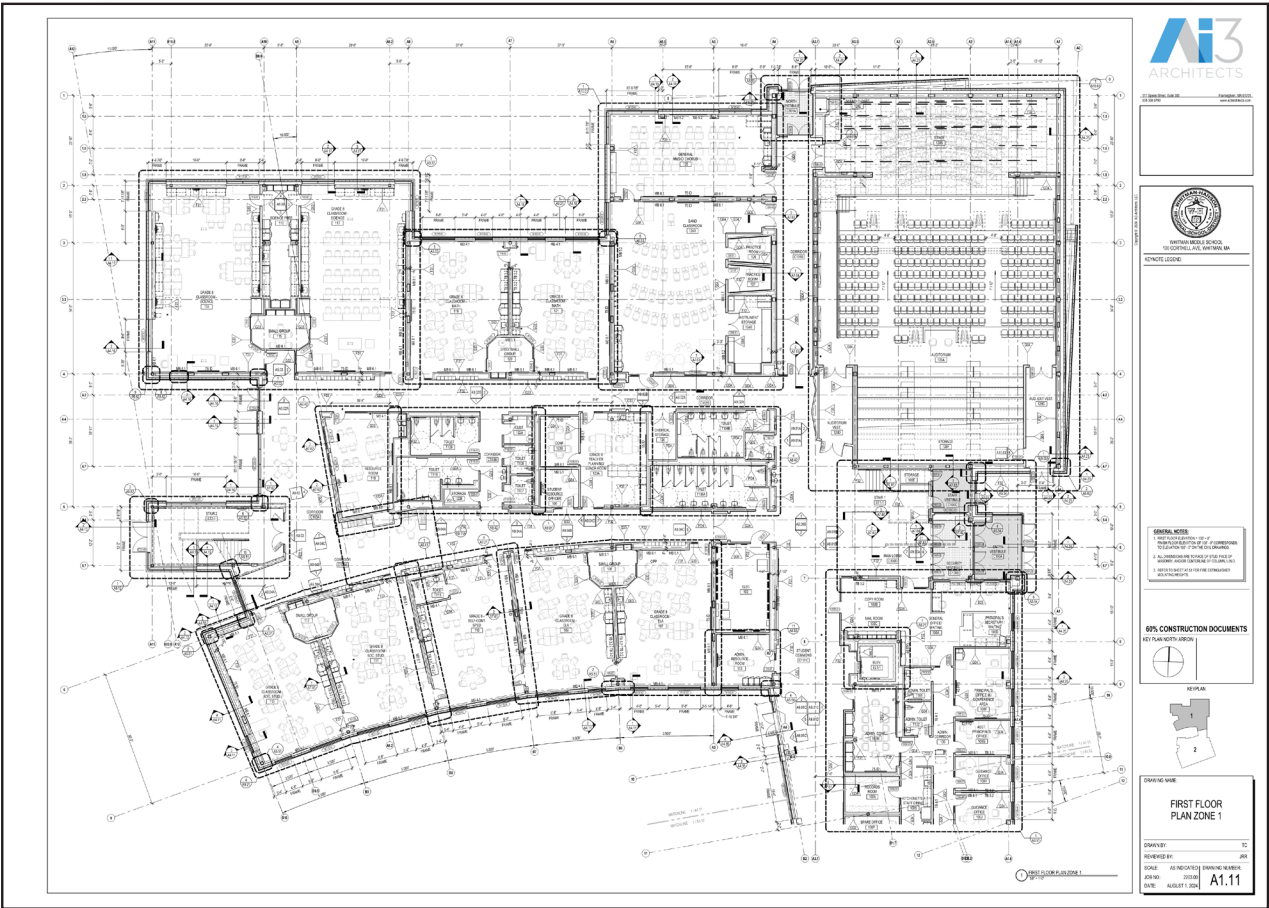
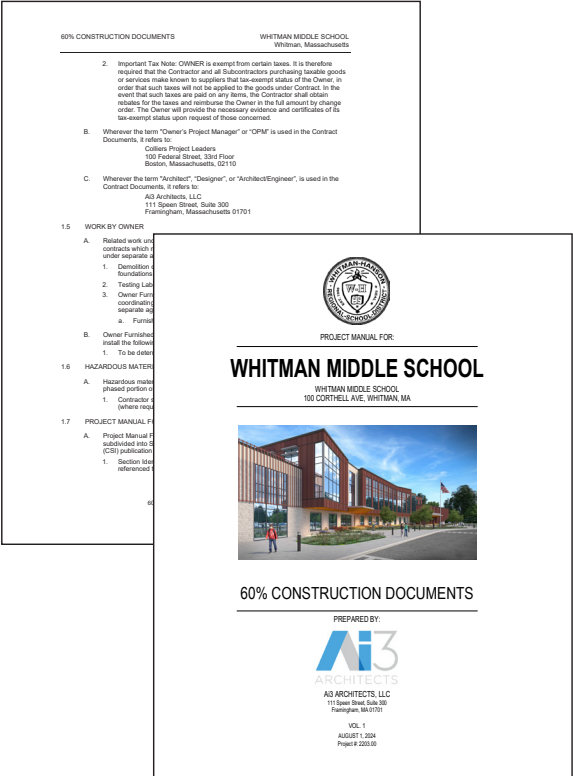
60% CDs Submission to the MSBA

Available for SBC Reference

Project Manual
Volumes 1 & 2

Drawings: Civil, Landscape, Irrigation, Architecture, Food Service, Structure, Fire Protection, Plumbing, Mechanical, Electrical, Technology, Theater, and Solar Design

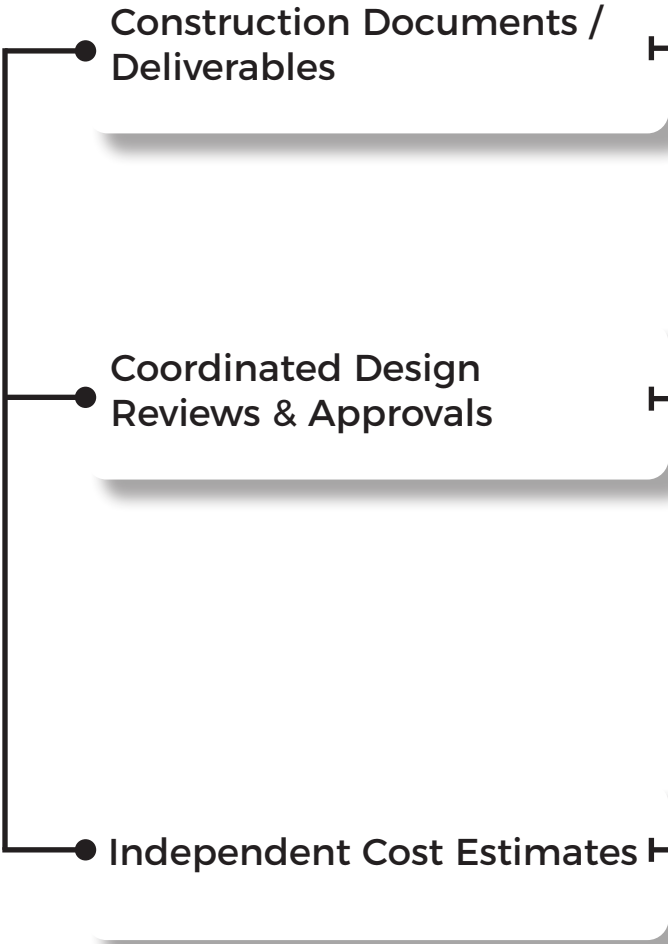
Module 6: 60% CDs
MSBA Report



// A link was shared with the SBC on Aug. 1, 2024 to access the full 60% CDs submission

Step 5
Construction Documents Submission

90% - 100% CDs
Aug. - Dec. 2024



			90% CDs			100% CDs			
			AUG	SEP	OCT	NOV	DEC	JAN	
+	Construction Documents (CDs)								
	+ Architectural Documents								
	+ Site/Landscape Documents								
	+ Engineering & Consultant Documents								
	+ CDs Project Manual & Proprietary Items								
	+ CDs Narratives & Calculations								
+	Early Bid Package Documents (Electrical Switchgear & Generator Only)								
	- Systems/Energy Life Cycle Cost Analysis								
	- Acoustic, ADA, & Code Reviews + Reports								
	- Security & Visual Oversight Review								
	- Facility & Maintenance Review								
-	Commissioning Agent Review								
	Structural Design Peer Review								
	+ Zoning Board of Approvals								
	✓ MA Architectural Access Board Review								
	- 90% CDs for Cost Estimating								
	- Designer's Construction Cost Estimate								
-	OPM Construction Cost Estimate								
	Reconciliation & Comparative Analysis								
	Value Engineering								

MSBA Submission

MSBA Submission

2024 Notable Dates (Proposed):

- Aug. 20 // Building Committee
- Sep. 10 // Early Package Received
- Oct. 01 // Early Package Released
- Oct. 15 // Building Committee to approve 90% Sub.
- Oct. 24 // MSBA CD Submission

Oct. 24
90% CDs

Dec. 12
100% CDs

- Completed
- Initiated
- Pending

Recap of August Activities

In addition to the 60% CDs Submission...

PERMITTING REVIEWS

- // **Aug. 5, 2024:** A notice of intent (NOI) was submitted by Vertex, the project's civil engineer, to MassDEP and the Whitman Conservation Committee
 - / The NOI outlines the proposed work and methods for protecting the wetlands
- // **Aug. 6, 2024:** An application for site plan review was submitted by Vertex to the Whitman Zoning Board of Appeals
- // The professional team is awaiting response from these local entities

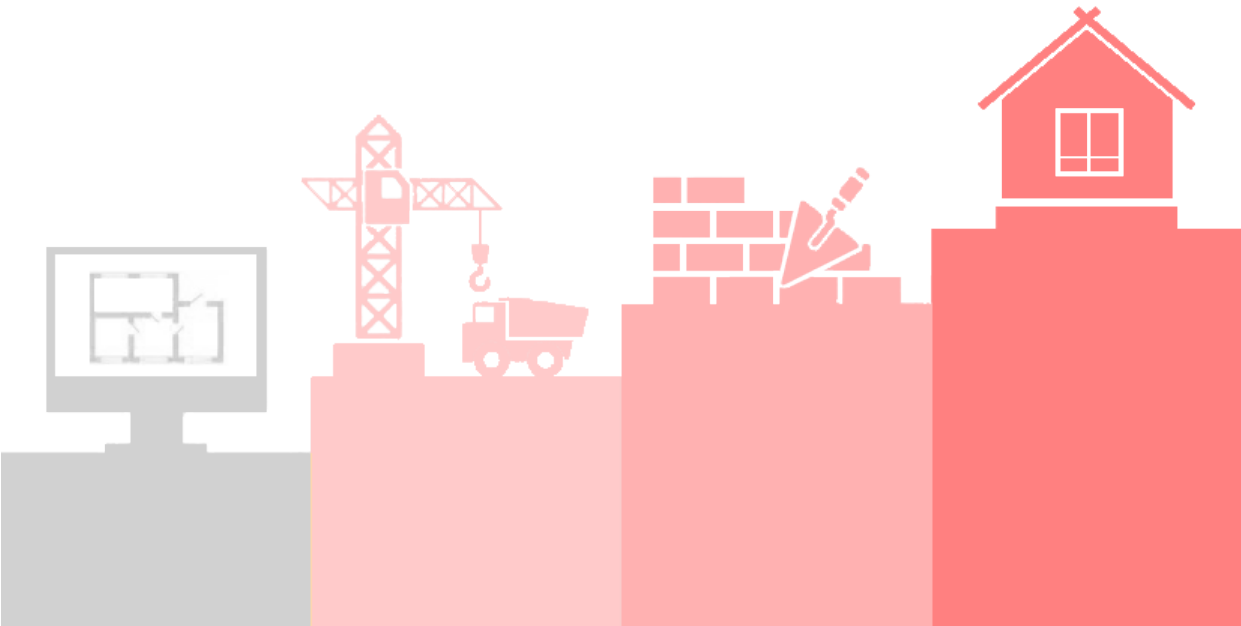
MA ACCESS BOARD REVIEW

- // **Aug. 14, 2024:** Variances granted by the MA Architectural Access Board (MAAB)

#	521 CMR	Description (Gym & Auditorium)
1	24.5.1	Handrails shall be provided along both sides of ramp segments.
2	27.4.1	Stairways shall have continuous handrails at both sides of all stairs.

PLUMBING INSPECTOR

- // **Aug. 21, 2024:** In-person review between Griffith & Vary, the project's plumbing and fire protection engineer, and Whitman's plumbing inspector of the 60% CDs and proposed systems
- // This is a check-in meeting typical of projects to ensure compliance with the authority having jurisdiction



Design Update



Exterior Update

Entry Canopy Supports



Exterior Update

Entry Canopy Supports





Rooftop Solar as
Add-Alternate # **1a**

Add-Alternates

// **1a** Solar (PV) on Roof
apx. 540,500 kWh/yr (55%)
= apx. \$2,050,000*

// **1b** Solar (PV) on 2 Canopies
apx. 435,800 kWh/yr (45%)
= apx. \$2,515,000*




**as of August 2024 estimates*

Solar Canopy (1) as
Add-Alternate # **1b**

Note, if this canopy doubles in size,
then the system is estimated to
achieve 100% energy production
(not reflected in the Aug. 2024 estimates)

Solar Canopy (2) as
Add-Alternate # **1b**

 Included as an Add-Alternate
(Increase to Total Project Budget)
= apx. \$4,565,000*

Approximations as of 60% CD Submission:

Production to offset consumption = **1,075,700 kWh/yr** = 100%
Designed total energy production = **976,300 kWh/yr** = 91%

Inflation Reduction Act

Steps to Receive Tax-Free Payments from the IRS for Clean Energy Tax Credits

- // Identify the qualifying project and which tax credits it will claim (Solar Energy & Energy Storage System)
- // Identify the tax year to determine when the return will be due (Since schools do not have a tax year, the IRS recommends they use their accounting year as their tax year)
- // Complete a pre-filing registration requirement to notify the IRS of the intent to claim the credit
 - / The IRS does not specify a deadline for that pre-filing registration process, but recommends completing the process approximately 120 days before the filing deadline
- // Satisfy all eligibility requirements for the tax credit and applicable bonus credits
- // File an annual tax return (Form 990-T) by the annual filing deadline, typically May 15, using the registration number provided by the IRS following the pre-registration process
- // Receive payment after the return is processed
- // For more information, see the [IRS' Elective Pay Overview](#) and [guide](#) for registering for benefits through the Direct Pay portal

EXAMPLE TIMELINE FOR WMS



LEED v4 Certification Update

DRAFT LEED v4 Scorecard (7/18/24)

// **LEED Silver Certification:** (50-59) required by MSBA, currently on target

// **LEED Gold Certification:** (60-79) possibility would increase with the acceptance of the add-alternates for renewable energy

Y	?	N		
1			C Integrative Process	1
Y	?	N		
2	1	12	Location and Transportation	15
1			C Sensitive Land Protection	1
		2	C High Priority Site	2
		5	C Surrounding Density and Diverse Uses (v4.1)	5
		4	C Access to Quality Transit	4
		1	C Bicycle Facilities	1
	1		C Reduced Parking Footprint (v4.1)	1
1			C Electric Vehicles (v4.1)	1
Y	?	N		
5	4	3	Sustainable Sites	12
Y			P Construction Activity Pollution Prevention	Req
Y			P Environmental Site Assessment	Req
1			C Site Assessment	1
		2	C Protect or Restore Habitat (v4.1)	2
1			C Open Space	1
	3		C Rainwater Management (v4.1)	3
2			C Heat Island Reduction	2
	1		C Light Pollution Reduction	1
		1	C Site Master Plan	1
1			C Joint Use of Facilities	1
Y	?	N		
6	2	4	Water Efficiency	12
Y			P Outdoor Water Use Reduction	Req
Y			P Indoor Water Use Reduction	Req
Y			P Building-Level Water Metering	Req
2			C Outdoor Water Use Reduction	2
3	2	2	C Indoor Water Use Reduction (v4.1)	7
		2	C Cooling Tower Water Use	2
1			C Water Metering	1

Y	?	N		
21	9	1	Energy and Atmosphere	31
Y			P Fundamental Commissioning & Verification	Req
Y			P Minimum Energy Performance	Req
Y			P Building-Level Energy Metering	Req
Y			P Fundamental Refrigerant Management	Req
6			C Enhanced Commissioning	6
14	2		C ACP: Alternative Energy Performance Metric	16
1			C Advanced Energy Metering	1
	2		C Demand Response	2
		1	C Enhanced Refrigerant Management	1
5			C Renewable Energy (v4.1)	5

5 points for Renewable Energy in the "?" column

Y	?	N		
8	2	3	Materials and Resources	13
Y			P Storage & Collection of Recyclables	Req
Y			P Constr. & Demolition Waste Mngmt Planning	Req
1	1	3	C Building Life-Cycle Impact Reduction (v4.1)	5
2			C Environmental Product Declarations (v4.1)	2
1	1		C Sourcing of Raw Materials (v4.1)	2
2			C Material Ingredients (v4.1)	2
2			C Construction & Demolition Waste Management	2

Projected target to achieve "Silver" minimum

61 points →

Y	?	N		
10	1	5	Indoor Environmental Quality	16
Y			P Minimum Indoor Air Quality Performance	Req
Y			P Environmental Tobacco Smoke Control	Req
Y			P Minimum Acoustic Performance (v4.1)	Req
2			C Enhanced Indoor Air Quality Strategies	2
3			C Low-Emitting Materials (v4.1)	3
1			C Construction IAQ Management Plan	1
1	1		C Indoor Air Quality Assessment	2
1			C Thermal Comfort	1
2			C Interior Lighting	2
		3	C Daylight	3
		1	C Quality Views	1
		1	C Acoustic Performance	1
Y	?	N		
6	0	0	Innovation ¹	6
1			C IN: LEED O+M Starter Kit	1
1			C IN: Green Building Education	1
1			C IN: Design for Active Occupants	1
1			C EP: Material Ingredients	1
1			C EP: EPDs	1
1			C LEED Accredited Professional	1
Y	?	N		
2	2	0	Regional Priority	4
1			C RP: Optimize Energy Performance	1
	1		C RP: Renewable Energy	1
	1		C RP: Building Life-Cycle Impact Reduction	1
1			C RP: Outdoor Water Use Reduction	1
Y	?	N		
61	21	28	Totals	110

Certified: 40 to 49 points, Silver: 50 to 59 points, Gold: 60 to 79 points, Platinum: 80 to 110
P: Prerequisite | C: Credit | EP: Exemplary Performance | RP: Regional Priority



Questions?

Thank you

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