MONTHLY REPORT



July 2024

DORE + WHITTIER

July 2024



I. EXECUTIVE SUMMARY

This is the eleventh monthly report for the Lexington High School project that will cover July 2024. The Lexington High School Project continued through the Preferred Schematic Report that began at the start of June. The project team anticipates the MSBA review comments sometime during the month of August. Once received, the SBC will review along with the project team. During the month of July, we held working group meetings, weekly project team meetings, a Permanent Building Committee (PBC) meeting, a LCCA Discussion, our SBC Meeting No. 13 & 14, and a full day SBC Retreat. At the SBC Meeting No. 13, the SBC was introduced to the educational adjacency diagrams along with the PSR decision timeline. At the SBC Meeting No. 14, the SBC was introduced to the Whole Building LCCA, pEUI, Solar PV Analysis and the PSR IDP/LEED Scorecard Criteria. During the full day SBC retreat time was spent discussing the project scope, cost, schedule in small and large groups. The August 14th community meeting was also reviewed.

Key milestone Preferred Schematic Report dates are outlined below.

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Milestone Dates-Preferred Schematic Report

June-September 2024

- Provide analysis of each prospective site/siting including **site limitations**, building **footprint**, athletic **fields**, **parking** areas, **bus and parent drop** of areas, **site access** and surrounding site features
- Evaluate potential impact that construction of each option will have on students and provide required/recommended mitigation efforts
- · Identify permitting requirements including estimated time to acquire each permit
- Develop conceptual architectural and site drawings
- · Narrative of major building systems including plumbing, HVAC, electrical with estimated loads
- Source, capacities, and method of obtaining utilities

September-October 2024

- Develop proposed project design and construction schedule including phasing
- · Develop estimate construction costs
- Develop total project budget
- Prepare final evaluations in detailed narratives and tables including a cost comparison table

November-December 2024

- · Vote preferred option
- $\bullet \quad \text{Summary of key components of Ed program and how preferred solution fulfills these}\\$
- Complete sustainability scorecard and signed letter
- Provide conceptual floor plans of preferred solution
- Provide clearly labeled site plans of preferred solution
- Provide overview of the total project budget and local funding
- Complete and submit budget statement for preferred solution

(Please note that ALL meeting recordings, agendas, minutes, and materials can be found on the project website found here: A New Vision for Lexington High School (lexingtonma.org)





At the July 8th SBC Meeting No. 13, The project team presented the following agenda:

- Call to Order
- Vote Previous Meeting Minutes
 - o June 24, 2024
- Review Educational Adjacency Diagrams
- Decision Timeline for Preferred Schematic Report
- Pool and Field House Discussion
- Recreational Field Impacts
- Public Comment
- Reflections/Action Items
- Adjourn

The project team presented the first review of the educational adjacency diagrams along with the Preferred Schematic Report (PSR) timeline. Feedback for the adjacency diagrams was fielded after the meeting via Thought Exchange and provided to SMMA for review. There was also feedback provided for the PSR timeline which SMMA used to revise and reissue it. The town manager Jim Malloy discussed the pool & field house and how it may not be an SBC responsibility. It was decided to have a summit meeting with the required stakeholders to be held on August 15th.

A copy of the minutes, presentation, and recording can be found on the project website

Meeting Minutes - Recording - Presentation

At the July 10th Communications Working Group, the group presented the following agenda:

- Review Progress on action items from 6/26 and 6/27 FAQ sub-group meetings
- Review 7/8 discussion and assign tasks for additional collateral development
- Planning for the 8/14 and 9/18 public meetings

The working group spent time reviewing their rework of the project website FAQ page. It was decided that the page needed to be organized in a way that conveyed all the project information easily for the public. The group assigned topics to individual members to work on drafting corresponding responses. Lexington's Director of Communication also became involved to help the Communication Working Group to complete this task. The working group also reviewed the upcoming community meetings and began drafting an agenda.

A copy of the minutes and recording can be found on the project website

Meeting Minutes - Recording

At the July 18th Life Cycle Cost Analysis Meeting, the project team provided the following agenda:

- Review previous LCCA Discussion Meeting
- Preparation for the LCCA discussion at the July 22, 2024, SBC Meeting

In this meeting the project reviewed the Life Cycle Cost Analysis for the proposed Lexington Highschool. SMMA received feedback in preparation for the following week where the LCAA would be shared with the full SBC.

A copy of the recording can be found on the project website - Recording





At the July 22nd SBC Meeting No.14, The project team presented the following agenda:

- Call to order
- Vote Previous Meeting Minutes
 - o July 8th, 2024
- Review MSBA comments
- Introduce Whole Building LCCA, pEUI, Solar PV Analysis, PSR IDP/LEED Scorecard Criteria
- PSR Timeline and Schedule review
- Public comment
- Reflections/Action items
- Adjourn

The project team did not review the Preliminary Design program MSBA comments as they had not been received yet, they are expected some time in August. SMMA introduced and explained multiple topics to be discussed with the SBC at the following meeting. These topics included the whole building LCCA review, pEUI, Solar PV Analysis, and a dive into the PSR IDP/LEED scorecard criteria. The project team also presented an updated PSR timeline for decisions based on the feedback provided at the previous SBC meeting.

A copy of the minutes, presentation, and recording can be found on the project website

Meeting Minutes – Recording – Presentation

At the July 24th Communication Working Group, the group used the following agenda:

- Review list of topics that should be discussed at the August community meeting (follow-up on action item from last meeting)
 - o Topic
 - What we should expect the community will want to learn
 - Who will be the subject matter expert for the item from the SBC
 - What we are able to say
- Continue Review of the FAQ items

The Communication Working Group spent this time planning the August 14th community meeting. After reviewing the possible formats, the working group settled on a Q&A panelist style meeting with the SBC as the panelists. The group decided on three main topics to be reviewed and discussed: Scope (education plan & cost), Location & Impact, and Community Values. It was noted that the review and progress on the FAQ was continuing.

A copy of the minutes and recording can be found on the project website

Meeting Minutes - Recording

July 2024



At the July 30th SBC Retreat, The School Building Committee provided the following agenda:

- Welcome & Overview
- How to gain the support of other town boards and committees
- How to gain the support of the general public
- Scope, cost, & schedule
- Other important aspects of the project that may be time critical
- Adjourn

This full day SBC retreat was organized so the committee could spend a considerable amount of time together to discuss and review the upcoming months of the Preferred Schematic Report as the timeline is time sensitive. The SBC focused on what stakeholders needed to be engaged in Lexington to help garner support from the town and public. The retreat also helped solidify the SBC's understanding of the scope, cost, and schedule as the project team attended to answer any questions that were presented.

A copy of the minutes, recordings, and presentation material can be found on the project website

Meeting Minutes - Not yet uploaded

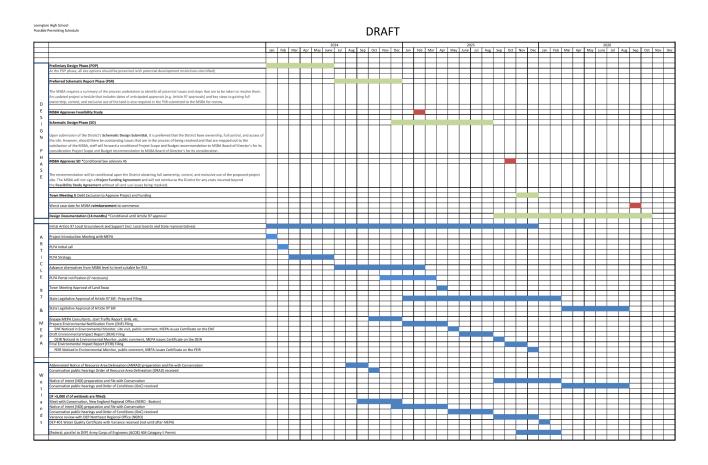
Presentation Material – All links can be found on the agenda

Recordings – Recording 1 – Recording 2 – Recording 3





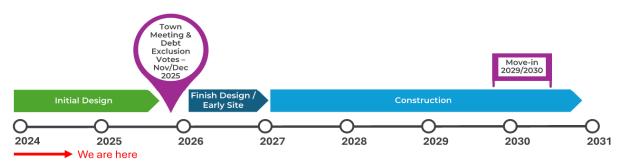
Included below is the current Article 97 schedule as of today. This schedule will be updated monthly. A .pdf of the schedule is included as backup to this document.





PROJECT SCHEDULE OVERVIEW

LHS Anticipated Project Timeline

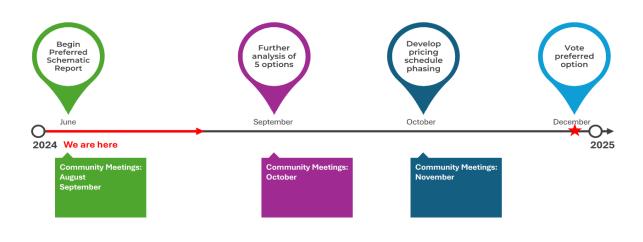


All dates after local vote in November / December 2025 are subject to change based upon the selected option.

Construction duration is shown to provide a potential range. Final duration will be determined toward the end of initial design.

Move-in date will be determined after an option is selected. Anticipated move-in currently shown in the range of 2029 to 2030

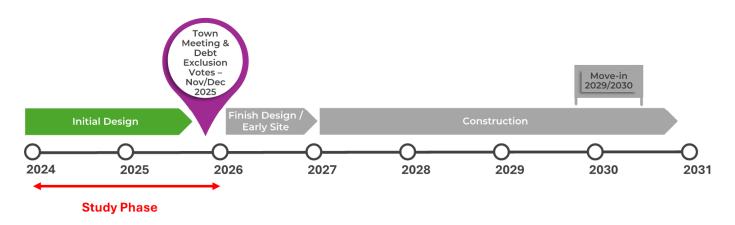
LHS Projected Timeline – Preferred Schematic Report



Issued:8/7/24



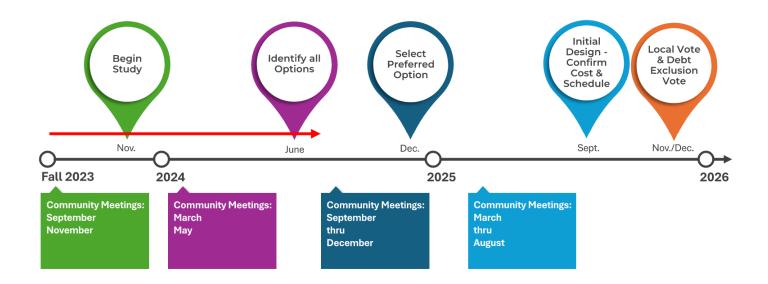
LHS Anticipated Project Timeline



Study Phase includes Feasibility and Schematic Design and is the current phase of the project

Issued:1/25/24

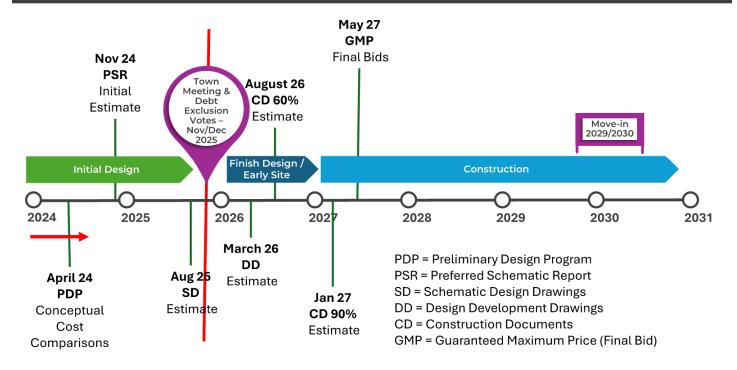
LHS Projected Timeline – Study Phase



Issued:1/25/24



LHS Anticipated Project Timeline - Estimating



July 2024



II. TASKS COMPLETED

A series of meetings were held in the month of July, they include:

- 7/8/2024 SBC Meeting No.13
- 7/10/2024 Communications Working Group
- 7/18/2024 LCCA Discussion
- 7/22/2024 SBC Meeting No. 14
- 7/24/2024 Communications Working Group
- 7/30/2024 SBC Retreat

In addition, the OPM has submitted our monthly MSBA report, reviewed and updated the project schedule along with the designer work plan, and continued to map out upcoming milestone dates and deliverables for key decisions that need to be made by the SBC and the community through the PSR phase.

III. 30-DAY LOOK AHEAD

In the month of August, the project team will be reviewing the following:

Review MSBA PDP Comments, PSR IDP/LEED Scorecard Criteria, Parking Quantity and Location, Driveways and Circulation, Current Use and Anticipated Impacts of Fields, Ground Floor Program & Footprint Area, Total Gross Square Footage, Choose one "New Construction on Fields" Massing Option, Initial CMR Discussion. The SBC will also be hosting a community meeting on August 14th and their will be a summit on August 15th to review the pool & field house.

Upcoming Meetings:

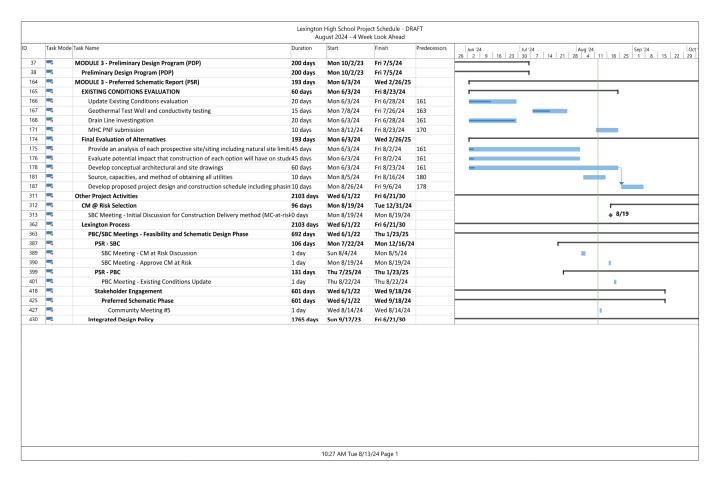
- 8/5/2024 SBC Meeting No.15
- 8/7/2024 Communication Working Group
- 8/14/2024 Community Meeting No. 6
- 8/15/2024 Field House & Pool Summit
- 8/19/2024 SBC Meeting No. 16
- 8/21/2024 Communications Working Group

Attached below is a 4 week look ahead from our project schedule. The full project schedule is included as a backup to this document.

I. 4 Week Look Ahead Schedule

July 2024





II. PROJECT BUDGET

Budget Status Narrative: In the month of July, nine (9) invoice(s) were submitted for payment against the project budget and two (2) amendments were approved.

July 2024



August 13, 2024

Project Name: Lexington High School

Subject: Monthly Report Budget Update

1. MSBA Reimbursement Status:

PR No.	Payment Request Date	Submitted Amount	Ineligible Project Costs	Eligible Project Costs	Eligible Grant	Recommended Payment Amount	MSBA Last Payment Date	MSBA Payment Amount
1	10/4/2023	\$46,262	\$1,600	\$44,662	\$13,845	\$0	12/21/2023	\$13,845
2	1/10/2024	\$89,198	\$1,568	\$87,630	\$27,165	\$0	2/1/2024	\$27,166
3	2/2/2024	\$254,269	\$0	\$254,269	\$78,823	\$0	3/21/2024	\$78,823
4	3/1/2024	\$92,828	\$0	\$92,828	\$28,777	\$0	3/21/2024	\$28,777
5	4/2/2024	\$45,239	\$8,896	\$36,343	\$11,266	\$0	5/3/2024	\$11,266
6	5/31/2024	\$351,726	\$42,510	\$309,216	\$95,857	\$0	6/25/2024	\$95,857
7	7/22/2024	\$265,241	\$214,118	\$51,123	\$15,848	\$15,848		
Total		\$1,144,763				\$15,848		\$255,734

amendments were approved.



	Task	Task Name	Duration	Start	2024	
0	Mode				2019 2024	2029
	-5	Modulo 1 Eligibility Phase	196 days	Wed 6/1/22		
2 12		Module 1 - Eligibility Phase Module 2 - Forming the Team	160 days	Thu 3/2/23	i i	
37		MODULE 3 - Preliminary Design Program (PDP)	200 days	Mon 10/2/23	' -	
38	- 3	Preliminary Design Program (PDP)	200 days	Mon 10/2/23	<u>'-</u> '	
64	- 5	MODULE 3 - Preferred Schematic Report (PSR)	193 days	WIOII 10/2/23	' -	
65	- <u>-</u> -	EXISTING CONDITIONS EVALUATION	60 days	Mon 6/3/24	H .	
66		Update Existing Conditions evaluation	20 days	Mon 6/3/24		
67		Geothermal Test Well and conductivity testing	15 days	Mon 7/8/24		
68		Drain Line investingation	20 days	Mon 6/3/24		
69		ANRAD submission to Conservation Commission	40 days	Mon 7/1/24	+	
170	- 5	Historical Documentation of Building	40 days	Mon 6/17/24		
171	- ,	MHC PNF submission	10 days	Mon 8/12/24	7	
72	-	Identify any additional testing required in the future	40 days	Mon 6/3/24		
173		PBC - Review PSR timeline	0 days	Thu 6/13/24	♦ 6/13	
174		Final Evaluation of Alternatives	193 days	Mon 6/3/24	<u> </u>	
75	-5	Provide an analysis of each prospective site/siting including natural site limitations, building footprint, athletic fields, parking areas, bus and parent drop off areas, site access and surrounding site features	45 days	Mon 6/3/24	•	
176	-5	Evaluate potential impact that construction of each option will have on students and provide required/rec	co 45 days	Mon 6/3/24		
77	- 5	Identify permitting requirements including the estimated time to acquire each permit	60 days	Mon 6/3/24		
178	- 5	Develop conceptual architectural and site drawings	60 days	Mon 6/3/24		
79	-	Narrative of major building & structural systems that are proposed for each alternative	45 days	Mon 6/3/24		
80	-	Narrative of major building systems including plumbing, HVAC, electrical with estimated loads	45 days	Mon 6/3/24		
81	-	Source, capacities, and method of obtaining all utilities	10 days	Mon 8/5/24	\	
82	-	Educational focus group (Mtg 5)	2 days	Wed 9/4/24	4	
83	-5	Site Safety and Security Focus Group (Mtg 5)	2 days	Wed 9/4/24		
84	-5	MEP and Sustainability Focus Group (Mtg 5)	2 days	Wed 9/4/24		
85	-5	Exterior and Interior Design Focus Group (Mtg 5)	2 days	Wed 9/4/24		
86		Eco Charette	1 day	Thu 9/5/24	4	
87	-5	Develop proposed project design and construction schedule including phasing considerations	10 days	Mon 8/26/24		
88		Develop Estimate Construction Costs	15 days	Mon 9/9/24	5	
89		Reconcile Estimates	3 days	Mon 9/30/24		
90		Confirm any alternate spaces to be included	5 days	Thu 10/3/24	Ir⊤	
91	-5	Develop total project budget	5 days	Thu 10/3/24		
92	-5	Prepare final evaluations in detailed narratives and tables including a cost comparison table	5 days	Thu 10/10/24		
193	- 5	Present Concept Plans with Costs and Schedule to SBC, discuss Preferred Schematic	1 day	Mon 10/21/24		
194		SBC to VOTE on Preferred Schematic	1 day	Mon 11/11/24		

		Lexington F	High School				
A	Task Mode	Task Name	Duration	Start		2024	
5	Mode	Provide an updated Ed Program that addresses all questions and comments in PDP review	10 days	Tue 11/12/24	2019	2024	2029
6	- 5	Summary of key components of Districts Ed Program and how preferred solution fulfills these requirements	10 days	Tue 11/12/24		T T	
97	-5	Complete sustainability scorecard and signed letter	10 days	Tue 11/12/24			
8	-5	Provide conceptual floor plans of preferred solution	10 days	Tue 11/12/24			
99	- 5	Provide clearly labeled site plans of preferred solution	10 days	Tue 11/12/24			
0		Provide overview of the Total Project Budget and local funding	10 days	Tue 11/12/24			
)1	- 5	Complete and submit a budget statement for preferred solution	10 days	Tue 11/12/24		 	
2	<u>_</u>	DRAFT PSR report available	5 days	Tue 11/26/24			
3	-5	SBC Review options / Eval Criteria	0 days	Fri 12/6/24		12/6	
1	-5	PBC - Review options / evaluation criteria	1 day	Thu 12/5/24			
5	-5	SBC review DRAFT PSR Submission	6 days	Mon 12/2/24		 	
5	-5	SMMA Finalizes Report	4 days	Tue 12/10/24		 	
7	-5	SBC Votes on Preferred Schematic Report (PSR)	1 day	Mon 12/16/24		 	
8	-5	MSBA Submission	52 days	Tue 12/17/24		n	
19	- 5	Submit to MSBA - Early due to Holidays	1 day	Tue 12/17/24		+	
0		Submit to MSBA - Official Date	0 days	Thu 12/26/24		♦ 12/26	
1		MSBA Review Period	15 days	Thu 12/26/24			
2	- 5	Respond to MSBA Comments	10 days	Thu 1/16/25			
3		MSBA Facilities Assessment Subcommittee Meeting	0 days	Wed 1/15/25		1/15	
4		MSBA Board Approval	0 days	Wed 2/26/25		2/26	
5	-5	MODULE 4 - Schematic Design	203 days	Thu 1/16/25		 	
8	-5	MODULE 5 - Project Scope and Budget Agreement	80 days	Tue 10/14/25		н	
9	-5	Project Scope and Budget Conference	10 days	Tue 10/14/25		1	
0	-5	Local Funding Authorization TBD	41 days	Mon 11/3/25		н	
	-5	Town meeting	20 days	Mon 11/3/25		h	
!	-5	Debt Exclusion	21 days	Mon 12/1/25		,	
3	-5	Project Funding Agreement	25 days	Tue 12/30/25			
4	- 5	MODULE 6 - Detailed Design	462 days?	Fri 8/29/25			
9	-5	MODULE 7 - Construction	1122 days	Wed 7/1/26		-	
1	<u>_</u>	Other Project Activities	2103 days	Wed 6/1/22			
2	-5	CM @ Risk Selection	96 days	Mon 8/19/24		H	
3	<u>_</u>	SBC Meeting - Initial Discussion for Construction Delivery method (MC-at-risk vs. DBB)	0 days	Mon 8/19/24		8/19	
4	- 3	SBC Meeting - Construction Delivery Method& SBC Vote	1 day	Mon 9/16/24		<u> </u>	
5		IG Application Process - If CM@R	50 days	Tue 9/17/24		rı	
6	-5	Complete the IG Application Form	3 days	Tue 9/17/24		F	
7	-5	Submit CM@R Application to IG	1 day	Fri 9/20/24		F .	
8	-5	Max of 60 Day IG application Review Period	45 days	Mon 9/23/24		 	
19		IG Formal approval to proceed with the CM @ Risk Delivery Method	1 day	Mon 11/25/24			
20	- <u>-</u> -	CM@R Request For Qualifications (RFQ)	40 days	Tue 9/17/24		lei .	

	Task	Task Name	Duration	Start	2024
1	Mode	Develop Deeft CMGD Descript For Ovelifications (DEO)	10 dave	T 0 /4 7 /2 4	2019 2024 202
1		Develop Draft CM@R Request For Qualifications (RFQ)	10 days	Tue 9/17/24	
2		Distribute Draft CM@R PreQ for Review&Approval by Selection Committee (SC)	1 day	Tue 10/1/24	
.3	-5	CM@R Prequalification Selection Committee meeting	1 day	Tue 10/8/24	<u> </u>
	-5	Run Central Register, COMBUYS&Local Ad for CM@R RFQ	5 days	Wed 10/2/24	10/8
5	-5	Issue CM@R RFQ	0 days	Tue 10/8/24	10/8
6		CM@R Qualifications Due	1 day	Wed 10/30/24	
7	-5	PreQ Committee reviews and ranks quals - shortlist 3 to 4 firms	5 days	Thu 10/31/24	
8		PBC/SBC Meeting - Notification of Shortlisted Firms	1 day	Mon 11/11/24	
9		CM@R Proposal and selection Process	60 days	Wed 10/9/24	
0		Develop CM @ Risk RFP/Contracts/Schedule/Est. Requirements	13 days	Wed 10/9/24	\
1		Local Council Review of RFP&Contracts	10 days	Mon 10/28/24	
2		Distribute CM@R RFP	1 day	Tue 11/12/24	11/10
3		CM Site Visit/Walk-Through	0 days	Tue 11/19/24	11/19
4		CM Proposals Due	0 days	Fri 11/29/24	11/29
5		CM selection committee review proposals	5 days	Mon 12/2/24	\downarrow
6		CM Selection Committee Meets and scores proposals	1 day	Mon 12/9/24	
7	-5	Issue Interview questionsℴ	1 day	Tue 12/10/24	
8	-5	Interview CM Firms	2 days	Wed 12/18/24	
9	-5	Negotiate Contract and award CM Firm	7 days	Fri 12/20/24	
0	-5	Award SD Estimating Purchase Order	1 day	Tue 12/31/24	
.1	-5	Article 97	1195 days	Wed 6/1/22	
2	-5	MSBA Milestones	438 days	Wed 6/1/22	
3	-5	Initial Article 97 Local Groundwork and support	104 wks	Wed 1/3/24	
4	-	Project Introduction Meeting w/ MEPA	1 day	Tue 1/2/24	$oxed{H}$
5	-5	PLPA - Initial Call	4 wks	Wed 1/28/26	
6	-5	High School and Center Recreation Area Working Group	1 day	Fri 1/23/26	
7	-5	Kickoff Meeting with PLPA	20 days	Thu 2/1/24	T ₁
8		PLPA waiver submission with alternatives (if applicable)	88 days	Thu 2/29/24	
9	-5	Advance alternatives from MSBA level to level suitable for EEA	170 days	Tue 7/2/24	
0	-5	PLPA Portal notification	105 days	Fri 11/1/24	
1	-5	Town Meeting - Approval of land swap	21 days	Tue 4/1/25	
2	-	State Legislative Approval of Article 97 Bill - Prep and filing	300 days	Thu 1/2/25	
3		State Legislative approval of Article 97	133 days	Thu 2/26/26	
1	-5	Article 97 Complete	1 day	Tue 9/1/26	<u> </u>
5	-5	Engage MEPA Consultants, start traffic report, GHG, etc.	65 days	Thu 1/2/25	
6		Prepare Environmental Notification Form (ENF) Filing	85 days	Wed 9/2/26	
7		ENF Noticed in Environmental Monitor, site visit, public comment, MEPA issues Certificate on the ENF	24 days	Tue 4/29/25	
8	-	Draft Environmental Impact Report (DEIR) Filing	65 days	Mon 6/2/25	
9	-	DEIR Noticed in Environmental Monitor, public comment, MEPA issues Certificate on the DEIR	22 days	Mon 9/1/25	
0	- 5	Final Environmental Impact Report (FEIR) Filing	43 days	Wed 10/1/25	
1	-5	FEIR Noticed in Environmental Monitor, public comment, MEPA issues Certificate on the FEIR	22 days	Mon 12/1/25	<u> </u>

