

TOWN OF WELLESLEY



MASSACHUSETTS

## BOARD OF SELECTMEN

TOWN HALL • 525 WASHINGTON STREET • WELLESLEY, MA 02482-5992

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THOMAS H. ULFELDER  
BETH SULLIVAN WOODS

FACSIMILE: (781) 239-1043  
TELEPHONE: (781) 431-1019 x2201

[WWW.WELLESLEYMA.GOV](http://WWW.WELLESLEYMA.GOV)

BLYTHE C. ROBINSON

EXECUTIVE DIRECTOR OF GENERAL GOVERNMENT

### SELECTMEN'S MEETING

#### *TENTATIVE AGENDA*

Middle School Library

**6:30 P.M. Tuesday, March 28, 2017**

1. 6:30 Citizen Speak
2. 6:35 Executive Session to discuss union contract negotiations – Library & Facilities Maintenance & Custodians
3. 6:40 Consider approval of Union contract settlements - Library and Facilities Maintenance Custodians
4. 6:45 Hardy, Hunnewell, Upham Statements of Interest
5. 6:50 Consider endorsement for ATM Articles

Next Meeting Dates: Monday, April 3, Annual Town Meeting/ Special Town Meeting  
Tuesday, April 4, Annual Town Meeting  
Wednesday, April 12, Annual Town Meeting



BOARD OF SELECTMEN  
MOTION WORDING FOR APPROVAL OF  
MSBA STATEMENTS OF INTEREST

MOVED: That the Board of Selectmen, in accordance with its charter, bylaws, and ordinances, authorizes the Superintendent to submit to the Massachusetts School Building Authority the Statement of Interest Form, dated March 22, 2017, for the **John D Hardy Elementary School, 293 Weston Road, Wellesley, Massachusetts**, which describes and explains the following deficiencies and the priority category(s) for which an application may be submitted to the Massachusetts School Building Authority in the future:

**Priority 5** - Replacement, renovation or modernization of school facility systems, such as roofs, windows, boilers, heating and ventilation systems, to increase energy conservation and decrease energy related costs in a school facility

**Priority 7** – Replacement of or addition to obsolete buildings in order to provide for a full range of programs consistent with state and approved local requirements

and hereby further specifically acknowledges that by submitting this Statement of Interest Form, the Massachusetts School Building Authority in no way guarantees the acceptance or the approval of an application, the awarding of a grant or any other funding commitment from the Massachusetts School Building Authority, or commits the Town of Wellesley to filing an application for funding with the Massachusetts School Building Authority.

MOVED: that the Board of Selectmen, in accordance with its charter, bylaws, and ordinances, authorizes the Superintendent to submit to the Massachusetts School Building Authority the Statement of Interest Form, dated March 22, 2017, for the **Hunnewell Elementary School, 28 Cameron Street, Wellesley, Massachusetts**, which describes and explains the following deficiencies and the priority category(s) for which an application may be submitted to the Massachusetts School Building Authority in the future:

**Priority 5** - Replacement, renovation or modernization of school facility systems, such as roofs, windows, boilers, heating and ventilation systems, to increase energy conservation and decrease energy related costs in a school facility

**Priority 7** – Replacement of or addition to obsolete buildings in order to provide for a full range of programs consistent with state and approved local requirements

and hereby further specifically acknowledges that by submitting this Statement of Interest Form, the Massachusetts School Building Authority in no way guarantees the acceptance or the approval of an application, the awarding of a grant or any other funding commitment from the Massachusetts School Building Authority, or commits the Town of Wellesley to filing an application for funding with the Massachusetts School Building Authority.

MOVED: that the Board of Selectmen, in accordance with its charter, bylaws, and ordinances, authorizes the Superintendent to submit to the Massachusetts School Building Authority the Statement of Interest Form, dated March 22, 2017, for the **Upham Elementary School, 35 Wynnewood Road, Wellesley, Massachusetts**, which describes and explains the following deficiencies and the priority category(s) for which an application may be submitted to the Massachusetts School Building Authority in the future:

**Priority 5** - Replacement, renovation or modernization of school facility systems, such as roofs, windows, boilers, heating and ventilation systems, to increase energy

conservation and decrease energy related costs in a school facility

**Priority 7** – Replacement of or addition to obsolete buildings in order to provide for a full range of programs consistent with state and approved local requirements

and hereby further specifically acknowledges that by submitting this Statement of Interest Form, the Massachusetts School Building Authority in no way guarantees the acceptance or the approval of an application, the awarding of a grant or any other funding commitment from the Massachusetts School Building Authority, or commits the Town of Wellesley to filing an application for funding with the Massachusetts School Building Authority.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

## Massachusetts School Building Authority

School District Wellesley

District Contact David F Lussier TEL: (781) 446-6210

Name of School John D Hardy

Submission Date 3/22/2017

### SOI CERTIFICATION

To be eligible to submit a Statement of Interest (SOI), a district must certify the following:

- ☒ The district hereby acknowledges and agrees that this SOI is NOT an application for funding and that submission of this SOI in no way commits the MSBA to accept an application, approve an application, provide a grant or any other type of funding, or places any other obligation on the MSBA.
- ☒ The district hereby acknowledges that no district shall have any entitlement to funds from the MSBA, pursuant to M.G.L. c. 70B or the provisions of 963 CMR 2.00.
- ☒ The district hereby acknowledges that the provisions of 963 CMR 2.00 shall apply to the district and all projects for which the district is seeking and/or receiving funds for any portion of a municipally-owned or regionally-owned school facility from the MSBA pursuant to M.G.L. c. 70B.
- ☒ The district hereby acknowledges that this SOI is for one existing municipally-owned or regionally-owned public school facility in the district that is currently used or will be used to educate public PreK-12 students and that the facility for which the SOI is being submitted does not serve a solely early childhood or Pre-K student population.
- ☒ After the district completes and submits this SOI electronically, the district must sign the required certifications and submit one signed original hard copy of the SOI to the MSBA, with all of the required documentation described under the "Vote" tab, on or before the deadline.
- ☒ The district will schedule and hold a meeting at which the School Committee will vote, using the specific language contained in the "Vote" tab, to authorize the submission of this SOI. This is required for cities, towns, and regional school districts.
- ☒ Prior to the submission of the hard copy of the SOI, the district will schedule and hold a meeting at which the City Council/Board of Aldermen or Board of Selectmen/equivalent governing body will vote, using the specific language contained in the "Vote" tab, to authorize the submission of this SOI. This is not required for regional school districts.
- ☒ On or before the SOI deadline, the district will submit the minutes of the meeting at which the School Committee votes to authorize the Superintendent to submit this SOI. The District will use the MSBA's vote template and the vote will specifically reference the school and the priorities for which the SOI is being submitted. The minutes will be signed by the School Committee Chair. This is required for cities, towns, and regional school districts.
- ☒ The district has arranged with the City/Town Clerk to certify the vote of the City Council/Board of Aldermen or Board of Selectmen/equivalent governing body to authorize the Superintendent to submit this SOI. The district will use the MSBA's vote template and submit the full text of this vote, which will specifically reference the school and the priorities for which the SOI is being submitted, to the MSBA on or before the SOI deadline. This is not required for regional school districts.
- ☒ The district hereby acknowledges that this SOI submission will not be complete until the MSBA has received all of the required vote documentation and certification signatures in a format acceptable to the MSBA. If Priority 1 is selected, your Statement of Interest will not be considered complete unless and until you provide the required engineering (or other) report, a professional opinion regarding the problem, and photographs of the problematic area or system.

Name of School      ---- SAMPLE SCHOOL [DRAFT] ----
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<b>Chief Executive Officer *</b>	<b>School Committee Chair</b>	<b>Superintendent of Schools</b>
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Marjorie Freiman	Sharon Gray	David F. Lussier
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Chair, Board of Selectmen		
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(signature)	(signature)	(signature)
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Date	Date	Date
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\* Local chief executive officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated to the chief executive office under the provisions of a local charter. Please note, in districts where the Superintendent is also the Local Chief Executive Officer, it is required for the same person to sign the Statement of Interest Certifications twice. Please do not leave any signature lines blank.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

## Massachusetts School Building Authority

School District Wellesley

District Contact David F Lussier TEL: (781) 446-6210

Name of School John D Hardy

Submission Date 3/22/2017

### Note

The following Priorities have been included in the Statement of Interest:

1. ☐ Replacement or renovation of a building which is structurally unsound or otherwise in a condition seriously jeopardizing the health and safety of school children, where no alternative exists.
2. ☐ Elimination of existing severe overcrowding.
3. ☐ Prevention of the loss of accreditation.
4. ☐ Prevention of severe overcrowding expected to result from increased enrollments.
5. ☒ Replacement, renovation or modernization of school facility systems, such as roofs, windows, boilers, heating and ventilation systems, to increase energy conservation and decrease energy related costs in a school facility.
6. ☐ Short term enrollment growth.
7. ☒ Replacement of or addition to obsolete buildings in order to provide for a full range of programs consistent with state and approved local requirements.
8. ☐ Transition from court-ordered and approved racial balance school districts to walk-to, so-called, or other school districts.

### SOI Vote Requirement

☒ I acknowledge that I have reviewed the MSBA's vote requirements for submitting an SOI which are set forth in the Vote Tab of this SOI. I understand that the MSBA requires votes from specific parties/governing bodies, in a specific format using the language provided by the MSBA. Further, I understand that the MSBA requires certified and signed vote documentation to be submitted with the SOI. I acknowledge that my SOI will not be considered complete and, therefore, will not be reviewed by the MSBA unless the required accompanying vote documentation is submitted to the satisfaction of the MSBA.

Potential Project Scope: Potential New School

Is this SOI the District Priority SOI? NO

School name of the District Priority SOI: Ernest F Upham

Is this part of a larger facilities plan? YES

If "YES", please provide the following:

**Facilities Plan Date:** 6/12/2012

**Planning Firm:** Symmes, Maini & McKee Associates (SMMA)

**Please provide an overview of the plan including as much detail as necessary to describe the plan, its goals and how the school facility that is the subject of this SOI fits into that plan:**

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

There are four critical elements that have supported the development of a facilities master plan in Wellesley. First, in order to assess the physical needs of all of its school buildings, the Wellesley Public Schools commissioned a Conditions Assessment and Feasibility Study that was performed by Symmes, Maini & McKee Associates (SMMA). This review included a focus on safety, health hazards, maintenance and infrastructure. In the fall of 2012, SMMA presented their findings through an online database. This database provides a robust tool for strategic planning, capital planning and maintenance prioritization, and has been thoroughly reviewed by the Facilities Maintenance Department (FMD), which has been managing SMMA's work since they were contracted. Second, the District—in collaboration with Town officials—has convened several committees during the past few years to examine the Hardy, Hunnewell, and Upham school facilities challenges and propose recommended plans for moving forward. Most recently, a Master Plan Committee has recommended to the School Committee that the Town conduct feasibility studies at all three sites, and proceed with building two new schools, beginning with Upham and then followed by Hunnewell. Should enrollment increase and begin to trend above current projections, the Town would then move to build a third new school on the Hardy site. Third, the District has received the results of two commissioned demographic studies to inform its short and long term planning. In 2013, Cropper GIS reported that elementary enrollment in Wellesley was expected to decline by approximately 14 percent, or 347 students, between SY2013-2014 and SY2023-2024. In October 2016, FutureThink reported that elementary enrollment in Wellesley was expected to decline by approximately 5 percent, or 114 students, between SY2017-18 and SY2026-27. Taken together, these reports suggest a continued decline of enrollment that may allow the district to consolidate from seven elementary schools to six. Finally, the Wellesley Public Schools has developed a 5-year Strategic Plan that provides a vision for the District's goals, as well as the needed resources and facilities to best achieve these goals. Most important is ensuring that we have the appropriate educational spaces within our schools to provide 21st Century learning opportunities for all of our students.

**Please provide the current student to teacher ratios at the school facility that is the subject of this SOI: 15 students per teacher**

**Please provide the originally planned student to teacher ratios at the school facility that is the subject of this SOI: 17 students per teacher**

**Does the District have a Master Educational Plan that includes facility goals for this building and all school buildings in District? NO**

**Does the District have related report(s)/document(s) that detail its facilities, student configurations at each facility, and District operational budget information, both current and proposed? YES**

**If "YES", please provide title, author, and date of report in area below.**

SMMA Building Condition Review 6/12/2012

**Please include a hard copy of these report(s)/document(s) with your hard copy Statement of Interest submittal.**

**Is there overcrowding at the school facility? YES**

**If "YES", please describe in detail, including specific examples of the overcrowding.**

Due to increased enrollment at Hardy School in recent years, the music and art rooms have been repurposed for regular classroom instruction.

**Has the district had any recent teacher layoffs or reductions? NO**

**If "YES", how many teaching positions were affected? 0**

**At which schools in the district?**

**Please describe the types of teacher positions that were eliminated (e.g., art, math, science, physical education, etc.).**

**Has the district had any recent staff layoffs or reductions? NO**

**If "YES", how many staff positions were affected? 0**

**At which schools in the district?**



Name of School	----- SAMPLE SCHOOL [DRAFT] -----
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**Please describe the types of staff positions that were eliminated (e.g., guidance, administrative, maintenance, etc.).**

**Please provide a description of the program modifications as a consequence of these teacher and/or staff reductions, including the impact on district class sizes and curriculum.**

Does Not Apply

**Please provide a detailed description of your most recent budget approval process including a description of any budget reductions and the impact of those reductions on the district's school facilities, class sizes, and educational program.**

The Wellesley School Committee approved an FY18 Operating Budget of \$72,208,147 on March 2, 2017. At the same time, the Town's proposed FY18 Capital Budget includes significant funding (\$1,553,000) for school-related building construction projects. Both the FY18 Operating and Capital Budgets must be approved at Town Meeting, which begins on March 27, 2017.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

## General Description

**BRIEF BUILDING HISTORY:** Please provide a detailed description of when the original building was built, and the date(s) and project scopes(s) of any additions and renovations (maximum of 5000 characters).

The 45,900 gross square foot Hardy Elementary school was constructed in 1924 and is the second oldest school in the Town, with additions in 1925 and 1956. Modular's were added in 1993

**TOTAL BUILDING SQUARE FOOTAGE:** Please provide the original building square footage PLUS the square footage of any additions.

45900

**SITE DESCRIPTION:** Please provide a detailed description of the current site and any known existing conditions that would impact a potential project at the site. Please note whether there are any other buildings, public or private, that share this current site with the school facility. What is the use(s) of this building(s)? (maximum of 5000 characters).

The site consists of approximately 7.5 acres and overall site functions as intended, though some safety, accessibility, and circulation deficiencies exist. No sight lighting is provided beyond the building mounted lights and adjacent street lights. Rails surrounding lower level boiler room egress are not adequate for child safety. Additional fire hydrant coverage should be considered for some northern portions of the school. Quantity of handicap parking spaces is inadequate. Multiple building egress points are not accessible from the site, including all of the modulars, and some walkways do not fully comply with slope requirements. No dedicated loading facility exists, and dumpster locations are not at grade with adjacent egress. Parent queueing during pick-up times sometimes extends beyond Hardy Road and onto Weston Road. Due to traffic volume on Weston Road, congestion was observed at Hardy Road / Weston Road intersection during drop-off and pick-up times. Walkway network around the school could be improved. Cracked and spalling concrete ramp and exterior stairs are significantly deteriorated. The parking lot and portions of the walkway network are in fair/poor condition due to moderate to severe fatigue cracking, and repaving in those areas should be considered in the next few years. No other building shares this current site with the school facility.

**ADDRESS OF FACILITY:** Please type address, including number, street name and city/town, if available, or describe the location of the site. (Maximum of 300 characters)

293 Weston Road, Wellesley, MA

**BUILDING ENVELOPE:** Please provide a detailed description of the building envelope, types of construction materials used, and any known problems or existing conditions (maximum of 5000 characters).

The building is largely uninsulated and employs inefficient and noisy unit ventilators. Although clad in brick, the modular classrooms have the usual issues with crawlspace integrity and generally weak quality of enclosure. Portions of the building are framed with cast in place concrete beams and slab, and other areas are framed with wood joist and wood roof trusses. There are some cracks in some CMU walls. The original wood floors have a noticeable deflection, but not too dramatic. There may be wood rot in the attic near roof leaks (some wood rafters showed signs of water stains. Most of the building has single glazed windows including some of the original double-hung wood windows in the 1925 section and most of the windows in the larger 1956 addition. There are a few sections of the original building and at a more recent elevator lobby addition that have thermally glazed replacement windows, but these appear to be 15 years old and thermally inefficient. Modular Classrooms are well past their useful service life, however repairs were made to the walls, roof and windows in 2014 to try to extend the life of these classrooms for a few more years.

**Has there been a Major Repair or Replacement of the EXTERIOR WALLS?** NO

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Year of Last Major Repair or Replacement:(YYYY)** 1993

**Description of Last Major Repair or Replacement:**

Modulars Added

**Roof Section A**

**Is the District seeking replacement of the Roof Section?** NO

**Area of Section (square feet)** 21000

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)**

EPDM (Firestone Red Shield Roofing System)

**Age of Section (number of years since the Roof was installed or replaced)** 7

**Description of repairs, if applicable, in the last three years. Include year of repair:**

This was a new roofing system with 15 year warranty beginning on 10/14/08

**Roof Section B**

**Is the District seeking replacement of the Roof Section?** NO

**Area of Section (square feet)** 24000

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)**

Gable roof with asphalt shingle (CertainTeed)

**Age of Section (number of years since the Roof was installed or replaced)** 7

**Description of repairs, if applicable, in the last three years. Include year of repair:**

This was a new roofing system with a warranty starting on 10/1/08

**Roof Section C**

**Is the District seeking replacement of the Roof Section?**

**Area of Section (square feet)**

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)**

**Age of Section (number of years since the Roof was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Roof Section D**

**Is the District seeking replacement of the Roof Section?**

**Area of Section (square feet)**

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)**

**Age of Section (number of years since the Roof was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Roof Section E**

**Is the District seeking replacement of the Roof Section?**

**Area of Section (square feet)**

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)**

**Age of Section (number of years since the Roof was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Roof Section F**

**Is the District seeking replacement of the Roof Section?**

**Area of Section (square feet)**

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)**

**Age of Section (number of years since the Roof was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Roof Section G**

**Is the District seeking replacement of the Roof Section?**

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Area of Section (square feet)**

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe))**

**Age of Section (number of years since the Roof was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Roof Section H**

**Is the District seeking replacement of the Roof Section?**

**Area of Section (square feet)**

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe))**

**Age of Section (number of years since the Roof was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Roof Section I**

**Is the District seeking replacement of the Roof Section?**

**Area of Section (square feet)**

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe))**

**Age of Section (number of years since the Roof was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Roof Section J**

**Is the District seeking replacement of the Roof Section?**

**Area of Section (square feet)**

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe))**

**Age of Section (number of years since the Roof was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Window Section A**

**Is the District seeking replacement of the Windows Section? NO**

**Windows in Section (count) 52**

**Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))**

Translucent panels (Kalwal)

**Age of Section (number of years since the Windows were installed or replaced) 30**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

Original 1924 windows replaced with translucent panels believed to be some time during 1980s.

**Window Section B**

**Is the District seeking replacement of the Windows Section? NO**

**Windows in Section (count) 49**

**Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))**

Original single pane metal windows

**Age of Section (number of years since the Windows were installed or replaced) 59**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

Broken glass and failed seals replaced as necessary

**Window Section C**

**Is the District seeking replacement of the Windows Section? NO**

**Windows in Section (count) 13**

**Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))**

Vinyl sliders

**Age of Section (number of years since the Windows were installed or replaced) 23**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

6 windows replaced in 2014

Name of School      ----- SAMPLE SCHOOL [DRAFT] -----
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**Window Section    D****Is the District seeking replacement of the Windows Section?****Windows in Section (count)****Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))****Age of Section (number of years since the Windows were installed or replaced)****Description of repairs, if applicable, in the last three years. Include year of repair:****Window Section    E****Is the District seeking replacement of the Windows Section?****Windows in Section (count)****Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))****Age of Section (number of years since the Windows were installed or replaced)****Description of repairs, if applicable, in the last three years. Include year of repair:****Window Section    F****Is the District seeking replacement of the Windows Section?****Windows in Section (count)****Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))****Age of Section (number of years since the Windows were installed or replaced)****Description of repairs, if applicable, in the last three years. Include year of repair:****Window Section    G****Is the District seeking replacement of the Windows Section?****Windows in Section (count)****Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))****Age of Section (number of years since the Windows were installed or replaced)****Description of repairs, if applicable, in the last three years. Include year of repair:****Window Section    H****Is the District seeking replacement of the Windows Section?****Windows in Section (count)****Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))****Age of Section (number of years since the Windows were installed or replaced)****Description of repairs, if applicable, in the last three years. Include year of repair:****Window Section    I****Is the District seeking replacement of the Windows Section?****Windows in Section (count)****Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))****Age of Section (number of years since the Windows were installed or replaced)****Description of repairs, if applicable, in the last three years. Include year of repair:****Window Section    J****Is the District seeking replacement of the Windows Section?****Windows in Section (count)****Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))****Age of Section (number of years since the Windows were installed or replaced)****Description of repairs, if applicable, in the last three years. Include year of repair:**

**MECHANICAL and ELECTRICAL SYSTEMS:** Please provide a detailed description of the current mechanical and electrical systems and any known problems or existing conditions (maximum of 5000 characters).

Name of School	----- SAMPLE SCHOOL [DRAFT] -----
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The building is heated with a steam system and the classrooms are served with steam unit ventilators with rooftop exhaust and supplemental radiation for heating. Other spaces are served by a combination of steam radiation, cabinet unit heaters and heating and ventilating units. The boiler plant was renovated in 2008 and there are two Weil-McLain gas-fired steam boilers installed to support the school that are in very good condition. The building steam and condensate distribution piping is in poor condition with substantial portions uninsulated. The control system is a mix of old pneumatic controls that serve the occupied zones and are in poor condition and newer DDC controls, which were installed with the boiler upgrade.

Toilet room existing fixtures are antiquated, high-flow type. Domestic hot water is created by a single 75-gallon water heater installed in 2005. The storage temperature at the water heater and supply temperature to the building are inadequate and do not meet code. There is no master mixing valve or hot water recirculation creating a significant delay in supply to the furthest fixture. The school experienced a major, age-related break in the cast-iron waste piping in 2012. There is no fire protection system installed for the wood framed school but it is strongly recommended.

Existing electrical systems including power distribution, lighting and fire alarm systems show some recent upgrades, but not throughout the entire building. In general, electrical systems are in fair and operational condition, but the older electrical systems' components shall be upgraded, especially at the lower level. Original main distribution panel was replaced by a newer switchboard in 1997. Panels, feeders and branch wiring circuits that are older than thirty years shall be replaced. Lighting system was updated in 2004 and retrofitted with T8 lamps, however lighting at the lower level still needs updating. Lighting controls are not consistent in similar educational spaces and are not appropriate for some school spaces. Exit signs shall be upgraded to meet Code. Fire alarm system needs some upgrading. Exterior lighting consisting of building-mounted lights is not time-controlled, only via a photocell. There is no lighting at the parking lot. There is no emergency generator at site.

There is one data closet requiring cable lengths that exceed the 100 meter industry standard. The Wide Area Network is not reliable dropping Food Service and INet access. Network connectivity is adequate. The building requires additional cabling to support full wireless access connectivity. Network equipment rooms require power upgrades to support future equipment upgrades. There is one CCTV camera at the main entrance and an Aiphone video intercom unit. There is no door access control or intrusion detection system except for key pad. Clock system is newer, wireless Primex system. There is one CCTV camera at the main entrance and an Aiphone video intercom unit. There is no door access control or intrusion detection system except for key pad. Consideration should be given to adding card access control, CCTV system and upgrading the intrusion detection system to include motion detection.

#### Boiler Section 1

Is the District seeking replacement of the Boiler? NO

Is there more than one boiler room in the School? YES

What percentage of the School is heated by the Boiler? 100

Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)

natural gas

Age of Boiler (number of years since the Boiler was installed or replaced) 8

Description of repairs, if applicable, in the last three years. Include year of repair:

Normal service calls and regular preventive maintenance.

#### Boiler Section 2

Is the District seeking replacement of the Boiler? NO

Is there more than one boiler room in the School? YES

What percentage of the School is heated by the Boiler? 100

Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)

natural gas

Age of Boiler (number of years since the Boiler was installed or replaced) 8

Description of repairs, if applicable, in the last three years. Include year of repair:

Normal service calls and regular preventive maintenance.

#### Boiler Section 3

Is the District seeking replacement of the Boiler?

Name of School	— SAMPLE SCHOOL [DRAFT] —
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**Is there more than one boiler room in the School?**

**What percentage of the School is heated by the Boiler?**

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

**Age of Boiler (number of years since the Boiler was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Boiler Section 4**

**Is the District seeking replacement of the Boiler?**

**Is there more than one boiler room in the School?**

**What percentage of the School is heated by the Boiler?**

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

**Age of Boiler (number of years since the Boiler was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Boiler Section 5**

**Is the District seeking replacement of the Boiler?**

**Is there more than one boiler room in the School?**

**What percentage of the School is heated by the Boiler?**

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

**Age of Boiler (number of years since the Boiler was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Boiler Section 6**

**Is the District seeking replacement of the Boiler?**

**Is there more than one boiler room in the School?**

**What percentage of the School is heated by the Boiler?**

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

**Age of Boiler (number of years since the Boiler was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Boiler Section 7**

**Is the District seeking replacement of the Boiler?**

**Is there more than one boiler room in the School?**

**What percentage of the School is heated by the Boiler?**

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

**Age of Boiler (number of years since the Boiler was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Boiler Section 8**

**Is the District seeking replacement of the Boiler?**

**Is there more than one boiler room in the School?**

**What percentage of the School is heated by the Boiler?**

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

**Age of Boiler (number of years since the Boiler was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Boiler Section 9**

**Is the District seeking replacement of the Boiler?**

**Is there more than one boiler room in the School?**

**What percentage of the School is heated by the Boiler?**

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

**Age of Boiler (number of years since the Boiler was installed or replaced)**

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Boiler Section 10**

**Is the District seeking replacement of the Boiler?**

**Is there more than one boiler room in the School?**

**What percentage of the School is heated by the Boiler?**

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

**Age of Boiler (number of years since the Boiler was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Has there been a Major Repair or Replacement of the HVAC SYSTEM? NO**

**Year of Last Major Repair or Replacement:(YYYY) 2014**

**Description of Last Major Repair or Replacement:**

Existing HVAC equipment was recommissioned.

**Has there been a Major Repair or Replacement of the ELECTRICAL SERVICES AND DISTRIBUTION SYSTEM? YES**

**Year of Last Major Repair or Replacement:(YYYY) 2004**

**Description of Last Major Repair or Replacement:**

Main switchboard replaced in 1997. Lighting upgrades in 2004. New exterior LEDs installed in 2014.

**BUILDING INTERIOR: Please provide a detailed description of the current building interior including a description of the flooring systems, finishes, ceilings, lighting, etc. (maximum of 5000 characters).**

Although all of the classrooms are in good general condition, the basic building infrastructure is poor in several areas. The building has an elevator serving both levels, but the accessible entrances are neither energy efficient nor located to enhance building security. The building has asbestos in pipe insulation (in non-public crawl spaces) and mastic adhering floor and ceiling tiles. Many segments of interior plaster walls are cracked or spalled, due to water infiltration and/or movement.

**PROGRAMS and OPERATIONS: Please provide a detailed description of the current programs offered and grades served, and indicate whether there are program components that cannot be offered due to facility constraints, operational constraints, etc. (maximum of 5000 characters).**

Hardy Elementary School houses 16 Regular Education classrooms and one Special Education classroom. We also have appropriate spaces for Physical Education and Library programs. We do not, however, have a lunchroom or appropriate spaces for our itinerant and support staff including speech and language, occupational therapy, ELL, reading interventionist, math coach, and Spanish FLES. In SY2016-17, art and music share one classroom resulting in one of the two specials being provided in the regular classroom using the "on a cart" model. The gym functions as our lunchroom from 11:30 to 1:20 each day except Wednesdays due to our half-day schedule each week. Itinerant staff, such as the ones listed above, share spaces throughout the building or conduct their sessions in the regular classroom when providing their services.

**CORE EDUCATIONAL SPACES: Please provide a detailed description of the Core Educational Spaces within the facility, a description of the number and sizes (in square feet) of classrooms, a description of science rooms/labs including ages and most recent updates, a description of the cafeteria, gym and/or auditorium and a description of the media center/library (maximum of 5000 characters).**

The Hardy School has 17 classrooms, including 2 originally designed for art and music, and 4 modular classrooms which would be considered as Core Academic Space. Two of these rooms are kindergarten classes. The sizes of these rooms vary – most are approximately 850 sf and the two kindergarten classes are closer to 1,100 sf. Additionally, there is a 1,700 sf Media Center/Library created from two original classrooms, and a 3,800 sf Multi-Purpose Room for physical education and health classes that also serves as the cafeteria. The diversity in the sizes and construction of each space are reflective of the different ages of construction for the various component buildings to the school: 1924 (original), 1925,



Name of School ----- SAMPLE SCHOOL [DRAFT] -----

1956, 1993 (MODS), and 1997 (MODS). The 17 core educational spaces are roughly evenly split between two levels that are serviced by an elevator built during a 1993 renovation. Aside from 2008 boiler and roof replacements, there have been no recent updates to the remainder of the building. The many additions have created an awkward floor plan that results in poor circulation and inefficient use of space.

**CAPACITY and UTILIZATION:** Please provide a detailed description of the current capacity and utilization of the school facility. If the school is overcrowded, please describe steps taken by the administration to address capacity issues. Please also describe in detail any spaces that have been converted from their intended use to be used as classroom space (maximum of 5000 characters).

Based on October 1 figures, Hardy's enrollment for SY2016-17 is 308 students. Art and music share one classroom resulting in one of the two specials being provided in the regular classroom using the "on a cart" model. Hardy has converted closet spaces and has utilized all spaces to provide planning areas for our itinerant and support staff. There is one space in the building to hold meetings with more than eight people and that is in the learning center. The learning center is a space that is used for students and thus our level of confidentiality is compromised depending upon the time of the meeting.

**MAINTENANCE and CAPITAL REPAIR:** Please provide a detailed description of the district's current maintenance practices, its capital repair program, and the maintenance program in place at the facility that is the subject of this SOI. Please include specific examples of capital repair projects undertaken in the past, including any override or debt exclusion votes that were necessary (maximum of 5000 characters).

The Wellesley Facilities Maintenance Department (FMD) operates and maintains all school buildings in the District, including the Hardy School. The FMD is responsible for custodial service, maintenance and capital projects in all 10 school buildings, which total over 880,000 square feet, with a staff of 68 and an FY17 budget of \$9.4M.

The Facilities Director leads a group of professional managers who oversee four core areas: custodial, maintenance, energy and capital projects. Preventive maintenance practices are a focus of the department, as are custodial procedures which incorporate "green cleaning" techniques. Capital projects are identified during planning through a collaborative approach with principals. Design/construction is managed within the FMD, through outside design professionals, and also through the Town's Permanent Building Committee (PBC). The FMD's Energy Manager is charged with managing and reducing energy consumption.

The District has a Maintenance Procedure Manual that explains how work is to be accomplished. The FMD relies on a computerized management systems by SchoolDude to manage maintenance and energy use. Our Maintenance Manager oversees 7 tradesmen, which allows quick and cost-effective response for service calls and required preventive maintenance.

Custodial operations are governed by our Custodial Procedures Manual, and our staff of 39 professional custodians (2 at the Upham) is overseen by our Custodial Manager. The District has a green cleaning program, uses state-of-the-art custodial equipment, trains staff at quarterly professional development sessions and uses "team cleaning" techniques at the HS and MS.

The District has accomplished a significant amount of capital construction work recently and plans to continue this work at an aggressive pace over the coming years. In 2013-2014, the Town completed about \$811,000 worth of cash-capital work on 46 different school projects. In 2014-15, the Town completed about \$929,000 worth of cash capital work on 30 different school projects. In 2015-2016, the Town completed about \$790,000 worth of cash capital work on 26 different school projects. In 2016-17, the Town completed about \$1,073,500 in cash capital work on 27 different school projects. It is expected that \$1,553,000 in cash capital will be budgeted for schools in FY17-18. The Town expects to increase the amount spent on school construction projects using cash-capital funds for the next year. Examples of the types of projects completed as part of the cash-capital budgets include: building envelope repair, concrete repair, HVAC improvements, door replacement, security upgrades and flooring work.

Name of School	----- SAMPLE SCHOOL [DRAFT] -----
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The Town is planning to fund larger debt-financed school construction projects over the next few years, as it has done in the recent past. Between 2007 and 2011, the District used \$8 million in debt-exclusion funds to perform significant upgrades to all elementary schools. This work focused on roofs, boilers, flooring, lighting HVAC and windows. In 2005-2006, the District also made over \$20 million worth of debt-funded improvements to the Middle School - addressing boilers, some windows, lighting, plumbing and flooring. In 2011 three new science laboratories were created within the existing footprint of the Middle School. The Town made these major investments in school buildings without the benefit of any MSBA grant funds; however, most recently the Town completed construction of the beautiful new 280,000 sf High School, which was opened in February 2012. This was funded in part with an MSBA grant. In the summer/fall 2014, major repair/replacement projects totaling \$2.5m were made to Sprague, Hunnewell and the Middle School. The District is also currently replacing windows at the Middle School as part of a \$5m MSBA Accelerated Repair Project. Major renovations totaling \$20m are currently under construction for the Schofield and Fiske elementary schools.

The District engaged Symmes Maini and McKee Associates (SMMA) in 2012 to perform a detailed conditions assessment and feasibility study of all ten school buildings, and to utilize an on-line database tool to store the information. This database has been used for capital planning and maintenance purposes, and the room categorization has been established based upon the MSBA Summary of Spaces designations. Recommendations made in this report suggest that a major school building renovation program is needed for most of the school buildings. The Hardy, Hunnewell and Upham schools were identified as schools with the highest needs.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 5**

***Question 1: Please provide a detailed description of the issues surrounding the school facility systems (e.g., roof, windows, boilers, HVAC system, and/or electrical service and distribution system) that you are indicating require repair or replacement. Please describe all deficiencies to all systems in sufficient detail to explain the problem.***

The Hardy School was built 89 years ago and has had numerous additions since, including three portable classrooms intended for far less use, and as a result the school has building systems that are well past their service life, unreliable and inefficient users of energy. The windows are past service life and have failed in many locations. The heating system is mainly comprised of steam-heated unit ventilators, exhaust louvers in poor locations and pneumatic controls, 2 to 3 times past its service life. The system is unreliable, difficult to control, hugely inefficient and unable to provide proper ventilation – resulting in high carbon dioxide levels in the rooms. The two cast-iron steam boilers were replaced within the last 10 years; however the piping between the boilers and univents is original in many cases and there is concern as to its remaining life. Replacement of the univents, piping, exhaust and windows would greatly improve energy efficiency and the learning environment.

There are also major life safety concerns with the Hardy, as there is no sprinkler system for this structure which has large areas of wood framing, and the fire alarm system hasn't been updated in almost 2 decades.

Most of the plumbing systems are original, as are the electrical system, and although some lighting upgrades have been made to try and improve the energy efficiency, the service as a whole is mostly original and there are significant power and technology needs within instructional space.

Despite recent repairs, the three portable classrooms are reaching the end of their intended life. Hardy also has significant asbestos containing material in crawl spaces and the attic above the gymnasium.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 5**

***Question 2: Please describe the measures the district has already taken to mitigate the problem/issues described in Question 1 above.***

As described in other areas of this SOI, the District has a very well staffed and well funded professional Facilities Maintenance Department, which provides both reactive/repair maintenance services and preventive maintenance services. The Town also funds many capital construction projects to address larger maintenance issues each year. Examples of the types of building issues that have been addressed at the Hardy in just the past few years include: security upgrades, door replacement, kiln room installation, concrete stair repair, wood stair replacement, wall replacement, HVAC service, steam trap replacement, plumbing pipe replacement and toilet partition replacement. The District and the Town are committed to maintaining the existing systems such that they are operating as best as is possible based on age and condition but it is simply keeping the old systems running while an overall rehabilitation still needs to occur.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 5**

***Question 3: Please provide a detailed explanation of the impact of the problem/issues described in Question 1 above on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.***

The heating/ventilating and windows most impact the ability of the District to deliver its educational program. The obsolete windows affect student's ability to concentrate and learn due to solar gain excessively heating the room, air infiltration causing cold breezes, glare affecting vision and transmission of outside noise from passing vehicles, other students and grass cutting. The pneumatically controlled, steam-heat system causes even more substantial problems with the learning environment. Students in one class at the Hardy may be wearing sweaters, while students in an adjacent classroom may be in tee-shirts due to the inability to control temperatures. Moreover, the age and condition of this system does not provide nearly the 800 ppm maximum CO<sub>2</sub> ventilation rates that the Massachusetts Department of Public Health has established for schools, so Hardy students are often tired or not as focused as they otherwise would be due to the poor ventilation. These issues also affect staff in the same way.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 5**

**Question 4: Please describe how addressing the school facility systems you identified in Question 1 above will extend the useful life of the facility that is the subject of this SOI and how it will improve your district's educational program.**

Implementing corrective actions to address the cited building deficiencies will reduce energy consumption and improve both indoor air quality and the learning environment at the Hardy. As a result, the educational goals would be improved significantly. Replacing key building systems which typically have a service life of 15 to 20 years, yet have dramatically exceeded these lifespans, will also extend the overall service life of the school. It should be noted that the systems upgrades alone will not resolve the awkward, serpentine-shaped and inefficient floor plan of Hardy School which is the result of numerous addition. An overall educational programming effort also needs to be reviewed as part of any major construction work contemplated at the Hardy.

**Please also provide the following:**

**Have the systems identified above been examined by an engineer or other trained building professional?:**  
YES

**If "YES", please provide the name of the individual and his/her professional affiliation (maximum of 250 characters):**

Symmes Maini and McKee Associates (SMMA)

**The date of the inspection:** 7/1/2012

**A summary of the findings (maximum of 5000 characters):**

The results of the assessment were consistent with the descriptions provided above, which was prepared using the SMMA work. As part of a Town-funded \$200,000 FY12 capital project, the District engaged SMMA to utilize a team of professional engineers (Structural, Civil, Mechanical, Electrical) and architects to fully evaluate all schools and to document the results in an on-line database that is readily available to the MSBA. This database has been used for capital planning and maintenance purposes, and the room categorization has been established based upon the MSBA Summary of Spaces designations.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 7**

***Question 1: Please provide a detailed description of the programs not currently available due to facility constraints, the state or local requirement for such programs, and the facility limitations precluding the programs from being offered.***

Beyond the main education programming for grades K-5, Hardy houses one of two district magnet programs for English Language Learners (ELLs). In SY2016-17, 19 students are being served in the ELL program. At the moment, no additional programs can be considered for the school due to facilities constraints.

The main impact of the facility on education programming is in heating/ventilation and temperature control. With unit-ventilators and windows at end-of-life, there are wide variations in temperatures between rooms in the building and not enough air circulation. The result is that the learning environments are less than ideal for teaching and learning.

Additionally, art and music share one classroom resulting in one of the two specials being provided in the regular classroom using the "on a cart" model. Hardy has converted closet spaces and has utilized all spaces to provide planning areas for our itinerant and support staff. There is one space in the building to hold meetings with more than eight people and that is in the learning center. The learning center is a space that is used for students and thus our level of confidentiality is compromised depending upon the time of the meeting.

From a safety perspective, the site at Hardy remains problematic as the school is situated on a busy road (Weston Road) adjacent to on and off ramps from Route 9. At drop-off and pick-up times, cars will often queue on Weston Road creating a dangerous situation as cars attempt to pass standing vehicles to access Route 9. This congestion is especially dangerous to student walkers who must use cross-walks amid this traffic congestion. The building's "serpentine" floor plan layout, the result of many additions, is not ideal from a circulation or space efficiency standpoint, which somewhat limits the programming of spaces in the school. The lack of a dedicated cafeteria requires dual use of the gymnasium to also serve lunches, which limits potential use of the gym for physical education and wellness.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 7**

***Question 2: Please describe the measures the district has taken or is planning to take in the immediate future to mitigate the problem(s) described above.***

As an interim measure to improve the air circulation, the district will continue to invest in the maintenance of room unit ventilators and exhaust to clean and replace parts and improve the overall performance of these units. An HVAC recommissioning project was implemented during the 2013-14 winter season to help address air quality problems. These are clearly stop-gap measures until a more comprehensive renovation can occur.

Finally, the district, in collaboration with the Wellesley Police Department, has taken several steps to address the traffic safety issue. Some visitor parking spaces were eliminated in the AM and PM to speed traffic flow of cars in and out of the school. The principal and her staff have also instituted tighter drop-off and pick-up procedures that have cut these times in half from the beginning of the year. Nevertheless, the traffic safety situation at Hardy remains a standing concern that we hope to address more fully in a renovation.



Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 7**

***Question 3: Please provide a detailed explanation of the impact of the problem described in this priority on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.***

The heating/ventilating and windows most impact the ability of the District to deliver its educational program. The obsolete windows affect student's ability to concentrate and learn due to solar-gain excessively heating the room, air infiltration causing cold breezes, glare affecting vision and transmission of outside noise from passing vehicles, other students and grass cutting. The pneumatically controlled, steam-heat system causes even more substantial problems with the learning environment. Students in one class at the Hardy may be wearing sweaters, while students in an adjacent classroom may be in tee-shirts due to the inability to control temperatures. Moreover, the age and condition of this system does not provide nearly the 800 ppm maximum CO<sub>2</sub> ventilation rates that the Massachusetts Department of Public Health has established for schools, so Hardy students are often tired or not as focused as they otherwise would be due to the poor ventilation. These issues also affect staff in the same way.

The traffic safety issue continues to lend itself to an atmosphere of anxiety at the school. In 2012, a cyclist was killed on Weston Road not far from the school at the beginning of the school year, which raised concern levels even further. That pushed some parents to stop letting their children walk to school, putting more cars on the road and making this challenge more complex.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

## REQUIRED FORM OF VOTE TO SUBMIT AN SOI

### REQUIRED VOTES

If the SOI is being submitted by a City or Town, a vote in the following form is required from both the City Council/Board of Aldermen **OR** the Board of Selectmen/equivalent governing body **AND** the School Committee.

If the SOI is being submitted by a regional school district, a vote in the following form is required from the Regional School Committee only. FORM OF VOTE Please use the text below to prepare your City's, Town's or District's required vote(s).

### FORM OF VOTE

Please use the text below to prepare your City's, Town's or District's required vote(s).

Resolved: Having convened in an open meeting on \_\_\_\_\_, prior to the closing date, the

\_\_\_\_\_  
[City Council/Board of Aldermen]

Board of Selectmen/equivalent Governing Body/School Committee of \_\_\_\_\_ [City/Town], in

accordance with its charter, by-laws, and ordinances, has voted to authorize the Superintendent to submit to the Massachusetts School Building Authority the Statement of Interest dated \_\_\_\_\_ for the

\_\_\_\_\_  
[Name of School], located at

\_\_\_\_\_  
[Address] which

describes and explains the following deficiencies and the priority category(s) for which an application may be submitted to the Massachusetts School Building Authority in the future

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\_\_\_\_\_  
[District or School District]; [If not a district, then at the priority] checked off

on the Statement of Interest Form and a brief description of the deficiency and the priority for each priority; and hereby further

specifically acknowledges that by submitting this Statement of Interest Form, the Massachusetts School Building Authority in no way guarantees the acceptance or the approval of an application, the awarding of a grant or any other funding commitment from the Massachusetts School Building Authority, or commits the City/Town/Regional School District to filing an application for funding with the Massachusetts School Building Authority.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----
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## CERTIFICATIONS

The undersigned hereby certifies that, to the best of his/her knowledge, information and belief, the statements and information contained in this statement of Interest and attached hereto are true and accurate and that this Statement of Interest has been prepared under the direction of the district school committee and the undersigned is duly authorized to submit this Statement of Interest to the Massachusetts School Building Authority. The undersigned also hereby acknowledges and agrees to provide the Massachusetts School Building Authority, upon request by the Authority, any additional information relating to this Statement of Interest that may be required by the Authority.

<b>Chief Executive Officer *</b>	<b>School Committee Chair</b>	<b>Superintendent of Schools</b>
Marjorie Freiman	Sharon Gray	David F. Lussier
Chair, Board of Selectmen		

(signature)	(signature)	(signature)
Date	Date	Date

\* Local Chief Executive Officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated to the chief executive office under the provisions of a local charter. Please note, in districts where the Superintendent is also the Local Chief Executive Officer, it is required for the same person to sign the Statement of Interest Certifications twice. Please do not leave any signature lines blank.

Name of District ----- SAMPLE DISTRICT [DRAFT] -----

## Massachusetts School Building Authority

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School District Wellesley

District Contact David F Lussier

TEL (781) 446-6210

Submission Date 3/22/2017

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## Closed Schools Information

### Note

(This section intentionally left blank when previewing. When you have submitted your final closed school data, your submission notes will be captured here.)

Name of District ----- SAMPLE DISTRICT [DRAFT] -----

## Closed Schools

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**Question 1:** Has the district sold, closed, or otherwise removed from service a school in the last 10 years?

No

**Question 2:** Does the district have any plans to sell, close, or otherwise remove from service a school in the next 10 years?

No

Name of District ----- SAMPLE DISTRICT [DRAFT] -----

## CERTIFICATIONS

The undersigned hereby certifies that, to the best of his/her knowledge, information and belief, the statements and information contained in this Closed Schools formation are true and accurate and that this Closed Schools Information has been prepared under the direction of the district school committee and the undersigned is duly authorized to submit this Closed Schools Information to the Massachusetts School Building Authority. The undersigned also hereby acknowledges and agrees to provide the Massachusetts School Building Authority, upon request by the Authority, any additional information relating to this Closed Schools Information that may be required by the Authority.

Chief Executive Officer *	School Committee Chair	Superintendent of Schools
Marjorie Freiman	Sharon Gray	David F. Lussier
Chair, Board of Selectmen		
(signature)	(signature)	(signature)
Date	Date	Date

\* Local Chief Executive Officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated to the chief executive office under the provisions of a local charter. Please note, in districts where the Superintendent is also the Local Chief Executive Officer, it is required for the same person to sign the Statement of Interest Certifications twice. Please do not leave any signature lines blank.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

## Massachusetts School Building Authority

School District Wellesley

District Contact David F Lussier TEL: (781) 446-6210

Name of School Hunnewell

Submission Date 3/22/2017

### SOI CERTIFICATION

To be eligible to submit a Statement of Interest (SOI), a district must certify the following:

- ☒ The district hereby acknowledges and agrees that this SOI is NOT an application for funding and that submission of this SOI in no way commits the MSBA to accept an application, approve an application, provide a grant or any other type of funding, or places any other obligation on the MSBA.
- ☒ The district hereby acknowledges that no district shall have any entitlement to funds from the MSBA, pursuant to M.G.L. c. 70B or the provisions of 963 CMR 2.00.
- ☒ The district hereby acknowledges that the provisions of 963 CMR 2.00 shall apply to the district and all projects for which the district is seeking and/or receiving funds for any portion of a municipally-owned or regionally-owned school facility from the MSBA pursuant to M.G.L. c. 70B.
- ☒ The district hereby acknowledges that this SOI is for one existing municipally-owned or regionally-owned public school facility in the district that is currently used or will be used to educate public PreK-12 students and that the facility for which the SOI is being submitted does not serve a solely early childhood or Pre-K student population.
- ☒ After the district completes and submits this SOI electronically, the district must sign the required certifications and submit one signed original hard copy of the SOI to the MSBA, with all of the required documentation described under the "Vote" tab, on or before the deadline.
- ☒ The district will schedule and hold a meeting at which the School Committee will vote, using the specific language contained in the "Vote" tab, to authorize the submission of this SOI. This is required for cities, towns, and regional school districts.
- ☒ Prior to the submission of the hard copy of the SOI, the district will schedule and hold a meeting at which the City Council/Board of Aldermen or Board of Selectmen/equivalent governing body will vote, using the specific language contained in the "Vote" tab, to authorize the submission of this SOI. This is not required for regional school districts.
- ☒ On or before the SOI deadline, the district will submit the minutes of the meeting at which the School Committee votes to authorize the Superintendent to submit this SOI. The District will use the MSBA's vote template and the vote will specifically reference the school and the priorities for which the SOI is being submitted. The minutes will be signed by the School Committee Chair. This is required for cities, towns, and regional school districts.
- ☒ The district has arranged with the City/Town Clerk to certify the vote of the City Council/Board of Aldermen or Board of Selectmen/equivalent governing body to authorize the Superintendent to submit this SOI. The district will use the MSBA's vote template and submit the full text of this vote, which will specifically reference the school and the priorities for which the SOI is being submitted, to the MSBA on or before the SOI deadline. This is not required for regional school districts.
- ☒ The district hereby acknowledges that this SOI submission will not be complete until the MSBA has received all of the required vote documentation and certification signatures in a format acceptable to the MSBA. If Priority 1 is selected, your Statement of Interest will not be considered complete unless and until you provide the required engineering (or other) report, a professional opinion regarding the problem, and photographs of the problematic area or system.

Name of School	----- SAMPLE SCHOOL [DRAFT] -----
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**Chief Executive Officer \***

Marjorie Freiman

**School Committee Chair**

Sharon Gray

**Superintendent of Schools**

David F. Lussier

Chair, Board of Selectmen

(signature)

(signature)

(signature)

Date

Date

Date

\* Local chief executive officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated to the chief executive office under the provisions of a local charter. Please note, in districts where the Superintendent is also the Local Chief Executive Officer, it is required for the same person to sign the Statement of Interest Certifications twice. Please do not leave any signature lines blank.



Name of School ----- SAMPLE SCHOOL [DRAFT] -----

## Massachusetts School Building Authority

School District WellesleyDistrict Contact David F Lussier TEL: (781) 446-6210Name of School HunnewellSubmission Date 3/22/2017

### Note

#### The following Priorities have been included in the Statement of Interest:

1. ☐ Replacement or renovation of a building which is structurally unsound or otherwise in a condition seriously jeopardizing the health and safety of school children, where no alternative exists.
2. ☐ Elimination of existing severe overcrowding.
3. ☐ Prevention of the loss of accreditation.
4. ☐ Prevention of severe overcrowding expected to result from increased enrollments.
5. ☒ Replacement, renovation or modernization of school facility systems, such as roofs, windows, boilers, heating and ventilation systems, to increase energy conservation and decrease energy related costs in a school facility.
6. ☐ Short term enrollment growth.
7. ☒ Replacement of or addition to obsolete buildings in order to provide for a full range of programs consistent with state and approved local requirements.
8. ☐ Transition from court-ordered and approved racial balance school districts to walk-to, so-called, or other school districts.

### SOI Vote Requirement

☒ I acknowledge that I have reviewed the MSBA's vote requirements for submitting an SOI which are set forth in the Vote Tab of this SOI. I understand that the MSBA requires votes from specific parties/governing bodies, in a specific format using the language provided by the MSBA. Further, I understand that the MSBA requires certified and signed vote documentation to be submitted with the SOI. I acknowledge that my SOI will not be considered complete and, therefore, will not be reviewed by the MSBA unless the required accompanying vote documentation is submitted to the satisfaction of the MSBA.

Potential Project Scope:      Renovation/ Addition

Is this SOI the District Priority SOI?      NO

School name of the District Priority SOI:      Ernest F Upham

Is this part of a larger facilities plan?      YES

If "YES", please provide the following:

Facilities Plan Date: 6/12/2012

Planning Firm: Symmes, Maini & McKee Associates

Please provide an overview of the plan including as much detail as necessary to describe the plan, its goals and how the school facility that is the subject of this SOI fits into that plan:

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

There are four critical elements that have supported the development of a facilities master plan in Wellesley. First, in order to assess the physical needs of all of its school buildings, the Wellesley Public Schools commissioned a Conditions Assessment and Feasibility Study that was performed by Symmes, Maini & McKee Associates (SMMA). This review included a focus on safety, health hazards, maintenance and infrastructure. In the fall of 2012, SMMA presented their findings through an online database. This database provides a robust tool for strategic planning, capital planning and maintenance prioritization, and has been thoroughly reviewed by the Facilities Maintenance Department (FMD), which has been managing SMMA's work since they were contracted. Second, the District—in collaboration with Town officials—has convened several committees during the past few years to examine the Hardy, Hunnewell, and Upham school facilities challenges and propose recommended plans for moving forward. Most recently, a Master Plan Committee has recommended to the School Committee that the Town conduct feasibility studies at all three sites, and proceed with building two new schools, beginning with Upham and then followed by Hunnewell. Should enrollment increase and begin to trend above current projections, the Town would then move to build a third new school on the Hardy site. Third, the District has received the results of two commissioned demographic studies to inform its short and long term planning. In 2013, Cropper GIS reported that elementary enrollment in Wellesley was expected to decline by approximately 14 percent, or 347 students, between SY2013-2014 and SY2023-2024. In October 2016, FutureThink reported that elementary enrollment in Wellesley was expected to decline by approximately 5 percent, or 114 students, between SY2017-18 and SY20126-27. Taken together, these reports suggest a continued decline of enrollment that may allow the district to consolidate from seven elementary schools to six. Finally, the Wellesley Public Schools has developed a 5-year Strategic Plan that provides a vision for the District's goals, as well as the needed resources and facilities to best achieve these goals. Most important is ensuring that we have the appropriate educational spaces within our schools to provide 21st Century learning opportunities for all of our students.

**Please provide the current student to teacher ratios at the school facility that is the subject of this SOI: 15 students per teacher**

**Please provide the originally planned student to teacher ratios at the school facility that is the subject of this SOI: 20 students per teacher**

**Does the District have a Master Educational Plan that includes facility goals for this building and all school buildings in District?** NO

**Does the District have related report(s)/document(s) that detail its facilities, student configurations at each facility, and District operational budget information, both current and proposed?** NO

If "NO", please note that:

If, based on the SOI review process, a facility rises to the level of need and urgency and is invited into the Eligibility Period, the District will need to provide to the MSBA a detailed Educational Plan for not only that facility, but all facilities in the District in order to move forward in the MSBA's school building construction process.

**Is there overcrowding at the school facility?** NO

If "YES", please describe in detail, including specific examples of the overcrowding.

**Has the district had any recent teacher layoffs or reductions?** NO

If "YES", how many teaching positions were affected? 0

At which schools in the district?

Please describe the types of teacher positions that were eliminated (e.g., art, math, science, physical education, etc.).

**Has the district had any recent staff layoffs or reductions?** NO

If "YES", how many staff positions were affected? 0

At which schools in the district?

Please describe the types of staff positions that were eliminated (e.g., guidance, administrative, maintenance,

Name of School	----- SAMPLE SCHOOL [DRAFT] -----
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etc.).

**Please provide a description of the program modifications as a consequence of these teacher and/or staff reductions, including the impact on district class sizes and curriculum.**

N/A

**Please provide a detailed description of your most recent budget approval process including a description of any budget reductions and the impact of those reductions on the district's school facilities, class sizes, and educational program.**

The Wellesley School Committee approved an FY18 Operating Budget of \$72,208,147 on March 2, 2017. At the same time, the Town's proposed FY18 Capital Budget includes significant funding (\$1,553,000) for school-related building construction projects. Both the FY18 Operating and Capital Budgets must be approved at Town Meeting, which begins on March 27, 2017.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

## General Description

**BRIEF BUILDING HISTORY:** Please provide a detailed description of when the original building was built, and the date(s) and project scopes(s) of any additions and renovations (maximum of 5000 characters).

The 36,400 gross square foot Hunnewell Elementary school was constructed in 1938, with additions in 1956 and 1995. Modular's were added in 1996 and a partial interior renovation occurred in 2009.

**TOTAL BUILDING SQUARE FOOTAGE:** Please provide the original building square footage PLUS the square footage of any additions.

36400

**SITE DESCRIPTION:** Please provide a detailed description of the current site and any known existing conditions that would impact a potential project at the site. Please note whether there are any other buildings, public or private, that share this current site with the school facility. What is the use(s) of this building(s)? (maximum of 5000 characters).

The site consists of approximately 5.8 acres and overall site functions as intended, though some safety, accessibility, and circulation deficiencies exist. Additional fire hydrant coverage should be considered for portions of the school greater than 200' from the closest hydrant. No loading dock or dedicated loading facility provided, and trash/recycling dumpsters are not easily accessible from school. Some walkways exceed code requirements for slope, and some building egress points are not accessible due to stepped landings. Circulation within the site is minimal. All bus and parent loading and unloading takes place along Cameron Street, which is less than ideal due to safety reasons. Cameron Street is restricted to one-way traffic during these times. On-site parking is not adequate for the school's daily needs and is a major problem in this area. Hardscape surfaces and site features in overall good condition, with some isolated areas in fair to poor condition. Isolated repairs or repaving in these isolated areas should be considered in the next few years. No other building shares this current site with the school facility.

**ADDRESS OF FACILITY:** Please type address, including number, street name and city/town, if available, or describe the location of the site. (Maximum of 300 characters)

28 Cameron Street  
Wellesley, MA 02482

**BUILDING ENVELOPE:** Please provide a detailed description of the building envelope, types of construction materials used, and any known problems or existing conditions (maximum of 5000 characters).

The exterior enclosure is minimally insulated and the windows are mostly single-paned. Some windows in the 1938 portion have minimally efficient thermal glazing and translucent fiberglass glazing panels that replaced original windows. Portions of the building/additions are framed with structural steel, wood roof trusses, and cast-in-place concrete foundations. There are cracks in some of the CMU walls. Gutters and downspouts in the original 1938 wing were replaced in 2014 along with repairs to the EPDM membrane.

**Has there been a Major Repair or Replacement of the EXTERIOR WALLS?** NO

**Year of Last Major Repair or Replacement:(YYYY)** 2009

**Description of Last Major Repair or Replacement:**

2009 - Interior upgrades. 1995 - Addition

**Roof Section** A

**Is the District seeking replacement of the Roof Section?** NO

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Area of Section (square feet)** 15500

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe))**

Gabled roof with asphalt shingles

**Age of Section (number of years since the Roof was installed or replaced)** 9

**Description of repairs, if applicable, in the last three years. Include year of repair:**

Copper gutters and downspouts replaced in 2014 in the original 1938 wing.

**Roof Section B**

**Is the District seeking replacement of the Roof Section?** NO

**Area of Section (square feet)** 20000

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe))**

Fully adhered flat roof with Carlisle single-ply thermoplastic poly-olefin (TPO) system.

**Age of Section (number of years since the Roof was installed or replaced)** 6

**Description of repairs, if applicable, in the last three years. Include year of repair:**

Drains added and some minor repairs made in 2014

**Roof Section C**

**Is the District seeking replacement of the Roof Section?** NO

**Area of Section (square feet)** 4500

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe))**

Fully adhered, flat single-ply (Firestone) EPDM system.

**Age of Section (number of years since the Roof was installed or replaced)** 20

**Description of repairs, if applicable, in the last three years. Include year of repair:**

Seams were reinforced in 2014.

**Roof Section D**

**Is the District seeking replacement of the Roof Section?**

**Area of Section (square feet)**

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe))**

**Age of Section (number of years since the Roof was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Roof Section E**

**Is the District seeking replacement of the Roof Section?**

**Area of Section (square feet)**

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe))**

**Age of Section (number of years since the Roof was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Roof Section F**

**Is the District seeking replacement of the Roof Section?**

**Area of Section (square feet)**

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe))**

**Age of Section (number of years since the Roof was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Roof Section G**

**Is the District seeking replacement of the Roof Section?**

**Area of Section (square feet)**

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe))**

**Age of Section (number of years since the Roof was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Roof Section H****Is the District seeking replacement of the Roof Section?****Area of Section (square feet)****Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe))****Age of Section (number of years since the Roof was installed or replaced)****Description of repairs, if applicable, in the last three years. Include year of repair:****Roof Section I****Is the District seeking replacement of the Roof Section?****Area of Section (square feet)****Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe))****Age of Section (number of years since the Roof was installed or replaced)****Description of repairs, if applicable, in the last three years. Include year of repair:****Roof Section J****Is the District seeking replacement of the Roof Section?****Area of Section (square feet)****Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe))****Age of Section (number of years since the Roof was installed or replaced)****Description of repairs, if applicable, in the last three years. Include year of repair:****Window Section A****Is the District seeking replacement of the Windows Section? NO****Windows in Section (count) 66****Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))****Translucent panels (Kalwal)****Age of Section (number of years since the Windows were installed or replaced) 30****Description of repairs, if applicable, in the last three years. Include year of repair:**

Original 1938 window were assumed to be replaced some time in the 1980's.

**Window Section B****Is the District seeking replacement of the Windows Section? NO****Windows in Section (count) 32****Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))**

Original, full-height single pane metal framed windows.

**Age of Section (number of years since the Windows were installed or replaced) 59****Description of repairs, if applicable, in the last three years. Include year of repair:**

Normal replacement of broken glass and hardware repair.

**Window Section C****Is the District seeking replacement of the Windows Section? NO****Windows in Section (count) 40****Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))**

Original, full-height single pane metal framed windows.

**Age of Section (number of years since the Windows were installed or replaced) 20****Description of repairs, if applicable, in the last three years. Include year of repair:**

Normal replacement of broken glass and hardware repair.

**Window Section D****Is the District seeking replacement of the Windows Section? NO****Windows in Section (count) 6****Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))**

Name of School      ----- SAMPLE SCHOOL [DRAFT] -----
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Vinyl slider windows

Age of Section (number of years since the Windows were installed or replaced)    22

Description of repairs, if applicable, in the last three years. Include year of repair:

Repairs to windows as needed.

**Window Section    E**

Is the District seeking replacement of the Windows Section?

Windows in Section (count)

Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))

Age of Section (number of years since the Windows were installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

**Window Section    F**

Is the District seeking replacement of the Windows Section?

Windows in Section (count)

Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))

Age of Section (number of years since the Windows were installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

**Window Section    G**

Is the District seeking replacement of the Windows Section?

Windows in Section (count)

Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))

Age of Section (number of years since the Windows were installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

**Window Section    H**

Is the District seeking replacement of the Windows Section?

Windows in Section (count)

Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))

Age of Section (number of years since the Windows were installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

**Window Section    I**

Is the District seeking replacement of the Windows Section?

Windows in Section (count)

Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))

Age of Section (number of years since the Windows were installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

**Window Section    J**

Is the District seeking replacement of the Windows Section?

Windows in Section (count)

Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))

Age of Section (number of years since the Windows were installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

**MECHANICAL and ELECTRICAL SYSTEMS:** Please provide a detailed description of the current mechanical and electrical systems and any known problems or existing conditions (maximum of 5000 characters).

The building is heated with a steam system and the classrooms are served with steam unit ventilators with rooftop exhaust and supplemental radiation for heating, much of which appears to be original to the building and in poor condition. Other spaces are served by a combination of steam radiation, cabinet unit heaters and heating and ventilating units, and there is a

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

small number of electric radiation installations. The boiler plant was upgraded in 2004 and there are two HB Smith gas-fired steam boilers installed to support the school that are in good condition. The control system is largely pneumatic, original to the building and is in poor condition.

Toilet room fixtures are antiquated, high-flow type. Building domestic hot water is supplied directly from a single 75-gallon water heater to an undersized piping system. There is no master mixing valve or hot water recirculation creating a significant delay in supply to the furthest fixture. Storage temperature has been set to 105 F or less at the request of the School nurse. Some modular classrooms are served by small storage point-of-use Ariston electric water heaters. Piping and hangers under building show signs of significant deterioration as does the building gas piping. Boiler blowdown, storm water and condensate (i.e., clearwater waste) appear to be intermingled at the sump pit.

Existing electrical systems including power distribution, lighting and fire alarm systems show some recent upgrades, but not throughout the entire building. In general, electrical systems are in fair and operational condition, but the older electrical systems' components shall be upgraded – panels, feeders, lighting fixtures. Original main distribution panel and a few panels were recently upgraded. Panels, feeders and branch wiring circuits that are older than thirty years shall be replaced. Lighting system is in fair condition, but outdated. Lighting controls and exit signs shall be upgraded to meet Code. Fire alarm system needs some upgrading. Exterior lighting is limited to building-mounted lights only. There is no lighting at the parking lot. There is no emergency generator at site.

There is no CCTV, door access control or intrusion detection system except for key pad. Consideration should be given to adding card access control, CCTV system and upgrading the intrusion detection system to include motion detection. Network connectivity is adequate. Fiber optic cables connect equipment rooms. The building requires additional cabling to support full wireless access connectivity. Network equipment rooms require power upgrades to support future equipment upgrades.

#### **Boiler Section 1**

**Is the District seeking replacement of the Boiler?** NO

**Is there more than one boiler room in the School?** YES

**What percentage of the School is heated by the Boiler?** 100

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**  
natural gas

**Age of Boiler (number of years since the Boiler was installed or replaced)** 12

**Description of repairs, if applicable, in the last three years. Include year of repair:**  
Cracked cast-iron sections were replaced in 2013 and 2014.

#### **Boiler Section 2**

**Is the District seeking replacement of the Boiler?** NO

**Is there more than one boiler room in the School?** YES

**What percentage of the School is heated by the Boiler?** 100

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**  
natural gas

**Age of Boiler (number of years since the Boiler was installed or replaced)** 12

**Description of repairs, if applicable, in the last three years. Include year of repair:**  
Normal repairs and preventive maintenance.

#### **Boiler Section 3**

**Is the District seeking replacement of the Boiler?**

**Is there more than one boiler room in the School?**

**What percentage of the School is heated by the Boiler?**

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

**Age of Boiler (number of years since the Boiler was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

#### **Boiler Section 4**

**Is the District seeking replacement of the Boiler?**



Name of School	----- SAMPLE SCHOOL [DRAFT] -----
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**Is there more than one boiler room in the School?**

**What percentage of the School is heated by the Boiler?**

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

**Age of Boiler (number of years since the Boiler was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Boiler Section 5**

**Is the District seeking replacement of the Boiler?**

**Is there more than one boiler room in the School?**

**What percentage of the School is heated by the Boiler?**

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

**Age of Boiler (number of years since the Boiler was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Boiler Section 6**

**Is the District seeking replacement of the Boiler?**

**Is there more than one boiler room in the School?**

**What percentage of the School is heated by the Boiler?**

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

**Age of Boiler (number of years since the Boiler was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Boiler Section 7**

**Is the District seeking replacement of the Boiler?**

**Is there more than one boiler room in the School?**

**What percentage of the School is heated by the Boiler?**

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

**Age of Boiler (number of years since the Boiler was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Boiler Section 8**

**Is the District seeking replacement of the Boiler?**

**Is there more than one boiler room in the School?**

**What percentage of the School is heated by the Boiler?**

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

**Age of Boiler (number of years since the Boiler was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Boiler Section 9**

**Is the District seeking replacement of the Boiler?**

**Is there more than one boiler room in the School?**

**What percentage of the School is heated by the Boiler?**

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

**Age of Boiler (number of years since the Boiler was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Boiler Section 10**

**Is the District seeking replacement of the Boiler?**

**Is there more than one boiler room in the School?**

**What percentage of the School is heated by the Boiler?**

**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**

**Age of Boiler (number of years since the Boiler was installed or replaced)**

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Has there been a Major Repair or Replacement of the HVAC SYSTEM?** NO

**Year of Last Major Repair or Replacement:(YYYY)** 2014

**Description of Last Major Repair or Replacement:**

HVAC recommissioning was performed in 2014.

**Has there been a Major Repair or Replacement of the ELECTRICAL SERVICES AND DISTRIBUTION SYSTEM?** YES

**Year of Last Major Repair or Replacement:(YYYY)** 2003

**Description of Last Major Repair or Replacement:**

Boiler room panel was installed in 2003. Main distribution panel MDP and few other panels were replaced in 1995-2002.

**BUILDING INTERIOR:** Please provide a detailed description of the current building interior including a description of the flooring systems, finishes, ceilings, lighting, etc. (maximum of 5000 characters).

According to the latest AHERA report, the asbestos in the classrooms has been removed, but there is still material to be removed in the attic. The toilets and drinking fixtures in the building are minimally accessible. Although well-maintained, the classrooms have outdated light fixtures and ventilation units. The school has reported persistent roof leaks in the cafeteria/gymnasium related to the dormers, and also problems with the gutters.

**PROGRAMS and OPERATIONS:** Please provide a detailed description of the current programs offered and grades served, and indicate whether there are program components that cannot be offered due to facility constraints, operational constraints, etc. (maximum of 5000 characters).

The Hunnewell School is a K-5 elementary school serving 256 students across 15 classrooms. This school also offers an elementary academic and therapeutic program for students with average to above-average cognitive profiles who present with challenges in the emotional/social/behavioral domains. These challenges may affect one or more of the following:

- Development of age-appropriate social relationships with adults and/or peers
- Self-regulation of behavioral responses to typical school demands
- Ability to appropriately make transitions from one activity to another
- Ability to manage frustration in an age-appropriate manner
- Ability to fully access curriculum and instruction due to emotional/social/behavioral challenges and/or possible academic skill deficits

Students are placed in the Therapeutic Learning Center (TLC) when the Team determines that this highly specialized, therapeutic level of service provision is appropriate to ensure progress in academic and social/behavioral domains. The program provides a highly structured setting with very consistent expectations and routines within the therapeutic milieu. This program is serving 12 students in SY2016-17.

Because every space is currently being used, it is challenging to support student MCAS testing in the spring, when students sometimes need more supervised time outside of the classroom. It is very common for the principal to give up her office for this purpose.

**CORE EDUCATIONAL SPACES:** Please provide a detailed description of the Core Educational Spaces within the facility, a description of the number and sizes (in square feet) of classrooms, a description of science rooms/labs including ages and most recent updates, a description of the cafeteria, gym and/or auditorium and a description of the media center/library (maximum of 5000 characters).

The Hunnewell School has 15 classrooms, including 2 modular classrooms, which would be considered as Core Academic Space. The two modular classrooms are being utilized for kindergarten classes. Two classrooms are being used as instructional space for the TLC program, and one classroom is hosting a satellite preschool class this school year. It has

Name of School	----- SAMPLE SCHOOL [DRAFT] -----
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been decided that the preschool class will remain at Hunnewell for the 2017-18 school year.

The size of these rooms varies by addition: rooms in the original 1938 wing are approximately 900 sf, rooms in the 1956 addition are about 850 sf, and rooms in the 1995 addition are about 930 sf. Additionally, there is a 2,000 sf Library, part of which has been partitioned off to accommodate SPED classes displaced due to over-enrollment issues in the school, and a 2,100 sf Multi-purpose room for physical education and health classes that also serves as the cafeteria. The diversity in the size and construction of each space is reflective of the different ages of construction for the various component buildings to the school: 1938 (original); 1956, 1995, 1996 (MODS). Aside from partial roof replacements in 2009, there have been no recent updates to the remainder of the building.

**CAPACITY and UTILIZATION:** Please provide a detailed description of the current capacity and utilization of the school facility. If the school is overcrowded, please describe steps taken by the administration to address capacity issues. Please also describe in detail any spaces that have been converted from their intended use to be used as classroom space (maximum of 5000 characters).

The school is being fully utilized and has experienced space challenges in recent years. For example, in SY2012-13 the art room was converted into a regular classroom for one year to accommodate student enrollment. Having a multi-use space that is used for both physical education classes and as a cafeteria make scheduling challenging. Classes cannot be scheduled from 11:30-1:30 each day to allow space for the students to eat lunch in three different groupings, which is required by the small space and the enrollment.

**MAINTENANCE and CAPITAL REPAIR:** Please provide a detailed description of the district's current maintenance practices, its capital repair program, and the maintenance program in place at the facility that is the subject of this SOI. Please include specific examples of capital repair projects undertaken in the past, including any override or debt exclusion votes that were necessary (maximum of 5000 characters).

The Wellesley Facilities Maintenance Department (FMD) operates and maintains all school buildings in the District, including the Hunnewell School. The FMD is responsible for custodial service, maintenance and capital projects in all 10 school buildings, which total over 880,000 square feet, with a staff of 68 and an FY17 budget of \$9.4M.

The Facilities Director leads a group of professional managers who oversee four core areas: custodial, maintenance, energy and capital projects. Preventive maintenance practices are a focus of the department, as are custodial procedures which incorporate "green cleaning" techniques. Capital projects are identified during planning through a collaborative approach with principals. Design/construction is managed within the FMD, through outside design professionals, and also through the Town's Permanent Building Committee (PBC). The FMD's Energy Manager is charged with managing and reducing energy consumption.

The District has a Maintenance Procedure Manual that explains how work is to be accomplished. The FMD relies on a computerized management systems by SchoolDude to manage maintenance and energy use. Our Maintenance Manager oversees 7 tradesmen, which allows quick and cost-effective response for service calls and required preventive maintenance.

Custodial operations are governed by our Custodial Procedures Manual, and our staff of 39 professional custodians (2 at the Upham) is overseen by our Custodial Manager. The District has a green cleaning program, uses state-of-the-art custodial equipment, trains staff at quarterly professional development sessions and uses "team cleaning" techniques at the HS and MS.

The District has accomplished a significant amount of capital construction work recently and plans to continue this work at an aggressive pace over the coming years. In 2013-2014, the Town completed about \$811,000 worth of cash-capital work on 46 different school projects. In 2014-15, the Town completed about \$929,000 worth of cash capital work on

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30 different school projects. In 2015-2016, the Town completed about \$790,000 worth of cash capital work on 26 different school projects. In 2016-17, the Town completed about \$1,073,500 in cash capital work on 27 different school projects. It is expected that \$1,553,000 in cash capital will be budgeted for schools in FY17-18. The Town expects to increase the amount spent on school construction projects using cash-capital funds for the next year. Examples of the types of projects completed as part of the cash-capital budgets include: building envelope repair, concrete repair, HVAC improvements, door replacement, security upgrades and flooring work.

The Town is planning to fund larger debt-financed school construction projects over the next few years, as it has done in the recent past. Between 2007 and 2011, the District used \$8 million in debt-exclusion funds to perform significant upgrades to all elementary schools. This work focused on roofs, boilers, flooring, lighting HVAC and windows. In 2005-2006, the District also made over \$20 million worth of debt-funded improvements to the Middle School - addressing boilers, some windows, lighting, plumbing and flooring. In 2011 three new science laboratories were created within the existing footprint of the Middle School. The Town made these major investments in school buildings without the benefit of any MSBA grant funds; however, most recently the Town completed construction of the beautiful new 280,000 sf High School, which was opened in February 2012. This was funded in part with an MSBA grant. In the summer/fall 2014, major repair/replacement projects totaling \$2.5m were made to Sprague, Hunnewell and the Middle School. The District is also currently replacing windows at the Middle School as part of a \$5m MSBA Accelerated Repair Project. Major renovations totaling \$20m are currently under construction for the Schofield and Fiske elementary schools.

The District engaged Symmes Maini and McKee Associates (SMMA) in 2012 to perform a detailed conditions assessment and feasibility study of all ten school buildings, and to utilize an on-line database tool to store the information. This database has been used for capital planning and maintenance purposes, and the room categorization has been established based upon the MSBA Summary of Spaces designations. Recommendations made in this report suggest that a major school building renovation program is needed for most of the school buildings. The Hardy, Hunnewell and Upham schools were identified as schools with the highest needs.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 5**

***Question 1: Please provide a detailed description of the issues surrounding the school facility systems (e.g., roof, windows, boilers, HVAC system, and/or electrical service and distribution system) that you are indicating require repair or replacement. Please describe all deficiencies to all systems in sufficient detail to explain the problem.***

The Hunnewell School was built 76 years ago and has had numerous additions since, including two 16 year old portable classrooms intended for a much shorter use period, and as a result the school has building systems that are well past their service life, unreliable and inefficient users of energy. Most of the windows are single-pane, past service life and have failed in many locations. The heating system is mainly comprised of steam-heated, unit ventilators, exhaust louvers in poor locations and outdated pneumatic controls, 2 to 3 times past their service life. The system is unreliable, difficult to control, hugely inefficient and unable to provide proper ventilation – resulting in high carbon dioxide levels in the rooms. The two cast-iron steam boilers are approaching the end of their service life (currently replacing cracked sections in one); however the piping between the boilers and univents is also original in many cases and there is concern as to its remaining life. Replacement of the univents, piping, exhaust and windows would greatly improve energy efficiency and the learning environment.

There are also major life safety concerns with the Hunnewell, as there is no sprinkler system for this structure which has large areas of wood framing, and the fire alarm system hasn't been updated in almost 2 decades.

Most of the plumbing systems are original, as is the electrical system, and although some lighting upgrades have been made there are still opportunities to reduce energy costs associated with lighting by installing energy efficient lighting and controls. General power distribution and technology infrastructures are severely lacking for the needs of today's school.

The two portable classrooms are well beyond their intended life and require maintenance to repair siding, doors, stairs and HVAC. There is also a significant amount of asbestos containing material in the attic of the Hunnewell.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 5**

***Question 2: Please describe the measures the district has already taken to mitigate the problem/issues described in Question 1 above.***

As described in other areas of this SOI, the District has a very well staffed and well funded professional Facilities Maintenance Department, which provides both reactive/repair maintenance services and preventive maintenance services. The Town also funds many capital construction projects to address larger maintenance issues each year. Examples of the types of building issues that have been addressed at the Hunnewell in just the past few years include: security upgrades, door replacement, ceiling fan installation, exhaust fan replacements, wood stair replacement, HVAC service, steam trap replacement, plumbing piping replacement, kiln room upgrade and window repairs. The District and the Town are committed to maintaining the existing systems such that they are operating as best as is possible based on age and condition with a goal to a long term solution.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 5**

***Question 3: Please provide a detailed explanation of the impact of the problem/issues described in Question 1 above on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.***

The heating/ventilating and windows most impact the ability of the District to deliver its educational program. The obsolete windows affect student's ability to concentrate and learn due to solar-gain excessively heating the room, air infiltration causing cold breezes, glare affecting vision and transmission of outside noise from passing vehicles, other students and grass cutting. The pneumatically controlled, steam-heat system causes even more substantial problems with the learning environment. Students in one class at the Hunnewell may be wearing sweaters, while students in an adjacent classroom may be in tee-shirts due to the inability to control temperatures. Moreover, the age and condition of this system does not provide nearly the 800 ppm maximum CO<sub>2</sub> ventilation rates that the Massachusetts Department of Public Health has established for schools, so Hunnewell students are often tired or not as focused as they otherwise would be due to the poor ventilation. These issues also affect staff in the same way.

Name of School ---- SAMPLE SCHOOL [DRAFT] ----

**Priority 5**

***Question 4: Please describe how addressing the school facility systems you identified in Question 1 above will extend the useful life of the facility that is the subject of this SOI and how it will improve your district's educational program.***

Implementing corrective actions to address the cited building deficiencies will reduce energy consumption and improve both indoor air quality and the learning environment at the Hunnewell. As a result the educational goals would be improved significantly. Replacing key building systems which typically have service life of 15 to 20 years, yet have dramatically exceeded these lifespans, will also extend the overall service life of the school. Nevertheless, the awkward and inefficient floor plan of Hunnewell, the result of numerous additions, should be considered as part of any major construction work contemplated at the school.

**Please also provide the following:**

**Have the systems identified above been examined by an engineer or other trained building professional?:**

YES

**If "YES", please provide the name of the individual and his/her professional affiliation (maximum of 250 characters):**

Symmes Maini and McKee Associates (SMMA)

**The date of the inspection:** 7/1/2012

**A summary of the findings (maximum of 5000 characters):**

The results of the assessment were consistent with the descriptions provided above, which was prepared using the SMMA work. As part of a Town-funded \$200,000 FY12 capital project, the District engaged SMMA to utilize a team of professional engineers (Structural, Civil, Mechanical, Electrical) and architects to fully evaluate all schools and to document the results in an on-line database that is readily available to the MSBA. This database has been used for capital planning and maintenance purposes, and the room categorization has been established based upon the MSBA Summary of Spaces designations.



Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 7**

***Question 1: Please provide a detailed description of the programs not currently available due to facility constraints, the state or local requirement for such programs, and the facility limitations precluding the programs from being offered.***

Beyond the main education programming for grades K-5, Hunnewell houses the District's Therapeutic Learning Center (TLC) for students with average to above-average cognitive profiles who present with challenges in the emotional/social/behavioral domains. This program is housed in portable classrooms at the school, where space can be challenging to offer appropriate services to students. Additionally, Hunnewell is hosting one of the District's integrated preschool classrooms due to space challenges at the main preschool building.

The main impact of the facility on education programming is in heating/ventilation and temperature control. With unit-ventilators and windows at end-of-life, there are wide variations in temperatures between rooms in the building and not enough air circulation. The result is that the learning environments are less than ideal for teaching and learning. Part of the library has also been converted, with temporary partitions, into a space to deliver special education services.

The buildings "horseshoe" floor plan layout, the result of many additions, is not ideal from a circulation or space efficiency standpoint, which somewhat limits the programming of spaces in the school. The lack of a dedicated cafeteria requires dual use of the gymnasium to also serve lunches, which limits potential use of the gym for physical education and wellness, including the new climbing wall installed in 2013. The school is in a congested site with very limited parking, which creates safety issues at the beginning and end of the school day during drop-off and pickup.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 7**

***Question 2: Please describe the measures the district has taken or is planning to take in the immediate future to mitigate the problem(s) described above.***

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As an interim measure to improve the air circulation, the District will continue to invest in the maintenance of room unit ventilators and exhaust to clean and replace parts and improve the overall performance of these units. An HVAC recommissioning project was implemented during the 2013-14 winter season to help address air quality problems. These are clearly stop-gap measures until a more comprehensive renovation can occur.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 7**

***Question 3: Please provide a detailed explanation of the impact of the problem described in this priority on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.***

The heating/ventilating and windows most impact the ability of the District to deliver its educational program. The obsolete windows affect student's ability to concentrate and learn due to solar-gain excessively heating the room, air infiltration causing cold breezes, glare affecting vision and transmission of outside noise from passing vehicles, other students and grass cutting. The pneumatically controlled, steam-heat system causes even more substantial problems with the learning environment. Students in one class at the Hunnewell may be wearing sweaters, while students in an adjacent classroom may be in tee-shirts due to the inability to control temperatures. Moreover, the age and condition of this system does not provide nearly the 800 ppm maximum CO<sub>2</sub> ventilation rates that the Massachusetts Department of Public Health has established for schools, so Hunnewell students are often tired or not as focused as they otherwise would be due to the poor ventilation. These issues also affect staff in the same way.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**REQUIRED FORM OF VOTE TO SUBMIT AN SOI****REQUIRED VOTES**

If the SOI is being submitted by a City or Town, a vote in the following form is required from both the City Council/Board of Aldermen **OR** the Board of Selectmen/equivalent governing body **AND** the School Committee.

If the SOI is being submitted by a regional school district, a vote in the following form is required from the Regional School Committee only. **FORM OF VOTE** Please use the text below to prepare your City's, Town's or District's required vote(s).

**FORM OF VOTE**

Please use the text below to prepare your City's, Town's or District's required vote(s).

Resolved: Having convened in an open meeting on \_\_\_\_\_, prior to the closing date, the \_\_\_\_\_ *(City Council/Board of Aldermen, Board of Selectmen/equivalent Governing Body/School Committee)* of \_\_\_\_\_ *(City/Town)*, in accordance with its charter, by-laws, and ordinances, has voted to authorize the Superintendent to submit to the Massachusetts School Building Authority the Statement of Interest dated \_\_\_\_\_ for the \_\_\_\_\_ *(Building)* located at \_\_\_\_\_ *(Address)* which describes and explains the following deficiencies and the priority category(s) for which an application may be submitted to the Massachusetts School Building Authority in the future

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\_\_\_\_\_ ; *(To be completed by the priority category)* and hereby further specifically acknowledges that by submitting this Statement of Interest Form, the Massachusetts School Building Authority in no way guarantees the acceptance or the approval of an application, the awarding of a grant or any other funding commitment from the Massachusetts School Building Authority, or commits the City/Town/Regional School District to filing an application for funding with the Massachusetts School Building Authority.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----
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## CERTIFICATIONS

The undersigned hereby certifies that, to the best of his/her knowledge, information and belief, the statements and information contained in this statement of Interest and attached hereto are true and accurate and that this Statement of Interest has been prepared under the direction of the district school committee and the undersigned is duly authorized to submit this Statement of Interest to the Massachusetts School Building Authority. The undersigned also hereby acknowledges and agrees to provide the Massachusetts School Building Authority, upon request by the Authority, any additional information relating to this Statement of Interest that may be required by the Authority.

<b>Chief Executive Officer *</b>	<b>School Committee Chair</b>	<b>Superintendent of Schools</b>
Marjorie Freiman	Sharon Gray	David F. Lussier
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Chair, Board of Selectmen		

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(signature)	(signature)	(signature)
<hr/>	<hr/>	<hr/>
Date	Date	Date

\* Local Chief Executive Officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated to the chief executive office under the provisions of a local charter. Please note, in districts where the Superintendent is also the Local Chief Executive Officer, it is required for the same person to sign the Statement of Interest Certifications twice. Please do not leave any signature lines blank.



Name of School ----- SAMPLE SCHOOL [DRAFT] -----

## Massachusetts School Building Authority

School District Wellesley

District Contact David F Lussier TEL: (781) 446-6210

Name of School: Ernest F Upham

Submission Date 3/22/2017

### SOI CERTIFICATION

To be eligible to submit a Statement of Interest (SOI), a district must certify the following:

- ☒ The district hereby acknowledges and agrees that this SOI is NOT an application for funding and that submission of this SOI in no way commits the MSBA to accept an application, approve an application, provide a grant or any other type of funding, or places any other obligation on the MSBA.
- ☒ The district hereby acknowledges that no district shall have any entitlement to funds from the MSBA, pursuant to M.G.L. c. 70B or the provisions of 963 CMR 2.00.
- ☒ The district hereby acknowledges that the provisions of 963 CMR 2.00 shall apply to the district and all projects for which the district is seeking and/or receiving funds for any portion of a municipally-owned or regionally-owned school facility from the MSBA pursuant to M.G.L. c. 70B.
- ☒ The district hereby acknowledges that this SOI is for one existing municipally-owned or regionally-owned public school facility in the district that is currently used or will be used to educate public PreK-12 students and that the facility for which the SOI is being submitted does not serve a solely early childhood or Pre-K student population.
- ☒ After the district completes and submits this SOI electronically, the district must sign the required certifications and submit one signed original hard copy of the SOI to the MSBA, with all of the required documentation described under the "Vote" tab, on or before the deadline.
- ☒ The district will schedule and hold a meeting at which the School Committee will vote, using the specific language contained in the "Vote" tab, to authorize the submission of this SOI. This is required for cities, towns, and regional school districts.
- ☒ Prior to the submission of the hard copy of the SOI, the district will schedule and hold a meeting at which the City Council/Board of Aldermen or Board of Selectmen/equivalent governing body will vote, using the specific language contained in the "Vote" tab, to authorize the submission of this SOI. This is not required for regional school districts.
- ☒ On or before the SOI deadline, the district will submit the minutes of the meeting at which the School Committee votes to authorize the Superintendent to submit this SOI. The District will use the MSBA's vote template and the vote will specifically reference the school and the priorities for which the SOI is being submitted. The minutes will be signed by the School Committee Chair. This is required for cities, towns, and regional school districts.
- ☒ The district has arranged with the City/Town Clerk to certify the vote of the City Council/Board of Aldermen or Board of Selectmen/equivalent governing body to authorize the Superintendent to submit this SOI. The district will use the MSBA's vote template and submit the full text of this vote, which will specifically reference the school and the priorities for which the SOI is being submitted, to the MSBA on or before the SOI deadline. This is not required for regional school districts.
- ☒ The district hereby acknowledges that this SOI submission will not be complete until the MSBA has received all of the required vote documentation and certification signatures in a format acceptable to the MSBA. If Priority 1 is selected, your Statement of Interest will not be considered complete unless and until you provide the required engineering (or other) report, a professional opinion regarding the problem, and photographs of the problematic area or system.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----
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<b>Chief Executive Officer *</b>	<b>School Committee Chair</b>	<b>Superintendent of Schools</b>
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Marjorie Freiman	Sharon Gray	David F. Lussier
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Chair, Board of Selectmen		
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(signature)	(signature)	(signature)
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Date	Date	Date
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\* Local chief executive officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated to the chief executive office under the provisions of a local charter. Please note, in districts where the Superintendent is also the Local Chief Executive Officer, it is required for the same person to sign the Statement of Interest Certifications twice. Please do not leave any signature lines blank.



Name of School ----- SAMPLE SCHOOL [DRAFT] -----

## Massachusetts School Building Authority

School District Wellesley

District Contact David F Lussier TEL: (781) 446-6210

Name of School Ernest F Upham

Submission Date 3/22/2017

### Note

The following Priorities have been included in the Statement of Interest:

1. ☐ Replacement or renovation of a building which is structurally unsound or otherwise in a condition seriously jeopardizing the health and safety of school children, where no alternative exists.
2. ☐ Elimination of existing severe overcrowding.
3. ☐ Prevention of the loss of accreditation.
4. ☐ Prevention of severe overcrowding expected to result from increased enrollments.
5. ☒ Replacement, renovation or modernization of school facility systems, such as roofs, windows, boilers, heating and ventilation systems, to increase energy conservation and decrease energy related costs in a school facility.
6. ☐ Short term enrollment growth.
7. ☒ Replacement of or addition to obsolete buildings in order to provide for a full range of programs consistent with state and approved local requirements.
8. ☐ Transition from court-ordered and approved racial balance school districts to walk-to, so-called, or other school districts.

### SOI Vote Requirement

☒ I acknowledge that I have reviewed the MSBA's vote requirements for submitting an SOI which are set forth in the Vote Tab of this SOI. I understand that the MSBA requires votes from specific parties/governing bodies, in a specific format using the language provided by the MSBA. Further, I understand that the MSBA requires certified and signed vote documentation to be submitted with the SOI. I acknowledge that my SOI will not be considered complete and, therefore, will not be reviewed by the MSBA unless the required accompanying vote documentation is submitted to the satisfaction of the MSBA.

Potential Project Scope: Renovation/ Addition

Is this SOI the District Priority SOI? YES

School name of the District Priority SOI: Ernest F Upham

Is this part of a larger facilities plan? YES

If "YES", please provide the following:

Facilities Plan Date: 6/12/2012

Planning Firm: Symmes, Maini & McKee Associates (SMMA)

Please provide an overview of the plan including as much detail as necessary to describe the plan, its goals and how the school facility that is the subject of this SOI fits into that plan:

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

There are four critical elements that have supported the development of a facilities master plan in Wellesley. First, in order to assess the physical needs of all of its school buildings, the Wellesley Public Schools commissioned a Conditions Assessment and Feasibility Study that was performed by Symmes, Maini & McKee Associates (SMMA). This review included a focus on safety, health hazards, maintenance and infrastructure. In the fall of 2012, SMMA presented their findings through an online database. This database provides a robust tool for strategic planning, capital planning and maintenance prioritization, and has been thoroughly reviewed by the Facilities Maintenance Department (FMD), which has been managing SMMA's work since they were contracted. Second, the District—in collaboration with Town officials—has convened several committees during the past few years to examine the Hardy, Hunnewell, and Upham school facilities challenges and propose recommended plans for moving forward. Most recently, a Master Plan Committee has recommended to the School Committee that the Town conduct feasibility studies at all three sites, and proceed with building two new schools, beginning with Upham and then followed by Hunnewell. Should enrollment increase and begin to trend above current projections, the Town would then move to build a third new school on the Hardy site. Third, the District has received the results of two commissioned demographic studies to inform its short and long term planning. In 2013, Cropper GIS reported that elementary enrollment in Wellesley was expected to decline by approximately 14 percent, or 347 students, between SY2013-2014 and SY2023-2024. In October 2016, FutureThink reported that elementary enrollment in Wellesley was expected to decline by approximately 5 percent, or 114 students, between SY2017-18 and SY2026-27. Taken together, these reports suggest a continued decline of enrollment that may allow the district to consolidate from seven elementary schools to six. Finally, the Wellesley Public Schools has developed a 5-year Strategic Plan that provides a vision for the District's goals, as well as the needed resources and facilities to best achieve these goals. Most important is ensuring that we have the appropriate educational spaces within our schools to provide 21st Century learning opportunities for all of our students.

**Please provide the current student to teacher ratios at the school facility that is the subject of this SOI: 14 students per teacher**

**Please provide the originally planned student to teacher ratios at the school facility that is the subject of this SOI: 20 students per teacher**

**Does the District have a Master Educational Plan that includes facility goals for this building and all school buildings in District?** NO

**Does the District have related report(s)/document(s) that detail its facilities, student configurations at each facility, and District operational budget information, both current and proposed?** YES

**If "YES", please provide title, author, and date of report in area below.**

Symmes, Maini & McKee Associates Building Condition Review 6/12/2012

**Please include a hard copy of these report(s)/document(s) with your hard copy Statement of Interest submittal.**

**Is there overcrowding at the school facility?** NO

**If "YES", please describe in detail, including specific examples of the overcrowding.**

**Has the district had any recent teacher layoffs or reductions?** NO

**If "YES", how many teaching positions were affected?** 0

**At which schools in the district?**

**Please describe the types of teacher positions that were eliminated (e.g., art, math, science, physical education, etc.).**

**Has the district had any recent staff layoffs or reductions?** NO

**If "YES", how many staff positions were affected?** 0

**At which schools in the district?**

**Please describe the types of staff positions that were eliminated (e.g., guidance, administrative, maintenance, etc.).**

Name of School	----- SAMPLE SCHOOL [DRAFT] -----
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**Please provide a description of the program modifications as a consequence of these teacher and/or staff reductions, including the impact on district class sizes and curriculum.**

Does Not Apply

**Please provide a detailed description of your most recent budget approval process including a description of any budget reductions and the impact of those reductions on the district's school facilities, class sizes, and educational program.**

The Wellesley School Committee approved an FY18 Operating Budget of \$72,208,147 on March 2, 2017. At the same time, the Town's proposed FY18 Capital Budget includes significant funding (\$1,553,000) for school-related building construction projects. Both the FY18 Operating and Capital Budgets must be approved at Town Meeting, which begins on March 27, 2017.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

## General Description

**BRIEF BUILDING HISTORY:** Please provide a detailed description of when the original building was built, and the date(s) and project scopes(s) of any additions and renovations (maximum of 5000 characters).

The 36,500 gross square foot Upham Elementary school was constructed in 1957, with an addition in 1967. Two modulars were added in 1993 and the roof and boilers were replaced in 2009.

**TOTAL BUILDING SQUARE FOOTAGE:** Please provide the original building square footage PLUS the square footage of any additions.

36500

**SITE DESCRIPTION:** Please provide a detailed description of the current site and any known existing conditions that would impact a potential project at the site. Please note whether there are any other buildings, public or private, that share this current site with the school facility. What is the use(s) of this building(s)? (maximum of 5000 characters).

The site consists of approximately 12 acres and overall site functions as intended, though some safety, accessibility, and circulation deficiencies were observed. Parking lot and overflow parking lots are insufficiently lit, as existing pole mounted site lights are inoperable. Multiple walkways exceed code requirements for slope, as well as the handicap accessible parking spaces and the route from the spaces to the front entrance. Route from handicap parking spaces is not protected or isolated from traffic using the front bus loop. A majority of the bituminous play areas have steeper than recommended slopes and do not meet accessible code requirements. The adjacent elevated playing field does not have handicap access and has been cited. Parking lot is inadequate for staff needs. Parent queuing area does not appear sufficient, and overall circulation patterns for vehicles and pedestrians are less than ideal. Parking overflows onto Wynnewood Ave. Designated bus loop for area is adequately sized for school needs and provides efficient circulation. Parent loading area is not adequate for demand, and circulation is not ideal due to the basketball play area being used for parent parking. Pedestrian access around site is not clearly defined as a result of the site layout. Overall network of walkways is inadequate. Drainage along north face of building is not adequate and has created interior moisture issues. Parking lots, access routes, paved play areas, and walkways are in overall poor condition due to areas of fatigue cracking, block cracking, seam cracking, and pothole development. Insufficient drainage along north face of building has created interior moisture and mold problems. Guardrail and chain link fence function but show signs of wear and damage. Repaving of some areas is should be considered in the next few years. No loading dock or dedicated loading area provided. Trash and recycling operations are adequate, though dumpster location areas are also used for parking. No other building shares this current site with the school facility.

**ADDRESS OF FACILITY:** Please type address, including number, street name and city/town, if available, or describe the location of the site. (Maximum of 300 characters)

35 Wynnewood Road  
Wellesley, MA 02481

**BUILDING ENVELOPE:** Please provide a detailed description of the building envelope, types of construction materials used, and any known problems or existing conditions (maximum of 5000 characters).

The exterior enclosure is minimally insulated, solid brick masonry walls and most of the glazing is single paned or minimally performing dual glazing with no thermally separated frames. Many of the doors are uninsulated, show signs of deterioration and are well beyond their service life. The roof is an insulated, fully-adhered PVC single-ply system. The structure consists of metal roof deck on open-web steel joists supported by steel beams/columns with lateral resistant provided by unreinforced brick masonry shear walls. The foundation consists of slab-on-grade and shallow spread footings.

Name of School      ----- SAMPLE SCHOOL [DRAFT] -----
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Exterior Window sills are heavily damaged, spalled, and in some places completely missing. Toilet partitions and fixtures are dated and nearing the end of their useful life. Exterior material failures around windows and doors leave surrounding wall construction vulnerable to failure in these areas due to water intrusion. The building is in fair structural condition. There are some minor cracks in some of the CMU corridor walls and the brick walls in the gymnasium. Little if any wall insulation and minimal roof insulation is present. Repairs were made to the two modular classrooms in 2014; however, these units are at the end of service life.

**Has there been a Major Repair or Replacement of the EXTERIOR WALLS?**    NO

**Year of Last Major Repair or Replacement:(YYYY)**    2000

**Description of Last Major Repair or Replacement:**

No information is available at this time

**Roof Section    A**

**Is the District seeking replacement of the Roof Section?**    NO

**Area of Section (square feet)**    40000

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)**

Fully adhered flat roof with Carlisle single-ply thermoplastic poly-olefin (TPO) system.

**Age of Section (number of years since the Roof was installed or replaced)**    6

**Description of repairs, if applicable, in the last three years. Include year of repair:**

New roofing was installed with 20 year warranty beginning on 9/3/09.

**Roof Section    B**

**Is the District seeking replacement of the Roof Section?**

**Area of Section (square feet)**

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)**

**Age of Section (number of years since the Roof was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Roof Section    C**

**Is the District seeking replacement of the Roof Section?**

**Area of Section (square feet)**

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)**

**Age of Section (number of years since the Roof was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Roof Section    D**

**Is the District seeking replacement of the Roof Section?**

**Area of Section (square feet)**

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)**

**Age of Section (number of years since the Roof was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Roof Section    E**

**Is the District seeking replacement of the Roof Section?**

**Area of Section (square feet)**

**Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)**

**Age of Section (number of years since the Roof was installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Roof Section    F**

**Is the District seeking replacement of the Roof Section?**

**Area of Section (square feet)**

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)

Age of Section (number of years since the Roof was installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

**Roof Section G**

Is the District seeking replacement of the Roof Section?

Area of Section (square feet)

Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)

Age of Section (number of years since the Roof was installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

**Roof Section H**

Is the District seeking replacement of the Roof Section?

Area of Section (square feet)

Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)

Age of Section (number of years since the Roof was installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

**Roof Section I**

Is the District seeking replacement of the Roof Section?

Area of Section (square feet)

Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)

Age of Section (number of years since the Roof was installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

**Roof Section J**

Is the District seeking replacement of the Roof Section?

Area of Section (square feet)

Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe)

Age of Section (number of years since the Roof was installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

**Window Section A**

Is the District seeking replacement of the Windows Section? NO

Windows in Section (count) 80

Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))

Original, single glazed metal framed windows.

Age of Section (number of years since the Windows were installed or replaced) 58

Description of repairs, if applicable, in the last three years. Include year of repair:

Normal repairs to glass and hardware.

**Window Section B**

Is the District seeking replacement of the Windows Section? NO

Windows in Section (count) 68

Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))

Original, single glazed metal framed windows.

Age of Section (number of years since the Windows were installed or replaced) 47

Description of repairs, if applicable, in the last three years. Include year of repair:

Normal repairs to glass and hardware.

**Window Section C**

Is the District seeking replacement of the Windows Section? NO

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Windows in Section (count) 8**

**Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))**

Vinyl sliders.

**Age of Section (number of years since the Windows were installed or replaced) 1**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

Original 1993 windows in these Modular classrooms were replaced in 2014.

**Window Section D**

**Is the District seeking replacement of the Windows Section?**

**Windows in Section (count)**

**Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))**

**Age of Section (number of years since the Windows were installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Window Section E**

**Is the District seeking replacement of the Windows Section?**

**Windows in Section (count)**

**Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))**

**Age of Section (number of years since the Windows were installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Window Section F**

**Is the District seeking replacement of the Windows Section?**

**Windows in Section (count)**

**Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))**

**Age of Section (number of years since the Windows were installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Window Section G**

**Is the District seeking replacement of the Windows Section?**

**Windows in Section (count)**

**Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))**

**Age of Section (number of years since the Windows were installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Window Section H**

**Is the District seeking replacement of the Windows Section?**

**Windows in Section (count)**

**Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))**

**Age of Section (number of years since the Windows were installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Window Section I**

**Is the District seeking replacement of the Windows Section?**

**Windows in Section (count)**

**Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))**

**Age of Section (number of years since the Windows were installed or replaced)**

**Description of repairs, if applicable, in the last three years. Include year of repair:**

**Window Section J**

**Is the District seeking replacement of the Windows Section?**

**Windows in Section (count)**

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))**  
**Age of Section (number of years since the Windows were installed or replaced)**  
**Description of repairs, if applicable, in the last three years. Include year of repair:**

**MECHANICAL and ELECTRICAL SYSTEMS: Please provide a detailed description of the current mechanical and electrical systems and any known problems or existing conditions (maximum of 5000 characters).**

The school is heated by hot water heating plant comprised of one conventional cast iron boiler and one high-efficiency, condensing-type boiler with a primary-secondary pumping system for distribution to the building loads. The classrooms are heated and ventilated through unit ventilators, fin tube radiation and a common exhaust system. Common spaces are served by heating and ventilating units, fin tube radiation and cabinet unit heaters. The control system is pneumatic and in poor condition. These HVAC systems are beyond service life and in need of replacement.

Plumbing fixtures are antiquated, high-flow type. Original building hot water is supplied directly from a single 48-gallon water heater installed in 2010 with no main mixing valve. Hot water throughout the Modulares is served by point-of-use electric storage water heaters.

Panels, feeders and branch wiring circuits that are older than thirty years shall be replaced. Most of the branch lighting and power electrical panels are original to the building and require upgrading. Most interior lighting is original to the building, direct fluorescent with plastic lenses. Much of the wiring in the building has jacketing with asbestos containing material. Quantity of power outlets in many spaces is insufficient. Light levels are adequate but glare is excessive. Power devices (receptacles) and wiring are original to the building. In general they are in fair to good condition, except for a few locations which are recommended for upgrading (non-GFI receptacle in kitchen). Emergency lighting is provided by means of battery packs with light heads and remote light heads. It's original to the building and fair, but working condition. There are a few non-electrical exit signs which are recommended for replacement. The existing FA system consisting of FACP (Notifier 500), exterior master box and interior radio master box (by Digitizer), smoke detectors and horn/strobes is in operational condition, but needs upgrading. There are no fire alarm devices in any of the older classrooms, and a few other locations. Most of interior lighting fixtures are original to the building utilizing non energy-efficient T12 lamps. Lighting controls in classrooms and similar educational spaces are minimal and include multi-switching arrangements appropriate for various tasks, there are no occupancy sensors in the building. There is no lighting control system in the building. Exterior egress lighting system is original to the building, consist building-mounted lights by egress doors, under main canopy, and pole mounted light. There are no parking lot lights. The lights are in poor condition, there are areas that require additional lighting. MDF equipment is located in crowded storage rooms. There is no emergency generator at site. There are no CCTV systems and one Aiphone at the main entry. Consideration should be given to adding card access control, CCTV system and upgrading the intrusion detection system to include motion detection.

#### **Boiler Section 1**

**Is the District seeking replacement of the Boiler?** NO  
**Is there more than one boiler room in the School?** YES  
**What percentage of the School is heated by the Boiler?** 100  
**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**  
 natural gas  
**Age of Boiler (number of years since the Boiler was installed or replaced)** 8  
**Description of repairs, if applicable, in the last three years. Include year of repair:**  
 Normal service calls and preventive maintenance.

#### **Boiler Section 2**

**Is the District seeking replacement of the Boiler?** NO  
**Is there more than one boiler room in the School?** YES  
**What percentage of the School is heated by the Boiler?** 100  
**Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)**



Name of School ----- SAMPLE SCHOOL [DRAFT] -----

natural gas .

Age of Boiler (number of years since the Boiler was installed or replaced) 8

Description of repairs, if applicable, in the last three years. Include year of repair:

Normal service calls and preventive maintenance.

#### Boiler Section 3

Is the District seeking replacement of the Boiler?

Is there more than one boiler room in the School?

What percentage of the School is heated by the Boiler?

Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)

Age of Boiler (number of years since the Boiler was installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

#### Boiler Section 4

Is the District seeking replacement of the Boiler?

Is there more than one boiler room in the School?

What percentage of the School is heated by the Boiler?

Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)

Age of Boiler (number of years since the Boiler was installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

#### Boiler Section 5

Is the District seeking replacement of the Boiler?

Is there more than one boiler room in the School?

What percentage of the School is heated by the Boiler?

Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)

Age of Boiler (number of years since the Boiler was installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

#### Boiler Section 6

Is the District seeking replacement of the Boiler?

Is there more than one boiler room in the School?

What percentage of the School is heated by the Boiler?

Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)

Age of Boiler (number of years since the Boiler was installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

#### Boiler Section 7

Is the District seeking replacement of the Boiler?

Is there more than one boiler room in the School?

What percentage of the School is heated by the Boiler?

Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)

Age of Boiler (number of years since the Boiler was installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

#### Boiler Section 8

Is the District seeking replacement of the Boiler?

Is there more than one boiler room in the School?

What percentage of the School is heated by the Boiler?

Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)

Age of Boiler (number of years since the Boiler was installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

#### Boiler Section 9

Is the District seeking replacement of the Boiler?

Is there more than one boiler room in the School?

What percentage of the School is heated by the Boiler?

Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)

Age of Boiler (number of years since the Boiler was installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

#### Boiler Section 10

Is the District seeking replacement of the Boiler?

Is there more than one boiler room in the School?

What percentage of the School is heated by the Boiler?

Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)

Age of Boiler (number of years since the Boiler was installed or replaced)

Description of repairs, if applicable, in the last three years. Include year of repair:

Has there been a Major Repair or Replacement of the HVAC SYSTEM? NO

Year of Last Major Repair or Replacement:(YYYY) 2014

Description of Last Major Repair or Replacement:

HVAC recommissioning project in 2014.

Has there been a Major Repair or Replacement of the ELECTRICAL SERVICES AND DISTRIBUTION SYSTEM? NO

Year of Last Major Repair or Replacement:(YYYY) 2014

Description of Last Major Repair or Replacement:

Exterior LEDs installed in 2014

**BUILDING INTERIOR:** Please provide a detailed description of the current building interior including a description of the flooring systems, finishes, ceilings, lighting, etc. (maximum of 5000 characters).

Although small and added to twice, many of the original finishes in the school are long past their useful service life. Classrooms are well maintained but have original ceilings and surface mounted fluorescent fixtures, and noisy, inefficient thru-wall fan coil units. The toilets and drinking fixtures in the building are minimally accessible. Daylight is good but windows are shaded by the original metal blinds. Some exterior doors are poorly sealed and reveal large gaps with daylight. Walls are uninsulated and most windows are single-paned. MODS are well past their lifetime. There is no chairlift or elevator to provide access between a major grade change in the middle of the school. Vandalism is a persistent problem as the rear roof is accessible from ground. Pipe insulation above main corridor is suspected to have asbestos according to the most recent AHERA report and should be abated within a few years. Some wiring has asbestos jacketed insulation.

**PROGRAMS and OPERATIONS:** Please provide a detailed description of the current programs offered and grades served, and indicate whether there are program components that cannot be offered due to facility constraints, operational constraints, etc. (maximum of 5000 characters).

The Upham School is a K-5 elementary school serving 225 students across 11 classrooms. In addition to the elementary academic program, Upham also offers a 'Skills' program designed to meet the needs of students diagnosed with a disability on the autism spectrum, which includes autistic disorder, Asperger's Disorder, pervasive developmental disorder not otherwise specified (PDD NOS), and Rhett's Syndrome. Students with autism spectrum disorder may present with needs in all or some of the following areas: Verbal and nonverbal communications, social interaction skills and proficiencies, unusual responses to sensory experiences, resistance to environmental change or change in daily routines, engagement in repetitive activities and stereotyped movements, behavioral difficulties resulting from autism spectrum disorder, and progress in the general curriculum, including social and emotional development. There are currently 29

Name of School	----- SAMPLE SCHOOL [DRAFT] -----
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students enrolled in the Skills Program at Upham.

Instruction is provided in small group or individual settings. Accompanied by program staff to provide continuity of instructional approaches, students are included in general education settings for academics, science, social studies, specials, and community building activities, as appropriate.

Because every space is currently being utilized at Upham, there are no spaces to offer additional supplementary and support programs for students.

One of the main challenges at Upham is that the multi-purpose room serves as the gymnasium and cafeteria, along with speech, OT/PT, as well as all-school assemblies. These activities must be scheduled around the lunch schedule from 12 noon to 2 p.m. severely restricting delivery of services to students. Additionally, because there are no ramps and bathroom modifications, students with severe physical disabilities are assigned to other schools.

**CORE EDUCATIONAL SPACES:** Please provide a detailed description of the Core Educational Spaces within the facility, a description of the number and sizes (in square feet) of classrooms, a description of science rooms/labs including ages and most recent updates, a description of the cafeteria, gym and/or auditorium and a description of the media center/library (maximum of 5000 characters).

The Upham School has 12 classrooms, including 2 modular classrooms, which would be considered as Core Academic Space. The sizes of these rooms vary by addition; rooms in the original 1957 wing are approximately 860 sf, rooms in the 1967 addition are about 840 sf and rooms in the 1993 MODS addition are about 900 sf. The kindergarten classroom is about 1,080 sf. Additionally, there is a 840 sf Library and a 4,000 sf Multi-purpose room for physical education and health classes that also serves as the cafeteria. There are a number of smaller SPED spaces for OT/PT, speech, etc. The diversity in the sizes and construction of each space are reflective of the different ages of construction for the various component buildings to the school: 1957 (original), 1967, 1993 (MODS). Aside from roof and boiler replacements in 2009, there have been no recent updates to the remainder of the building.

**CAPACITY and UTILIZATION:** Please provide a detailed description of the current capacity and utilization of the school facility. If the school is overcrowded, please describe steps taken by the administration to address capacity issues. Please also describe in detail any spaces that have been converted from their intended use to be used as classroom space (maximum of 5000 characters).

Upham's enrollment for SY2016-17 is 225 students. There are a total of 11 K-5 sections. All education spaces at Upham are currently being utilized.

**MAINTENANCE and CAPITAL REPAIR:** Please provide a detailed description of the district's current maintenance practices, its capital repair program, and the maintenance program in place at the facility that is the subject of this SOI. Please include specific examples of capital repair projects undertaken in the past, including any override or debt exclusion votes that were necessary (maximum of 5000 characters).

The Wellesley Facilities Maintenance Department (FMD) operates and maintains all school buildings in the District, including the Upham School. The FMD is responsible for custodial service, maintenance and capital projects in all 10 school buildings, which total over 880,000 square feet, with a staff of 68 and an FY17 budget of \$9.4M.

The Facilities Director leads a group of professional managers who oversee four core areas: custodial, maintenance, energy and capital projects. Preventive maintenance practices are a focus of the department, as are custodial procedures which incorporate "green cleaning" techniques. Capital projects are identified during planning through a collaborative approach with principals. Design/construction is managed within the FMD, through outside design professionals, and also through the Town's Permanent Building Committee (PBC). The FMD's Energy Manager is charged with managing and reducing energy consumption.

Name of School	--- SAMPLE SCHOOL [DRAFT] ---
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The District has a Maintenance Procedure Manual that explains how work is to be accomplished. The FMD relies on a computerized management systems by SchoolDude to manage maintenance and energy use. Our Maintenance Manager oversees 7 tradesmen, which allows quick and cost-effective response for service calls and required preventive maintenance.

Custodial operations are governed by our Custodial Procedures Manual, and our staff of 39 professional custodians (2 at the Upham) is overseen by our Custodial Manager. The District has a green cleaning program, uses state-of-the-art custodial equipment, trains staff at quarterly professional development sessions and uses "team cleaning" techniques at the HS and MS.

The District has accomplished a significant amount of capital construction work recently and plans to continue this work at an aggressive pace over the coming years. In 2013-2014, the Town completed about \$811,000 worth of cash-capital work on 46 different school projects. In 2014-15, the Town completed about \$929,000 worth of cash capital work on 30 different school projects. In 2015-2016, the Town completed about \$790,000 worth of cash capital work on 26 different school projects. In 2016-17, the Town completed about \$1,073,500 in cash capital work on 27 different school projects. It is expected that \$1,553,000 in cash capital will be budgeted for schools in FY17-18. The Town expects to increase the amount spent on school construction projects using cash-capital funds for the next year. Examples of the types of projects completed as part of the cash-capital budgets include: building envelope repair, concrete repair, HVAC improvements, door replacement, security upgrades and flooring work.

The Town is planning to fund larger debt-financed school construction projects over the next few years, as it has done in the recent past. Between 2007 and 2011, the District used \$8 million in debt-exclusion funds to perform significant upgrades to all elementary schools. This work focused on roofs, boilers, flooring, lighting HVAC and windows. In 2005-2006, the District also made over \$20 million worth of debt-funded improvements to the Middle School - addressing boilers, some windows, lighting, plumbing and flooring. In 2011 three new science laboratories were created within the existing footprint of the Middle School. The Town made these major investments in school buildings without the benefit of any MSBA grant funds; however, most recently the Town completed construction of the beautiful new 280,000 sf High School, which was opened in February 2012. This was funded in part with an MSBA grant. In the summer/fall 2014, major repair/replacement projects totaling \$2.5m were made to Sprague, Hunnewell and the Middle School. The District is also currently replacing windows at the Middle School as part of a \$5m MSBA Accelerated Repair Project. Major renovations totaling \$20m are currently under construction for the Schofield and Fiske elementary schools.

The District engaged Symmes Maini and McKee Associates (SMMA) in 2012 to perform a detailed conditions assessment and feasibility study of all ten school buildings, and to utilize an on-line database tool to store the information. This database has been used for capital planning and maintenance purposes, and the room categorization has been established based upon the MSBA Summary of Spaces designations. Recommendations made in this report suggest that a major school building renovation program is needed for most of the school buildings. The Hardy, Hunnewell and Upham schools were identified as schools with the highest needs.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 5**

***Question 1: Please provide a detailed description of the issues surrounding the school facility systems (e.g., roof, windows, boilers, HVAC system, and/or electrical service and distribution system) that you are indicating require repair or replacement. Please describe all deficiencies to all systems in sufficient detail to explain the problem.***

The Upham School was built 57 years ago and has had two additions since, including two 21 year old portable classrooms intended for a much shorter use period, and as a result the school has building systems that are well past their service life, unreliable and inefficient users of energy. Most of the windows are single-pane, past service life and have failed in many locations. The heating system is mainly comprised of hot-water, unit ventilators, exhaust louvers in poor locations and outdated pneumatic controls, 2 to 3 times past their service life. The system is unreliable, difficult to control, hugely inefficient and unable to provide proper ventilation – resulting in high carbon dioxide levels in the rooms. While the boilers are newer, the piping between the boilers and univents is also original in many cases and there is concern as to its remaining life. Replacement of the univents, piping, exhaust and windows would greatly improve energy efficiency and the learning environment. There are also major life safety concerns with the Upham, as there is no sprinkler system for this structure and the fire alarm system hasn't been updated in almost 2 decades. Plumbing systems are original, as is most of the electrical system. General power distribution and technology infrastructures are severely lacking for the needs of today's school. Despite recent repairs, the two portable classrooms are reaching the end of their intended life. There is also a significant amount of asbestos containing material in the ceiling and wiring of the Upham.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 5**

***Question 2: Please describe the measures the district has already taken to mitigate the problem/issues described in Question 1 above.***

As described in other areas of this SOI, the District has a very well staffed and well funded professional Facilities Maintenance Department, which provides both reactive/repair maintenance services and preventive maintenance services. The Town also funds many capital construction projects to address larger maintenance issues each year. Examples of the types of building issues that have been addressed at the Upham in just the past few years include: security upgrades, door replacement, HVAC recommissioning, pavement repairs, new kiln room and carpet replacement. The District and the Town are committed to maintaining the existing systems such that they are operating as best as is possible based on age and condition with a goal to a long term solution.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 5**

***Question 3: Please provide a detailed explanation of the impact of the problem/issues described in Question 1 above on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.***

The heating/ventilating and windows most impact the ability of the District to deliver its educational program. The obsolete windows affect student's ability to concentrate and learn due to solar-gain excessively heating the room, air infiltration causing cold breezes, glare affecting vision and transmission of outside noise from passing vehicles, other students and grass cutting. The pneumatically controlled, heating/ventilation system causes even more substantial problems with the learning environment. Students in one class at the Upham may be wearing sweaters, while students in an adjacent classroom may be in tee-shirts due to the inability to control temperatures. Moreover, the age and condition of this system does not provide nearly the 800 ppm maximum CO2 ventilation rates that the Massachusetts Department of Public Health has established for schools, so Upham students are often tired or not as focused as they otherwise would be due to the poor ventilation. These issues also affect staff in the same way.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 5**

***Question 4: Please describe how addressing the school facility systems you identified in Question 1 above will extend the useful life of the facility that is the subject of this SOI and how it will improve your district's educational program.***

Implementing corrective actions to address the cited building deficiencies will reduce energy consumption and improve both indoor air quality and the learning environment at the Upham. As a result the educational goals would be improved significantly. Replacing key building systems which typically have service life of 15 to 20 years, yet have dramatically exceeded these lifespans, will also extend the overall service life of the school. Nevertheless, the inefficient floor plan and lack of an elevator at Upham, the result of additions, should be considered as part of any major construction work contemplated at the school.

**Please also provide the following:**

**Have the systems identified above been examined by an engineer or other trained building professional?:**  
**YES**

**If "YES", please provide the name of the individual and his/her professional affiliation (maximum of 250 characters):**

Symmes, Maini and McKee Associates (SMMA)

**The date of the inspection:** 7/1/2012

**A summary of the findings (maximum of 5000 characters):**

The results of the assessment were consistent with the descriptions provided above, which was prepared using the SMMA work. As part of a Town-funded \$200,000 FY12 capital project, the District engaged SMMA to utilize a team of professional engineers (Structural, Civil, Mechanical, and Electrical) and architects to fully evaluate all schools and to document the results in an on-line database that is readily available to the MSBA. This database has been used for capital planning and maintenance purposes, and the room categorization has been established based upon the MSBA Summary of Spaces designations.



Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 7**

***Question 1: Please provide a detailed description of the programs not currently available due to facility constraints, the state or local requirement for such programs, and the facility limitations precluding the programs from being offered.***

Beyond the main education programming for grades K-5, Upham houses the District's 'Skills' Program for 29 students on the autism spectrum. At the moment, no additional programs can be considered for the school due to facilities constraints. The main impact of the facility on education programming is in heating/ventilation and temperature control. With unit-ventilators and windows at end-of-life, there are wide variations in temperatures between rooms in the building and not enough air circulation. The result is that the learning environments are less than ideal for teaching and learning. The lack of a dedicated cafeteria requires dual use of the gymnasium to also serve lunches. This multi-purpose space is also used for OT/PT and speech services, which limits potential use of the gym for physical education and wellness.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 7**

***Question 2: Please describe the measures the district has taken or is planning to take in the immediate future to mitigate the problem(s) described above.***

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As an interim measure to improve the air circulation, the district will continue to invest in the maintenance of room unit ventilators and exhaust to clean and replace parts and improve the overall performance of these units. An HVAC recommissioning project was implemented during the 2013-14 winter season to help address air quality problems. These are clearly stop-gap measures until a more comprehensive renovation can occur.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**Priority 7**

***Question 3: Please provide a detailed explanation of the impact of the problem described in this priority on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.***

The heating/ventilating and windows most impact the ability of the District to deliver its educational program. The obsolete windows affect student's ability to concentrate and learn due to solar-gain excessively heating the room, air infiltration causing cold breezes, glare affecting vision and transmission of outside noise from passing vehicles, other students and grass cutting. The pneumatically controlled, heating and ventilation system causes even more substantial problems with the learning environment. Students in one class at the Upham may be wearing sweaters, while students in an adjacent classroom may be in tee-shirts due to the inability to control temperatures. Moreover, the age and condition of this system does not provide nearly the 800 ppm maximum CO2 ventilation rates that the Massachusetts Department of Public Health has established for schools, so Upham students are often tired or not as focused as they otherwise would be due to the poor ventilation. These issues also affect staff in the same way.

Name of School ----- SAMPLE SCHOOL [DRAFT] -----

**REQUIRED FORM OF VOTE TO SUBMIT AN SOI****REQUIRED VOTES**

If the SOI is being submitted by a City or Town, a vote in the following form is required from both the City Council/Board of Aldermen **OR** the Board of Selectmen/equivalent governing body **AND** the School Committee.

If the SOI is being submitted by a regional school district, a vote in the following form is required from the Regional School Committee only. **FORM OF VOTE** Please use the text below to prepare your City's, Town's or District's required vote(s).

**FORM OF VOTE**

Please use the text below to prepare your City's, Town's or District's required vote(s).

Resolved: Having convened in an open meeting on \_\_\_\_\_, prior to the closing date, the

\_\_\_\_\_  
(City Council/Board of Aldermen  
 Board of Selectmen/Equivalent Governing Body/School Committee) of \_\_\_\_\_ (City/Town/District), in

accordance with its charter, by-laws, and ordinances, has voted to authorize the Superintendent to submit to the Massachusetts School Building Authority the Statement of Interest dated \_\_\_\_\_ for the

\_\_\_\_\_  
(Name of School) located at

\_\_\_\_\_  
(Address) which

describes and explains the following deficiencies and the priority category(s) for which an application may be submitted to the Massachusetts School Building Authority in the future

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

\_\_\_\_\_  
(The Office is responsible for the clarity of the following)

In the following list, the first three are the most serious deficiencies, followed by the remaining deficiencies in order of priority. and hereby further

specifically acknowledges that by submitting this Statement of Interest Form, the Massachusetts School Building Authority in no way guarantees the acceptance or the approval of an application, the awarding of a grant or any other funding commitment from the Massachusetts School Building Authority, or commits the City/Town/Regional School District to filing an application for funding with the Massachusetts School Building Authority.

Name of School      ----- SAMPLE SCHOOL [DRAFT] -----
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## CERTIFICATIONS

The undersigned hereby certifies that, to the best of his/her knowledge, information and belief, the statements and information contained in this statement of Interest and attached hereto are true and accurate and that this Statement of Interest has been prepared under the direction of the district school committee and the undersigned is duly authorized to submit this Statement of Interest to the Massachusetts School Building Authority. The undersigned also hereby acknowledges and agrees to provide the Massachusetts School Building Authority, upon request by the Authority, any additional information relating to this Statement of Interest that may be required by the Authority.

<b>Chief Executive Officer *</b>	<b>School Committee Chair</b>	<b>Superintendent of Schools</b>
Marjorie Freiman	Sharon Gray	David F. Lussier
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Chair, Board of Selectmen		

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(signature)	(signature)	(signature)
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Date	Date	Date

\* Local Chief Executive Officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated to the chief executive office under the provisions of a local charter. Please note, in districts where the Superintendent is also the Local Chief Executive Officer, it is required for the same person to sign the Statement of Interest Certifications twice. Please do not leave any signature lines blank.



**Administrative  
Policy and  
Procedure**

**Board of Selectmen  
EXECUTIVE SESSION POLICY  
Approved - March 13, 2017**

**PURPOSE:**

To comply with Section 21 and Section 22 of the *Open Meeting Law, M.G.L. c.30A*, with regard to the meetings of the public body in executive session, and to review executive session minutes periodically to determine whether continued non-disclosure is warranted.

**APPLICABILITY**

Public bodies may meet in executive session only for the specific purposes outlined in G.L. 30A, § 21. They are not required to disclose the minutes, notes or other materials used in executive session where the disclosure of these records may defeat the lawful purpose of the executive session. Once disclosure would no longer defeat the lawful purposes of the executive session, however, minutes and other records from that executive session must be disclosed unless exempted. Public bodies are required to review their executive session minutes periodically to determine whether continued non-disclosure is warranted.

**POLICY:**

1. The Board of Selectmen shall conduct all executive sessions in compliance with the *Open Meeting Law*, and as specified below (Implementation Procedure).
2. The Board shall approve the content of all draft executive session minutes within thirty (30) days of the executive session, or at the next executive session, whichever is later.
3. The Board shall review their executive session minutes on a quarterly basis to determine whether continued non-disclosure is warranted. At the Board's next open session meeting after such review, the Chair shall identify those minutes that the Board determined are ripe for release. The open session minutes shall reflect such declaration.
4. The Board shall produce executive session minutes, that the Board has determined such release will not defeat the purpose of the executive session, within ten (10) calendar days of a public records request. If the Board has not recently determined whether the requested executive session minutes are subject to continued non-disclosure, it must do so at its next meeting, or within thirty (30) days, whichever is sooner. If such meeting will be held more than ten (10) calendar days from the date of the request, the Board must notify the requestor of the date that the determination will be made within the ten (10) calendar day period. Within three (3) calendar days after such meeting, the Board must either produce the minutes or inform the requestor that such minutes are not subject to disclosure. Any response denying access to the executive session minutes must be in compliance with the *Public Records Law*.

**IMPLEMENTATION PROCEDURE:**

1. The Board shall include in their agenda postings the specific *Open Meeting Law* clause under which they are planning to go into executive session.

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**Board of Selectmen  
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Approved - March 13, 2017**

2. If the executive session will be convened under Purpose 1,<sup>i</sup> the individual in question must receive written notice 48 hours in advance of the executive session and must be afforded all the rights outlined under the *Open Meeting Law*.
3. Procedure for entering into executive session:
  - a. The Board must first convene in open session.
  - b. The Chair requests a motion to enter into executive session. The motion should:
    - i. Identify the purpose for the executive session;
    - ii. For Purposes 3, 6, and 8,<sup>ii</sup> include the requisite declaration that having such discussion in open session would have a detrimental effect on the specific purpose of the executive session;
    - iii. Invite any non-members to join the executive session for some or all agenda topics; and
    - iv. State whether the Board will reconvene in open session to adjourn the meeting or to continue with the regular open session meeting.
4. The vote to enter executive session, all votes taken while in executive session, and the vote to leave executive session shall be by roll call and recorded in the minutes as such.
5. The Board shall review all executive session minutes and records quarterly to determine if public non-disclosure is still warranted, and such determination must be announced at the next meeting of the Board and recorded in the minutes of that meeting.
6. The released minutes and any public records used at that meeting, shall be forwarded to the Town Clerk for public filing and review within ten (10) business days of their release. Such minutes shall be posted online.

**DEFINITION**

As defined in M.G.L., Chapter 4, Section 7, Clause 26 "Public records" shall mean all books, papers, maps, photographs, recorded tapes, financial statements, statistical tabulations, or other documentary materials or data, regardless of physical form or characteristics, made or received by any officer or employee of any agency, executive office, department, board, commission, bureau, division or authority of the commonwealth, or of any political subdivision thereof, or of any authority established by the general court to serve a public purpose, or any person, corporation, association, partnership or other legal entity which receives or expends public funds for the payment or administration of pension for any current or former employees of the commonwealth or any political subdivision as defined in section 1 of chapter 32, unless such materials or data fall within the allowed exemption.

**REGULATORY / STATUTORYS REFERENCES:**

This policy is subject to the requirements set forth in M.G.L. c.4, § 7, cl 26.

This policy is subject to the requirements set forth in M.G.L. c.30A, §§ 21 and 22.



**Administrative  
Policy and  
Procedure**

**Board of Selectmen  
EXECUTIVE SESSION POLICY  
Approved - March 13, 2017**

**APPROVED BY:**

*Board of Selectmen, Chair:* Marjorie R. Freiman

Marjorie R. Freiman

*Board of Selectmen:* Ellen Gibbs

Ellen J. Gibbs

*Board of Selectmen:* Jack Morgan

Jack Morgan

*Board of Selectmen:* Thomas H. Ulfelder

Thomas H. Ulfelder

*Board of Selectmen:* Beth Sullivan Woods

Beth Sullivan Woods

**Original date:** ..... February 15, 2017

**Revised dates:** .....

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<sup>i</sup> Purpose 1: To discuss the reputation, character, physical condition or mental health, rather than professional competence, of an individual, or discuss the discipline or dismissal of, or complaints or charges against, a public officer, employee, staff member or individual.

<sup>ii</sup> Purpose 3: To discuss strategy with respect to collective bargaining or litigation if an open meeting may have a detrimental effect on the bargaining or litigation position of the public body.

Purpose 6: To consider the purchase, exchange, lease or value of real estate, if the chair declares that an open meeting may have a detrimental effect on the negotiating position of the public body.

Purpose 8: To consider or interview applicants for employment by a preliminary screening committee, if the chair declares that an open meeting will have a detrimental effect in obtaining qualified applicants. This shall not apply to any meeting regarding applicants who have passed a preliminary screening.





Charles D. Baker, Governor  
Karyn E. Polito, Lieutenant Governor  
Stephanie Pollack, MassDOT Secretary & CEO  
Brian Shortleeve, Chief Administrator and Acting General Manager



March 17, 2017

Dear Legislator:

I am sure you have been hearing a lot about the MBTA's weekend commuter rail service and so I am writing to offer a brief overview about several factors that will or could affect weekend commuter rail service in the near future.

As you know, the MBTA Fiscal and Management Control Board (FMCB) is reviewing the suspension of weekend commuter rail service as one of several options it will consider as it seeks to close the MBTA's FY2018 operating budget deficit. The FMCB is now hearing from a range of stakeholders, including you, about that and other options and will not make any formal decisions until next month. The FMCB will be discussing this issue at their meeting on Monday March 27 and they always welcome remarks from elected officials during the public comment period, which begins at noon.

You should also be aware that some weekend commuter rail service will be suspended beginning this summer for reasons that are not budget-related.

The first reason is a federal mandate for the MBTA to install Positive Train Control on the commuter rail system. Positive Train Control is a safety system to prevent train-to-train collisions, over-speed derailments, incursions into established work zone limits, and movement of trains through track switches that may have been left in the incorrect position. In compliance with federal requirements, the T has filed a PTC Implementation Plan to the Federal Railroad Administration to install hardware on all commuter rail lines and two pilot lines (Stoughton and Lowell Lines) by December 31, 2018, with full PTC implementation by December 31, 2020. The T faces a \$105,000 a day fine if PTC is not operational by December 31, 2018 unless an extension is granted. Even such an extension still requires all PTC hardware to be installed and pilot lines to be up and running before December 31, 2018.

Work on PTC has begun. Because the T requires complete and unencumbered access to commuter rail rights of way, it is not possible to meet the federal PTC deadline if regular service operates. As the T has already discussed several times at meetings and in public postings, this PTC work necessitates simultaneous **commuter rail weekend service suspensions beginning this summer and lasting into 2018 for the Lowell, Haverhill, Newburyport, Needham, Fairmount, Rockport, Fitchburg, Franklin, and Worcester Lines** as well as the Wildcat Branch (a 2.88 mile length of track between the Lowell and Haverhill lines). Simultaneous weekend shutdowns of the entire **Lowell and Haverhill Lines** will begin in July 2017. The newer and more technologically advanced **Greenbush, Middleborough or Kingston/Plymouth Lines** are will not face weekend shutdowns; nor will the **Providence/Stoughton Line**, which already had PTC installed by Amtrak. Commuter rail customers will benefit from an important secondary benefit to these PTC-related weekend shutdowns, which will also enable the T to accomplish state of good repair

work to improve system safety and reliability that simply cannot be done while trains are running. This work includes signal upgrades, installation of new railroad ties, and track maintenance.

Besides mandated PTC work, weekend commuter rail service suspensions are planned for the Lowell and Fitchburg Lines as the Green Line Extension Project proceeds. Current plans call for 25 annual weekend shutdowns of the Lowell and Fitchburg Commuter Rail Lines, beginning as early as March 2018 and continuing until project completion (approximately 2021). These lines will never be shut down at the same time but will be staggered throughout each construction season.

The weekend shutdown schedules above assume, of course, that PTC and GLX work both proceed as planned. But as you know, these are very complex projects and additional weekend shutdowns could become necessary.

While these limited suspensions of weekend commuter rail service due to PTC and GLX work will proceed this summer and beyond, let me restate that the FMCB has not yet decided whether or how to pursue the option of reconfiguring weekend service on all commuter rail lines. But the option is on the table because the MBTA must at least examine the cost/benefit of high-subsidy, low ridership services such as weekend commuter rail in the face of a nearly \$50 million operating budget deficit in FY18. Currently, the MBTA subsidizes a weekday commuter rail trip by about \$5 per passenger, a subsidy that jumps to about \$34 per passenger for the same trip on a Saturday or Sunday.

Faced with a statutory requirement to balance the T's operating budget, the Board is reviewing options to both reduce costs and increase own-source revenues. I recognize that curtailing weekend service will adversely affect some riders and businesses and welcome all ideas for more fiscally responsible ways to maintain this service over the long term. Working collaboratively with Keolis, I believe we have come a long way since the winter of 2015, implementing a number of important reforms and new approaches to old problems that have put the MBTA, including our important commuter rail service, on a better path. We now have an opportunity to work together to rethink weekend commuter rail service as part of the necessary but sometimes painful effort ensure the fiscal sustainability of the MBTA. I welcome your feedback on this important matter and look forward to working with you.

Sincerely,



Brian Shortsleeve  
Chief Administrator and  
Acting General Manager, MBTA

**MASSACHUSETTS**  
**FISCAL ALLIANCE**



February 15, 2017

Selectman Marjorie Freiman  
525 Washington St  
Wellesley, MA 02482

Dear Selectman Freiman,

I'm writing to draw your attention to carbon tax legislation under consideration in the state legislature.

The measure, SD 1021, sponsored by Senator Michael Barrett of the Third Middlesex district, claims to be "revenue neutral." It is not. SD 2021 would drive up costs on gas, electricity, and home heating oil. Municipal budgets as well as individual citizens will feel its effects.

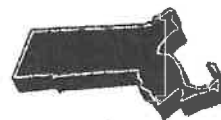
Your Representative Alice Piesh has cosponsored this same legislation. We urge you to let him know you do not support a new, broad tax on energy. We have included a copy of our testimony against this bill for your reference. If you have any questions, please call me at (617) 797-2540 or email at [paul@massfiscal.org](mailto:paul@massfiscal.org) with any questions. Thank you.

Sincerely,

A handwritten signature in black ink that reads "Paul D. Craney". The signature is written in a cursive, flowing style.

Paul Craney  
Executive Director  
Massachusetts Fiscal Alliance

# **MASSACHUSETTS FISCAL ALLIANCE**



## **S1747 An Act Combating Climate Change**

Paul D. Craney  
Executive Director  
Massachusetts Fiscal Alliance  
18 Tremont St. #707, Boston, MA 02108

Joint Committee on Telecommunications, Utility and Energy  
October 27, 2015

I am submitting this in opposition to S1747, An Act Combating Climate Change. What this bill presents to do, is impose a “revenue neutral” carbon tax. There are many reasons for being opposed to this bill and I hope you will consider the following concerns.

To first address the point of the bill, reducing carbon dioxide emissions, in which the purpose of doing this would be to prevent the greater outcome of climate change, or the slow progressive warming of the earth’s atmosphere. From a big picture, it is a good idea to measure if the labors of our efforts are worth the fruits. This policy to reduce carbon emissions addresses emissions in the small state of Massachusetts with a population of just over 6.7 million people. We don’t know what the fruit of our labor, or the reduction in global warming will be yet, but let’s put this into perspective. Recently, President Obama announced a large-scale “Clean Power Plan” that pushes for a 28% emissions reduction by 2025. This national plan, affecting the roughly 319 million people in the U.S. is said to prevent just 0.02 degrees Celsius in warming by 2100.<sup>i</sup> In fact, if you were to eliminate all carbon emissions that MA produces, that would only result in a 0.002-degree Celsius reduction in temperature by the year 2100.<sup>ii</sup> I urge you to imagine how much less of an affect any policy on a statewide level would have in the grand scheme of things. To compare apples to apples, the CBO put out a study on the implementation of a Carbon Tax on the national level and concluded “The tax would help reduce U.S. emissions but would have only a modest effect on the Earth’s climate without a worldwide effort.”<sup>iii</sup> Time and again, Secretary Clinton has said that it is important to get the most heavily populated countries like India and China on board to reduce their emissions because “there is no sense in negotiating an agreement if it will have no practical impact in reducing emissions to safer levels.”<sup>iv</sup> Once again, imagine how much more insignificant implementing this tax on the small state of MA would be, never mind the extra layers of headache that will result from it for the average person and government agencies alike.

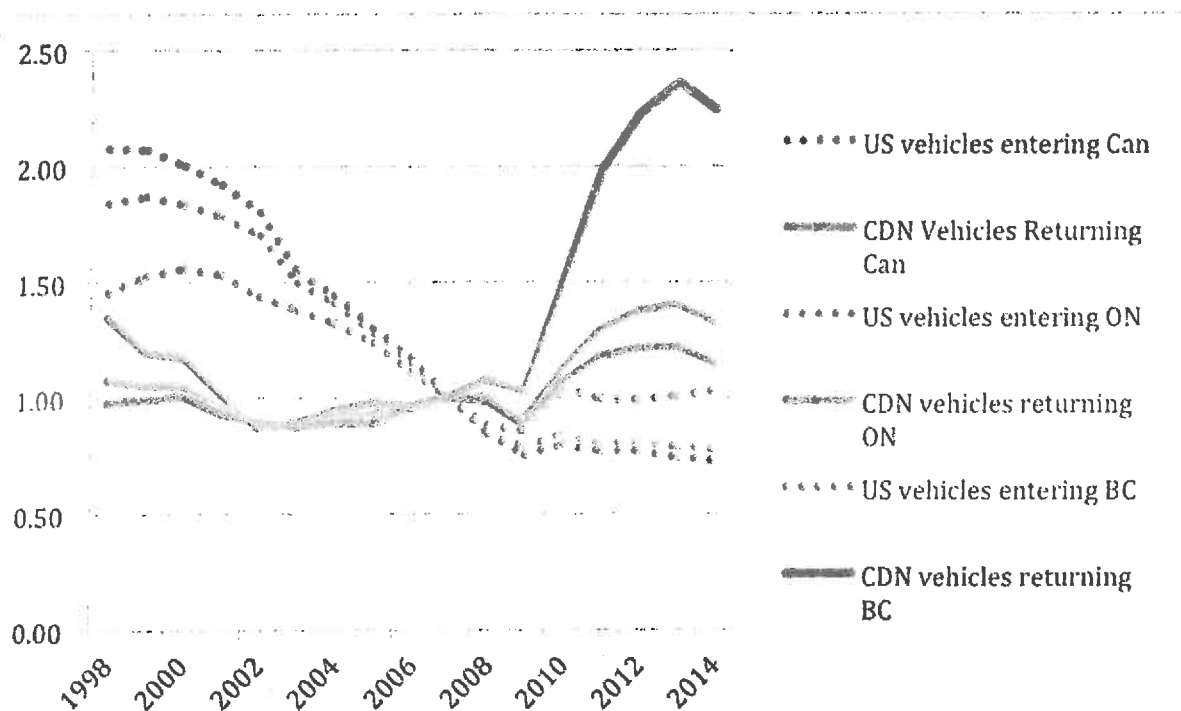
As I am sure you will repeatedly hear, British Columbia (BC) is the leading example of a revenue neutral carbon tax since its implementation in 2008. Looking beyond the glowing reviews however, there are some points that shouldn’t be overlooked on different parts of this

bill. Firstly, since carbon emissions from vehicles account for a majority of all emissions, the effect this tax will have on gas alone is a large one.

In BC, studies have shown that their carbon tax on gas is five times more potent in decreasing gas usage than a normal market driven gas hike.<sup>v</sup> They speculate that the typically green-minded individuals who want to use less gas feel like the playing field is more level and that by using less gas, others can't freeloader and use more due to their sacrifice. This results in the green-minded people carrying out their goal of using less gas with the implementation of the field-leveling carbon tax. However, what was once a reasoning on the individual basis, could now be applied to a city, state or province as a whole. For example, if just one state in the U.S. cuts back its usage of gasoline, this lowers the world price and allows every other driver on Earth to get slightly cheaper gas.<sup>vi</sup> Even this theory however, was short lived. Findings that declines in gas usage leveled off after the last increase in the carbon tax in 2012 were soon found.<sup>vii</sup>

Another way to refute the lower gas usage in BC is a simple one: people were buying gas elsewhere. The studies don't capture consumption of gas, but rather the sale of gas in BC. Since buying cheaper goods in other states isn't a new theory for MA residence, why shouldn't we assume that people will go to other surrounding New England states to fill up their gas tanks? For those who think this theory is unrealistic, see the following chart which shows vehicle border crossing between BC and the southern bordering U.S., specifically focusing on 2008 levels when BC carbon tax was implemented.

**Figure 1. Annual Vehicle Border Crossings, U.S. vs. Select Canadian Regions, Index 100 = 2007**



Source: Statistics Canada, Table 427-0002.

Further, proponents of the carbon tax like to say that the economy had remained largely untouched by the implementation of this tax in BC. This however, is when they compare BC to the rest of Canada, and doesn't take into consideration the fact that BC was actually doing better than Canada as a whole before the implementation of this tax. If you look at the unemployment rate five years before the implementation of the carbon tax in BC, it was at 5.6% and the Canadian average was at 6.6%. Take those numbers and compare them with five years after the implementation of the tax where BC unemployment rate was at 7.1% compared to Canada's 7.6%.<sup>viii</sup> This shows that the labor market advantage that BC once had was cut in half after the implementation of this tax. The economic effects that such a tax could have on MA would be disastrous.

Finally, since our state and nation as a whole does rely mostly on fossil fuels, if you tax them, things are going to cost more, despite the promised rebate. The price of gas, electricity and home heating are going to go up as a result. You can also assume that companies that are the largest emissions producers, who are the ones that are supposed to feel the biggest hit, will pass along the burden to the average consumer through higher costs on consumer goods, and will cut corners on quality. In the end the average person will take the biggest hit with the implementation of this tax. In turn, I hope you will consider taking a deeper look into the consequences of this legislation.

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<sup>i</sup> <http://www.cato.org/blog/002degc-temperature-rise-averted-vital-number-missing-epas-numbers-fact-sheet>

<sup>ii</sup> [http://scienceandpublicpolicy.org/images/stories/papers/originals/state\\_by\\_state.pdf](http://scienceandpublicpolicy.org/images/stories/papers/originals/state_by_state.pdf)

<sup>iii</sup> <https://www.cbo.gov/publication/44223>

<sup>iv</sup> [http://www.nbcnews.com/id/30440785/ns/us\\_news-environment/t/clinton-china-india-must-join-climate-action/#.VikRFSvYFyg](http://www.nbcnews.com/id/30440785/ns/us_news-environment/t/clinton-china-india-must-join-climate-action/#.VikRFSvYFyg)

<sup>v</sup> <https://socialsciences.uottawa.ca/sites/default/files/public/eco/eng/documents/1211e.pdf>

<sup>vi</sup> <http://instituteeforenergyresearch.org/analysis/british-columbias-carbon-tax-and-leakage-into-the-u-s/>

<sup>vii</sup> <http://instituteeforenergyresearch.org/analysis/british-columbias-carbon-tax-and-leakage-into-the-u-s/>

<sup>viii</sup> Unemployment data from Statistics Canada, Table 282-0087. The averages are based on the monthly data, i.e. July 2003 through July 2008, and July 2008 through July 2013.