CITY OF NEWTON

IN BOARD OF ALDERMEN

PUBLIC FACILITIES COMMITTEE REPORT

WEDNESDAY, OCTOBER 17, 2012

Present: Ald. Salvucci (Chairman), Lennon, Albright, Gentile, Crossley, Danberg, and Laredo
Absent: Ald. Lappin
Also present: Ald. Blazar, Fischman, Fuller, Hess-Mahan, Linsky, Rice, Sangiolo, and Schwartz
City officials present: Lou Taverna (City Engineer), David Turocy (Commissioner of Public Works), Maciej Konieczny (Project Manager; Public Buildings Department), Miriam Tuchman (Project Manager; Public Buildings Department), Alex Valcarce (Project Manager; Public Buildings Department), Carol Chafetz (Director of Operations and Environmental Affairs), Sue Dzikowski (Director of Finance; School Department), Ouida Young (Associate City Solicitor), Claire Sokoloff (School Committee Chair), and Robert Rooney (Chief Operating Officer)

#312-12 COMCAST petitioning for a grant of location to install 72'± of 3" conduit in CHAPEL STREET from Pole #78/8 proceeding 41' in a northerly direction thence turning westerly for an additional 31' to 55 Chapel Street. 09/27/12 @ 3:18 PM]

ACTION: APPROVED 6-0 (Gentile not voting)

NOTE: Neil Carroll, Comcast Representative, presented the petition for a grant of location to install conduit in Chapel Street to provide cable and internet service to an office park at 55 Chapel Street. The project would not disturb the sidewalk or curbing on Chapel Street and Comcast will restore the roadway to its original condition. The public hearing was opened and no one spoke for or against the petition. Ald. Lennon moved approval, which carried unanimously.

#313-12 NATIONAL GRID petitioning for a grant of location to install and maintain 124' ± of 4" gas main in BOUND BROOK ROAD from the existing 4" gas main at 83 Bound Brook Road to 98 Bound Brook Road for a new gas service. (Ward 8) 10/02/12 @ 2:16 PM)

ACTION: APPROVED WITH A CONDITION 6-0-1 (Gentile abstaining)

NOTE: National Grid Permit Representative Dennis Regan presented the petition to extend an existing gas main in Bound Brook Road to provide new gas service to 98 Bound Brook Road. The Department of Public Works has reviewed the petition and recommended approval of the item. The public hearing was opened and no one spoke for or against the petition.

The Committee discussed whether to condition this grant of location with a requirement that National Grid prepay the street opening permit fee due to National Grid's failure to pay the fee in the past. Public Works Commissioner David Turocy stated that he had met with National Grid

representatives and they have agreed to pay for all past street opening permits and are expected to pay the City on a monthly basis going forward. The Committee decided a condition requiring payment in a timely fashion was appropriate. Ald. Crossley moved approval of the petition with the condition, which carried by a vote of six in favor, none opposed and one abstention. Ald. Gentile was not present for the entire discussion; therefore, he abstained.

#301-12 DESIGN REVIEW COMMITTEE in accordance with §5-58 of the City of Newton Ordinances petitioning for site plan approval for the Carr School Renovation Project. [09/24/12 @ 9:20 AM]

ACTION: HELD 7-0

NOTE: Public Buildings Commissioner Stephanie Gilman began the presentation by introducing Miriam Tuchman, who is the Public Building Department's new project manager. Ms. Tuchman is a licensed architect with twelve years of experience in project management. She worked for the City of Cincinnati, OH; therefore, she is familiar with the public construction process. Ms. Tuchman will be taking over project management of the Carr School from Maciej Konieczny.

The architects, Peter Turowski and Bonne DeSousa of T2 Architects, provided the attached PowerPoint presentation of the Carr School renovation project. The City is planning to use the Carr School for elementary school swing space during the renovations or replacements of the elementary schools over the next twenty years. In order to use the school as swing space, the City needs to renovate the building and make it accessible. Site plans were previously provided to the Committee and are available online on the Committee's webpage. Ald. Crossley pointed out that the plans did not include floor plans for the project, as required by City ordinance. Commissioner Gilman assured the Committee that the floor plans would be provided before the Board of Aldermen voted the site plan.

The architects reviewed the timeline for project. It is expected that design development and creation of construction documents will take place this fall and winter. The bid process for the reconstruction should occur in Spring 2013; construction should begin in July, and be complete by August 2014 in time to use the Carr School as swing space for the Angier Elementary School.

The original Carr School was built in 1934 and an addition was built in 1966. Since the addition, there has been very little work done on the building. Therefore, a number of improvements are required to make the building appropriate for use as a school. The renovations will include a bump out at the back of the building for an elevator and a fully accessible front entryway to meet building code along with window replacements, a new roof, cupola repairs, masonry work, site work and a new parking lot in the rear of the school. The plan includes emergency vehicle access to the rear of the school. There is no intent to change the exterior of the building except for the bump out in the rear for the new elevator shaft.

The proposed 23-space rear parking lot and 11-space front lot will allow for 34 parking spaces on site. The parking plan also includes three handicap van loading spaces, two at the

front of the building and one at rear of the building at the elevator entrance. One handicap parking space in the front of the school and the space in the rear would accommodate vans. It is expected that the swing school will require at least 75 parking spaces for staff. The Carr School was used for elementary school swing space in 2001 and 2003. In addition, the Carr School currently houses a number of programs including the Newton Cultural Center, the Suzuki Music School and a daycare. The current site does not provide adequate spaces for these uses. A number of staff and visitors use on street parking. The need for additional spaces when the building is used as swing space would be addressed through off-site parking in the neighborhood of Carr School. There was concern among Committee members that there would be an impact to the neighborhood and that there did not seem to be a developed parking management plan for the off-site parking.

The site plan calls for a parent pick up and drop off in the rear of the school through the parking lot. Police Sergeant Jay Babcock, Police Captain Marc Gromada, and Traffic Planner David Koses expressed discomfort with the plan to place the parent pick up and drop off at the rear of the building due to the potential for children to run into the parking lot. The parent drop-off and pick-up (blue zone) is not a safe solution and should be re-studied. Committee members were in agreement that the blue zone in the rear of the school was not an appropriate location and asked if there was any consideration given to moving the parking lot further into the rear of the site. Unfortunately, the parking lot cannot be moved, as there is a playground and baseball field located in the rear of the school. There is also a steep hill in the rear of the building. It was suggested that a blue zone be considered for the front of the school or along Linwood Avenue. It is not possible to put a blue zone in the front of the school, as the loading zone for the busses is located there and there is not enough space to include both uses. There are curb cuts every 30' to 40' along Linwood Avenue; therefore, there is not enough room for a blue zone. In addition, the right of way that provides access to the rear of the school would need to be widened to add a sidewalk. A neighbor's fence also encroaches on the right of way and would need to be moved back a few feet and two trees on the side of the right of way would need to be removed.

Police Sergeant Jay Babcock and Police Captain Marc Gromada informed the Committee that they were apprehensive about the loading zone for the busses in the front of the school on Nevada Street. When the busses drop-off and pick-up students on streets they are required to put out stop signs and barrier arms to stop all traffic on a street. The estimated time it takes to unload a bus is about 15 minutes and to load a bus takes approximately 20 to 25 minutes. The busses have the potential to create traffic issues throughout the neighborhood, particularly on California Street. The Committee asked if there had been any consideration to relocating the bus zone to Linwood Avenue. It was explained that Linwood Avenue is not wide enough to accommodate the busses and the curb cuts are too close together for a bus to drop-off or load.

The Committee asked if there were any alternatives for the bus zone. The architects provided an alternate plan showing a bus lane on the site in front of the school. Having the busses unload and load on the site would allow a blue zone to be placed on Nevada Street in front of the school. The drawbacks related to this alternative are that there would be a loss of approximately eight parking spaces in the front lot and children that are picked-up or dropped-off by parents would need to cross in front of the busses to access or exit the school. The plan

would require monitoring by school staff to ensure the safety of the children. Ald. Gentile suggested that the bus zone remain on Nevada Street in front of the school for now and if need be a bus lane on the school site could be added at a later date. The Committee asked the architects and Public Building Department to further study the location of the bus zone.

The School Department's Director of Operations and Environmental Affairs Carol Chafetz has spoken with a number of School officials who were around during the previous uses of Carr School as swing space. They informed Ms. Chafetz that the parent pick-up and drop-off decreased dramatically due to the distance of the school from home and the use of busses. In addition, the school staff made sure that the students were ready to load before busses put out their stop signs. It made the process much quicker and was only minor inconvenience to motorists.

Commissioner of Public Buildings Stephanie Gilman stated that the City's Transportation Team, which is composed of City staff that review traffic and parking issues related to construction, parking management, and regulations, has met regarding the site plan and parking management around the Carr School. The team will continue to meet to develop a parking management plan and review options related to bus pick-up and drop-off. Commissioner Gilman added that she expects that the Ward 1 and 2 Aldermen and the neighbors would be involved as the plans progress. Ald. Albright urged that there be a neighborhood liaison committee formed to keep the neighborhood informed about all the issues related to the project.

The public hearing was opened and George Howard, 243 Linwood Avenue, stated that it is his fence that abuts the right of way from Linwood Avenue. Mr. Howard would like to be kept informed regarding the project, particularly anything that relates to the right of way. Peter Richmond, 219 Linwood Avenue, stated that he is concerned that the additional parking in the area will hinder emergency vehicle access and suggested that the City may want to restrict parking to one side of the street on the neighborhood streets. As his home is located on the corner of Linwood Avenue and Nevada Street he would like to be kept informed of the construction plan.

A construction management plan has been developed for the project that includes the restriction of parking in front of the Carr site to only construction vehicles and the drop-off of materials for the project. There will also be a safe walkway to the park in the rear of the site and appropriate fencing and water-filled jersey barriers at the gates.

When design funds were requested for the site plan development for this project, the Committee was told that the estimated cost was somewhere between $8 and $10 million. The new estimate for the project is over $12.7 million. The Committee asked why the estimate had increased so much. It was explained that a full roof replacement is necessary and has increased the estimate by $600,000. The roof replacement was originally included in the SEA Building Assessment with a lower estimated cost. However, at that point it was considered a stand-alone project, which would result in a lower estimate. There is an increase of $1 million for the necessary reconfiguration of interior space, interior finishes, mechanical, electrical, plumbing, fire and interior accessibility upgrades. There is a $500,000 increase for the disposal of

hazardous materials and a $500,000 increase for soft costs, the general contractor and contingency. There is also a $235,000 escalation increase. The Committee felt that it would be helpful to have a cost summary of the project.

Committee members would not support a site plan, which included a parent pick-up and drop-off in the rear of the site. Ald. Albright moved hold in order for further information on the parent drop-off and pickup, parking management, the bus zone and a draft board order with conditions reflecting the need for study of the parent drop-off and pickup, parking management, the bus zone. The motion for hold carried unanimously.

REFERRED TO PUBLIC FACILITIES AND FINANCE COMMITTEES

#321-12 HIS HONOR THE MAYOR requesting authorization to appropriate the sum of six hundred ninety-five thousand five hundred fifty-eight dollars ($695,558) from bonded indebtedness for the purpose of completing design services through the construction administration phase of the Carr School Building renovation project. [10/09/12 @ 2:37 PM]

ACTION: APPROVED 7-0

NOTE: The request is for funding to complete the design services to the construction administration phase, which includes 100% construction drawings. The request is being made at this time in order to ensure that the project is ready to go out to bid in April 2013. The schedule for the renovation is very tight, as it needs to be completed by September 2014 for occupation by the Angier School during construction at that school. The Committee understood the need for the funds and Ald. Crossley made a motion for approval, which carried unanimously.

REFERRED TO PROGRAMS & SERV. AND PUBLIC FACILITIES COMMITTEES

#315-12 ALD. FULLER, RICE AND GENTILE of the Angier School Building Committee providing updates and discussion on the Angier School Building Project as it develops through the site plan approval process. [10-02-12 @ 3:37PM]

PROG & SERV HELD 5-0 (Linsky and Merrill not voting) on 10/17/12

ACTION: HELD 7-0

NOTE: The Programs & Services Committee joined the Committee for the discussion of the Angier School Building Project and the Massachusetts School Building Authority (MSBA) process. Ald. Fuller provided the Committees with an update on the work of the Angier School Building Committee and the project schedule (attached) for the next few months. Josslin Lesser Project Management has already been chosen as the owner's project manager. DiNisco has been chosen as the project designer. The next three months will include a lot of big picture decisions on the Angier School Project. The next meeting of the Angier School Building Committee is scheduled for October 18, 2012 with the Design Review Committee. The committees will develop evaluation criteria, which relates to the alternatives related to the project, which include renovation, renovation with an addition, a partial renovation and new construction. All interested Aldermen are encouraged to attend the meeting.

Associate City Solicitor Ouida Young outlined what the role and responsibilities of the Board of Aldermen, the Angier School Building Committee and the Design Review Committee are in terms of the project. The MSBA recently changed its requirements for funding by the MSBA. The Angier School Project is the first project the City has done with the MSBA since the changes. The attached MSBA documents provide the requirements through the feasibility study process. The City's procedures do not mesh well with the MSBA requirements and the City has already had to amend an ordinance related to the designer selection process to allow for the procedure the City must follow to be eligible for MSBA funding. The final designer selection is done by a panel that is primarily composed of members of the MSBA with some city representation.

The City is in the process of marrying the two procedures, the local and the MSBA requirements. One of the things that the MSBA requires is the creation of a School Building Committee. The Angier School Building Committee was formed last year in accordance with the MSBA regulations. The MSBA clearly specifies the type of members who must be on the School Building Committee, which consists of twelve voting members and a number of non-voting members. The Angier School Building Committee is preparing for a number of meetings with the Design Review Committee in order to follow the City's process for building construction. The City's ordinances require the Design Review Committee review and approve the substantive development with the designer of the program and of the actual design of the building.

In terms of the Boards role, as you know, the times for input into the project are at the site plan approval point, which is likely to occur in mid-June and as well as appropriation points in the project. The Board will obviously want to be more involved with this project. In the past, the Public Facilities Committee has been updated and briefed during City construction projects and although it is not required by ordinance, it is a helpful practice. The practice will continue with this project through updates from the aldermanic representative on the Angier School Committee to the Public Facilities and Programs & Services Committees, Committee of the Whole meetings and written updates. There is a clear commitment by the administration that there needs to be consensus on the building process as the project moves forward through each step of the project.

There are already two joint meetings set up for the School Committee and the Board of Aldermen. The Board and School Committee are not being asked to vote at either of the meetings but it is an opportunity for an update on the project and to get input from the Board and School Committee if there are any concerns. After those meeting the Angier School Building Committee and the Design Review Committee will be informed of any suggestions or concerns. The first meeting is scheduled for November 19, 2012 for an update on the educational programming and an evaluation of general, broad options for the school construction. The second meeting will be on January 10, 2013 to review the preferred schematic design alternative. The MSBA considers the preferred schematic design to be preferred options for renovation, or the option for a whole new school.

The City's Project Manager Alex Valcarce explained that at this point in the project the City is now launching into the full-blown feasibility study. The Angier School Building Committee with the Design Review Committee are going to be the guiding force that is going to help shepherd the City through the process. The attached timeline was put together to help illustrate the first part of the written schedule provided by the owner's project manager.

The MSBA only meets six times a year and every submittal to them needs to occur about six weeks in advance of a meeting. The City needs to do any required local approval before any submittal. The City has attempted work through the schedule with all involved parties to lay out a schedule that allows the City to work through its local process and address any issues that the City could encounter through the design process. The meeting of the Angier School Building Committee and the Design Review Committee tomorrow night is to develop evaluation criteria to develop the design options. The design options would then be evaluated to determine which options meet the criteria. The design or designs that meets the most criteria should be the ones that become the preferred option(s). The preferred option(s) will be submitted and developed into the schematic design. That design will lead into the budget and scope of agreement. The submittal to MSBA of the preferred option is scheduled for February 14, 2013 and will go to the April 2013 MSBA meeting. Mr. Valcarce highlighted the joint presentations to the Board of Aldermen and School Committee. The joint meetings will allow input from the Board and School Committee regarding the educational program and the preferred schematic design alternatives. The input will be used to reassess the decisions and if possible, incorporate the input in order to build a maximum consensus on the project.

The budget will not be available until the schematic design process is complete, which should occur in June 2013. At that point the schematic design and budget are submitted to the MSBA for approval. Once the MSBA approves the design and budget, the City has 120 days to get local approval.

Ald. Hess-Mahan stated that the Board and voters are going to be asked to vote on debt exclusions without budgets for either Angier Elementary School or Cabot Elementary School, which seems backwards. Ald. Gentile responded that there are estimates for buildings based on square footage cost. The estimate for the Angier School is $35 to $37 million, based on a 75,000 sq. ft. building at an estimated cost of approximately $400 per square foot. The same type of estimation has been done for Cabot Elementary School but the square footage cost was increased to $500 to account for escalation. Both estimates are conservative. There will be a slightly improved estimate available in January 2013.

Unfortunately, the City cannot put dollar figures in the ballot question text. The Administration will have to inform citizens of the costs through literature, information on the City website and community meetings. In addition if there is a significant increase in the costs compared to what the Administration tells citizens, the Department of Revenue will not allow an increase in the debt exclusion to cover the additional overage. If the City quotes $35 million for the Angier School and it comes in at $50 million, The Department of Revenue is not going to allow the City to increase the debt exclusion for anything over the figure that was identified to the voters.

There was concern that the override questions were being put on the ballot before the MSBA approved the project or there was a more definite estimate. It is possible that the override votes could wait until the MSBA approved the project and its budget. The City has 120 days to get local approval.

It was pointed out that there was a recently constructed elementary school in Dedham that was funded through a debt exclusion override, which went through a similar process. The Dedham School is comparable but not the same size. The Committees asked that further information on the Dedham project be provided. Mr. Valcarce agreed to provide the information. The owner's project manager could also provide the Committees with information regarding the budgeting process for the schools. They have worked on twelve similar types of school building projects.

It was pointed out that the Committees are scheduled to have another update on November 7, 2012 and then there will be an opportunity to continue the conversation regarding the debt exclusions. It is a difficult process with a large amount of risk involved. There was a motion to hold the item in both Committees, which carried unanimously in both Committees.

REFERRED TO PUBLIC FACILITIES AND FINANCE COMMITTEES

#320-12 ALD. SALVUCCI AND GENTILE requesting a discussion with the Engineering Division of the Public Works Department regarding the billing and collecting of street opening permit fees. [09/28/12 @ 10:28 AM]

ACTION: HELD 7-0

NOTE: The City has not received any payments from National Grid for street opening permits since 2003. The Commissioner of Public Works ordered a halt to non-emergency National Grid work and met with National Grid representatives on October 12, 2012 regarding the unpaid permit fees. The Public Works Department was able to provide copies of all of the unpaid National Grid street opening permits. National Grid concurred that they should have been paying all street opening permit fees since 2003. National Grid has $232,300 of unpaid street opening permit fees. National Grid will pay the outstanding $230,300 once they have reviewed and verified each of street opening permits.

The Commissioner stated that National Grid has completed its review of the 2012 permits and will be providing a check in the next week to pay the 2012 balance. The Commissioner expects that all outstanding fees will be paid by the end of this calendar year. The Public Works Department and National Grid have agreed that the Department of Public Works will bill National Grid on a monthly basis and National Grid will pay each bill within 30-days.

It was suggested that the item be held for an update in February 2013. The Committee would like to ensure that National Grid has paid all outstanding fees and that the new invoicing system is working. Therefore, the Committee voted unanimously to approve a motion to hold.

REFERRED TO PUBLIC FACILITIES AND FINANCE COMMITTEES

#54-12 ALD. SALVUCCI, BLAZAR AND FULLER requesting the creation of a revolving fund into which 50% of all betterment income shall be deposited to be used exclusively for individual requests for betterments. [02/02/12 @ 10:21 AM]

ACTION: APPROVED 6-0-1 (Crossley abstaining)

NOTE: The docket item is a request to create a revolving fund to be used exclusively for betterments requested by property owners. The Department of Public Works has not done any homeowner requested sidewalk or curb betterments in approximately 10 years. There is currently a betterment revolving fund, which was created for the purpose of funding individual betterments but is being used for betterments done in the course of street reconstruction projects. The proposed revolving fund would be funded with 50% of all income collected from completed betterments. The other 50% of collected income would continue to be used for betterments during road reconstruction projects.

Commissioner Turocy explained that currently when the Public Works Department repaves a street, the property owners on that street are offered a curbing betterment. Commissioner Turocy added that it is more efficient for the Public Works Department to address betterments when they are working on a street. The Commissioner added that if the above request were approved, it would be helpful if the Board of Aldermen would consider raising the betterment assessment threshold from $500 to somewhere between $1,500 and $2,000. The Committee members were in favor of the increase in the betterment threshold and an item requesting the increase will appear on the next docket.

The Commissioner informed the Committee that new sidewalks are installed at no cost to property owners during reconstruction projects. The Commissioner is planning to continue this practice for both types of betterments, as one of the Administration's goals is a more walkable City and additional sidewalks coincide with the walkability goal. If an individual property owner were to request a sidewalk betterment, the Commissioner would need to determine where the sidewalk is located and how much pedestrian traffic is in the area to prioritize the betterment. The closer a sidewalk betterment request is to a village center or school the higher priority it will become.

Ald. Gentile moved approval of the item, which carried by a vote of six in favor and one abstention. Ald. Crossley abstained, as she would like further information on the impact to the Commissioner's current betterment program. The Committee also docketed the below item to increase the betterment threshold.

Text of the new docket item:

REFERRED TO PUBLIC FACILITIES AND FINANCE COMMITTEES

#54-12(2) PUBLIC FACILITIES COMMITTEE proposing that Chapter 26, Section 71 (b)(1) & (2) and Section 73(c)(2) of the City of Newton Ordinances be amended by increasing the assessment minimum from five hundred dollars ($500) to no more than two thousand dollars ($2,000). [10/17/12]

#99-12 ALD. LAREDO, ALBRIGHT, CROSSLEY & KALIS requesting a discussion with His Honor the Mayor regarding the creation of a long-range master plan (20-25 years) regarding the means, methods, timing, and coordination to address the City's complete infrastructure needs, including but not limited to school buildings, fire stations, other municipal buildings, streets, sidewalks, trees, playgrounds and other recreational facilities, water, stormwater, and sewer systems, and all other facilities and infrastructure identified in the city's recent capital assessment. The master plan should be comprised of specific plans from individual departments and at a minimum, the master plan should (a) identify those infrastructure needs and (b) present a phased plan, with identifiable funding sources for meeting those needs. [04-04-12 @ 10:30 PM]

ACTION: HELD 7-0

NOTE: The above item was held without discussion.

Respectfully submitted,

Anthony J. Salvucci, Chairman

Presentation to Public Facilities Committee:

October 17, 2012

SITE PLAN REVIEW

Newton, MA | City of Newton Public Buildings Department

#301-12

SCHOOL CONSTRUCTION PLAN| Carr School Reconstruction

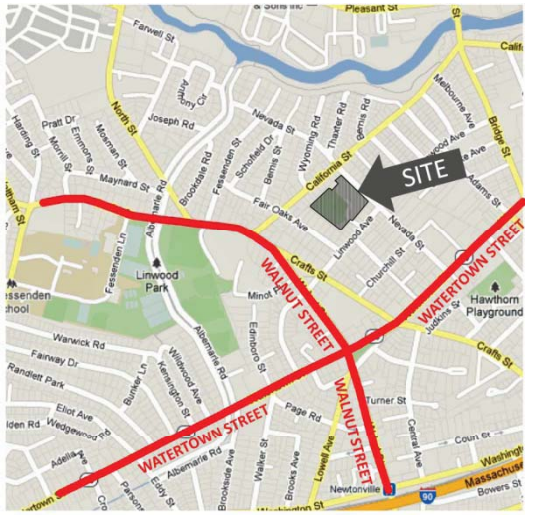
Appendix 2: LONG RANGE PLAN - ELEMENTARY SCHOOL TIMELINE 10/1/2012

Fiscal Year	School Year	New School / Major Renovation					Renovations / Additions										Carr
		Angier (MSBA)	Cabot (MSBA)	Zervas	Ward	Lincoln-Eliot (MSBA)	Williams	Peirce	Country-side	Franklin	Mason-Rice	Burr	Under-wood	Horace Mann	Memorial-Spaulding	Bowen	
FY12	2011-12	Start MSBA															Plans to Vacate
FY13	2012-13	Feasibility Study															Feasibility Study
FY14	2013-14	Design				Pre-K* +4 Classrooms											Construction
FY15	2014-15	Construction	Feasibility Study														Angier Students
FY16	2015-16	Construction	Design														Angier Students
FY17	2016-17	Completed: +6 Classrooms	Construction	Feasibility Study													Cabot Students
FY18	2017-18		Construction	Design													Cabot Students
FY19	2018-19		Completed: +7 Classrooms	Construction			Feasibility Study										Zervas Students
FY20	2019-20			Construction			Design	Feasibility Study									Zervas Students
FY21	2020-21			Completed: +4 Classrooms	Feasibility Study		Construction	Design									Williams Students
FY22	2021-22				Design		+6 New Classrooms	Construction									Peirce Students
FY23	2022-23				Construction	Feasibility Study		+4 New Classrooms									Ward Students
FY24	2023-24				Construction	Design											Ward Students
FY25	2024-25				Completed: +4 Classrooms	Construction			Feasibility Study								Lincoln-Eliot Students
FY26	2025-26					Construction			Design	Feasibility Study							Lincoln-Eliot Students
FY27	2026-27					Completed: +4 Classrooms			Construction	Design	Feasibility Study						Countryside Students
FY28	2027-28								No New Classrooms	Construction	Design	Feasibility Study					Franklin Students
FY29	2028-29									+4 New Classrooms	Construction	Design	Feasibility Study				Mason-Rice Students
FY30	2029-30										+4 New Classrooms	Construction	Design	Feasibility Study			Burr Students
FY31	2030-31											+3 New Classrooms	Construction	Design			Underwood Students
FY32	2031-32												No New Classrooms	Construction	Feasibility Study		Horace Mann Students
FY33	2032-33													+3 New Classrooms		Feasibility Study	Horace Mann Students

*Pre-K Program is currently in two locations (Lincoln-Eliot and the Ed Center). Long term plan is to consolidate the program in one location.

#301-12

AERIAL & LOCUS PLAN | Carr School Reconstruction



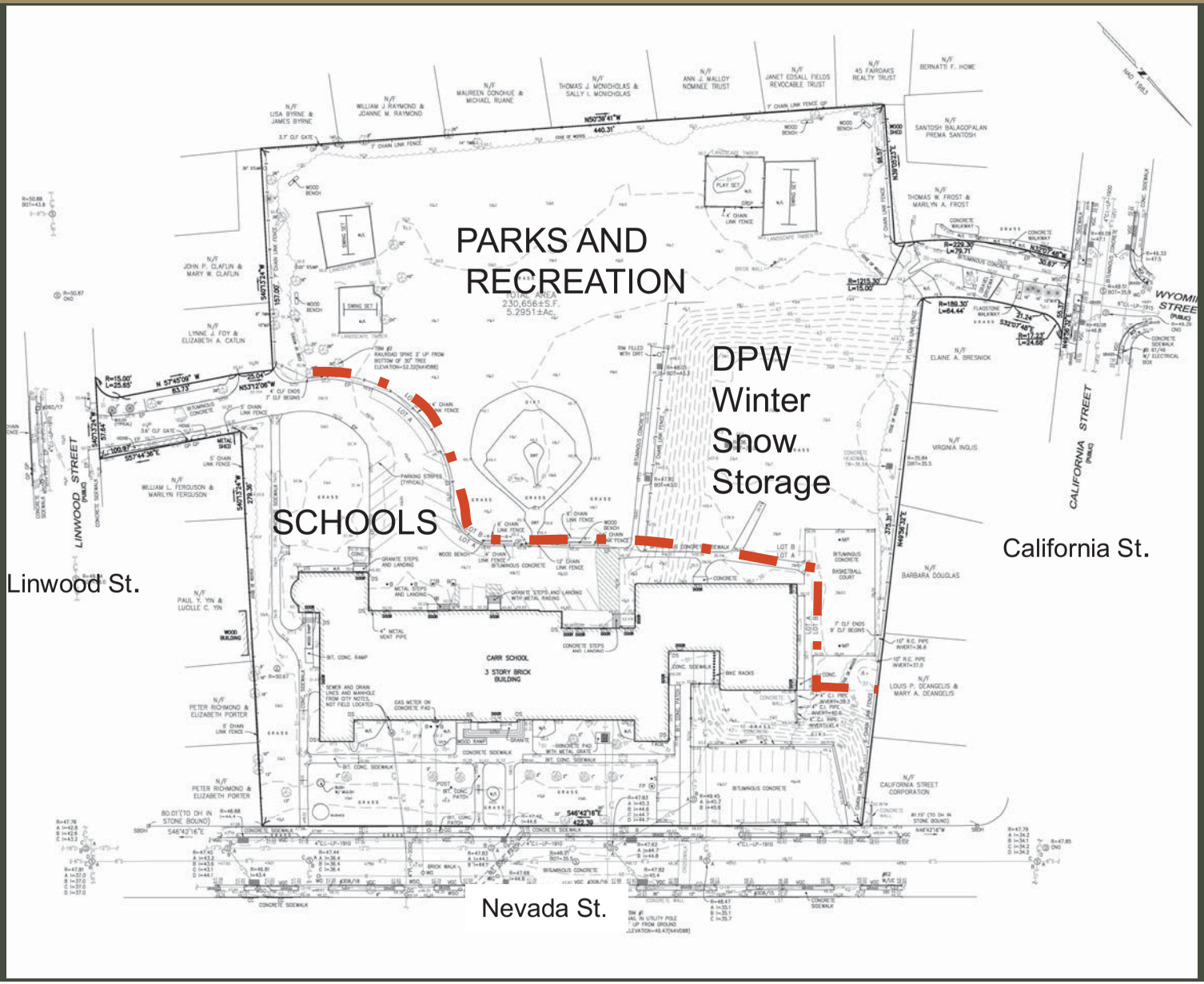
1 LOCUS PLAN
N.T.S.

Carr Elementary School

Newton, MA

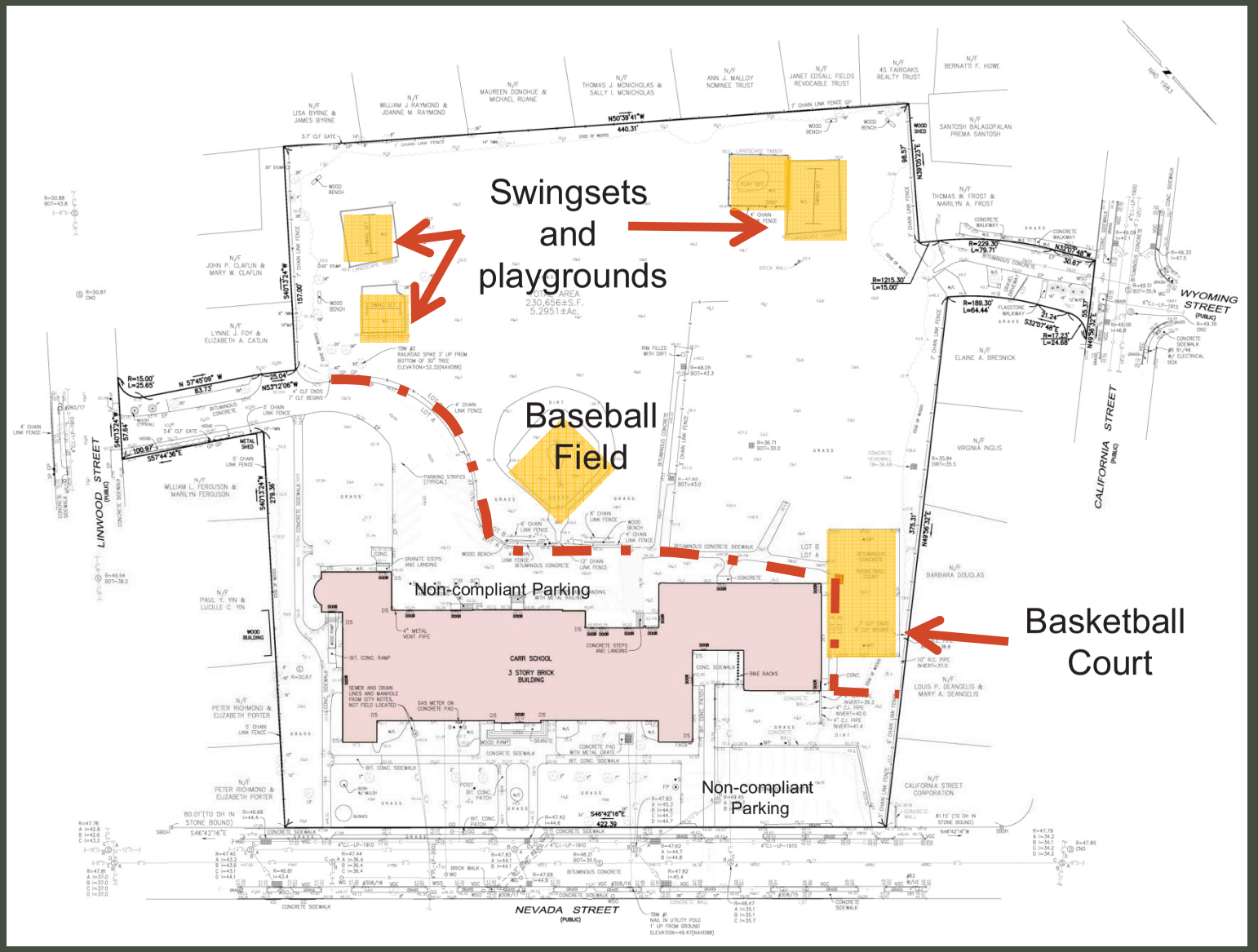
#301-12

SITE USE| Carr School Reconstruction



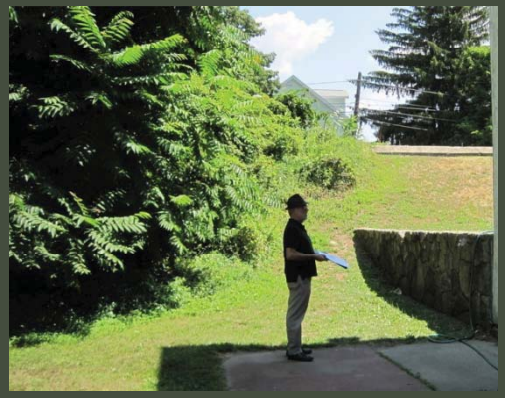
#301-12

EXISTING AMMENITIES| Carr School Reconstruction



#301-12

EXISTING CONDITIONS PHOTOS| Carr School Reconstruction



#301-12

EXISTING CONDITIONS PHOTOS| Carr School Reconstruction

#301-12

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#301-12

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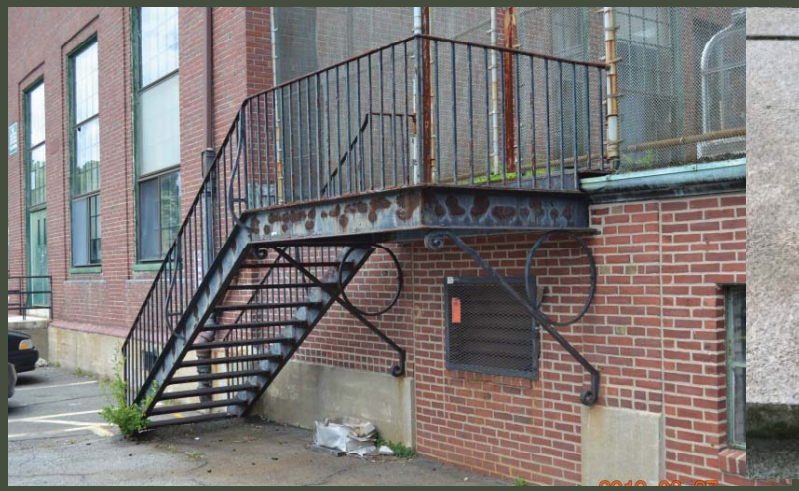
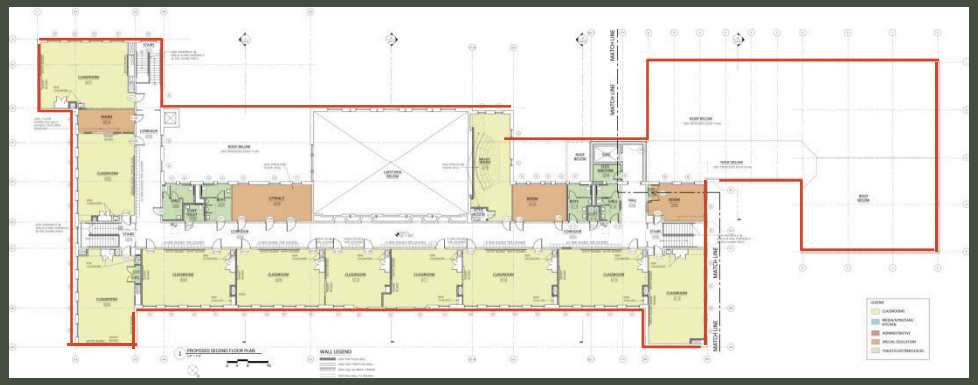


#301-12

SITE ACCESS PHOTOS| Carr School Reconstruction

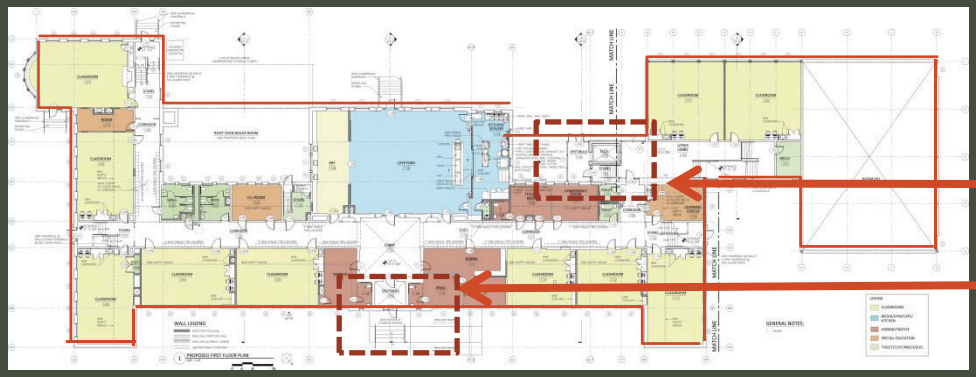
#301-12

BUILDING PLAN | Carr School Reconstruction



2nd

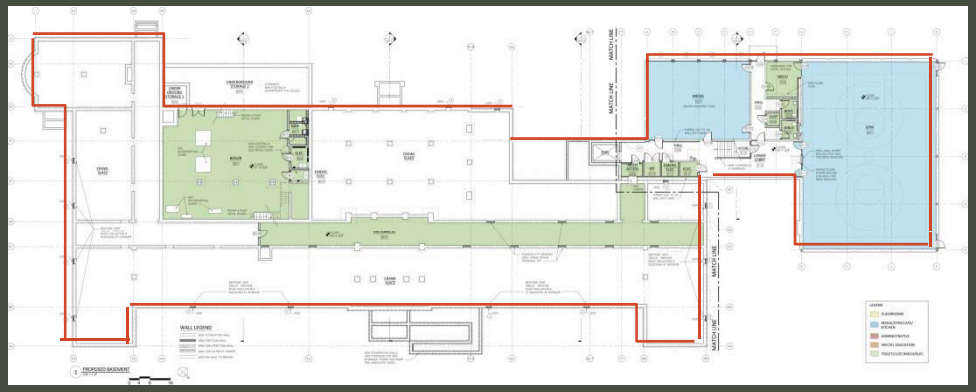
Elevator Lobby



New accessible rear entry and elevator

Improved accessible main entry

1st



Basement

New fully accessible facility

Carr Elementary School

Newton, MA

#301-12

EXTERIOR VIEWS| Carr School Reconstruction

Carr Elementary School

Newton, MA

#301-12

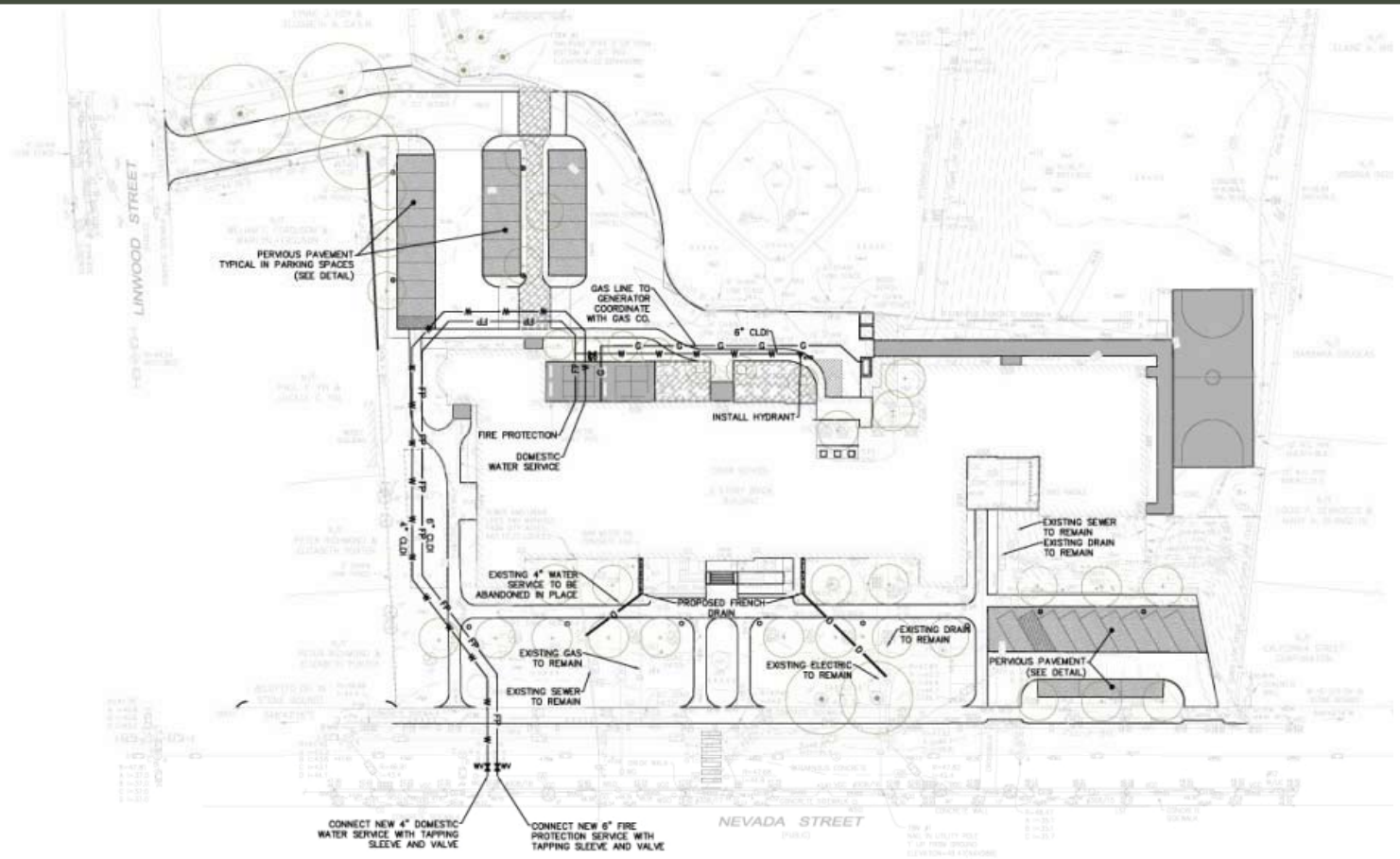
PROPOSED SITE PLAN| Carr School Reconstruction

Carr Elementary School

Newton, MA

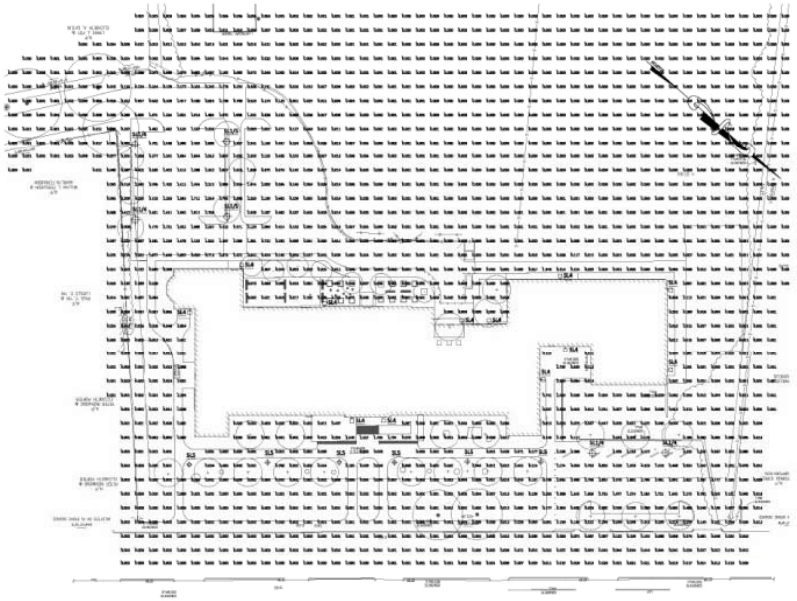
#301-12

CIVIL PLAN | Carr School Reconstruction



#301-12

SITE LIGHTINGPLAN| Carr School Reconstruction



1 LC.1 SITE PLAN - PROPOSED LIGHTING LAYOUT & ILLUMINATION VALUES

SCALE: 1" = 30'-0"

2 LC.1 PROPOSED TYPE SL1/4 & SL1/5

N.T.S.

3 LC.1 PROPOSED TYPE SL4

N.T.S.

4 LC.1 PROPOSED TYPE SL5

N.T.S.

FIXTURE SCHEDULE

Symbol	Qty	Label	Arrangement	Mounting Height	Lumens	LLF	Description	Watts	Manufacturer	Catalog Series	Light Source	IES Class
⊕	16	SL1/4	Single	16'-0" A.F.G.	7,554	1.0	Post-top Area Lighting	90	Beta LED	ARE-EDR-WW-RS-09-D	4000K, LED W BI-LEVEL DRIVER	Type IV - Full Cutoff
⊕	16	SL1/5	Single	16'-0" A.F.G.	7,496	1.0	Post-top Area Lighting	90	Beta LED	ARE-EDR-SM-RS-09-D	4000K, LED W BI-LEVEL DRIVER	Type V - Full Cutoff
□	16	SL4	Single	8'-0" A.F.G.	2,060	1.0	Wall Mounted Egress Lighting	28	Gardco	111L-4-3DLA-MW	4000K, LED W BI-LEVEL DRIVER	Type IV - Full Cutoff
⊕	16	SL5	Single	3'-0" A.F.G.	1,360	1.0	Bollard Pathway Lighting	22	Beta LED	PWY-EDG-SM-02-D	4000K, LED W BI-LEVEL DRIVER	Type V - Full Cutoff

TYPE SL1/4, SL1/5 & SL5 FIXTURES

DUSK - 9:00PM: FULL LIGHT OUTPUT

9:00PM - DAWN: 50% OUTPUT*

TYPE SL4 FIXTURES

DUSK - 12:00PM: FULL LIGHT OUTPUT

12:00PM - DAWN: 50% OUTPUT*

5 LC.1 PROPOSED INITIAL TIME SCHEDULES

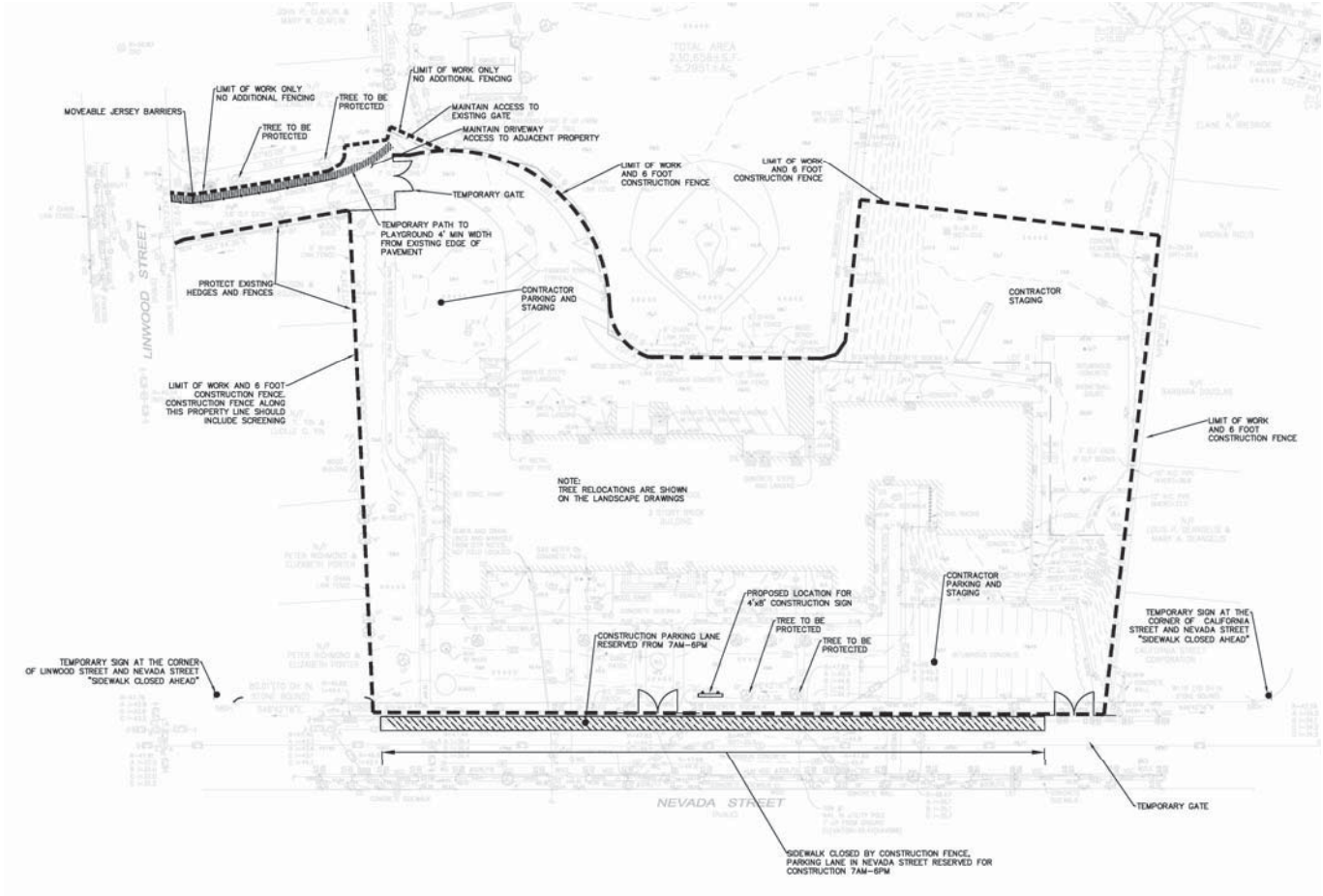
N.T.S.

Carr Elementary School

Newton, MA

#301-12

CONSTRUCTION PLAN| Carr School Reconstruction



Carr Elementary School

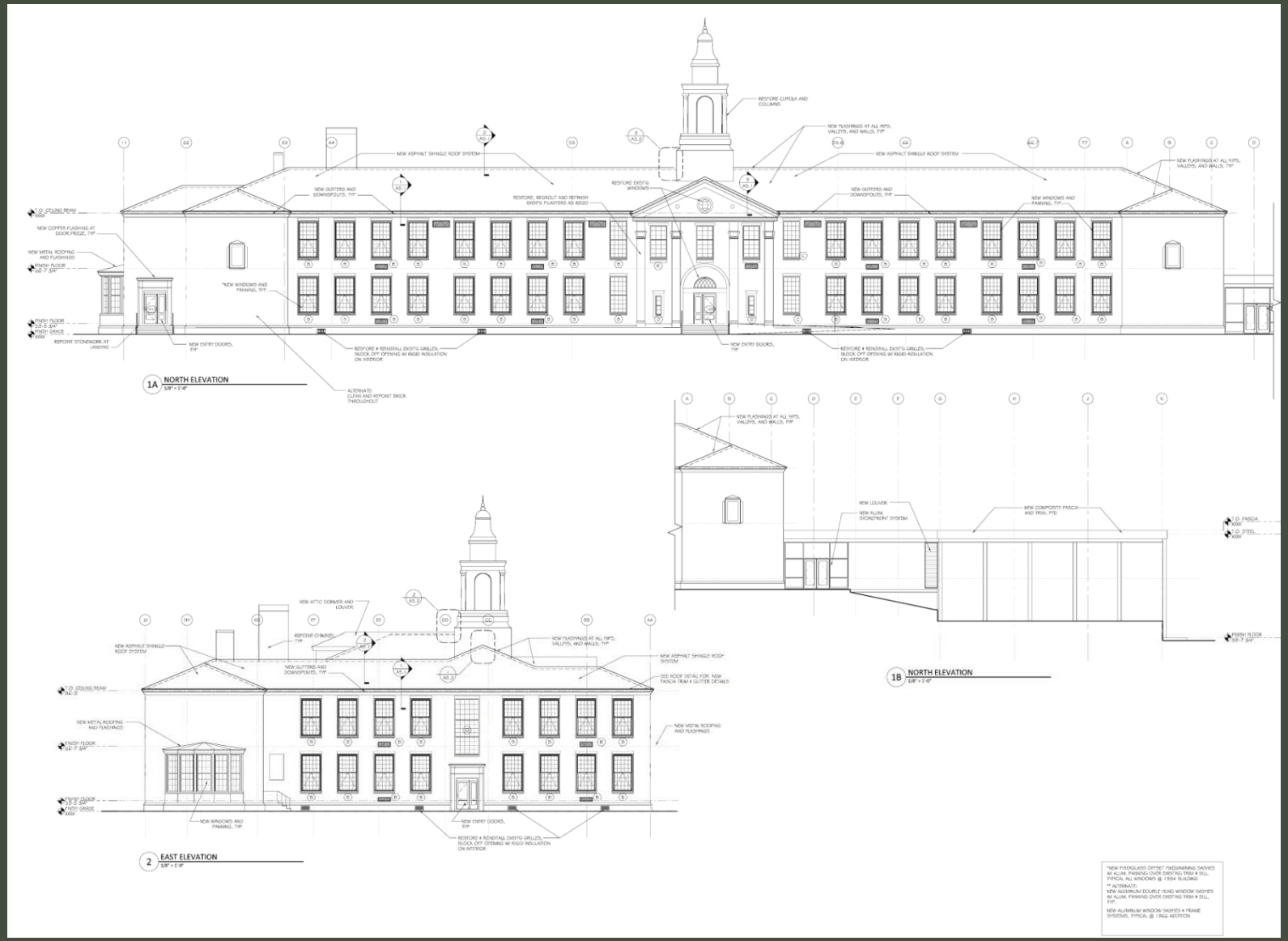
Newton, MA

#301-12

LANDSCAPE IMAGES| Carr School Reconstruction

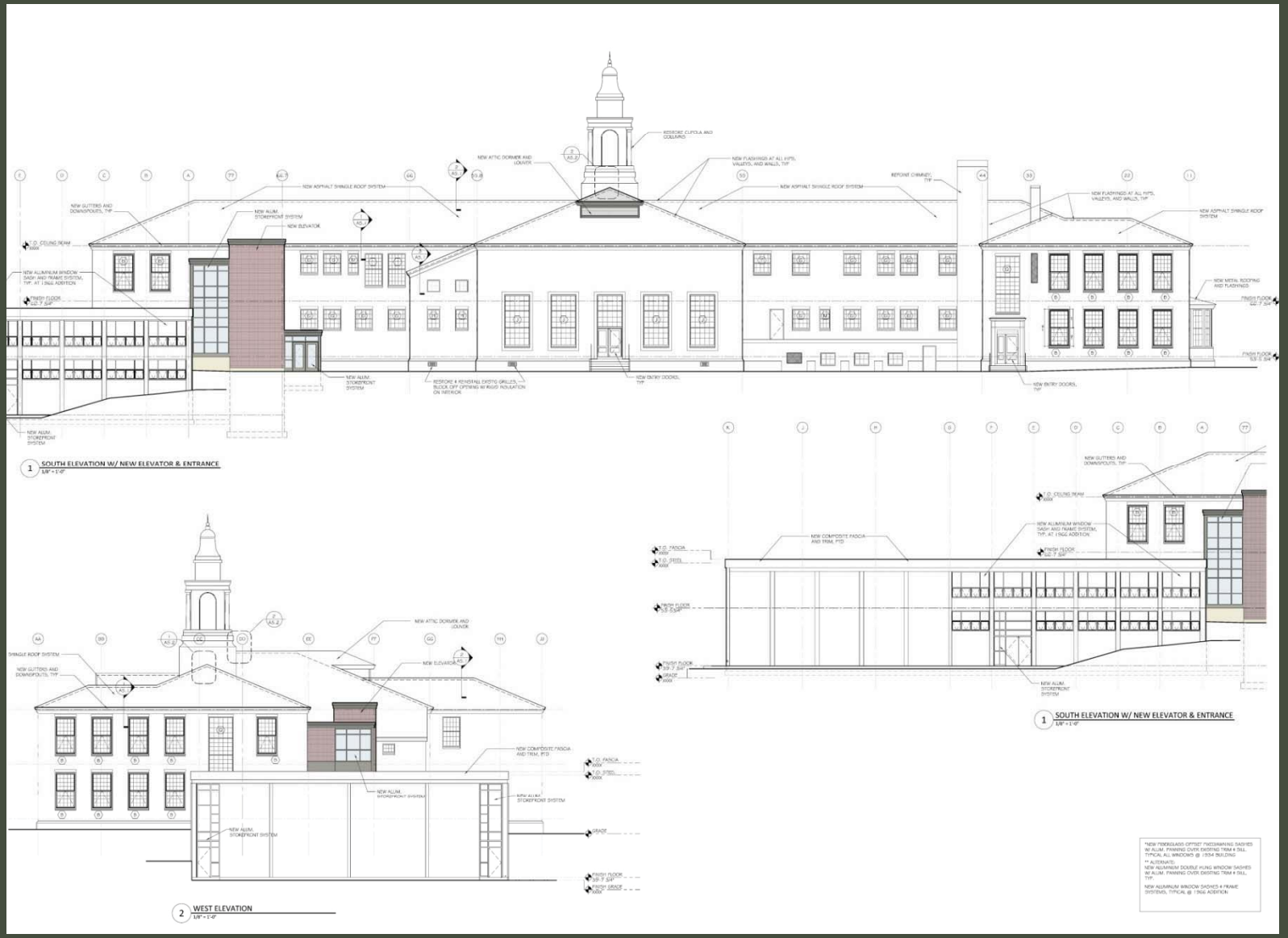
#301-12

EXTERIOR ELEVATIONS| Carr School Reconstruction



#301-12

EXTERIOR ELEVATIONS| Carr School Reconstruction



#301-12

Next Steps

Site Plan Approval

Design/ Design Review Fall Winter 2012-13

- **Design Development**
- **Construction Documents**

Public Facilities Meeting **January, 2013**

Bidding **Spring, 2013**

Construction **July, 2013-August, 2014**

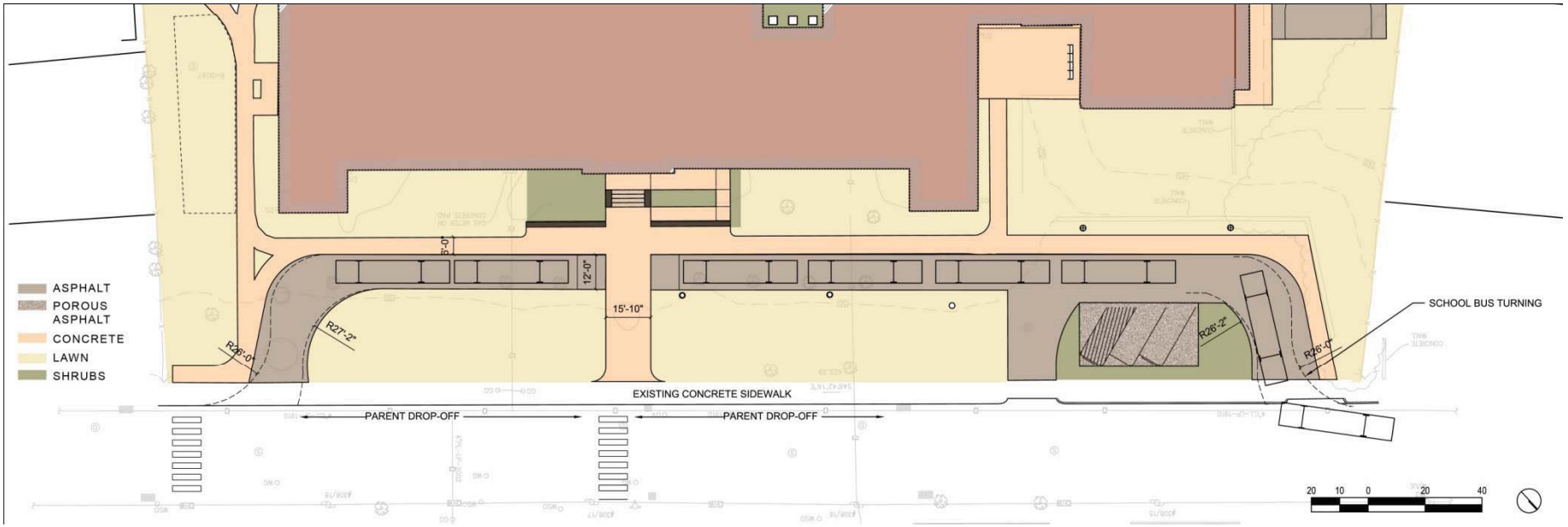
Thank You

Newton, MA | City of Newton Public Buildings Department

#301-12

ALTERNATIVE PRELIMINARY SITE PLAN | Carr School Reconstruction

TAG Comments incorporated



20 10 0 20 40

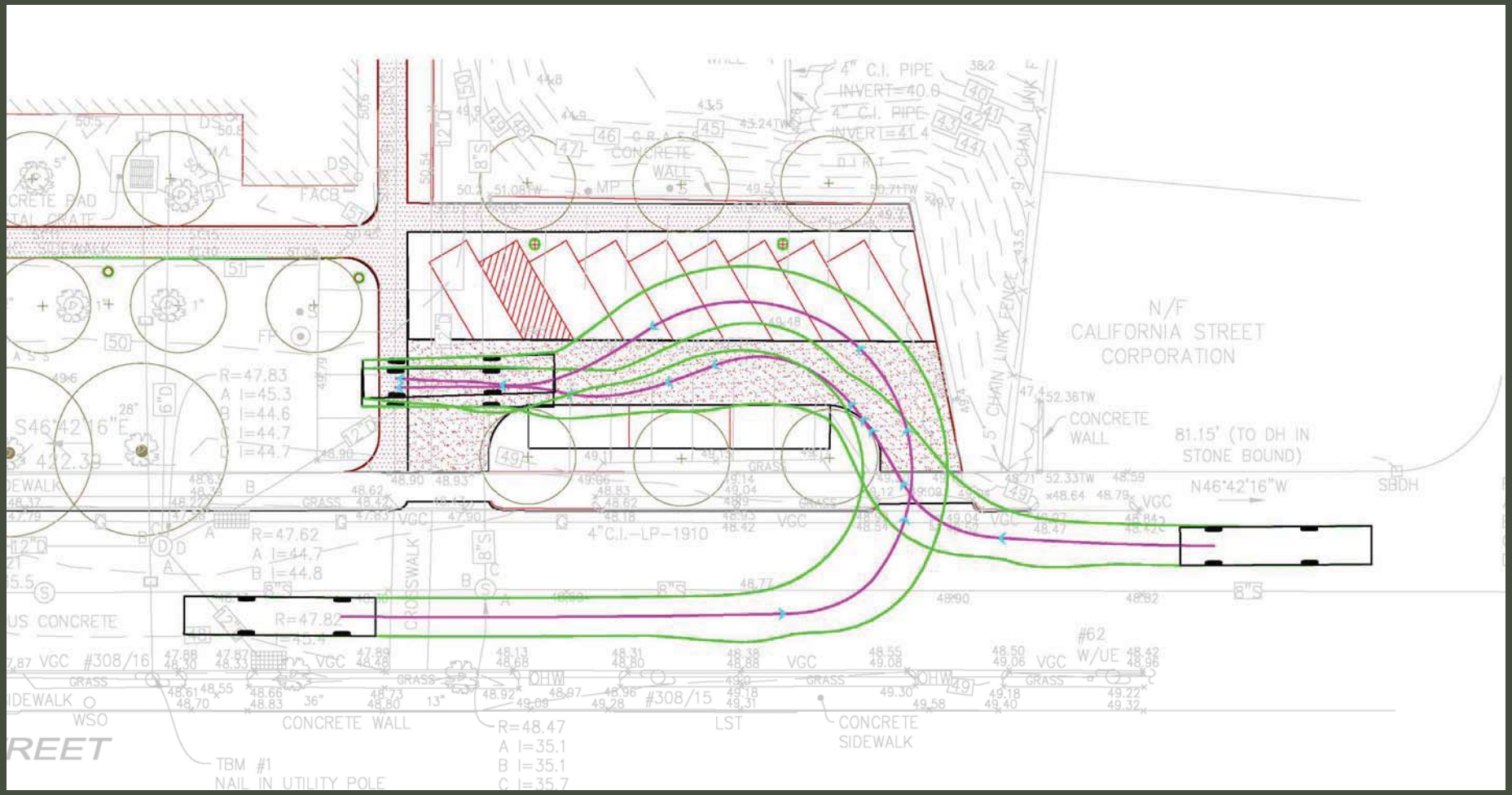
Carr Elementary School

Newton, MA

#301-12

ALTERNATIVE PRELIMINARY SITE PLAN | Carr School Reconstruction

TAG Comments incorporated



Carr Elementary School

Newton, MA

#301-12


STOP

#301-12

PROPOSED SITE PLAN| Carr School Reconstruction

Carr Elementary School

Newton, MA

#301-12

Angier Elementary School - Newton, MA

Projected Meeting and Milestone Schedule:
Designer Selection, Feasibility Study and Schematic Design

	Date		Time	Item
✓	Thurs	10/18/12	2:30PM	Educational Programming Meeting
✓	Thurs	10/18/12	5:00PM	Meeting with ASBC/DRC to review evaluation criteria and construction delivery alternatives
	Thurs	11/08/12	5:00PM	Meeting with ASBC/DRC to review educational programming
	Thurs	11/15/12	6:00PM	Meeting with ASBC/DRC to review concept and design (possible Public Forum)
	Mon	11/19/12	8:00PM	Meeting with ASBC/DRC presentation to Board of Aldermen and School Committee
	Thurs	11/29/12	6:00PM	Meeting with ASBC/DRC to review design based on feedback (vote to authorize submittal of PDP)
	Fri	12/14/12	---	Preliminary Design Program Report submission to MSBA
	Thurs	01/03/13	6:00PM	Meeting with ASBC/DRC to review final options and vote to submit to MSBA
	Thurs	01/10/13	7:00PM	Meeting with ASBC/DRC presentation to Board of Aldermen and School Committee
	Thurs	01/17/13	6:00PM	Meeting with ASBC/DRC to approve Preferred Schematic Design alternative
	Thurs	02/14/13	---	Submit Preferred Schematic Report to MSBA
		02/27/13 or 03/20/13		MSBA Facilities Assessment Subcommittee
	Wed	04/03/13	---	MSBA Board Meeting to approve Preferred Option
		04/04/13 06/2013	---	Schematic Design
		Jun 2013	TBD	Designer Review Committee approval; Newton Code Section 5-58 Approvals
	Thurs	06/13/13	---	Submit Schematic Design to MSBA
	Wed	07/31/13	---	MSBA Board Meeting to approve Schematic Design
		Aug 2013	---	Local Approval of the Project - Appropriation by the Board of Aldermen for the approved budget amount

Massachusetts School Building Authority

Timothy P. Cahill
Chairman, State Treasurer

Katherine P. Craven
Executive Director

MSBA Owner's Project Manager Selection Summary

Please see the MSBA's OPM Selection Guidelines for more information

The success of a school building project is dependent on the performance of the owner's project manager (the "OPM") and the OPM's ability to facilitate an effective working relationship with the owner, designer, contractor and others involved in the project. As a representative of the interests of both the Owner and the Massachusetts School Building Authority (the "MSBA"), the OPM is the focal point for accountability and must be independent of the other project participants. This document summarizes the MSBA's guidelines for a qualifications-based OPM selection process.

Initial Steps in the Procurement of an OPM

1. Form a school building committee and submit the names and background of committee members to the MSBA for approval.
2. Designate a full-time MCPPO-certified employee to oversee procurement and manage the OPM contract.
3. Identify the Selection Committee for the procurement of the OPM.
4. Prepare a request for services for the OPM, using the MSBA Model RFS and contract, to be submitted to the MSBA for review. If available, the request for services should include an estimated project schedule and budget.
5. Develop a draft advertisement for OPM services, to be submitted to the MSBA for approval. At minimum, the advertisement should be published in the Central Register and a newspaper of general circulation in the area where the project is located and should appear at least two weeks before the application deadline. Among the items to be included in the advertisement are:
    a. A brief description of the project and required scope of services.
    b. Estimated project cost.
    c. Date and time of a project site inspection (recommended).
    d. Owner's contact person.
    e. Response deadline.

Minimum Requirements

The **project director,** who is the OPM's authorized representative, must have certification for school project designers and owner's project managers from the Massachusetts Certified Public Purchasing Official ("MCPPO") program as administered by the Office of the Inspector General. He or she must be registered in Massachusetts as an architect or professional engineer and have at least five years experience managing the construction and design of public buildings.

-or-

If not a registered architect or professional engineer, the project director must have seven years experience managing the construction and design of public buildings.

Massachusetts School Building Authority

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

Designer Selection Process

The MSBA Designer Selection Panel (DSP) has jurisdiction over the procurement of designers in connection with cities, towns, regional school districts, and independent agricultural and technical schools seeking funding from the MSBA for public school construction projects whose estimated construction cost is anticipated to be $5,000,000 or greater. The DSP designer selection process incorporates the procedures required by the General Laws of Massachusetts pertaining to designer services for public building construction (Chapter 7, Section 38A½, et seq.).

Please note: The DSP is now providing districts that have school projects with estimated construction costs that are anticipated to be less than $5,000,000 with the opportunity to go through the MSBA Designer Selection Panel process to select a designer. Districts should contact Marie Deslauriers (mailto:Marie.Deslauriers@massschoolbuildings.org ?subject=Designer%20Selection%20Panel) at 617.720.4466 for more information.

The goals of the DSP are:

- high quality design services for public building projects;
- application of consistent procedures in the procurement of the design services;
- broad-based participation of all qualified design consultants; and
- integrity and transparency of the process for procurement of design services.

The DSP is made up of 13 appointed members (/about/panels-dsp) and three representatives of the local city, town or regional school district who are selected by the District on a project-by-project basis. The three members who are representatives of the respective city, town or regional school district for the specific project under consideration includes one member designated by the school committee, the superintendent of schools or his/her designee and the chief executive officer of the city or town or his/her designee.

The 13 appointed members are recruited from recommended candidates of the Boston Society of Architects (BSA), the American Council of Engineering Companies of Massachusetts (ACEC) and the Associated General Contractors of Massachusetts (the AGC) as well as MSBA staff, independent design and construction professionals.

Meetings are held at the MSBA offices in Boston and are always open to the public. (To encourage discussion, however, competitors are asked to voluntarily leave the room when designer candidates are being interviewed by the DSP for specific projects.)

Next DSP Meeting

The next DSP meeting will be held on Tuesday, December 4, 2012, 8:30 AM - 12:00 PM.

**Please note, the November DSP meetings have been canceled.*

2012 DSP Meeting Schedule (/sites/default/files/edit-contentfile/DSP/2012_DSP_Meeting_Dates.pdf)

2013 DSP Meeting Schedule (/sites/default/files/edit-contentfile/DSP/2013%20DSP%20Meeting%20Dates_Final.pdf)

Information about the DSP:

- DSP Meeting Results
  - 2012 Results (/building/team/dsp/meeting_results/2012)
  - 2011 Results (/building/team/dsp/meeting_results/2011)
  - 2010 Results (/building/team/dsp/meeting_results/2010)
  - 2007-2009 Results (/building/team/dsp/meeting_results/2007-2009)
- Designer Selection Panel Members (/about/panels-dsp)
- Designer Selection Procedures (/sites/default/files/edit-contentfile/DSP/MSBA%20DSP%20Procedures%20031412.pdf)
- The DSP Process (/building/team/dsp/process)
- Designer Guidelines for Selection (/sites/default/files/edit-contentfile/DSP/DesignerselectionGuidelines.pdf)
- Designer RFS Template (/sites/default/files/edit-contentfile/DSP/Designer%20RFS_February_2012_FINAL%202_24_12(updated).doc) (word)
- Master File Brochure Form (http://www.mass.gov/anf/docs/dcam/dlforms/dsb/masterfile-11-2-1.doc) - Updated February 2011
- Standard Designer Application Form for Municipalities and Public Agencies not within the DSB Jurisdiction (http://www.mass.gov/anf/docs/dcam/dlforms/dsb/designer-municp-app-11-7-11.doc) – Updated July 2011 (MS Word)

- Designer Services Base Contract for Design/Bid/Build and CM-at- Risk (http://www.massschoolbuildings.org/sites/default/files/edit-contentfile/Guidelines_Forms/Contracts_Forms/Base%20Contract%20v_02_25.pdf) , *Revised February 25, 2011*
  - Designer Services Contract Amendment for Design/Bid/Build (http://www.massschoolbuildings.org/sites/default/files/edit-contentfile/Guidelines_Forms/Contracts_Forms/DBB%20v_02_25.pdf) (PDF)
  - Designer Services Contract Amendment for CM-at-Risk (http://www.massschoolbuildings.org/sites/default/files/edit-contentfile/Guidelines_Forms/Contracts_Forms/CM-R%20v_02_25.pdf) (PDF)
  - Designer Services Base Contract Pages 1-2 and Attachments A, C, D, E and F (http://www.massschoolbuildings.org/sites/default/files/edit-contentfile/Guidelines_Forms/Contracts_Forms/Base%20Design%20Contract%20Word%20Pages%20(1-2%20and%20Ex_ACDEF).doc) (word)
- Supplier Diversity Office (SDO) *formerly known as the State Office of Minority and Women Business Assistance (SOMWBA)* Guidelines (PDF) (http://www.mass.gov/anf/docs/osd/sdo/forms/constmunicipalgeneralguidelines2012.pdf)
- MCPPO Certification (http://www.mass.gov/ig/mcppo/private-sector-training/)

DSP Frequently Asked Questions (FAQ's) (/building/team/dsp/FAQs)

Information on the Designer Roundtable:

- Designer Roundtable (/about/roundtables/Designer)

Informational Interviews
Firms interested in providing designer services for Massachusetts K-12 public school projects funded through the MBSA are invited to present their qualifications to the Designer Selection Panel in a non-project-specific informational interview. These interviews are not mandatory but are offered as an opportunity for designers to introduce themselves to the DSP and present information about their overall qualifications, experience and approach. Firms will be provided approximately 15 minutes for their presentations followed by a 15 minute period of questions and answers led by DSP members. Please contact Marie Deslauriers (mailto:Marie.Deslauriers@massschoolbuildings.org?subject=Designer%20Selection%20Panel) (617.720.4466) for additional information and to request an interview.

Contact Information
If you have any questions about the Designer Selection Panel, please contact Marie Deslauriers (mailto:Marie.Deslauriers@massschoolbuildings.org?subject=Designer%20Selection%20Panel) (617.720.4466) at the Massachusetts School Building Authority.

All DSP meetings are held at the MSBA Offices located at 40 Broad Street, 5th Floor, unless otherwise noted.

#315-12

Massachusetts School Building Authority

Steven Grossman
Chairman, State Treasurer

Katherine P. Craven
Executive Director

Module 3
Feasibility Study

June 2010
Updated November 2011

11/21/11

11/21/11

INTRODUCTION

Module 3 – Feasibility Study:

If the District has completed all tasks defined in Module 1 – Prerequisites and Module 2 – Project Team and submitted the Module 2 Completion Checklist, the District may now proceed with the Feasibility Study as outlined in this Module. Module 3 – Feasibility Study is one of eight MSBA modules intended to provide a guide to the procedures and approvals needed to work collaboratively with the MSBA. (The Program Overview and listing of eight modules is provided in Appendix 3A for reference.)

Welcome to Module 3 – Feasibility Study

During the Feasibility Study, the District and its team collaborate with the MSBA to generate an initial space summary, document existing conditions, establish design parameters, develop and evaluate alternatives, and recommend the most cost effective and educationally appropriate solution to the MSBA Board of Directors. The MSBA Board of Directors must approve the preferred solution for a project before the preferred solution may advance into schematic design. See this Module for additional detail.

Module 3 has been provided as a general guide for Districts and their teams to plan their work in a collaborative effort in accordance with the MSBA's procedures and requirements. This Module is not intended to replace and/or supersede the services required by the OPM and/or Designer contracts. The Designer and OPM each shall be solely responsible for performing the services required by its contract with the District, respectively, and nothing in this Module shall be construed as relieving the Designer or OPM from its duties and responsibilities.

Feasibility Study Participants should include, at a minimum, the following:

- **The School Building Committee** as submitted by the District and approved by the MSBA in its School Building Committee Approval form, as well as elected officials and other District representatives, as deemed necessary by the District to show the educational and financial support of the city/town/regional school district for the preferred solution.

- **The Owner's Project Manager** as submitted by the District and approved by the MSBA in accordance with MSBA regulations and policies.

- **The Designer** as selected locally by the District and approved by the MSBA for projects estimated to cost less than $5 million or as selected through the MSBA's Designer Selection Panel for projects estimated to cost more than $5 million.

- **The MSBA,** through the assigned MSBA Project Manager and Field Coordinator.

11/21/11

Feasibility Study Submittal Procedures

All documents and materials submitted to the MSBA during the course of the Feasibility Study must be transmitted by the Owner's Project Manager ("OPM"). The OPM is required to compile and coordinate all submittals prior to delivery to the MSBA. This includes those items required to be provided by the OPM, as well as those of the Designer and the District.

For each submittal to the MSBA, the Designer and District must submit the required materials to the OPM. The OPM shall compile the submittal with the items indicated in the Designer and OPM Contracts, confirm that the District's School Building Committee has officially approved the submittal and verify its completeness and conformity to MSBA requirements. The OPM shall then forward this submittal to the assigned MSBA field coordinator under a separate cover letter signed by the OPM, including a certification from the OPM that the OPM has reviewed and coordinated the materials, and the submittal is complete, and a confirmation that the District has approved the materials for submission to the MSBA, in accordance with Section 8.1.1.2 of the OPM Contract which requires the OPM to "... assist the Owner in the preparation of all information, material, documentation and reports that may be required or requested by the Authority....".

Preliminary Design Program – Submit one (1) hard-copy of materials and one (1) electronic file in PDF format.

Preferred Schematic Report – Submit one (1) binder of materials per this Module, one (1) set of half-sized drawings, and one (1) electronic file in PDF format.

Incomplete submittals or submittals not reviewed by the OPM will not be accepted. Partial submittals will not be accepted without prior approval by the MSBA.

TABLE OF CONTENTS

APPENDICES

3A. Program Overview

3B. Sample Project Schedule

3C. Space Summary Templates

3D. Local Actions and Approvals Certification Template

3E. Budget Statement for Preferred Solution

3F. Module 3 Feasibility Study Completion Checklist

3.0 Feasibility Study

After all tasks defined in Module 1 – Prerequisites and Module 2 – Forming the Team have been completed by the District and acknowledged by the MSBA, a District may proceed with the Feasibility Study. Please remember that an invitation from the MSBA's Board of Director to collaborate on a Feasibility Study is ***not*** approval of a project. The purpose of the Feasibility Study is for the District, its Owner's Project Manager ("OPM") (for projects with estimated construction costs in excess of $1.5 million), its Designer, and the MSBA to explore potential solutions that meet the requirements of the District's Educational Program, and to determine the most cost effective and educationally appropriate solution to recommend to the MSBA Board of Directors for its consideration and approval to proceed into schematic design. Moving forward in the MSBA's process requires collaboration with the MSBA, and communities that "get ahead" of the MSBA without MSBA approval will not be eligible for grant funding. To qualify for any funding from the MSBA, local communities must follow the MSBA's statute and regulations, which require MSBA collaboration and approval at each step of the process.

Due to the variety and nature of proposed appropriate solutions (e.g., non-construction alternatives such as redistricting, repairs to a single building system, renovations to the entire facility, an addition, or a new school), each Feasibility Study will vary slightly as to the specific requirements, scope, cost and schedule. The particular requirements, scope, cost and schedule of a Feasibility Study will be outlined in the Feasibility Study Agreement between the District and the MSBA. The requirements may be based on many factors including the MSBA's review and evaluation of any previous studies as well as any meetings and discussions between the District and the MSBA.

In order to ascertain MSBA input and approval throughout the Feasibility Study process, the District is required to secure MSBA concurrence and/or approval of each of the following study milestones/reports before proceeding to the next:

- Preliminary Design Program
- Preferred Schematic Report

A sample Project Schedule that includes major milestones during the Feasibility Study and Schematic Design process has been provided for your reference in Appendix 3B.

3.1 Preliminary Design Program

The purpose of the Preliminary Design Program is to define the programmatic, functional, spatial, and environmental requirements of the educational facility necessary to meet the District's educational program, and perform the review and investigation required to clearly define the existing building deficiencies. Based upon a review of the District's educational program, the Designer will identify and prepare in written and graphic form for review, clarification, and agreement the educational goals and programmatic space needs for the subject school. The space needs along with an evaluation of existing conditions and site development requirements will form the basis of the Designer's recommendation for an evaluation of alternatives upon which the most educationally appropriate and cost effective solution may be recommended.

The Preliminary Design Program shall include the following:

- Table of Contents
- Introduction
- Educational program
- Initial space summary
- Evaluation of existing conditions
- Site development requirements
- Preliminary Evaluation of Alternatives
- Local Actions and Approval Certification
- Appendix

3.1.1 Introduction

The Introduction shall present a brief overview of the reason for the Feasibility Study, a list of all project participants, an outline of key data that informs the basis of the Study, and a summary of the process undertaken to examine, analyze, and conclude upon the findings of this Preliminary Design Program. The following shall be included:

- A brief summary of the facility deficiencies identified by the District in the Statement of Interest (SOI) at the time when the SOI was submitted. Include a copy of the most recent associated SOI in the Appendix of the submittal;
- The date of the invitation from the MSBA Board of Directors to conduct a Feasibility Study. Include a copy of the MSBA Board Action letter in the Appendix of the submittal;
- The agreed-upon design enrollment. (If the enrollment certification included multiple enrollments, then include the conditions associated with each enrollment). Include a copy of the executed study or design enrollment certification, as applicable, in the Appendix of the submittal;
- A brief narrative summary of the Capital Budget Statement indicating local available funding capacity, other ongoing and planned municipal projects, estimated budgets, and the target budget for the proposed project;
- A project directory with contact information for representatives of all District stakeholders (e.g., Mayor/Board of Selectmen, Superintendent, School Building Committee, School Committee, Local officials, and others involved in the project), Designer (point of contact and key support staff and sub-consultants) and OPM (and key support staff);
- Updated project schedule, including: 1) projected MSBA Board of Directors meeting for approval to proceed into Schematic Design, 2) projected MSBA Board of Directors meeting for approval of Project Scope and Budget Agreement, and 3) projected Town/City Vote for Project Scope and Budget Agreement. Identify any variances from the schedule outlined in the District's Feasibility Study Agreement with the MSBA.

3.1.2 Educational Program

The District will work with the Designer to evaluate the existing educational program currently offered by the District and define the educational activities planned to be offered. The Preliminary Design Program must include documentation of the District's existing educational program, and new or expanded educational specifications if applicable. The Preliminary Design Program must include the process of collaboration, outcomes, and documentation of support among the stakeholders.

The Educational Program shall include a statement of the teaching philosophy and methods; a thorough, in-depth explanation of the district's curriculum goals; and, objectives of the program elements associated with the subject facility. Through the use of narratives, figures, and charts, the Educational Program shall describe and include, but not necessarily be limited to, the following:

- Grade and school configuration policies
- Class size policies
- School scheduling method
- Teaching methodology and structure (e.g., academies, departments, houses, teams, etc.)
- Teacher planning and room assignment policies
- Pre-kindergarten (SPED only, tuition programs, locations, if applicable)
- Kindergarten (full day, half day, locations, if applicable)
- Lunch programs (district kitchen, full service kitchens, warming kitchens, etc.)
- Technology instruction policies and program requirements (labs, in-classroom, media center, required infrastructure, etc.)
- Art (in-classroom, specialized area)
- Music/Performing Arts (in-classroom, specialized area)
- Physical Education
- Special Education (in-house, collaborative, facility restrictions)
- Vocational Education programs
- Transportation policies
- Functional and spatial relationships and adjacencies
- Security and visual access requirements

3.1.3 Initial Space Summary

Based upon the District's Educational Program as described above and the agreed-upon enrollment, the District, working with its Designer, must complete the Initial Space Summary to identify the educational spaces the District believes are needed to deliver its educational program. Once agreed upon by the MSBA, this Initial Space Summary will help inform the development of alternatives to be studied, upon which the most educationally appropriate and cost effective solution may be recommended.

The Initial Space Summary must be based on the agreed-upon design enrollment, supported by the District's Educational Program and must include the following:

- An itemization of each existing educational space;
- The total gross square footage of the existing facility;

- An itemization of each proposed educational space; and
- A total gross square footage for the proposed renovated/added-to/new facility.

MSBA regulations, 963 CMR 2.00, establish allowable gross square footage per student for different types of school facilities of varying scale. To assist Districts and their design teams in developing proposed Initial Space Summaries, the MSBA has created space summary templates (in Excel format), one each for elementary, K-8, middle, and high schools. Each template includes three separate columns as follows:

- The first column documents existing conditions;
- The second column documents proposed spaces subdivided by existing spaces proposed to remain, new spaces, and total;
- The third column is the MSBA's guidelines. Other than inserting the agreed upon enrollment at the bottom, this column is not to be altered.

Refer to Appendix 3C Space Summary Templates for additional information.

As an attachment to the Initial Space Summary, Districts must provide scaled floor plans of the existing facility and narrative descriptions of the reasons for any variance between the District's proposed program/educational spaces and the MSBA guidelines for each category of spaces. Districts and their teams should consider the following when completing the Initial Space Summary:

- The initial space summary does not have to differentiate between existing spaces to remain and new spaces when generating the proposed program;
- The values for allowable spaces within the MSBA Guidelines column must not be adjusted as this will prevent a clear understanding of how the proposed program compares to the guidelines and potential limitations on MSBA participation. If this column is adjusted or edited, the proposed Initial Space Summary will be returned, without MSBA review comments, for correction and resubmission;
- The spreadsheet may be expanded by adding rows within the appropriate category to include entries for existing programs and spaces as needed to accurately describe existing educational spaces;
- Categories of space or room type not included in the initial space summary template (e.g., ROTC, computer lab, etc.) should be listed under the "Other" category; and
- If the MSBA and the District agree that more than one design enrollment is to be considered (i.e., grade reconfigurations or redistricting) as part of the Feasibility Study, a separate Initial Space Summary must be generated for each potential enrollment.

3.1.4 Evaluation of Existing Conditions

The Designer will analyze existing conditions of all buildings that comprise the school, site, and environment. The Designer will assemble sufficient information on the problems and opportunities with the existing school building(s) and site, so that any major implications for future requirements and design can be accurately judged. This information is required to be of a level sufficient enough to assist in the development of

the preliminary alternatives to be evaluated and must include, at a minimum, an outline of the potential scope, budget, and schedule impacts. The information should include the following:

- Determination that the District has legal title to the property, or alternatively, the required actions necessary to obtain clear title or to control, in accordance with the provisions of 963 CMR 2.05(1), and operate the Assisted Facility and Project Site for the useful life of the Assisted Facility;
- Determination that the property is available for development;
- Determination of any historic registrations and/or potential local and/or state interest/requirements in historic preservation and the associated potential impact on scope and time;
- Determination of any development restrictions that may apply;
- Evaluation of building code compliance for the existing facility;
- Evaluation of Architectural Access Board Rules and Regulations and their application to a potential project;
- Evaluation of significant structural, environmental, geotechnical or other physical conditions that may impact the cost and evaluation of alternatives;
- Determination for need and schedule for soils exploration and geotechnical evaluation;
- Environmental site assessments consisting of, at a minimum, a Phase I Initial Site Investigation conforming to 310 CMR 40.00, et seq. performed by a licensed site professional. (Results of the Phase I investigation may require additional environmental testing); and
- Assessment of the school for the presence of any hazardous materials including, but not necessarily limited to, lead paint and asbestos. Destructive testing may be required where hazardous materials potentially exist behind and within existing construction.

The District will furnish the Designer with all available studies, drawings, surveys, photographs and subsoil exploration reports of the proposed project's existing buildings (if any) and the site or sites.

The Designer shall include in the Preliminary Design Program Report a clear, written statement of the methods and assumptions of, and limitations on the accuracy of, any information provided. The Designer shall recommend during the course of the Feasibility Study what further investigatory work should be carried out prior to recommending an option as the Preferred Solution and what work should be carried out prior to submittal of the Schematic Design.

3.1.5 Site Development Requirements

In narrative form, the Designer shall describe in general terms project requirements related to site development to be considered during the preliminary and final evaluation of alternatives and submit an existing site plan(s) including, but not limited to:

- Structures and fences
- Site access and circulation
- Parking and paving
- Code setbacks and limitations

- Zoning setbacks and limitations
- Emergency vehicle access
- Utilities
- Athletic fields and outdoor educational spaces
- Site orientation and location considerations and issues

3.1.6 Preliminary Evaluation of Alternatives

Based upon the Educational Program, Initial Space Summary, evaluation of existing conditions, and site development requirements, the District, working with its Designer, shall perform a preliminary evaluation of alternatives for approval by the MSBA. To ensure that the Feasibility Study determines the most cost effective and educationally appropriate solution, it is imperative that the preliminary evaluation of alternatives is sufficiently comprehensive in scope to initially consider all possible solutions. Each alternative should satisfy significant components of the Educational Program, Standards, Policies and Guidelines of the MSBA to the extent feasible, unless specifically authorized in writing by the MSBA.

The Preliminary Evaluation of Alternatives should include at least the following:

- Analysis of school district student school assignment practices and available space in other schools in the district
- Tuition agreements with adjacent school districts (per MGL c.70B §8)
- Rental or acquisition of existing buildings that could be made available for school use (per MGL c.70B §8)
- Base repair option that is limited to minimum work to meet current code requirements, to be used as a benchmark for comparative analysis of all other alternatives
- Renovation(s) and/or addition(s) of varying degrees to the existing building(s)
- Construction of new building and the evaluation of potential locations

The Preliminary Evaluation of Alternatives shall include for each alternative: a description of the alternative; an examination of the degree to which the alternative fulfills the stated Educational Program requirements and provides for the spaces identified in the Initial Space Summary; how it addresses site and facility goals and objectives; an assessment of the impact of construction phasing; and, estimated preliminary construction and project costs. The level of detail provided for each alternative and the associated conceptual cost estimates must be suitable for a comparative cost analyses for the various alternatives.

The results of the Preliminary Evaluation of Alternatives shall be presented in narratives, figures, and tables to clearly demonstrate to the District and the MSBA the evaluation criteria (e.g., existing space issues, the educational program, site requirements, etc.), how each alternative did or did not address the criteria, the advantages and disadvantages of each alternative, and the comparative cost analyses. The Preliminary Evaluation of Alternatives shall conclude with a list of at least three distinct alternatives that are recommended for further development and evaluation during the Final Evaluation of Alternatives.

3.1.7 Local Actions and Approvals

The Preliminary Design Program, as with other submittals to the MSBA, must be reviewed and approved locally for submittal to the MSBA, in accordance with the state open meeting law and any other local requirements. Public participation and local approval procedures and practices may vary by community and by project. Districts are encouraged to consult with their local counsel to ensure that all applicable requirements are satisfied. The District must document local approval of the Preliminary Design Program and its submittal to the MSBA. The MSBA requires Districts to provide a certified copy of Minutes of the School Building Committee ("SBC") meeting(s) where the Feasibility Study related submittals were approved for submittal to the MSBA. The Minutes must include the specific language of the vote and the results of the vote, stating the number of SBC members who voted in favor of submittal to the MSBA, the number opposed, and the number of abstentions, if any.

The District also must list the relevant SBC meeting dates; provide copies of the agendas of such meetings; briefly describe the materials presented, if applicable; list the names and affiliations of specific stakeholders in attendance (e.g., representatives of the local historic commission, school committee members beyond those in the SBC, local community group representatives, etc.); and, list what materials are available for public review and where those materials may be viewed. The MSBA also requires Districts to provide similar information for public meetings and presentations conducted in connection with the proposed project, in addition to SBC meetings.

Refer to Appendix 3D "Local Actions and Approvals Certification Template" for additional information. A signed Local Actions and Approvals Certification on District letterhead is required for MSBA staff to consider inviting the District to present its proposed project to the MSBA Facilities Assessment Subcommittee or to forward the proposed project to the MSBA Board of Directors for its consideration and approval to proceed into schematic design.

3.2 MSBA Review of Preliminary Design Program

After a District has submitted a Preliminary Design Program that meets the requirements set forth above, the MSBA will review the Program to determine if it concurs with the Initial Space Summary for an evaluation of preliminary alternatives and accepts the District's recommendation of proposed preliminary alternatives to be further studied as part of the Final Evaluation of Alternatives.

Initial Space Summary:

The MSBA will provide a written response that: provides the MSBA's evaluation of the extent to which the initial space summary conforms to the MSBA guidelines and regulations; states the approval status of the proposed initial space summary; and, if applicable, lists the specific conditions that the MSBA will be monitoring as the Statement of Interest moves forward in the grant process.

The MSBA is committed to working with Districts to determine the most cost effective and educationally appropriate solution to meet their specific needs. To this end, the MSBA is willing to work with a District to better understand its Educational Program and

any unique needs the District may have. As part of the Preliminary Design Program, the District should supply a sufficient description and substantiation of the educational program needs in order for the MSBA to consider variations to MSBA guidelines that are reasonable, required to deliver the educational curriculum and are likely to be financially supported by the community. To bolster the likelihood of success, foster a clear understanding of the MSBA's willingness to financially participate and define the conditions upon which alternatives will be developed, it is essential that the MSBA and the District reach agreement on the initial space summary. Therefore, MSBA approval of the initial space summary, or potentially a conditional approval, is required for the MSBA to continue working with the District on the Preferred Schematic Report. The MSBA may issue a conditional approval of the initial space summary solely for the purposes of evaluating the preliminary alternatives. The final approval of the space summary and the agreed upon square footages will be determined upon submission of the Preferred Schematic Report.

Preliminary Evaluation of Alternatives:

The MSBA will review the District's Preliminary Evaluation of Alternatives to determine if it is sufficiently comprehensive in scope to initially consider all appropriate solutions that could be supported by the community and the MSBA Board of Directors for continued, more comprehensive, investigation during the Final Evaluation of Alternatives during the next part of the Feasibility Study process. The District and the MSBA must agree that the Preliminary Evaluation of Alternatives is sufficiently comprehensive and represents a scope of work that is mutually agreeable to both the MSBA and the District to continue working on the Preferred Schematic Report. The MSBA review of the Preliminary Evaluation of Alternatives may or may not result in consideration of additional and/or refined alternatives.

3.3 Preferred Schematic Study and Report

3.3.1 Preferred Schematic Study

Once the MSBA has accepted the Preliminary Design Program, the District and its Designer should proceed with the final evaluation of the proposed alternatives.

3.3.2 Preferred Schematic Report

The purpose of the Preferred Schematic Report is to finalize the Preliminary Design Program, summarize the process and conclusions of the Preliminary Evaluation of Alternatives and substantiate and document the District's selection and recommendation for a preferred solution. The Preferred Schematic Report shall include the Preliminary Design Program as an appendix, with all updates and changes identified during the preferred schematic study presented as appropriate within the report. The Report should address all concerns and questions raised by the MSBA during its review of the Preliminary Design Program and clearly identify any changes incorporated by the District based on further evaluations and considerations.

The District, through its OPM, must submit the Preferred Schematic Report by the deadline established by the MSBA for a proposed Board action. This schedule is posted

on the MSBA website and should have been incorporated as part of the updated schedule required in part 3.1.1 of the Preliminary Design Program.

The Preferred Schematic Report shall include the following:

- Table of Contents
- Introduction
- Evaluation of Existing Conditions
- Final Evaluation of Alternatives
- Preferred Solution
- Local Actions and Approvals Certification

3.3.2.1 Introduction

The Introduction shall summarize the process undertaken and conclusions of this Preferred Schematic Report and shall include:

- Overview of the process undertaken since submittal of the Preliminary Design Program that concludes with submittal of the Preferred Schematic Report, including any new information and changes to previously submitted information;
- Overview of the community outreach program and community feedback regarding the recommendation of the Preferred Schematic since submittal of the Preliminary Design Program;
- Summary of updated project schedule including: 1) projected MSBA Board of Directors Meeting for approval of Project Scope and Budget Agreement, 2) projected Town/City vote for Project Scope and Budget Agreement, 3) anticipated start of construction, and 4) target move in date
- Summary of the final evaluation of existing conditions
- Summary of the final evaluation of alternatives
- Summary of the District's preferred solution
- Brief description of the local approval process and the date upon which the District approved submittal of the Preferred Schematic Report to the MSBA

3.3.2.2 Evaluation of Existing Conditions

Refer to the appended Preliminary Design Program and describe in narratives and graphic form any changes resulting from additional evaluation or new information that informs the evaluation of the existing conditions and its impact on the final evaluation of alternatives. If the changes are substantive, provide an amended report noted as final.

3.3.2.3 Final Evaluation of Alternatives

The Final Evaluation shall include at least three potential alternatives. Unless specifically approved in writing by the MSBA, at least one of the three potential alternatives shall be renovation and/or addition to existing building(s) that maximizes use of the existing facility. Include the following for each alternative where appropriate:

- Provide an analysis of each prospective site.

- Evaluation of the potential impact that construction of the option will have on students and measures required or recommended to mitigate impact, including, but not necessarily limited to, provision of temporary facilities, relocation requirements, phased construction, off-hour construction, etc.
- Conceptual architectural and site drawings as required conveying a successful organization of spaces that will satisfy the spatial and organizational requirements of the Educational Program.
- An outline of the major building structural systems that are proposed for each alternative.
- The source, capacities, and method of obtaining all utilities. For additions and renovations, evaluate the impact on existing utilities.
- A narrative of the major building systems including plumbing, HVAC, electrical (including proposed information technology and/or multi-media systems) with estimated mechanical and electrical loads including applicable heating, cooling, domestic hot water and electrical block loads.
- A proposed total project budget and a construction cost estimate using the Uniformat II Elemental Classification format (to as much detail as the drawings and descriptions permit, but no less than Level 2).
- Permitting requirements including the estimated time to acquire each of the required permits.
- Proposed project design and construction schedule including consideration of phasing of the proposed project.

The Final Evaluation of Alternatives shall be presented in detailed narratives and tables as appropriate to present clearly how and to what degree each alternative addresses each evaluation criteria and shall include a cost comparison table in the format presented below. All construction costs shall represent marked up construction costs, and costs not directly associated with building costs shall be described as to what is included (e.g., building demolition/take down, site costs, hazardous material abatement etc.)

Table 1 – Summary of Preliminary Design Pricing

Option (Description)	Total Gross Square Feet	Square Feet of Renovated Space (cost*/sf)	Square Feet of New Construction (cost*/sf)	Site, Building Takedown, Haz Mat. Cost*	Estimated Total Construction** (cost*/sf)	Estimated Total Project Costs
Option A (Description i.e. add/reno)	XXX sf	XXX sf $/sf	XXX sf $/sf	$	$ $/sf	$
Option B (Description)	XXX sf	XXX sf $/sf	XXX sf $/sf	$	$ $/sf	$
Option C (Description)	XXX sf	XXX sf $/sf	XXX sf $/sf	$	$ $/sf	$
Option D (Description)	XXX sf	XXX sf $/sf	XXX sf $/sf	$	$ $/sf	$

Option (Description)	Total Gross Square Feet	Square Feet of Renovated Space (cost*/sf)	Square Feet of New Construction (cost*/sf)	Site, Building Takedown, Haz Mat. Cost*	Estimated Total Construction** (cost*/sf)	Estimated Total Project Costs
Option E*** (Description)	XXX sf	XXX sf $/sf	XXX sf $/sf	$	$ $/sf	$
Option F (Description)	XXX sf	XXX sf $/sf	XXX sf $/sf	$	$ $/sf	$

** Marked Up Construction Costs*
*** Does not include Construction Contingency*
**** **District's Preferred Solution***

3.3.2.4 Preferred Solution

Describe the District's preferred solution using narrative, figures, and charts including: how the preferred solution meets the District's educational program, key educational adjacencies, programmatic spaces, conceptual floor plan(s), site plan(s), and updated project schedule.

Educational Program
Summarize key components of the District's Educational Program and how the preferred solution fulfills the stated Educational Program requirements.

Preferred Solution Space Summary
Provide an updated space summary that is based on the agreed-upon enrollment, the District's Initial Space Summary, written comments provided by the MSBA as part of its review of the Preliminary Design Program, and the District's preferred solution. The Preferred Solution Space Summary must include the following:

- An itemization of each existing educational space and the total net and gross square footage and grossing factor of the existing facility;
- An itemization of each proposed educational space that is within existing building to remain or renovated space and the total net and gross square footage and grossing factor of the existing to remain or renovated space;
- An itemization of each proposed educational space that is within new construction; and the total net and gross square footage and grossing factor of new construction;
- An itemization of the total proposed educational space and the total net and gross square footage and grossing factor of the proposed facility;
- An itemization of the MSBA's guidelines and the total net and gross square footage, agreed upon student enrollment, and grossing factor. Other than inserting the agreed upon enrollment at the bottom, this column is not to be altered.

Describe the reason for any variation between the Initial Space Summary and written comments provided by the MSBA as part of its review of the Preliminary Design Program.

Building Plans

Provide conceptual floor plans of the preferred solution, in color that are clearly labeled to identify educational spaces in the preferred solution.

Submit a preliminary MA-CHPS or LEED-S scorecard and a statement from the Designer including:

"This is an acknowledgement that the _____School District has identified a goal of ____% additional reimbursement from the MSBA High Efficiency Green School Program. As their Designer, I have submitted a completed _____scorecard showing ____ attempted points, which will meet that goal.

The scope of work for this project will include the construction elements and performance tasks to achieve that goal, and all subsequent documents, including but not limited to, specifications, drawings and cost estimates will match the scope of work indicated in the submitted scorecard".

Site Plans

Provide clearly labeled site plans of the preferred solution including, but not limited to:

- Structures and boundaries
- Site access and circulation
- Parking and paving
- Code setbacks and limitations
- Zoning easements and environmental buffers
- Emergency vehicle access
- Utilities
- Athletic fields and outdoor educational spaces (existing and proposed)
- Site orientation

Budget

Provide an overview of the Total Project Budget and local funding including the following:

- Estimated total construction cost
- Estimated total project cost
- Estimated funding capacity
- List of other municipal projects currently underway
- District's not-to-exceed Total Project Budget
- Brief description of the local process for authorization and funding of the proposed project
- Estimated impact to local property tax, if applicable

Complete and submit a budget statement for the preferred schematic. The overall goal of the budget statement for preferred solution is to document the total change in operational costs that the District expects as a result of the proposed project. To assist

in documenting this change the MSBA has developed an Excel template that includes two tabs, one for expenditures and one for revenues. Refer to Appendix 3E for additional information

Schedule

Provide an updated project schedule including the following projected dates:

- MSBA Board of Directors meeting for approval to proceed into Schematic Design
- MSBA Board of Directors Meeting for approval of Project Scope and Budget Agreement and Project Funding Agreement
- Town/City vote for Project Scope and Budget Agreement
- Construction Start
- Move-in date
- Substantial completion

3.3.2.9 Local Actions and Approvals

The Preferred Schematic Report, as with other submittals to the MSBA, must be reviewed and approved locally for submittal to the MSBA, in accordance with the state open meeting law and any other local requirements. Public participation and local approval procedures and practices may vary by community and by project. Districts are encouraged to consult with their local counsel to ensure that all applicable requirements are satisfied.

The District must document local approval of the Preferred Schematic Report and its submittal to the MSBA. The MSBA requires Districts to provide a certified copy of the Minutes of the School Building Committee ("SBC") meeting from the meeting(s) where the Feasibility Study related submittals were approved for submittal to the MSBA. The Meeting minutes must include the specific language of the vote and the results of the vote, stating the number of SBC Members who voted in favor of submittal to the MSBA, the number of opposed and the number of abstentions.

The District must also list SBC meeting dates, the agendas, briefly describe the materials presented, if applicable, specific stakeholders in attendance (e.g., representatives of the local historic commission, school committee members beyond those in the SBC, local community group representatives, etc.), what materials are available for public review and where those materials may be viewed. The MSBA also requires Districts to provide similar information for public meetings and presentations conducted in addition to school building committee meetings.

Refer to Appendix 3D "Local Actions and Approvals Certification Template" for additional information. A signed Local Actions and Approvals Certification on District Letterhead is required for MSBA staff to forward the proposed project to the MSBA Board of Directors for its consideration and approval to proceed into schematic design.

3.4 Approval by MSBA Board of Directors to Proceed into Schematic Design

In order for the MSBA Board of Directors to consider a District's preferred solution for approval to proceed into schematic design, the following must occur prior to the date of the Board meeting, in accordance with the deadlines established by the MSBA:

- The District, through its OPM, must submit its Preferred Schematic Report to the MSBA in accordance with the deadlines published on the MSBA's website (www.MassSchoolBuildings.org).
- MSBA staff must complete its review of the Report, and the District must submit responses to any questions or issues raised by the MSBA in a timeframe adequate to support the schedule for the Board's meetings.
- The District and its Designer may be required to present an overview of its Report at an MSBA Facilities Assessment Subcommittee meeting.
- The District and its Designer must respond to any concerns or issues identified at the MSBA Facilities Assessment Subcommittee in a timely fashion, prior to the deadline established by the MSBA.

3.4.1 MSBA staff review

The District and the MSBA shall work in collaboration to determine which of the solutions studied may be recommended to the MSBA Board of Directors as the preferred solution in the Preferred Schematic Report. The solution may be phased in order of priority of need, if appropriate. It is possible, in some cases, that the study may recommend a "no-build" solution. If the MSBA and the District cannot agree upon a preferred solution, no preferred schematic design shall be forwarded to the Board for its consideration. The MSBA and the District will begin a review of the alternatives presented to determine if there are actions that can be taken to reach consensus on a final recommendation.

The MSBA review process for the Preferred Schematic Report includes:

- Written response comments based on staff review
- Conference call with the District and its design team to discuss the Report
- Written responses from the District addressing staff comments as required.

3.4.2 Facility Assessment Subcommittee Review

Upon receipt and review of the Preferred Schematic Report, MSBA staff may or may not schedule the District for presentation at a Facilities Assessment Subcommittee ("FAS") Meeting. The FAS meeting is an informational meeting only and is intended to provide an opportunity for Districts to present information and further the MSBA's understanding of the proposed project. The FAS will not take any votes, and any formal actions required by the MSBA Board of Directors to fulfill MSBA procedures will be taken at the regularly scheduled Board meetings. FAS meeting dates are posted on the MSBA

website, which should be consulted when preparing the overall work plan and schedule for the Feasibility Study.

FAS meetings are limited to one, 2-hour meeting per month. MSBA staff will determine which districts will present at an FAS meeting based upon the complexity of the proposed project, staff's review of the Preferred Schematic Report, and the time available. It is possible that not all Districts will be asked to present their proposed project at a FAS meeting.

If the MSBA is going to ask a District to present at a FAS meeting, staff will notify the District, Designer, and OPM by e-mail. The e-mail will include an outline of the material that should be presented, which typically includes an overview of the project that explains the basis of the project, the evaluation conducted to arrive at the recommended preferred schematic, and if applicable, responses to specific questions regarding potential concerns noted during staff's review of the Preferred Schematic Report.

3.4.3 MSBA Board approval

After the District has presented at the Facilities Assessment Subcommittee, if required, MSBA staff will present the preferred option to the MSBA Board of Directors for its consideration and approval of a Preferred Schematic Design. If the Board approves a District to proceed into schematic design for its preferred solution, as described in the Preferred Schematic Report, the MSBA shall issue a Board Action Letter, summarizing the Board's actions. Upon receipt of the Board Action Letter, the District should complete and sign the checklist provided in Appendix 3F and submit it to the MSBA for acceptance. Once this checklist has been accepted, the District may proceed into Schematic Design – see Module 4.

3.5 Conclusion of Module 3

The District should maintain the checklist provided in Appendix 3F throughout the Feasibility Study process as each step/document is submitted, reviewed, and completed. Upon receipt of the MSBA Board Action letter, the District should sign the checklist as noted on the form, submit the signed checklist to MSBA, and prepare to proceed to Schematic Design (Module 4).

11/21/11

APPENDIX 3A

Program Overview

(Bold denotes current module)

Program Overview

The Massachusetts School Building Authority's ("MSBA") grant program for school building construction and renovation projects is a non-entitlement competitive program based on need. The MSBA's Board of Directors (the "Board") approves grants based on need and urgency, as expressed by the City, Town, Regional School District, or independent agricultural and technical school ("District") and validated by the MSBA. Once the MSBA Board of Directors invites a District into the Eligibility Period to potentially participate in the MSBA's grant program, the collaborative process includes the following eight Modules:

Module 1 – Eligibility Period: Before a District can progress in the MSBA's grant approval process, it must complete the following within 270 calendar days: an Initial Compliance Certification to certify the District's understanding of the grant program rules through completion of; a School Building Committee Form documenting the creation of a School Building Committee, Capital Budget Statement that summarizes the District's funding capacities; documentation of the District's existing maintenance practices; a design enrollment certification for the proposed project agreed upon by the MSBA (may not be applicable for Repair Assessments depending on the proposed scope of work); confirmation of community authorization and funding to proceed; and submittal of a signed MSBA standard Feasibility Study Agreement ("FSA"), which establishes scope, schedule and budget for a feasibility study and schematic design and enables a District to be reimbursed for eligible expenses. Districts that complete the preliminary requirements within the 270-day Eligibility Period are eligible to receive invitation to Feasibility Study from the MSBA Board of Directors.

Module 2 – Forming the Project Team: Once the MSBA Board of Directors authorizes an Invites the District to Feasibility Study and authorizes the Executive Director to Enter into an FSA, the District procures the team of professionals utilizing MSBA specific procurement processes and standard Request for Services ("RFS") templates and Contracts to work with the District as the proposed project advances through the MSBA's grant process.

Module 3 – Feasibility Study: The District and its team collaborate with the MSBA to generate an initial space summary, document existing conditions, establish design parameters, develop and evaluate alternatives, and recommend the most cost effective and educationally appropriate solution to the MSBA Board of Directors. Approval by the MSBA Board of Directors is required for all projects in order to advance the preferred schematic into schematic design. ***See this Module for additional detail.***

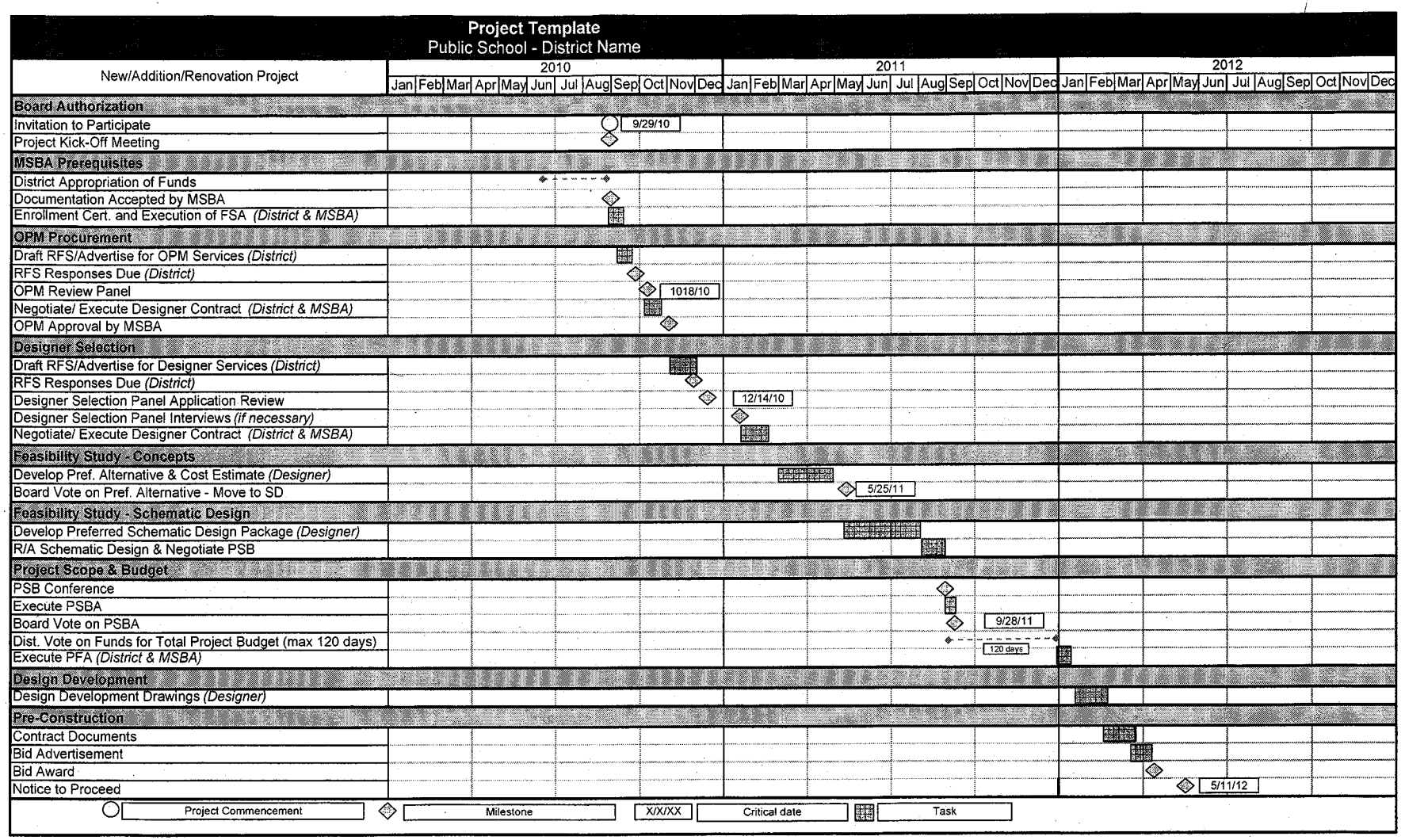
Module 4 – Schematic Design: The District and its team develop a final design program and robust schematic design of sufficient detail to establish the scope, budget and schedule for the Proposed Project.

Module 5 – Project Scope and Budget and Project Funding Agreements: Based upon the completed Feasibility Study the District and the MSBA staff establish and document the project scope, budget, schedule, and MSBA financial participation to forward to the MSBA Board of Directors for their approval. Approval by the MSBA Board of Directors establishes the MSBA participation in the proposed project. Once the District secures community authorization and financial support, the MSBA and the District enter into a Project Funding Agreement, which defines the scope, budget and schedule for the Proposed Project.

Module 6 – Design Development, Construction Documentation & Bidding: The District and its team advance the design, generate construction documentation, procure bids and award a construction contract in accordance with the agreed upon project scope, budget and schedule as documented in the Project Funding Agreement, and the requirements contained in the MSBA's standard contracts for Owner's Project Management and Designer Services. The MSBA continues to monitor the project to ensure it remains on track and meets the expectation of both the District and the MSBA as defined in the Project Funding Agreement

Module 7 – Construction Administration: The MSBA continues to monitor progress of the project to confirm that it remains on track and meets the expectation of both the District and the MSBA as defined in the Project Funding Agreement.

Module 8 – Project Closeout: The MSBA performs final audit to determine final total grant amounts and make final payment.



*Note: This schedule contains only estimated dates and durations based upon the District being voted into the Capital Pipeline on September 29, 2010. Schedule subject to change.

#315-12

Proposed Space Summary- Elementary Schools

FILL IN SCHOOL NAME HERE	Existing Conditions			PROPOSED									MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
				Existing to Remain/Renovated			New			Total						
ROOM TYPE	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	Comments
CORE ACADEMIC SPACES			0			0			0			0		0	0	
(List classrooms of different sizes seperately)																
Pre-Kindergarten w/ toilet													1,200		-	1,100 SF min - 1,300 SF max
Kindergarten w/ toilet													1,200	0	-	1,100 SF min - 1,300 SF max
General Classrooms - Grade 1-6													950	0	-	900 SF min - 1,000 SF max
SPECIAL EDUCATION			0			0			0			0			500	
(List rooms of different sizes seperately)																
Self-Contained SPED													950	0	-	8% of pop. in self-contained SPED
Self-Contained SPED - toilet													60	0	-	
Resource Room													500	0	-	1/2 size Genl. Clrm.
Small Group Room / Reading													500	1	500	1/2 size Genl. Clrm.
ART & MUSIC			0			0			0			0			0	
Art Classroom - 25 seats													1,000	0	-	assumed schedule 2 times / week / student
Art Workroom w/ Storage & kiln													150	0	-	
Music Classroom / Large Group - 25-50 seats													1,200	0	-	assumed schedule 2 times / week / student
Music Practice/ Ensemble													75	0	-	
HEALTH & PHYSICAL EDUCATION			0			0			0			0			6,300	
Gymnasium													6,000	1	6,000	6000 SF Min. Size
Gym Storeroom													150	1	150	
Health Instructor's Office w/Shower & Toilet													150	1	150	
MEDIA CENTER			0			0			0			0			2,020	
Media Center/Reading Room													2,020	1	2,020	
DINING & FOOD SERVICE			0			0			0			0			3,000	
Cafeteria/Dining													0	1	-	2 seatings - 15SF per seat
Stage													1,000	1	1,000	
Chair/Table/Equipment Storage													200	1	200	
Kitchen													1,600	1	1,600	1600 SF for first 300 + 1 SF/student Add'l
Staff Lunch Room													200	1	200	20 SF/Occupant
MEDICAL			0			0			0			0			310	
Medical Suite Toilet													60	1	60	
Nurses' Office/Waiting Room													250	1	250	
Examination Room / Resting													100	0	-	
ADMINISTRATION & GUIDANCE			0			0			0			0			1,865	
General Office / Waiting Room/Toilet													300	1	300	
Teachers' Mail and Time Room													100	1	100	
Duplicating Room													150	1	150	
Records Room													110	1	110	
Principal's Office w/ Conference Area													375	1	375	
Principal's Secretary / Waiting													125	1	125	
Assistant Principal's Office													120	0	-	
Supervisory / Spare Office													120	1	120	
Conference Room													250	1	250	
Guidance Office													150	0	-	
Guidance Storeroom													35	1	35	
Teachers' Work Room													300	1	300	
CUSTODIAL & MAINTENANCE			0			0			0			0			1,900	
Custodian's Office													150	1	150	

#315-12

Proposed Space Summary- Elementary Schools

FILL IN SCHOOL NAME HERE	Existing Conditions			PROPOSED									MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
				Existing to Remain/Renovated			New			Total						
ROOM TYPE	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	Comments
Custodian's Workshop													375	1	375	
Custodian's Storage													375	1	375	
Recycling Room / Trash													400	1	400	
Receiving and General Supply													200	1	200	
Storeroom													200	1	200	
Network/Telecom Room													200	1	200	
OTHER			0			0			0			0			0	
Other *(specify)*																
Total Building Net Floor Area (NFA)			0			0			0			0			15,895	
Proposed Student Capacity/Enrollment															-	
Total Building Gross Floor Area (GFA)[2]															-	
Grossing factor (GFA/NFA)			#DIV/0!									#DIV/0!			0.00	

[1] **Individual Room Net Floor Area (NFA)** Includes the net square footage measured from the inside face of the perimeter walls and includes all specific spaces assigned to a particular program area including such spaces as non-communal toilets and storage rooms.

[2] **Total Building Gross Floor Area (GFA)** Includes the entire building gross square footage measured from the outside face of exterior walls

Architect Certification

I hereby certify that all of the information provided in this "Proposed Space Summary" is true, complete and accurate and, except as agreed to in writing by the Massachusetts School Building Authority, in accordance with the guidelines, rules, regulations and policies of the Massachusetts School Building Authority to the best of my knowledge and belief. A true statement, made under the penalties of perjury.

Name of Architect Firm: _____

Name of Principal Architect: _____

Signature of Principal Architect: _____

Date: _____

#315-12

Proposed Space Summary- Elementary - K-8 School

ELEMENTARY SCHOOL	Existing Conditions			PROPOSED									MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
				Existing to Remain/Renovated			New			Total						
ROOM TYPE	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	Comments
CORE ACADEMIC SPACES		0	0		0	0		0	0		0	0		0	0	
(List classrooms of different sizes seperately)																
Pre-Kindergarten w/ toilet			0			0			0	0	0	0	1,200		-	1,100 SF min - 1,300 SF max
Kindergarten w/ toilet			0			0			0	0	0	0	1,200	0	-	1,100 SF min - 1,300 SF max
General Classrooms - Grades 1-5			0			0			0	0	0	0	950	0	-	900 SF min - 1,000 SF max
General Classrooms - Grades 6-8			0			0			0	0	0	0	950	0	-	
Science Classroom / Lab			0			0			0	0	0	0	1,200	0	-	1 period / day / student
Science prep room			0			0			0	0	0	0	80	0	-	
SPECIAL EDUCATION			0			0			0			0			500	
(List rooms of different sizes seperately)																
Self-Contained SPED -Grades 6-8			0			0			0	0	0	0	950	0	-	8% of pop. in self-contained SPED
Self-Contained SPED -Grades 1-5			0			0			0	0	0	0	950	0	-	8% of pop. in self-contained SPED
Self-Contained SPED - Grades 1-5 toilet			0			0			0	0	0	0	60	0	-	
Self-Contained SPED - Grades 6-8 toilet			0			0			0	0	0	0	60	0	-	
Resource Room - Grades 6-8			0			0			0	0	0	0	500	0	-	
Resource Room - Grades 1-5			0			0			0	0	0	0	500	0	-	
Small Group Room / Reading			0			0			0	0	0	0	500	1	500	1/2 size Gen. Clrm.
ART & MUSIC			0			0			0			0			200	
Art Classroom - Grades 1-5			0			0			0	0	0	0	1,000	0	-	assumed schedule 2 times / week / student
Art Classroom - Grades 6-8			0			0			0	0	0	0	1,200	0	-	assumed use - 50% population 2 times / week
Art Workroom w/ Storage & kiln			0			0			0	0	0	0	150	0	-	
						0			0	0	0	0				
Band / Chorus - 100 seats			0			0			0	0	0	0	1,500	0	-	
Music Classroom / Large Group - 25-50 seats			0			0			0	0	0	0	1,200	0	-	assumed schedule 2 times / week / student
Music Practice/ Ensemble - Grades 1-5			0			0			0	0	0	0	75	0	-	
Music Practice/ Ensemble - Grades 6-8			0			0			0	0	0	0	200	1	200	
VOCATIONS & TECHNOLOGY			0			0			0			0			0	
Tech. Clrm. - (E.G. Drafting, Business)			0			0			0	0	0	0	1,200	0	-	Assumed use - 25% Population - 5 times/week
Tech. Shop - (E.G. Consumer, Wood)			0			0			0				2,000	0	-	Assumed use - 25% Population - 5 times/week
HEALTH & PHYSICAL EDUCATION			0			0			0			0			#DIV/0!	
Gymnasium			0			0			0	0	0	0	6,000	1	6,000	6000 SF Min. Size
Gym Storeroom			0			0			0	0	0	0	150	1	150	
Health Instructor's Office w/Shower & Toilet			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
Locker Rooms - Boys/Girls w/Toilets			0			0			0	0	0	0	1,000	2	2,000	
MEDIA CENTER			0			0			0			0			#DIV/0!	
Media Center/Reading Room			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
DINING & FOOD SERVICE			0			0			0			0			3,600	
Cafeteria/Dining			0			0			0	0	0	0	0	1	-	2 seatings - 15SF per seat
Kitchen			0			0			0	0	0	0	1,600	1	1,600	1600 SF for first 300 + 1 SF/student Add'l
Chair/Table/Equipment Storage			0			0			0	0	0	0	200	1	200	200 SF for first 300 + .333 SF/student Add'l
Staff Lunch Room			0			0			0	0	0	0	200	1	200	200 SF for first 400 + .25 SF/student Add'l
Stage			0			0			0	0	0	0	1,600	1	1,600	
MEDICAL			0			0			0			0			310	
Medical Suite Toilet			0			0			0	0	0	0	60	1	60	
Nurses' Office/Waiting Room			0			0			0	0	0	0	250	1	250	
Examination Room / Resting			0			0			0	0	0	0	100	0	-	
ADMINISTRATION & GUIDANCE			0			0			0			0			#DIV/0!	
Principal's Office w/ Conference Area			0			0			0	0	0	0	375	1	375	

#315-12

Proposed Space Summary- Elementary - K-8 School

ELEMENTARY SCHOOL	Existing Conditions			PROPOSED									MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
				Existing to Remain/Renovated			New			Total						
ROOM TYPE	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	Comments
Principal's Secretary / Waiting			0			0			0	0	0	0	125	1	125	
Assistant Principal's Office - AP1			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
Assistant Principal's Office - AP2			0			0			0	0	0	0	#DIV/0!	0	#DIV/0!	
General Office / Waiting Room/Toilet			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
Conference room			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
Teachers' Mail and Time Room			0			0			0	0	0	0	100	1	100	
Duplicating Room			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
Records Room			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
Supervisory / Spare Office			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
Guidance area																
General Waiting Room			0			0			0	0	0	0	100	1	100	
Guidance Office			0			0			0	0	0	0	150	1	150	
Guidance Storeroom			0			0			0	0	0	0	#DIV/0!	1	#DIV/0!	
Teachers' Work Room			0			0			0	0	0	0	300	1	300	
CUSTODIAL & MAINTENANCE			0			0			0			0			#DIV/0!	
Custodian's Office			0			0				0	0	0	150	1	150	
Custodian's Workshop			0			0				0	0	0	#DIV/0!	1	#DIV/0!	
Custodian's Storage			0			0				0	0	0	375	1	375	
Storeroom			0			0				0	0	0	200	1	200	
Recycling Room / Trash			0			0				0	0	0	400	1	400	
Receiving and General Supply			0			0				0	0	0	200	1	200	
Network/Telecom Room			0			0				0	0	0	200	1	200	
OTHER			0			0			0			0			0	
Other *(specify)*			0			0			0	0	0	0				
Total Building Net Floor Area (NFA)			0			0			0			0			#DIV/0!	
Proposed Student Capacity/Enrollment												0			-	Enter grade enrollments to the right
Total Building Gross Floor Area (GFA)[2]					GSF of existing			GSF new	0			0			#DIV/0!	
Grossing factor (GFA/NFA)			#DIV/0!								(estimate)				1.50	

Grades K-5	
	#DIV/0!
Grades 6-8	
	#DIV/0!

[1] **Individual Room Net Floor Area (NFA)** Includes the net square footage measured from the inside face of the perimeter walls and includes all specific spaces assigned to a particular program area including such spaces as non-communal toilets and storage rooms.

[2] **Total Building Gross Floor Area (GFA)** Includes the entire building gross square footage measured from the outside face of exterior walls

Architect Certification

I hereby certify that all of the information provided in this "Proposed Space Summary" is true, complete and accurate and, except as agreed to in writing by the Massachusetts School Building Authority, in accordance with the guidelines, rules, regulations and policies of the Massachusetts School Building Authority to the best of my knowledge and belief. A true statement, made under the penalties of perjury.

Name of Architect Firm: _____

Name of Principal Architect: _____

Signature of Principal Architect: _____

Date: _____

#315-12

Proposed Space Summary - Middle Schools

FILL IN SCHOOL NAME HERE	Existing Conditions			PROPOSED									MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
				Existing to Remain/Renovated			New			Total						
ROOM TYPE	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	Comments
CORE ACADEMIC SPACES			0			0			0			0			0	
(List classrooms of different sizes seperately)																
Classroom - General													950	0	-	850 SF min - 950 SF max
Small Group Seminar (20-30 seats)/ Resource													500	0	-	
Science Classroom / Lab													1,200	0	-	1 period / day / student
Prep Room													80	0	-	
SPECIAL EDUCATION			0			0			0			0			500	
(List classrooms of different sizes seperately)																
Self-Contained SPED													950	0	-	assumed 8% of pop. in self-contained SPED
Self-Contained SPED Toilet													60	0	-	
Resource Room													500	0	-	1/2 size Genl. Clrm.
Small Group Room / Reading													500	1	500	1/2 size Genl. Clrm.
ART & MUSIC			0			0			0			0			200	
Art Classroom													1,200	0	-	assumed use - 50% population 2 times / week
Art Workroom w/ Storage & kiln													150	0	-	
Band / Chorus - 100 seats													1,500	0	-	assumed use - 50% population 2 times / week
Music Practice / Ensemble													200	1	200	
VOCATIONS & TECHNOLOGY			0			0			0			0			0	
Tech. Clrm. - (E.G. Drafting, Business)													1,200	0	-	Assumed use - 25% Population - 5 times/week
Tech. Shop - (E.G. Consumer, Wood)													2,000	0	-	Assumed use - 25% Population - 5 times/week
HEALTH & PHYSICAL EDUCATION			0			0			0			0			8,400	
Gymnasium													6,000	1	6,000	
Gym Storeroom													150	1	150	
Health Instructor's Office w/Shower & Toilet													250	1	250	
Locker Rooms - Boys/Girls w/Toilets													1,000	2	2,000	
MEDIA CENTER			0			0			0			0			2,680	
Media Center/Reading Room													2,680	1	2,680	
DINING & FOOD SERVICE			0			0			0			0			3,600	
Cafetorium/Dining													0	1	-	2 seatings - 15SF per seat
Stage													1,600	1	1,600	
Chair/Table/Equipment Storage													200	1	200	
Kitchen													1,600	1	1,600	1600 SF for first 300 + 1 SF/student Add'l
Staff Lunch Room													200	1	200	20 SF/Occupant
MEDICAL			0			0			0			0			310	
Medical Suite Toilet													60	1	60	
Nurses' Office/Waiting Room													250	1	250	
Examination Room / Resting													100	0	-	
ADMINISTRATION & GUIDANCE			0			0			0			0			2,400	
General Office / Waiting Room/Toilet													300	1	300	
Teachers' Mail and Time Room													100	1	100	
Duplicating Room													200	1	200	
Records Room													200	1	200	
Principal's Office w/ Conference Area													375	1	375	
Principal's Secretary / Waiting													125	1	125	
Assistant Principal's Office - AP1													150	1	150	
Assistant Principal's Office - AP2													150	0	-	
Supervisory / Spare Office													150	1	150	
Conference Room													350	1	350	

#345-12

Proposed Space Summary - Middle Schools

FILL IN SCHOOL NAME HERE	Existing Conditions			PROPOSED									MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
				Existing to Remain/Renovated			New			Total						
ROOM TYPE	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	Comments
Guidance Office													150	0	-	
Guidance Waiting Room													100	1	100	
Guidance Storeroom													50	1	50	
Teachers' Work Room													300	1	300	
CUSTODIAL & MAINTENANCE			0			0			0			0			1,775	
Custodian's Office													150	1	150	
Custodian's Workshop													250	1	250	
Custodian's Storage													375	1	375	
Recycling Room / Trash													400	1	400	
Receiving and General Supply													200	1	200	
Storeroom													200	1	200	
Network/Telecom Room													200	1	200	
OTHER			0			0			0			0			0	
Other *(specify)*																
Total Building Net Floor Area (NFA)			0			0			0			0			19,865	
Proposed Student Capacity/Enrollment															0	
Total Building Gross Floor Area (GFA)[2]															0	
Grossing factor (GFA/NFA)			#DIV/0!									#DIV/0!			0.00	

[1] **Individual Room Net Floor Area (NFA)** Includes the net square footage measured from the inside face of the perimeter walls and includes all specific spaces assigned to a particular program area including such spaces as non-communal toilets and storage rooms.

[2] **Total Building Gross Floor Area (GFA)** Includes the entire building gross square footage measured from the outside face of exterior walls

Architect Certification

I hereby certify that all of the information provided in this "Proposed Space Summary" is true, complete and accurate and, except as agreed to in writing by the Massachusetts School Building Authority, in accordance with the guidelines, rules, regulations and policies of the Massachusetts School Building Authority to the best of my knowledge and belief. A true statement, made under the penalties of perjury.

Name of Architect Firm: _____

Name of Principal Architect: _____

Signature of Principal Architect: _____

Date: _____

#315-12

Proposed Space Summary - High Schools

FILL IN SCHOOL NAME HERE	Existing Conditions			PROPOSED									MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
				Existing to Remain/Renovated			New			Total						
ROOM TYPE	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	Comments
CORE ACADEMIC SPACES			0			0			0			0			2,100	
(List classrooms of different sizes seperately)																
Classroom - General													850	2	1,700	825 SF min - 950 SF max
Teacher Planning													100	2	200	
Small Group Seminar (20-30 seats)													500	0	-	
Science Classroom / Lab													1,440	0	-	3 x85% ut=20 Seats-1 per /day/student
Prep Room													200	0	-	
Central Chemical Storage Rm													200	1	200	
SPECIAL EDUCATION			0			0			0			0			0	
(List classrooms of different sizes seperately)																
Self-Contained SPED													950	0	-	assumed 8% of pop. in self-contained SPED
Self-Contained SPED Toilet													60	0	-	
Resource Room													500	0	-	1/2 size Genl. Clrm.
Small Group Room													500	0	-	1/2 size Genl. Clrm.
ART & MUSIC			0			0			0			0			3,625	
Art Classroom - 25 seats													1,200	0	-	Assumed use - 25% Population - 5 times/week
Art Workroom w/ Storage & kiln													150	0	-	
Band - 50-100 seats													1,500	1	1,500	Assumed use - 25% Population - 5 times/week
Chorus - 50-100 seats													1,500	1	1,500	
Ensemble													200	1	200	
Music Practice													75	-1	(75)	
Music Storage													500	1	500	
VOCATIONS & TECHNOLOGY			0			0			0			0			-3,200	
Tech Clrm. - (E.G. Drafting, Business)													1,200	-1	(1,200)	Assumed use - 50% Population - 5 times/week
Tech Shop - (E.G. Consumer, Wood)													2,000	-1	(2,000)	Assumed use - 50% Population - 5 times/week
HEALTH & PHYSICAL EDUCATION			0			0			0			0			16,200	
Gymnasium													12,000	1	12,000	
PE Alternatives													3,000	1	3,000	
Gym Storeroom													300	1	300	
Locker Rooms - Boys/Girls w/Toilets													0		-	5.6 sf/student total
Phys. Ed. Storage													500	1	500	
Athletic Director's Office													150	1	150	
Health Instructor's Office w/Shower & Toilet													250	1	250	
MEDIA CENTER			0			0			0			0			3,650	
Media Center/Reading Room													3,650	1	3,650	
AUDITORIUM / DRAMA			0			0			0			0			2,650	
Auditorium													0	1	-	2/3 Enrollment @ 10 SF/Seat - 750 seats MAX
Stage													1,600	1	1,600	
Auditorium Storage													250	1	250	
Make-up / Dressing Rooms													300	2	600	
Controls / Lighting / Projection													200	1	200	
DINING & FOOD SERVICE			0			0			0			0			2,900	
Cafeteria / Student Lounge/ Break-out													0	1	-	3 seatings - 15SF per seat
Chair / Table Storage													300	1	300	
Scramble Serving Area													600	1	600	
Kitchen													1,600	1	1,600	1600 SF for first 300 + 1 SF/student Addl
Staff Lunch Room													400	1	400	20 SF/Occupant
MEDICAL			0			0			0			0			210	
Medical Suite Toilet													60	1	60	
Nurses' Office/Waiting Room													250	1	250	
Interview Room													100	-1	(100)	
Examination Room / Resting													100	0	-	
ADMINISTRATION & GUIDANCE			0			0			0			0			2,920	
General Office / Waiting Room/Toilet													300	1	300	

#315-12

Proposed Space Summary - High Schools

FILL IN SCHOOL NAME HERE	Existing Conditions			PROPOSED									MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
				Existing to Remain/Renovated			New			Total						
ROOM TYPE	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	ROOM NFA[1]	# OF RMS	area totals	Comments
Teachers' Mail and Time Room													100	1	100	
Duplicating Room													200	1	200	
Records Room													200	1	200	
Principal's Office w/ Conference Area													375	1	375	
Principal's Secretary / Waiting													125	1	125	
Assistant Principal's Office - AP1													150	1	150	
Assistant Principal's Office - AP2													150	0	-	
Supervisory / Spare Office													120	1	120	
Conference Room													450	1	450	
Guidance Office													150	0	-	
Guidance Waiting Room													100	1	100	
Guidance Storeroom													100	1	100	
Career Center													300	1	300	
Records Room													100	1	100	
Teachers' Work Room													300	1	300	
CUSTODIAL & MAINTENANCE			0			0			0			0			2,075	
Custodian's Office													150	1	150	
Custodian's Workshop													250	1	250	
Custodian's Storage													375	1	375	
Recycling Room / Trash													400	1	400	
Receiving and General Supply													300	1	300	
Storeroom													400	1	400	
Network/Telecom Room													200	1	200	
OTHER			0			0			0			0			0	
Other *(specify)*																
Total Building Net Floor Area (NFA)			0			0			0			0			33,130	
Proposed Student Capacity/Enrollment															0	#N/A
Total Building Gross Floor Area (GFA)[2]															#N/A	
Grossing factor (GFA/NFA)			#DIV/0!									#DIV/0!			#N/A	

[1] **Individual Room Net Floor Area (NFA)**

I hereby certify that all of the information provided in this "Proposed Space Summary" is true, complete and accurate and, except as agreed to in writing by the Massachusetts School Building Authority, in accordance with the guidelines, rules, regulations and policies of the Massachusetts School Building Authority to the best of my knowledge and belief. A true statement, made under the penalties of perjury.

[2] **Total Building Gross Floor Area (GFA)**

Includes the entire building gross square footage measured from the outside face of exterior walls

Architect Certification

I hereby certify that all of the information provided in this "Proposed Space Summary" is true, complete and accurate and, except as agreed to in writing by the Massachusetts School Building Authority, in accordance with the guidelines, rules, regulation

Name of Architect Firm: _____

Name of Principal Architect: _____

Signature of Principal Architect: _____

Date: _____

#315-12

11/21/11

Appendix 3D
Module 3 Local Actions and Approval Certification Template

Instructions: Complete the letter and certification set forth below and print on (City/Town/Regional School District) letterhead. Please submit one original, signed version of the letter and certification and one electronic version to the MSBA.

[Letterhead of City/Town/Regional School District]

[Date]

Ms. Diane Sullivan
Senior Capital Program Manager
40 Broad Street
Boston, Massachusetts 02109

Dear Ms. Sullivan:

The (*City/Town/Regional School District*) School Building Committee ("SBC") has completed its review of the Feasibility Study [*Preliminary Design Program or Preferred Schematic Report*] for the (*insert school name*) school project (the "Project"), and on (*insert date of school building committee during which the vote to submit was conducted*), the SBC voted to approve and authorize the Owner's Project Manager to submit the Feasibility Study related materials to the MSBA for its consideration. A certified copy of the SBC meeting minutes, which includes the specific language of the vote and the number of votes in favor, opposed, and abstained, are attached.

Since the MSBA's Board of Directors approved the District to proceed into schematic design on (*insert date of the MSBA Board of Directors meeting*), the SBC has held (*insert number of SBC meetings*) meetings regarding the Project, in compliance with the state Open Meeting Law. These meetings include:

[Insert a complete list of SBC meetings held to discuss and/or present to the public material related to the Project and include the following information for each meeting: the time and location of the meeting, who presented (if applicable), a summary of the concerns and comments presented, a list of the materials discussed or made available for public review, a list of votes taken and the results, and when and where notice of each meeting was posted.]

In addition to the SBC meetings listed above, the District held (*insert number of public meetings*) public meetings, which were posted in compliance with the state Open Meeting Law, at which the Project was discussed. These meetings include:

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[Insert a complete list of all public meetings held to discuss and/or present to the public material related to the Project and include the following information for each meeting: who hosted the meeting (e.g., School Committee, Board of Selectmen), the time and location of the meeting who presented (if applicable), a brief summary of the concerns and comments presented, a list of the materials discussed or made available for public review, a list of votes taken and the results, and when and where notice of each meeting was posted.

The presentation materials for each meeting, meeting minutes, and summary materials related to the Project are available locally for public review at (*insert location of materials (e.g. website, town hall, superintendent's office etc)*).

To the best of my knowledge and belief, each of the meetings listed above complied with the requirements of the Open Meeting Law, M.G.L. c. 30A, §§ 18-25 and 940 CMR 29 *et seq*.

If you have any questions or require any additional information, please contact (*insert name, title, and contact information*).

By signing this Local Action and Approval Certification, I hereby certify that, to the best of my knowledge and belief, the information supplied by the District in this Certification is true, complete, and accurate.	By signing this Local Action and Approval Certification, I hereby certify that, to the best of my knowledge and belief, the information supplied by the District in this Certification is true, complete, and accurate.	By signing this Local Action and Approval Certification, I hereby certify that, to the best of my knowledge and belief, the information supplied by the District in this Certification is true, complete, and accurate.
By:	**By:**	**By:**
Title: Chief Executive Officer	**Title: Superintendent of Schools**	**Title: Chair of the School Committee**
Date:	**Date:**	**Date:**

7/15/10

Budget Statement for Preferred Schematic - Expenditures

Category	2007-2008 FY2007 Staff (FTE)	2007-2008 FY2007 Budget	2008-2009 FY2008 Staff (FTE)	2008-2009 FY2008 Budget	2009-2010 FY2009 Staff	2009-2010 FY2009 Budget	Change from Previous Year Staff (FTE)	Change from Previous Year Budget	Post-Constuction Budget Staff	Post-Constuction Budget Budget	New Facility vs. Current Staff (FTE)	New Facility vs. Current Budget
Salaries												
Administration												
Admin. Secretary	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Assistant Principal	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Business Office	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Curriculum Director/Coord.	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Custodians/Maintenance Staff	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Executive Secretary	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Facilities Manager	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Guidance	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Adjustment Counselor	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Guidance Counselors	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Guidance Director	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Legal	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Nurse	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Other	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Principal	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Special Education Admin	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Superintendent/Asst. Superintendent	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Transportation	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Treasurer	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Total Administration	**0.00**	-	**0.00**	-	**0.00**	-	**0.00**	-	**0.00**	-	**0.00**	-
Instruction - Teaching Services												
Arts	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Business	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Communications	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Coping Instructor	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Culinary Arts	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
ELL	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
English Language	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Family Consumer Services	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Foreign Language	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Health Services	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
History & Social Science	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Instructional Assistant/Paraprofessionals	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Library/Media	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Mathematics	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
MCAS	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Music	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Other	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Physical Education	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Reading	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
School Adjustment Counselor	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Science												
Biology	0.00	-	0.00		0.00		0.00	-	0.00	-	0.00	-
Botany	0.00	-	0.00		0.00		0.00	-	0.00	-	0.00	-
Chemistry	0.00	-	0.00		0.00		0.00	-	0.00	-	0.00	-
Geology	0.00	-	0.00		0.00		0.00	-	0.00	-	0.00	-
Physics	0.00	-	0.00		0.00		0.00	-	0.00	-	0.00	-
Special Education	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Substitute Teachers	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Technology	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Vocational Tech.	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Total Instruction - Teaching Services	**0.00**	-	**0.00**	-	**0.00**	-	**0.00**	-	**0.00**	-	**0.00**	-
Total Salaries Administration & Instruction	**0.00**	-	**0.00**	-	**0.00**	-	**0.00**	-	**0.00**	-	**0.00**	-
Employee Benefits												
All employee-related fringe (health insurance, retirement etc)		-		-		-		-		-		-
Materials & Services												
Materials												
Audio-Visual Materials		-		-		-		-		-		-
Culinary Arts Materials		-		-		-		-		-		-
General Office Supplies		-		-		-		-		-		-

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Budget Statement for Preferred Schematic - Expenditures

Category	2007-2008 FY2007 Staff (FTE)	2007-2008 FY2007 Budget	2008-2009 FY2008 Staff (FTE)	2008-2009 FY2008 Budget	2009-2010 FY2009 Staff	2009-2010 FY2009 Budget	Change from Previous Year Staff (FTE)	Change from Previous Year Budget	Post-Constuction Budget Staff	Post-Constuction Budget Budget	New Facility vs. Current Staff (FTE)	New Facility vs. Current Budget
Information technology		-		-		-		-		-		-
Hardware		-		-		-		-		-		-
Software		-		-		-		-		-		-
Library Materials		-		-		-		-		-		-
Non info-tech equipment		-		-		-		-		-		-
Testing Materials & Supplies		-		-		-		-		-		-
Textbooks		-		-		-		-		-		-
Vocational Program Materials		-		-		-		-		-		-
Total Materials		-		-		-		-		-		-
Services												
Athletics		-		-		-		-		-		-
Attendance		-		-		-		-		-		-
Food Service		-		-		-		-		-		-
Health Services		-		-		-		-		-		-
Other Student Activities		-		-		-		-		-		-
Psychological Services		-		-		-		-		-		-
School Security		-		-		-		-		-		-
Student Transportation		-		-		-		-		-		-
Total Services		-		-		-		-		-		-
Total Material & Services		-		-		-		-		-		-
Facility Costs & Capital Improvements												
Facility Costs												
Custodial Supplies		-		-		-		-		-		-
Electricity		-		-		-		-		-		-
Heating Oil		-		-		-		-		-		-
Maintenance												
Building Security Maintenance		-		-		-		-		-		-
Elevator		-		-		-		-		-		-
Equipment Maintenance		-		-		-		-		-		-
Exterminating		-		-		-		-		-		-
Facility Maintenance		-		-		-		-		-		-
Fire Alarm		-		-		-		-		-		-
Fire Extinguisher Inspection		-		-		-		-		-		-
Generator		-		-		-		-		-		-
HVAC Maintenance		-		-		-		-		-		-
Other		-		-		-		-		-		-
Site Maintenance (Grouds)		-		-		-		-		-		-
Technology		-		-		-		-		-		-
Trash Removal		-		-		-		-		-		-
Natural Gas		-		-		-		-		-		-
Snow Removal		-		-		-		-		-		-
Telephone		-		-		-		-		-		-
Water/Sewer		-		-		-		-		-		-
Total Facility Costs		-		-		-		-		-		-
Captial Improvements												
Captial Improvements		-		-		-		-		-		-
Total Facility Costs & Capital Improvements		-		-		-		-		-		-
Debt Service												
Short-term		-		-		-		-		-		-
Long-term		-		-		-		-		-		-
Total Debt Service		-		-		-		-		-		-
Total Budget & Staff	0.00	-	0.00	-	0.00	-	0	-	0	-	0	-

#315-12

7/15/10

Budget Statement for Preferred Schematic - Revenue

As reported on the school district's most recent three End of Year Pupil and Financial Reports schedule 1, please report sources of revenue in the fiel

	FY08 End of Year Financial Report						
	Regular Day	Special Education	C74 Occupational Day	Adult Education	Other Programs	Un-distributed	Total
A. Revenue from Local Sources							
Assessments received by Regional Schools	-	-	-	-	-	-	-
E&D Fund Appropriations	-	-	-	-	-	-	-
Tuition from Individuals	-	-	-	-	-	-	-
Tuition from Other Districts in Comm.	-	-	-	-	-	-	-
Tuition from Districts in Other States	-	-	-	-	-	-	-
Previous Year Unexpended Encumbrances (Carry Forward)	-	-	-	-	-	-	-
Transportation Fees	-	-	-	-	-	-	-
Earnings on Investments	-	-	-	-	-	-	-
Rental of School Facilities	-	-	-	-	-	-	-
Other Revenue	-	-	-	-	-	-	-
Medical Care and Assistance	-	-	-	-	-	-	-
Non Revenue Receipts	-	-	-	-	-	-	-
Total Revenue From Local Sources	-	-	-	-	-	-	-
B. Revenue from State Aid	-	-	-	-	-	-	-
School Aid (Chapter 70)	-	-	-	-	-	-	-
Mass School Building Authority - Construction Aid	-	-	-	-	-	-	-
Pupil Transportation (Ch. 71, 71A,71B,74)	-	-	-	-	-	-	-
Charter Tuition Reimbursements & Charter Facilities Aid	-	-	-	-	-	-	-
Circuit Breaker	-	-	-	-	-	-	-
Foundation Reserve	-	-	-	-	-	-	-
Total Revenue From State Aid	-	-	-	-	-	-	-
C. Revenue from Federal Grants							
ESE Administered Grants	-	-	-	-	-	-	-
Direct Federal Grants	-	-	-	-	-	-	-
Total Revenue Federal Grants	-	-	-	-	-	-	-
D. Revenue from State Grants							
ESE Administered Grants	-	-	-	-	-	-	-
Other State Grants	-	-	-	-	-	-	-
Total Revenue From State Grants	-	-	-	-	-	-	-
E. Revenue - Revolving & Special Funds							
School Lunch Receipts	-	-	-	-	-	-	-
Athletic Receipts	-	-	-	-	-	-	-
Tuition Receipts - School Choice	-	-	-	-	-	-	-
Tuition Receipts - Other	-	-	-	-	-	-	-
Other Local Receipts	-	-	-	-	-	-	-
Private Grants	-	-	-	-	-	-	-
Total Revenue Revolving & Special Funds	-	-	-	-	-	-	-
Total Revenue All Sources	-	-	-	-	-	-	-

7/15/10

Budget Statement for Preferred Schematic - Revenue

As reported on the school district's most recent three End ds below

	FY09 End of Year Financial Report						
	Regular Day	Special Education	C74 Occupational Day	Adult Education	Other Programs	Un-distributed	Total
A. Revenue from Local Sources							
Assessments received by Regional Schools	-	-	-	-	-	-	-
E&D Fund Appropriations	-	-	-	-	-	-	-
Tuition from Individuals	-	-	-	-	-	-	-
Tuition from Other Districts in Comm.	-	-	-	-	-	-	-
Tuition from Districts in Other States	-	-	-	-	-	-	-
Previous Year Unexpended Encumbrances (Carry Forward)	-	-	-	-	-	-	-
Transportation Fees	-	-	-	-	-	-	-
Earnings on Investments	-	-	-	-	-	-	-
Rental of School Facilities	-	-	-	-	-	-	-
Other Revenue	-	-	-	-	-	-	-
Medical Care and Assistance	-	-	-	-	-	-	-
Non Revenue Receipts	-	-	-	-	-	-	-
Total Revenue From Local Sources	-	-	-	-	-	-	-
B. Revenue from State Aid	-	-	-	-	-	-	-
School Aid (Chapter 70)	-	-	-	-	-	-	-
Mass School Building Authority - Construction Aid	-	-	-	-	-	-	-
Pupil Transportation (Ch. 71, 71A,71B,74)	-	-	-	-	-	-	-
Charter Tuition Reimbursements & Charter Facilities Aid	-	-	-	-	-	-	-
Circuit Breaker	-	-	-	-	-	-	-
Foundation Reserve	-	-	-	-	-	-	-
Total Revenue From State Aid	-	-	-	-	-	-	-
C. Revenue from Federal Grants							
ESE Administered Grants	-	-	-	-	-	-	-
Direct Federal Grants	-	-	-	-	-	-	-
Total Revenue Federal Grants	-	-	-	-	-	-	-
D. Revenue from State Grants							
ESE Administered Grants	-	-	-	-	-	-	-
Other State Grants	-	-	-	-	-	-	-
Total Revenue From State Grants	-	-	-	-	-	-	-
E. Revenue - Revolving & Special Funds							
School Lunch Receipts	-	-	-	-	-	-	-
Athletic Receipts	-	-	-	-	-	-	-
Tuition Receipts - School Choice	-	-	-	-	-	-	-
Tuition Receipts - Other	-	-	-	-	-	-	-
Other Local Receipts	-	-	-	-	-	-	-
Private Grants	-	-	-	-	-	-	-
Total Revenue Revolving & Special Funds	-	-	-	-	-	-	-
Total Revenue All Sources	-	-	-	-	-	-	-

7/15/10

Budget Statement for Preferred Schematic - Revenue

As reported on the school district's most recent three End

	FY10 End of Year Financial Report						
	Regular Day	Special Education	C74 Occupational Day	Adult Education	Other Programs	Un-distributed	Total
A. Revenue from Local Sources							
Assessments received by Regional Schools	-	-	-	-	-	-	-
E&D Fund Appropriations	-	-	-	-	-	-	-
Tuition from Individuals	-	-	-	-	-	-	-
Tuition from Other Districts in Comm.	-	-	-	-	-	-	-
Tuition from Districts in Other States	-	-	-	-	-	-	-
Previous Year Unexpended Encumbrances (Carry Forward)	-	-	-	-	-	-	-
Transportation Fees	-	-	-	-	-	-	-
Earnings on Investments	-	-	-	-	-	-	-
Rental of School Facilities	-	-	-	-	-	-	-
Other Revenue	-	-	-	-	-	-	-
Medical Care and Assistance	-	-	-	-	-	-	-
Non Revenue Receipts	-	-	-	-	-	-	-
Total Revenue From Local Sources	-	-	-	-	-	-	-
B. Revenue from State Aid	-	-	-	-	-	-	-
School Aid (Chapter 70)	-	-	-	-	-	-	-
Mass School Building Authority - Construction Aid	-	-	-	-	-	-	-
Pupil Transportation (Ch. 71, 71A,71B,74)	-	-	-	-	-	-	-
Charter Tuition Reimbursements & Charter Facilities Aid	-	-	-	-	-	-	-
Circuit Breaker	-	-	-	-	-	-	-
Foundation Reserve	-	-	-	-	-	-	-
Total Revenue From State Aid	-	-	-	-	-	-	-
C. Revenue from Federal Grants							
ESE Administered Grants	-	-	-	-	-	-	-
Direct Federal Grants	-	-	-	-	-	-	-
Total Revenue Federal Grants	-	-	-	-	-	-	-
D. Revenue from State Grants							
ESE Administered Grants	-	-	-	-	-	-	-
Other State Grants	-	-	-	-	-	-	-
Total Revenue From State Grants	-	-	-	-	-	-	-
E. Revenue - Revolving & Special Funds							
School Lunch Receipts	-	-	-	-	-	-	-
Athletic Receipts	-	-	-	-	-	-	-
Tuition Receipts - School Choice	-	-	-	-	-	-	-
Tuition Receipts - Other	-	-	-	-	-	-	-
Other Local Receipts	-	-	-	-	-	-	-
Private Grants	-	-	-	-	-	-	-
Total Revenue Revolving & Special Funds	-	-	-	-	-	-	-
Total Revenue All Sources	-	-	-	-	-	-	-

11/21/11

Appendix 3F
Module 3 Feasibility Study Completion Checklist

Submittal	Submittal Date	Review comments addressed
3.1 Preliminary Design Program		
3.1.7 Local Actions and Approval Certification		N/A
3.3.2 Preferred Schematic Report		
3.3.2.9 Local Actions and Approval Certification		N/A
3.4.1 Conference Call		
3.4.2 Facilities Assessment Subcommittee Meeting		
3.4.3 MSBA Board approval	N/A	
3.5 MSBA Board Action Letter denoting approval of authorization to proceed to schematic design	Date Received	N/A

By signing this Feasibility Study Completion Checklist, I hereby certify that I have read and understand the checklist and further certify that the information supplied by the District in the table above is true, accurate, and complete.

By:

Title: Chief Executive Officer

Date:

By signing this Feasibility Study Completion Checklist, I hereby certify that I have read and understand the checklist and further certify that the information supplied by the District in the table above is true, accurate, and complete.

By:

Title: Superintendent of Schools

Date:

By signing this Feasibility Study Completion Checklist, I hereby certify that I have read and understand the checklist and further certify that the information supplied by the District in the table above is true, accurate, and complete.

By:

Title: Chair of the School Committee

Date:

Massachusetts School Building Authority

Steven Grossman
Chairman, State Treasurer

Katherine P. Craven
Executive Director

Module 4
Schematic Design

April 2011

4/6/11

INTRODUCTION

Module 4 – Schematic Design:

If the District has completed all tasks defined in Module 1 – Prerequisites, Module 2 – Project Team and Module 3 – Feasibility Study and submitted the Completion Checklists for Module 3, the District may now proceed with Schematic Design as outlined in this Module. Module 4 – Schematic Design is one of eight modules developed by the Massachusetts School Building Authority ("MSBA") that are intended to provide a guide to the procedures and approvals needed to work collaboratively with the MSBA. The Program Overview and listing of eight modules is provided in Appendix 4A for reference.

Welcome to Module 4 – Schematic Design

During Schematic Design, the District and its team collaborate with the MSBA to develop a robust schematic design of sufficient detail to establish the scope, budget and schedule upon which to evaluate the basis for a proposed project, secure approval of the proposed project by the MSBA's Board of Directors and to obtain Department of Elementary and Secondary Education approval of the proposed project for delivery of the district's special educational program.

Module 4 begins with the MSBA's Board of Directors approving the preferred solution and concludes with the MSBA's Board of Directors authorizing the MSBA Executive Director to enter into a Project Scope and Budget Agreement and a Project Funding Agreement with the District for a specific project scope, budget and schedule. See this Module for additional detail.

Module 4 has been provided as a general guide for Districts and their teams to plan their work in a collaborative effort in accordance with the MSBA's procedures and requirements. This Module is not intended to replace and/or supersede MSBA regulations, agreements, or the services required by the OPM and/or Designer contracts. The Designer and OPM each shall be solely responsible for performing the services required by its contract with the District, respectively, and nothing in this Module shall be construed as relieving the Designer or OPM from its duties and responsibilities.

Schematic Design Participants should include, at a minimum, the following:

- **The School Building Committee** as submitted by the District and approved by the MSBA in its School Building Committee Approval form, as well as elected officials and other District representatives, as deemed necessary by the District to show the educational and financial support of the city/town/regional district for the Proposed Project.

- **The Owner's Project Manager** as selected by the District and approved by the MSBA in accordance with MSBA regulations and policies.

- **The Designer** as selected locally by the District and approved by the MSBA for projects under $5 million or as selected through the MSBA's Designer Selection Panel for projects over $5 million.

- **The MSBA,** through the assigned MSBA Project Manager and Field Coordinator.

Schematic Design Submittal Procedures

All documents and materials submitted to the MSBA during the course of Schematic Design must be transmitted by the Owner's Project Manager ("OPM"). The OPM is required to compile and coordinate all submittals prior to delivery to the MSBA. This includes not only those items required to be provided by the OPM, but also those required to be provided by the Designer and/or the District.

For each submittal to the MSBA, the Designer and District must submit the required materials to the OPM. The OPM shall compile the submittal with the items indicated in the Designer and OPM Contracts, confirm that the District's School Building Committee has officially approved the submittal and verify its completeness and conformity to MSBA requirements. The OPM shall then forward this submittal to the assigned MSBA field coordinator under a separate cover letter signed by the OPM. The cover letter shall include a certification from the OPM that (1) the OPM has reviewed and coordinated the materials, (2) the submittal is complete, and (3) the District has approved the materials for submission to the MSBA, in accordance with Section 8.1.1.2 of the OPM Contract which requires the OPM to "... assist the Owner in the preparation of all information, material, documentation and reports that may be required or requested by the Authority...." Submittals shall be in the form of two hard copies (half-sized drawings, other Figures no larger than "11x17") and one electronic file in PDF format.

Incomplete submittals or submittals not reviewed by the OPM will not be accepted. Partial submittals will no longer be accepted without prior written approval by the MSBA.

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APPENDICES

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Massachusetts School Building Authority

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

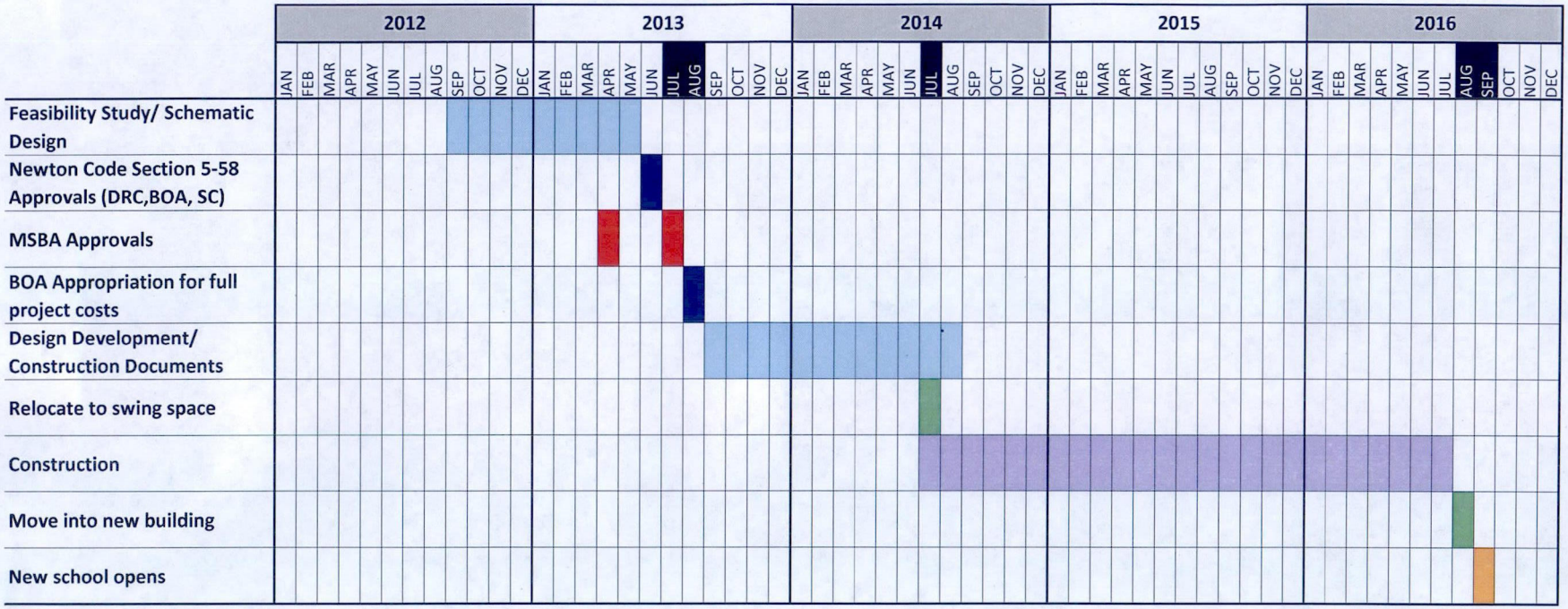
Module 5 – Funding the Project

Based upon the completed Feasibility Study and the steps outlined in Module 4 – Schematic Design (http://www.massschoolbuildings.org/building/schematic), the District and MSBA staff establish and document the project scope, budget, schedule, and MSBA financial participation to forward to the MSBA Board of Directors for their approval. Approval by the MSBA Board of Directors establishes the MSBA participation in the proposed project. Module 5 – Funding the Project (/sites/default/files/edit-contentfile/Build%20With%20Us/Funding%20the%20Project/Module%205%20-%20Funding%20the%20Project.pdf) provides guidance on MSBA vote language (http://www.massschoolbuildings.org/sites/default/files/edit-contentfile/Guidelines_Forms/Vote%20Requirements/Project_Scope_Budget_Vote_Language_Bulletin_Sept_20_2008.pdf) and outlines the steps necessary to be completed by the District to enter into a Project Scope and Budget Agreement and a Project Funding Agreement with the MSBA. The District should utilize the Module 5 – Funding the Project Completion Checklist (/sites/default/files/edit-contentfile/Build%20With%20Us/Funding%20the%20Project/Module%205%20-%20Funding%20the%20Project%20Completion%20Checklist.doc) to ensure that it has completed all steps.

Upon Board approval of a proposed project, the District and the MSBA may enter into a Project Scope and Budget Agreement (http://www.massschoolbuildings.org/sites/default/files/edit-contentfile/Guidelines_Forms/Contracts_Forms/MSBA_TEMPLATE_FORWEB_7_09.pdf) that defines the project scope, budget, schedule, and potential MSBA participation in the project. Once the District secures community authorization and financial support, the MSBA and the District enter into a Project Funding Agreement, which also defines the scope, budget and schedule for the project. Once a Project Funding Agreement (/building/funding/agreements) is executed, the District can begin submitting requests for reimbursement (http://www.massschoolbuildings.org/building/funding/reimbursements) to the MSBA for project costs beyond the feasibility study.

Angier Elementary School - Newton, MA

Projected Milestone Schedule: Feasibility Study/Schematic Design (2012) through New School Opening (2016)



LEGEND

- design
- MSBA approvals
- moving
- construction
- Local approvals
- school opening

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JOSLIN LESSER Project Management