

**BELMONT HIGH SCHOOL BUILDING COMMITTEE  
OWNER'S PROJECT MANAGER (OPM) SUBCOMMITTEE  
FINAL MEETING MINUTES  
Tuesday, December 13, 2016  
Town Hall ~ Selectmen's Meeting Room  
7:30 AM**

2017 JAN 31 AM 9:52

**Meeting #1**

*Subcommittee Members Attending:*

Chair McLaughlin; Members: Gerry Boyle, Phyllis Marshall, Pat Brusch, and Bill Lovallo

*Members Absent:* Joel Mooney

**I. Call to Order**

The meeting was called to order at 7:35 a.m. by Mr. Lovallo. He then noted that the subcommittee needs to elect a Chair and a Secretary. This was briefly discussed.

**II. The OPM Subcommittee Leadership:**

*Ms. Marshall moved:* That Mr. McLaughlin serve as *Chair* of the OPM subcommittee.  
The motion passed unanimously.

*Ms. Brusch moved:* That Mr. Boyle serve as *Secretary* of the OPM subcommittee.  
The motion passed unanimously.

**III. Development of Draft OPM Request for Services**

Ms. Marshall distributed materials concerning the OPM Request for Services (RFS). (Please note: the RFS is a *draft* document).

The subcommittee reviewed the OPM Request for Services draft and briefly discussed the following:

- the cost of the project (which estimate to use?)
- the prospect of the bid being challenged
- the ad (legal notice) for the bids
- the potential need for legal counsel to review the RFS
- the duties of the OPM for a CM-at-Risk process and when the CM-at-Risk would enter the process
- Ms. Brusch reviewed the CM-at-Risk process for the Wellington project
- the MSBA language concerning the BHS Building Committee versus the Belmont School Committee – a question arose concerning if the School Committee needs to approve the RFS
- the need for a bi-weekly call (and/or email chain) with an MSBA representative (Ms. Jess Deleconio) to trouble shoot questions as they arise

Ms. Marshall then reviewed the draft document (Request for OPM Services). Mr. Lovallo suggested adding a brief description, which will provide an overview of Belmont. Ms. Marshall agreed to do so

and then referenced the Statement of Interest (SOI). She explained why she left the Priorities section in. Ms. Brusch underscored the need for the *district-wide* enrollment challenges to be emphasized, perhaps in the Background section. The subcommittee agreed that the unprecedented enrollment facing Belmont Public Schools is a huge driver for the “three configuration” options conversation. The CM-at-Risk option, it was agreed, needs to be listed as a possibility. Mr. Lovallo explained the need for the environmental code criteria (LEED certified versus CHPS). Ms. Brusch explained the differences in LEED and CHPS.

#### **IV. OPM Selection Process Timing**

Mr. Lovallo took a step back and reviewed the overall schedule/timing of the RFS process as well as the overall project schedule. He explained the reason for the urgency concerning the creation of the RFS; it has a target submission date to the MSBA for review before the holiday break. The subcommittee pondered whether or not 10 days is enough time to assemble the RFS.

#### **V. Development of Draft OPM Request for Services (continued)**

The subcommittee discussed various time durations for the following phases:

- Feasibility Study/Schematic Design Phase
- Design Development/Construction Documents/Bidding Phase
- Construction Phase

The subcommittee discussed the minimum requirements and the selection process/schedule criteria. Concerning the selection process, Mr. Lovallo proposed a process. The subcommittee will receive, grade, and rank, at least three applicants to be interviewed. The subcommittee will then check references of these three applicants, will send an invite with an interview agenda (prior to the interview), and will interview the applicants (the subcommittee will prepare a list of questions ahead of time).

Mr. Lovallo briefly reviewed the advertising process. The evaluation criteria (ranking/scoring process) was then discussed.

Mr. Boyle and Ms. Marshall intend to complete the *draft* RFS document by Monday, 12/19/16. The draft will be voted on by the full BHSBC on Thursday, December 22, 2016 at 4:30 p.m.

**Next Meetings:**      OPM Subcommittee    Tuesday, December 20, 2016 at 4:00 p.m.  
                                          BHSBC                                  Thursday, December 22, 2016 at 4:30 p.m.

#### **IX. Related Meeting Documents:**

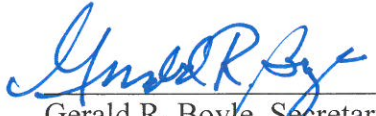
1. Request for OPM Services (draft RFS from the MSBA)
2. BHS OPM Selection Process Timing
3. Belmont High School Statement of Interest
4. Town of Natick’s RFS for OPM Services

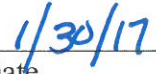
#### **XI. Adjournment**

The meeting was adjourned at 9:36 a.m. by Chair McLaughlin.

Respectfully submitted by:

Lisa Gibalerio

Approved:   
Gerald R. Boyle, Secretary

  
Date

<b>BELMONT HIGH SCHOOL</b>				
<b>Owner's Project Manager Selection Process</b>				
December 8, 2016				
No	Date	Duration	Task	Comment
1	November 17, 2016		set agenda for OPM selection	obtain RFS material from MSBA
2	December 1, 2016		draft RFS from boilerplate	
3	December 8, 2016		BC mtg #10, SC formed and authorized by BC	SC meets to finalize RFS, finalize rated evaluation criteria
4	December 8, 2016	1 week for review	Town council review RFS boilerplate	
5	December 15, 2016	1 week to finalize RFS	BC mtg #11, SC submit RFS for authorization by BC	
6	December 15, 2016	2 weeks for review	submit RFS to MSBA for review	
7	December 15, 2016	1 week for review	submit MSBA OPM contract to Town Council for review	
8	December 30, 2016	submission + 2 wks	MSBA responds with RFS review comments	SC meets to update RFS if needed
9	January 3, 2017	Tuesday	SC places advertisement for OPM	
10	January 5, 2017		BC meeting #12	mtg with WBC to discuss lessons learned
11	January 12, 2017	Thursday	CR runs advertisement	
12	January 19, 2017	advertisement + 1 wk	walk through for respondents	not mandatory
13	January 26, 2017	advertisement + 2 wks	deadline for RFS questions	
14	February 1, 2017	advertisement + 3 wks	deadline for RFS responses	
15	February 2, 2017		BC meeting #13	SC update on responses
16	February 13, 2017	responses + 10 days	SC evaluates responses and prepares short list of 3 to 5 firms	
17	February 15, 2017	2 days	interview short list firms	
18	February 20, 2017	1 week	school vacation week	
19	February 28, 2017	interview + 12 days	SC ranks and selects OPM	call references for all short list firms
20	March 2, 2017		BC meeting #14 to confirm OPM	negotiate fee with OPM, complete MSBA selection report
21	March 16, 2017	confirmation + 2 wks	submit OPM selection report to MSBA	1 week for review comments
22	March 23, 2017	submission + 1 wk	receive comments by MSBA	
23	March 30, 2017	comments + 1 wk	final submittal of MSBA selection report	
24	April 3, 2017		MSBA OPM selection board vote of approval	Board meets first Monday of month
25	April 6, 2017		BC meeting #15, execute contract with OPM	

## Massachusetts School Building Authority

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### Next Steps to Finalize Submission of your FY 2015 Statement of Interest

Thank you for submitting your FY 2015 Statement of Interest (SOI) to the MSBA electronically. **Please note, the District's submission is not yet complete.** The District is required to print and mail a hard copy of the SOI to the MSBA along with the required supporting documentation, which is described below.

Each SOI has two Certification pages that must be signed by the Superintendent, the School Committee Chair, and the Chief Executive Officer\*. Please make sure that **both** certifications contained in the SOI have been signed and dated by each of the specified parties and that the hardcopy SOI is submitted to the MSBA with **original signatures**.

**SIGNATURES: Each SOI has two (2) Certification pages that must be signed by the District.**

In some Districts, two of the required signatures may be that of the same person. If this is the case, please have that person sign in both locations. Please do not leave any of the signature lines blank or submit photocopied signatures, as your SOI will be incomplete.

*\*Local chief executive officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated as the chief executive office under the provisions of a local charter.*

**VOTES: Each SOI must be submitted with the proper vote documentation.** This means that (1) the required governing bodies have voted to submit each SOI, (2) the specific vote language required by the MSBA has been used, and (3) the District has submitted a record of the vote in the format required by the MSBA.

- **School Committee Vote:** Submittal of all SOIs must be approved by a vote of the School Committee.
  - For documentation of the vote of the School Committee, Minutes of the School Committee meeting at which the vote was taken must be submitted with the original signature of the Committee Chairperson. The Minutes must contain the actual text of the vote taken which should be substantially the same as the MSBA's SOI vote language.
- **Municipal Body Vote:** SOIs that are submitted by cities and towns must be approved by a vote of the appropriate municipal body (e.g., City Council/ Aldermen/Board of Selectmen) in addition to a vote of the School Committee.
  - Regional School Districts do not need to submit a vote of the municipal body.
  - For the vote of the municipal governing body, a copy of the text of the vote, which shall be substantially the same as the MSBA's SOI vote language, must be submitted with a certification of the City/Town Clerk that the vote was taken and duly recorded, and the date of the vote must be provided.

**CLOSED SCHOOLS: Districts must** download the report from the "Closed School" tab, which can be found on the District Main page. Please print this report, which then must be signed by the Superintendent, the School Committee Chair, and the Chief Executive Officer. A signed report, with original signatures must be included with the District's hard copy SOI submittal. **If a District submits multiple SOIs, only one copy of the Closed School information is required.**

**ADDITIONAL DOCUMENTATION FOR SOI PRIORITIES #1 AND #3:** If a District selects Priority #1 and/or Priority #3, the District is required to submit additional documentation with its SOI.

- If a District selects Priority #1, Replacement or renovation of a building which is structurally unsound or otherwise in a condition seriously jeopardizing the health and safety of the school children, where no alternative exists, the MSBA requires a hard copy of the engineering or other report detailing the nature and severity of the problem and a written professional opinion of how imminent the system failure is likely to manifest itself. The District also must submit photographs of the problematic building area or system to the MSBA.
- If a District selects Priority #3, Prevention of a loss of accreditation, the MSBA requires the full accreditation report(s) and any supporting correspondence between the District and the accrediting entity.

**ADDITIONAL INFORMATION:** In addition to the information required with the SOI hard copy submittal, the District may also provide any reports, pictures, or other information they feel will give the MSBA a better understanding of the issues identified at a facility.

If you have any questions about the SOI process please contact Diane Sullivan at 617-720-4466 or [Diane.Sullivan@massschoolbuildings.org](mailto:Diane.Sullivan@massschoolbuildings.org).

## Massachusetts School Building Authority

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School District Belmont

District Contact Anthony DiCologero TEL: (617) 993-5430

Name of School Belmont High

Submission Date 3/31/2015

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### SOI CERTIFICATION

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

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

Name of School Belmont High

**Chief Executive Officer \***

Andrés T. Rojas

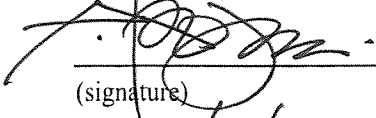
**School Committee Chair**

Laurie Q. Slap

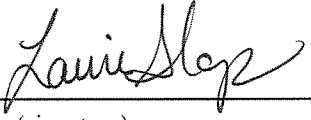
**Superintendent of Schools**

John P. Phelan

Chair, Board of Selectmen



(signature)



(signature)



(signature)

Date 04/01/15

Date 4/1/15

Date 4/1/15

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



## Massachusetts School Building Authority

School District Belmont

District Contact Anthony DiCologero TEL: (617) 993-5430

Name of School Belmont High

Submission Date 3/31/2015

### Note

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

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

### SOI Vote Requirement

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

Potential Project Scope: Renovation/ Addition

Is this SOI the District Priority SOI? YES

School name of the District Priority SOI: 2015 Belmont High

Is this part of a larger facilities plan? YES

If "YES", please provide the following:

Facilities Plan Date: 10/15/2004

Planning Firm: Design Partnership of Cambridge, Inc.

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

Since 2004, the district has adjusted the plan as follows: The overall increase in the Belmont Public School (BPS) enrollment is a major concern for the district. BPS has seen an increase of 317 and is projected to see at least a total of 725 new students over a ten year period. This projection does not take into effect two building projects within the Town that when completed would bring over 400 units of living space (via apartments and condominiums) to Belmont. The district has completed several research studies to analyze this K-12 dilemma, and one option is to relieve pressure on our overcrowded middle school (serving over 1300 students in grades 5-8) by proposing a high school plan (SOI) to the MSBA that would involve an 8-12 high school facility. Thus, solving two problems (overcrowded middle school, overcrowded and decrepit high school) with one building program. 1. Goal One – solve issue of over enrollment at the middle school and high school. 2. Goal Two – increase learning space for high school. 3. Goal Three – utilization of space at high school in a collaborative 21st Century learning model. 4. Goal Four – provide adequate science / STEM space for students and programs. 5. Goal Five – increase the quality of every aspect of the high school facility.

**Please provide the current student to teacher ratios at the school facility that is the subject of this SOI: 23 students per teacher**

**Please provide the originally planned student to teacher ratios at the school facility that is the subject of this SOI: 16 students per teacher**

**Does the District have a Master Educational Plan that includes facility goals for this building and all school buildings in District? YES**

**If "YES", please provide the author and date of the District's Master Educational Plan.**

ARCADD, Inc. dated April 23, 1999.

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

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

Over a 5 years period, Belmont Public Schools, K-12, has seen an increase in enrollment. Specifically, Belmont High School has seen an increase the past three years and anticipates the growth to continue. Below are the aggregate increases over a 5 year period:

**Belmont Public Schools K-12 Enrollment**

Date - Enrollment - Difference year-to-year

Oct. 1 1009 3905

Oct. 1, 2010 3877 - 28

Oct. 1, 2011 3900 - 23

Oct. 1, 2012 3994 - 94

Oct. 1, 2013 4136 - 42

Oct. 1, 2014 4222 - 86

\*Difference, 2009-2014 - 317

**Belmont Public Schools k-12 Projected Enrollment Based on NESDEC Plus 30 Index**

Date Enrollment - Difference 2014-2019

Oct. 1 2019 4630 - 408

**Belmont High School Enrollment**

Date - Enrollment - Difference year-to-year

Oct. 1, 2009 1119

Oct. 1, 2010 1104 - 15

Oct. 1, 2011 1083 - 21

Oct. 1, 2012 1120 - 37

Oct. 1, 2013 1183 - 63

Oct. 1, 2014 1236 - 53

Because of the increasing enrollment at Belmont High School, the delivery of instruction, and the ability to assess students has been negatively impacted as well as simply accommodating the appropriate educational setting for students. For example, when students are not scheduled for a class, they are allowed to meet with teachers, go to the library or cafeteria. Since the increase in enrollment and the limited facility space available to students, the library will often reach full capacity and be forced to close the doors to additional students. Students will often wait outside the library and wait for other students to exit the space before being allowed to enter.

To help provide additional study space for students during the school day, the Little Theater has been made available. This space traditionally has been reserved for performances, class presentations and lectures only. When the room is not occupied, students are allowed to use the space to socialize and complete their school work. Unfortunately, the space is not supervised, and the administration frequently needs to limit the access to students.

To assist in alleviating the school's overcrowding problem, 30 benches have been purchased and placed in the hallway for students to access. The benches are utilized every period of the day and has only shifted the student overflow concerns to the hallways.

For the past several years, Belmont High School has offered open campus to seniors who meet the academic, attendance and discipline criteria. Students who meet the criteria are allowed to leave school during their free time. To help address the student overcrowding concerns, open campus was extended to the junior class. Offering open campus to the both seniors and juniors has assisted in managing the overcrowding concerns during the school day. Many teachers are teaching in different classrooms instead of delivering instruction in one classroom.

Because of the limited classroom space, the number of teachers sharing rooms has increased. Below are the statistics for the past two years:

Year - # of Teachers - # of Rooms  
2013-2014 - 9 Taught in 2 classrooms  
2013-2014 - 2 Taught in 3 classrooms  
  
2014-2015 - 13 Taught in 2 classrooms  
2014-2015 - 3 Taught in 3 classrooms

As a direct result of the enrollment increase and limited facility space, teaching and learning has been impacted. Teachers are restricted in delivering their instruction, the number of assessments, and covering the required amount of curriculum. To accommodate the increase in enrollment, students are being taught in modified classroom spaces. Below are some examples:

Original classrooms converted to smaller classroom to add additional space  
1970's stadium style classrooms designed originally for science lecture rooms now accommodate wellness classes  
An originally designed garage attached to the building has been converted to a large orchestra and music classroom

The current confinements do not support faculty and staff in meeting the school-wide expectations for students in providing a 21st century education to prepare students for college and career ready.

Each faculty and staff department is segregated from each other. As a result, faculty and staff are not afforded the opportunity to communicate and collaborate. Teachers often make a strong attempt to work with each other but are faced with facility challenges, i.e., limited classroom space, no school-wide faculty and staff room, limited computer space rooms, no collaborative teacher work rooms.

**Has the district had any recent teacher layoffs or reductions?** YES

**If "YES", how many teaching positions were affected?** 10

**At which schools in the district?** All schools in the district

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

No recent layoffs have occurred. However, there is an override question on the ballot for 4/7/15. If passed, no layoffs will occur. If not passed, 10.5 teaching FTEs will be eliminated in music, PE, english, math, science, social stud., and reading.

**Has the district had any recent staff layoffs or reductions? YES**

**If "YES", how many staff positions were affected? 14**

**At which schools in the district? All schools in the district**

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

No recent layoffs have occurred. However, there is an override question on the ballot for 4/7/15. If passed, no layoffs will occur. If not passed, 14 non-teaching FTEs will be eliminated in admin., clerical, guidance, aides, library, and custodial.

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

High School Impact is as follows: FTE Reduction 4.8. Reductions in ELA and math will result in average class size of 27 students. Reductions in science and social studies will not allow any student to take an additional course in these areas, only seniors looking for a 5th course. Reductions will result in the loss of all 5th year courses – cutting AP courses in Chinese, Spanish, Latin, and French AP and Honors. Reductions will result in the loss of all third year art. Open campus extended to juniors starting in September. Increased amount of “frees” housed in the cafeteria, library and halls. Twelfth graders will only be allowed to take 5 classes, 11th - 5 ½, and 10th - 6. Many teachers are teaching in different classrooms instead of delivering instruction in one classroom. In 2013-14, 9 teachers taught in 2 classrooms and 2 teachers taught in 3 classrooms. In 2014-15, 13 teachers taught in 2 classrooms and 3 teachers taught in 3 classrooms.

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

There is an override question on the ballot on 4/7/15, which will directly affect the FY16 Budget. If the override is not passed the district will need to manage a \$1.7 Million shortfall for FY16. There will be 24.6 FTEs eliminated including 10.5 teaching FTEs in the areas of music, physical education, English, math, science, social studies, foreign language, art, reading, and preschool. Also, 14.1 non-teaching FTEs will be eliminated if the override is not passed in clerical support, instructional aides, assistant principal, guidance counselors, science coordinator, science curriculum director, library aides, custodian, and physical therapist positions. In this scenario, non-salary reductions will be in instructional supplies and materials, professional development, facilities maintenance and repairs. These reductions will negatively impact the district's ability to maintain school facilities; will increase class size -- and more dramatically increase student to instructional staff ratio regardless of class size by reducing aides at the elementary level -- and eliminate some course offerings at the secondary level. If the override is passed on 4/7/15, no budget-driven reductions would be anticipated. Ten additional FTEs would be hired throughout the district to address growing enrollment. Facilities spending would increase modestly to address maintenance and repairs in school buildings.

## General Description

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

Belmont High School was constructed as a new building on a vacant site and opened in 1970. There have been no additions or major renovations since it opened. The existing infrastructure is original equipment with the exception of replacement of all HVAC units on the roof of the building.

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

257120

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

Belmont High School was constructed on the present 33 acre site and opened in 1970. A field house (which provides locker room space) and an ice rink are also on the high school property as separate, stand-alone buildings. There is a retention pond located on the site, which periodically overflows, resulting in flooding in the parking lot and in portions of the school building.

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

221 Concord Avenue, Belmont, MA 02478

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

In October, 2004 a Master Plan and Feasibility Study for Renovations to Belmont High School was issued by Design Partnership of Cambridge. That report made the following observations about the building enclosure. Belmont High School was designed by the architectural firm of KLQ of Foxboro, Massachusetts. The building is a steel and concrete frame supporting brick exterior walls with precast concrete trim, and brick and other masonry is used extensively on the interior also. The construction is, overall, substantial. DPC's evaluation shows that all elements of the exterior envelope, with the exception of the roof, are due for either replacement (e. g. all classroom windows) or repair.

**Has there been a Major Repair or Replacement of the EXTERIOR WALLS?** YES

**Year of Last Major Repair or Replacement:(YYYY)** 2012

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

A building envelope study conducted by the engineering firm of Russo, Barr Associates in 2006 recommended the repointing of all masonry walls, replacing deteriorating steel lintels and replacing metal panel systems at the High School, at an estimated cost of \$370,000. At the annual Town Meeting in April 2008, the Town approved \$81,000 to begin the first phase of that project, which has been completed. The overall project has been completed.

**Roof Section** A

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

**Area of Section (square feet)** 150000

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

Sarnafil membrane roof

**Age of Section (number of years since the Roof was installed or replaced)** 19

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

Minor isolated repairs only

**Window Section A**

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

**Windows in Section (count)** 150

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

Existing windows are original to the building. They are fixed glass with hopper-style vents

**Age of Section (number of years since the Windows were installed or replaced)** 45

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

Reglazing of exterior extrusions. Translucent panels in the athletic wing of the building were replaced over a multi-year phase-in, completed in FY11.

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

From the October 2004 Master Plan, Design Partnership of Cambridge made the following observations about the mechanical and electrical systems. Virtually all components of the building's mechanical and electrical systems need attention. They are all, with minor exceptions, original equipment and have exceeded their design life expectancy. The boilers are oil-fired steam, feeding roof mounted air handling units directly and supplying hot water via converters to unit ventilators on the periphery of the building. Steam systems are very difficult to control. The building's electrical system is also original equipment, with the exception of some upgrades to the tel/data network made necessary by changing technologies. DPC's consultant electrical engineers and RDK Engineers, noted that the then 30-year old power distribution system is beyond its expected useful life. In addition to an increased frequency of component failures, replacement parts are becoming more scarce with time.

**Boiler Section 1**

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

**Is there more than one boiler room in the School?** NO

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

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

Dual fuel capacity (natural gas and oil). Natural gas is used as the primary heating source

**Age of Boiler (number of years since the Boiler was installed or replaced)** 45

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

The three boilers in the boiler room are original to the building. In FY14 all three boilers were retrofitted with dual fuel burners.

**Has there been a Major Repair or Replacement of the HVAC SYSTEM?** YES

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

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

The basic HVAC system consists of unit ventilators providing heat and outdoor air to most spaces that border an exterior wall, and sixteen rooftop air handling units providing heat, outdoor air and cooling in some interior spaces. In 2006, as part of a townwide Energy Service Company (ESCO) project, six of the rooftop units were replaced. At the annual Town Meeting in April 2007, \$1,000,000 was authorized for borrowing to fund the replacement of the ten remaining rooftop units. That project was completed in 2008. Repair and upgrading of unit ventilators in classrooms is being performed and is currently ongoing.

In 2014 an air exhaust evacuation system was installed in the indoor pool area located in the athletics wing of the building.

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

**Year of Last Major Repair or Replacement:(YYYY) 1970**

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

The majority of the electrical system is original to the building. Only minor replacement of some subpanels has occurred.

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

From the October 2004 Master Plan and Feasibility Study for Renovations to Belmont High School, Design Partnership made the following observations about the building interior. The quality of interior finish is high with many high-use areas featuring quarry tile flooring and other low maintenance materials. Besides employing exclusively non-combustible materials, the design made liberal use of spray-on fireproofing, whose asbestos-content will add to the difficulty and cost of repair and renovation work. The interior finishes are tired. Floor tiles throughout the building contain asbestos. Although this material poses no threat until it is disturbed, it must be removed and replaced as part of any meaningful renovation program. Above the suspended ceilings, structural beams are treated with asbestos containing spray-on fire retardant. The vast majority of the suspended ceiling tiles are original to the building and have started to deteriorate. While the ceiling tiles themselves do not contain asbestos, a number have fallen out of the ceiling and have been replaced. This is an ongoing operational task that has a financial impact to the district. Most other finished areas will be disturbed by necessary work to address barrier-free access or by re-planning spaces for more effective and efficient use by evolving educational and support programs.

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

Belmont High School offers a core academic program focused on college preparatory. Each year approximately 90% of the graduates go on to 4 year schools, 4% go on to two year schools, 1% go on to prep schools or gap year, 1% go into the military or employment, and 4% are categorized as "other". Students must meet the following graduation requirements:

- \* 4 years of English
- \* 4 years of math
- \* 4 years of science
- \* 3 years of social studies
- \* 2 years of a foreign language
- \* 1 year of fine and performing arts
- \* 4 years of physical education
- \* senior thesis
- \* 40 hours of community service

With an emphasis on preparing students for college, there are limited offerings for students to pursue an area of interest, i.e., industrial arts, business, graphic design, etc. The physical constraints of the facility allow limited flexibility for students to partake in exploratory electives. Over the years, space has been modified to allow programs to be introduced. For example, the garage space has been converted over to an orchestra and chorus room, home economics rooms have been converted into art rooms, classrooms have been divided up to create small learning community centers for special education, office space has been converted over to a English Language Learner (ELL) classroom, science stadium seating lecture halls have been converted over to wellness classrooms, and storage and office space has been converted over to the METCO student workroom/directors office.

The New England Association of Schools and Colleges (NEASC) report of 2002 and 2013 both identified the limited space at Belmont High School as negatively impacting the delivery of instruction and curriculum. As a result, Belmont High School was placed on warning for facilities in 2002 and 2013. Since the building poses an obstacle to properly deliver a 21st century education, Belmont High School was also placed on warning in the area of curriculum. Even though

modifications have been made to classroom space, Belmont High School remains on warning in the area of facilities and curriculum.

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

A detailed description of every instructional space can be found within the 2004 Master Plan, a hardcopy of which has been filed with the MSBA with the original SOI for Belmont High School. These "ed specs" note there are 36 general classrooms, most of which are approximately 750 square feet. There are also 27 specialized teaching classrooms: 4 Physics, 5 Biology, 3 Chemistry, 4 Art, 3 Music 2 Wellness, 6 Special Education.

The science labs range from 1,161 square feet to 1,445 square feet. Two earth science labs are 930 square feet each. The Library & Media Center has a combined space of 5,964 square feet. All of these spaces are original to the 1970 construction with very little modification.

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

The current building is over-subscribed at an enrollment of 1,235 students, limiting our capacity to deliver a 21st Century education. Over the next 10 years, district projections anticipate a student enrollment of 1,420.

Many teachers are teaching in different classrooms instead of delivering instruction in one classroom. In the 2013-2014 School Year, nine teachers taught in two different classrooms; two teachers taught in three different classrooms. Currently at Belmont High School, 13 teachers teach in two different classrooms; three teachers teach in three classrooms.

Please see the list of spaces repurposed below:

Wellness & social studies classes are held in a stadium/lecture setting which does not support differentiated instruction and 21st century learning expectations for BHS

Science labs are being conducted in general classrooms that were not designed as science labs

Full classes (30+ students) are held in smaller modified classrooms

Orchestra chorus classes are held in a garage area of the building

Science teachers lab preparation rooms are used for storage of science equipment and supplies, which prevents teachers from using those rooms for lab preparation

Ceramic classes are being held in previous home economics rooms

The Campus Alternative Program now occupies previous home economics rooms and a converted storage room

Two library/Media rooms are used for storage

METCO student work room was previously a storage room

ELL classrooms were previously an office and teacher work space



Music technology class is taught in a previous piano practice room

Weight room is housed in a former classroom

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

The district utilizes a contracted cleaning company to perform a clearly-defined and detailed list of tasks on a daily basis. The maintenance of the building systems is part of a districtwide program of preventative maintenance. The district maintenance and custodial staff have a scheduled checklist of items for servicing all motors and other elements of the systems. The District uses outside vendors for regular preventative maintenance and unscheduled repairs to HVAC, elevator and fire protection systems. Breakdowns are reported to the Town/School consolidated Facilities Department through the use of a computerized work order system. The Town budgets major capital repairs through a Capital Budget Committee separate from the operating budgets. As mentioned above, over the past few years, funds have been appropriated, or borrowing approved, at the annual Town Meeting for the rooftop HVAC replacements, the building envelope study, translucent panel replacements in the gymnasium and field house, and tennis court resurfacing on the grounds of the High School. None of these Capital Budget items required an override or debt exclusion.

**Priority 2**

***Question 1: Please describe the existing conditions that constitute severe overcrowding.***

*The overall increase in the Belmont Public School (BPS) enrollment is a major concern for the district. BPS has seen an increase of 317 and is projected to see at least a total of 800 new students over a ten year period (2009-2019). This projection does not take into effect two building projects within the Town that when completed would bring over 400 units of living space (via apartments and condominiums) to Belmont. The district has organized several research groups to analyze this K-12 dilemma, and one option is to relieve pressure on our overcrowded middle school (serving over 1300 students in grades 5-8) by proposing a high school plan (SOI) to the MSBA that would involve an 8-12 high school facility. Thus, solving two problems (overcrowded middle school, overcrowded and decrepit high school) with one building program.*

*Additionally the district is experiencing an increase in international students which presents two pressures on the district. The first pressure is that the increase of international students is far more complicated to project. This projection is out of the scope of our traditional New England School Development Council (NESDEC) birth rate model – therefore the district has great concern for repeated surges in enrollment. Secondly, a corresponding impact to the district is that the ELL population has spiked (from 91 in 2008 to 220 in 2014) thus creating the need for small group instructional spaces (per DESE mandated policy) for these students.*

*The concerning condition to the community and the district is that enrollment at all three levels of the district is growing rapidly. The makeup of the district is four elementary schools (K-4), one middle school (5-8) and one high school (9-12). The SOI for the high school will hopefully address the 9-12 concerns and potentially the middle school overcrowding by housing grade 8 at BHS. The additional concern for the district is that the schools will need to provide modular classrooms and most likely permanent additions to two of its elementary schools.*

*There are many potential reasons for this increase in enrollment, from proximity to Boston/Cambridge, Level One school district status, and the overall attractiveness of the Belmont community.*

**Priority 2**

***Question 2: Please describe the measures the School District has taken to mitigate the problem(s) described above.***

Throughout the district each of the six schools has re-purposed space within their buildings. Library space, computer labs, office space, and conference rooms are taken and converted to full and small groups spaces to accommodate the increase in overall enrollment and the subsequent increase in special education and ELL students. This puts the district in the conflict of needing full classroom space and small pullout space to comply with the ELL state mandated 2.5 hours of pullout instruction for this population of students.

At Belmont High specifically, the re-purposing of classrooms is significant. From redesigning the library to hold four classroom and/or multipurpose spaces, to putting benches in the hallways to give places for students to go during free periods.

Because of the increasing enrollment and facility concerns at Belmont High School, the delivery of instruction, the ability to assess students and to simply accommodate the appropriate educational setting for students to be college and career ready, has negatively impacted the delivery of a 21st century education at Belmont High School.

For example, when students are not scheduled for a class, they are allowed to meet with teachers, go to the library or cafeteria. Since the increase in enrollment and the limited facility space available to students, the library will often reach full capacity and be forced to close the doors to additional students. Students will often wait outside the library and wait for other students to exit the space before being allowed to enter.

To help provide additional study space for students during the school day, the Little Theater has been made available. This space traditionally has been reserved for performances, class presentations and lectures only. When the room is not occupied, students are allowed to use the space to socialize and complete their school work. Unfortunately, the space is not supervised and the administration frequently needs to limit the access to students.

To assist in alleviating the school's overcrowding problem, 30 benches have been purchased and placed in the hallway for students to access. The benches are utilized every period of the day and have only shifted the student overflow concerns to the hallways.

For the past several years, Belmont High School has offered open campus to seniors who meet the academic, attendance and discipline criteria. Students who meet the criteria are allowed to leave school during their free time. To help address the student overcrowding concerns, open campus was extended to the junior class. Offering open campus to the both seniors and juniors has assisted in managing the overcrowding concerns during the school day.

*Belmont High School is oversubscribed at the present time. Many teachers are teaching in different classrooms instead of delivering instruction in one classroom. Thirteen teachers share two classrooms and 3 teachers share 3 classrooms. Similar issues arise at our middle school as well. Belmont High School will explore modular classrooms for the 2015/16 school year and will need more modular classrooms for the next five years until a more permanent solution is adopted. Two of our four elementary schools as well as our middle school will have modular classrooms by the 2016/17 school year. For the 2015/16 school year all three levels will share space, provide instruction in non-classroom space like hallways and continue to parcel out space for small group instruction by taking space from the libraries and offices.*

*Currently the high school has an overcrowded library (student center), benches in the hallway, and a full cafeteria utilized by students during the day.*

Because of the limited classroom space, the number of teachers sharing rooms has increased. Below are the statistics for the past two years:

Year # of Teachers # of Rooms

2013-2014 9 Taught in 2 classrooms

2013-2014 2 Taught in 3 classrooms

2014-2015 13 Taught in 2 classrooms

2014-2015 3 Taught in 3 classrooms

As a direct result of the enrollment increase and limited facility space, teaching and learning has been impacted. Teachers are restricted in delivering their instruction, number of assessments, and covering the required amount of curriculum. To accommodate the increase in enrollment, students are being taught in modified classroom space. Below are some examples:

1. Original classrooms converted to smaller classroom to add additional space
2. 1970's stadium style classrooms designed originally for science lecture rooms now accommodate wellness classes
3. An originally designed garage attached to the building has been converted to a large orchestra and music classroom
4. Former home economics class rooms have been converted over to art and alternative learning rooms

In 1970, the model for new schools was to create a design which departmentalized the different content areas. Each area has a department office and the subject classes in that wing of the school. As a result of the segregated areas, faculty and staff are not afforded the opportunity to communicate and collaborate with other teachers from different departments. Teachers often make a strong attempt to work with each other but are faced facility challenges i.e. limited classroom space, no school-wide faculty and staff room, limited computer space rooms, no collaborative teacher work rooms.

Below are specific limitations impacting the delivery of a 21st century education

\*Limits to differentiated instruction

\*Limits to the development of 21 Century Learning Skills

\* Limits the ability to meet the Belmont High School student expectations (Communicate, Collaborate, Creativity, Critical Thinking)

\*Limits to the implementation of a student-centered learning environment

\*Limits to the capacity for students and teachers to engage in collaborative work teams, thereby impacting the social-emotional development of students

\*Limits the cross curricular collaboration in developing the curricular (inquiry and problem-solving, higher order thinking, cross-disciplinary learning, authentic learning opportunities both in and out of school, development of heterogeneity classes)

\*Limits teachers ability to personalize instruction

\*Limits opportunities to engage students in cross-disciplinary learning, become active and self-directed learners

\*Limits teachers from organizing group learning activities

\*Limits teachers from engaging in cross-curricular discourse on instructional practices

**Priority 2**

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

Students are not engaged in the presence of an educator during every instructional period of the school day.

Throughout the district each of the six schools has re-purposed space within their buildings. Library space, computer labs, office space, and conference rooms are taken and converted to full and small groups spaces to accommodate the increase in overall enrollment and the subsequent increase in special education and ELL students. This puts the district in the conflict of needing full classroom space and small pullout space to comply with the ELL state mandated 2.5 hours of pullout instruction for this population of students.

At Belmont High specifically, the re-purposing of classrooms is significant. From redesigning the library to hold four classroom and/or multipurpose spaces, to putting benches in the hallways to give places for students to go during free periods.

Because of the increasing enrollment and facility concerns at Belmont High School, the delivery of instruction, the ability to assess students and to simply accommodate the appropriate educational setting for students to be college and career ready, has negatively impacted the delivery of a 21st century education at Belmont High School.

For example, when students are not scheduled for a class, they are allowed to meet with teachers, go to the library or cafeteria. Since the increase in enrollment and the limited facility space available to students, the library will often reach full capacity and be forced to close the doors to additional students. Students will often wait outside the library and wait for other students to exit the space before being allowed to enter.

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*Belmont High School is oversubscribed at the present time. Many teachers are teaching in different classrooms instead of delivering instruction in one classroom. Thirteen teachers share two classrooms and 3 teachers share 3 classrooms. Similar issues arise at our middle school as well. Belmont High School will explore modular classrooms for the 2015/16 school year and will need more modular classrooms for the next five years until a more permanent solution is adopted. Two of our four elementary schools as well as our middle school will have modular classrooms by the 2016/17 school year. For the 2015/16 school year all three levels will share space, provide instruction in non-classroom space like hallways and continue to parcel out space for small group instruction by taking space from the libraries and offices.*

*Currently the high school has an overcrowded library (student center), benches in the hallway, and a full cafeteria utilized by students during the day.*

Because of the limited classroom space, the number of teachers sharing rooms has increased. Below are the statistics for the past two years:

Year # of Teachers # of Rooms

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 2013-2014 2 Taught in 3 classrooms

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 2014-2015 3 Taught in 3 classrooms

As a direct result of the enrollment increase and limited facility space, teaching and learning has been impacted. Teachers are restricted in delivering their instruction, number of assessments, and covering the required amount of curriculum. To accommodate the increase in enrollment, students are being taught in modified classroom space. Below are some examples:

1. Original classrooms converted to smaller classroom to add additional space
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4. Former home economics class rooms have been converted over to art and alternative learning rooms

In 1970, the model for new schools was to create a design which departmentalized the different content areas. Each area has a department office and the subject classes in that wing of the school. As a result of the segregated areas, faculty and staff are not afforded the opportunity to communicate and collaborate with other teachers from different departments. Teachers often make a strong attempt to work with each other but are faced facility challenges i.e. limited classroom space, no school-wide faculty and staff room, limited computer space rooms, no collaborative teacher work rooms.

Below are specific limitations impacting the delivery of a 21st century education

- \*Limits to differentiated instruction
- \*Limits to the development of 21 Century Learning Skills
- \* Limits the ability to meet the Belmont High School student expectations (Communicate, Collaborate, Creativity, Critical Thinking)
- \*Limits to the implementation of a student-centered learning environment
- \*Limits to the capacity for students and teachers to engage in collaborative work teams, thereby impacting the social-emotional development of students
- \*Limits the cross curricular collaboration in developing the curricular (inquiry and problem-solving, higher order thinking, cross-disciplinary learning, authentic learning opportunities both in and out of school, development of heterogeneity classes)
- \*Limits teachers ability to personalize instruction
- \*Limits opportunities to engage students in cross-disciplinary learning, become atice and self-directed learners
- \*Limits teachers from organizing group learning activities
- \*Limits teachers from engaging in cross-curricular discourse on instructional practices

**Please also provide the following:**

<b>Cafeteria Seating Capacity:</b>	650
<b>Number of lunch seatings per day:</b>	4
<b>Are modular units currently present on-site and being used for classroom space?:</b>	YES
<b>If "YES", indicate the number of years that the modular units have been in use:</b>	10
<b>Number of Modular Units:</b>	1
<b>Classroom count in Modular Units:</b>	3

Seating Capacity of Modular classrooms: 75

What was the original anticipated useful life in years of the modular units when they were installed?: 25

Have non-traditional classroom spaces been converted to be used for classroom space?: YES

If "YES", indicate the number of non-traditional classroom spaces in use: 14

Please provide a description of each non-traditional classroom space, its originally-intended use and how it is currently used (maximum of 1000 characters):

There is a modular building on site that is currently being used for office space and other non-instructional space. It is anticipated that for the 2015-2016 School Year that three of the six rooms in the modular building will be used as classrooms, due to current increases in enrollment. Only three of the six rooms are large enough to be used as classrooms. To date, the following spaces have already been repurposed to address the instructional needs of the building:

Wellness & social studies classes are held in stadium/lecture setting does not support differentiated instruction and BHS's 21st century learning expectations.

Science labs are being conducted in general classrooms that were not designed as science labs

Full classes (30+ students) are held in smaller modified classrooms

Orchestra chorus classes are held in a garage area of the building

See complete list in Priority 4 Question 3

Please explain any recent changes to the district's educational program, school assignment polices, grade configurations, class size policy, school closures, changes in administrative space, or any other changes that impact the district's enrollment capacity (maximum of 5000 characters):

Enrollment increases at all grades within the district have necessitated the reassignment of students at the elementary level to be reassigned in some cases to an elementary building other than their local, neighborhood school. This is done to balance class size within each elementary grade among the four elementary schools in the district.

What are the district's current class size policies (maximum of 500 characters)?:

The district's has established class size guidelines for grades K-8. They are as follows:

Grade Guidelines

K 18-22

1 19-23

2 19-23

3 20-24

4 20-24

5 20-24

6 22-26

7 22-26

8 22-26

**Priority 3**

***Question 1: Please provide a detailed description of the "facility-related" issues that are threatening accreditation. Please include in this description details related to the program or facility resources (i.e. Media Center/Library, Science Rooms/Labs, general classroom space, etc.) whose condition or state directly threatens the facility's accreditation status.***

In the New England Association of School and Colleges (NEASC) Evaluation Report of the Visiting Committees in both 2002 and 2012, the Committees identified numerous recommendations concerning the facility needs of Belmont High School. As a result of the visits, NEASC placed Belmont High School on Warning status in 2002 and in 2012 in the area of facilities. In addition, Belmont High School was placed on Warning status for curriculum because of the inability for faculty and staff to deliver a 21st century education to students. Since the accreditation visits in 2002 and 2012, several improvements to the facility have been made and updated reports have been submitted to NEASC. Despite these efforts, Belmont High School continues to be on Warning status for the facility and the delivery of a 21st century curriculum. Below is a list of the major concerns as identified in the 2012 NEASC Report:

School Space

The school site and plant do not support the delivery of high quality school programs and services. Some issues are associated with the lack of adequate space while others are associated with the utilization and deterioration of the facility. The library is currently utilized as a study hall which limits teachers' abilities to use it effectively for guided research and inquiry. The issues in the life and chemistry science lab classrooms are centered on the increased classroom space that was reclaimed in a section of the room previously devoted solely to lab tables. This reclamation limits the lab area and compromises lab safety. The teachers are now limited by space concerns in their ability to deliver quality science curriculum in traditional classroom instruction. However, the physics classrooms are not in the science wing and are not configured as lab spaces. When the science graduation requirements were expanded, the physics classrooms were relocated, as they did not require gas or plumbing. Physics labs requiring probes or computers are performed in a separate computer lab area on a sign-up-as-available basis.

Public Announcement System

The public announcement system functions erratically throughout the building; it is unreliable. It never works in the music room and other locations throughout the building. In case of an emergency, there is no guarantee all classrooms would hear a request for lockdown procedures to commence. Because the public announcement system cannot be relied on as the main form of communication, the school administration is unable to notify all the faculty and staff during a crisis situation.

Fire Alarm System

Belmont High School's fire alarm system was installed in 1987. The alarm panel is located in the school's boiler room. There used to be two panels; one panel has been "cannibalized" for parts to fix the other one, since the system is outdated and parts are almost impossible to find. The intended use of the alarm panel is to indicate where a fire is occurring in the building. The panel does not function properly. If a fire alarm goes off, the indicator board bulbs do not glow to indicate the affected area. So, the source of the alarm has to be researched. It is known that a fire is occurring, but, because of the dysfunction of the panel, it is not known where the fire is. Because the fire alarm system is outdated and cannot be relied on as a main source of information when locating a fire, the fire department is not able to respond to an emergency in appropriate time.

Entry Control System

When a guest arrives at Belmont High School they are asked to check in at the greeter's desk at one end of the building and then proceed to the main office. The office is positioned in a way that guests are not visible to the office staff when



seeking entrance to the school through the main entrance or egress doors. The school does not have entry control devices such as doors with electronically controlled latches, an entrance intercom system or security cameras. All exterior doors do not secure when entering and exiting the building. Without these security measures Belmont High School cannot ensure a secure building where all occupants are safe.

#### Little Theatre

The Little Theater, located at the lowest part of the building, takes on water when heavy rain occurs. A wood floor has been built over the concrete to raise the stage. When the Little Theater takes on water, it also gives off a strange odor.

#### Windows

When it rains or snows, or ice melts, water comes over the building's window overhangs. Those overhangs have no drainage planes/drip edges, so water enters the building through windows/areas that aren't properly sealed. Serious damage has occurred in the back of the building, the foyer/lobby, and in the 1st floor classrooms. Unfortunately, some of the electrical panels are located near the documented water leaks.

#### Storage

There is a lack of storage at Belmont High School. In the music rooms, supplies are stacked up in the orchestra room. The music practice room is filled with supplies and equipment. The theater program supply area is limited and overcrowded. The academic departments rely on overstocked storage rooms which also serve as teacher/student tutoring and study spaces.

#### HVAC System

The heating and ventilation system in the building is in need of updating. Due to consistent failure of steam traps, it is difficult to adequately regulate the flow of heat into the classrooms. As a result, many classrooms are either very hot and noisy or very cold. Many of pneumatic air lines that drive the HVAC system are old, dried out, and cracked, causing dampers and thermostats to not open and close when needed. Inefficient boilers and excessive production of hot water due to a broken mixing/exchange valve, results in excessively high energy costs. Sixteen rooftop units were installed in 2006-2008. They are digital units that are accompanied by software. The software to adjust the unit programming cannot be run from a computer in the office. It is necessary to climb to the roof to change it, making it difficult during good and inclement weather.

#### Americans with Disabilities Act (ADA)

Belmont High School maintains documentation that the physical plant and facilities meet most applicable federal and state laws and are in compliance with local health and safety regulations. Issues needing to be addressed exist with ADA compliance. The Belmont High School facility is not in full compliance with the Americans with Disabilities Act (ADA). Program access for individuals in wheelchairs is compromised by:

"The size of the elevator not accommodating motorized wheelchairs"

"No access to classroom lecture halls 138 and 221 A & B"

"No access to the Little Theater"

"No access to the bleachers"

"No access to the nurse's office"

Limited access to restrooms and the sinks"

Limited width of doorways"

#### "NEASC Facility Recommendations

1. "Develop and implement a plan that addresses the effective use of existing space"
2. "Ensure the public announcement system functions in every classroom and area in the building and physical plant"

3. "Address water inflow issues in all identified areas"
4. "Provide heat to areas of the building where it is currently not provided"
5. "Bring the building up to ADA compliance"
6. "Provide sufficient storage for the music and drama programs"
7. "Replace the school's fire alarm system to ensure occupant safety"
8. "Replace the outdated boiler system"
9. "Update the building's heating/ventilation system"
10. "Facilitate access to heating unit programming"
11. "Replace the water tank in the field house"
12. "Reconcile the proximity of electric panels and documented water leaks"
13. "Fix and update all doors in the building that are in poor condition"

NEASC Curriculum Recommendations

1. "Overcrowding-ensure class size does not impede the implementation of curriculum"
2. "Overcrowding-establish educationally conducive environments students can access during free periods"
3. "Overcrowding-ensure the library functions as an area to support the implementation of BHS curriculum and achievement of the 21st century learning expectations"
4. "Overcrowding-ensure class size does not impede teachers meeting students' needs"
5. "Overcrowding-develop and implement a plan to ensure the library/media center is appropriately utilized as a resource for students and teacher to be actively engaged in the implementation of the school's curriculum"
6. "Overcrowding-develop and implement a plan that addresses the effective use of existing space"
7. "Update, fund and implement a long-range plan that addresses all building and physical plant needs that ensures the delivery of programs"

Similarly, the 1999 facility audit by ARCADD recommended extensive renovations including replacing boilers and burner, exhaust fans, wiring, kitchen equipment, etc. Because of inadequate funding, repairs to critical systems are made as problems arise. All of these concerns prevent the faculty and staff from implementing the school-wide expectations (Collaboration, Critical Thinking, Creativity, and Communication) and as a result, not fully preparing students to be college and career ready.

**Priority 3*****Question 2: Please describe the measures the district has taken to mitigate the problem(s) described above.***

The NEASC report was received in February 2013. Many of the same facility-related findings from the previous NEASC report from 2002 were reiterated in 2013.

Through the Town of Belmont Capital Budget Committee, the following projects have been funded by Town Meeting to try to alleviate some of the facility problems at Belmont High School:

1. A building envelope study for all school buildings was approved for FY07, and was conducted by the engineering firm of Russo, Barr Associates.
2. Based upon the recommendation of the building envelope study, which recommended repairs to the High School building exterior walls estimated to cost \$370,000, the Town Meeting approved \$81,000 for FY09 to begin these repairs.
3. Town Meeting approved \$125,000 for FY08 plus \$100,000 for FY09 as part of a phased replacement of sections of the translucent panels in the gymnasium and field house. An additional \$112,629 was expended in FY10 and an additional \$125,000 was approved for FY11 for the final phases of translucent panel replacement. The project is completed.
4. The Energy Service Company (ESCO) project in 2006 replaced six of the sixteen rooftop HVAC units and replaced all interior lighting with energy saving fixtures.
5. Town Meeting for FY08 authorized the borrowing of \$1,000,000 to replace the remaining ten rooftop HVAC units, which has been completed.
6. In the summer of 2008, in-house maintenance workers removed the fixed lab tables in the science rooms to accommodate more room for student chairs. These rooms were originally designed as combination classrooms and laboratories, but the fixed lab tables had become obstructions.
7. In the summer of 2009, a new Foreign Language lab was installed with equipment and furnishings paid by an \$80,000 grant from the Foundation for Belmont Education with the labor provided by the district's in-house maintenance workers.
8. In FY10:
  - \$44,025 was appropriated to begin repairs on the univent heating units in each classroom.
  - \$100,943 was appropriated to repave the access road in front of the high school building.
9. In FY11:
  - \$93,168 was expended for building envelope work (brick repointing, replacing external sealants, etc).
  - \$72,770 was expended for the final phase of replacing translucent panels.
10. In FY12:
  - \$14,979 was expended to rebuild heating units in the gymnasium.
  - FY12 and FY14 at total of \$187,000 was appropriated to convert the building to be heated by natural gas. The project included purchasing three new dual fuel (natural gas and oil) burners to replace the existing three oil-fired burners. Also included in the scope of the project was laying new underground gas piping to the building.
11. In FY13:

- \$100,000 was appropriated to repave a portion of the main parking lot.
  - \$50,000 was appropriated to continue repairs on the univent heating units in each classroom.
12. In FY14
- \$200,000 was appropriated to repave a portion of the main parking lot (for a project total of \$300,000).
  - \$87,000 was appropriated for the town's share for National Grid to install high pressure natural gas piping underground and connect it to Belmont High School. An alternate pathway over which to run the pipeline was identified, which reduced the cost from the initial estimate of \$93,000.
  - In addition to these capital budget appropriations, in FY14 the School Department and the Town's Facilities Department expended over \$60,000 to address repairs and water and air quality issues with the indoor swimming pool at Belmont High School.
13. In FY15
- \$40,000 was appropriated to repair and paint the ceiling in the HS pool area.
  - \$40,000 was appropriated to install an ultraviolet filtration system for the HS pool.
  - Approximately \$35,000 was expended to build out small group learning rooms in the HS library.
  - \$50,000 was appropriated to continue with the repair and upgrade of classroom univents.

**Priority 3**

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

The following are examples of the impact of facilities/curriculum/enrollment related deficiencies cited in the NEASC Evaluation Report of the Visiting Committee in 2012:

1. "The negative impact of the facility to adequately and fully support the opportunities for all students to practice and achieve each of the 21st century learning expectations and delivery of the curriculum" - Facility/Curriculum
2. "The lack of adequate space in the library/media center causing reduced functionality of the center" - Facility/Enrollment/Curriculum
3. "Limited science lab areas compromising lab safety" - Facility/Curriculum
4. "Lack of adequate electricity, water, and technology in several science classrooms and labs" - Facility/Curriculum
5. "The poor condition of the heating and ventilation systems throughout the building"
6. "Ensure class size does not impede teachers meeting students' needs" - Enrollment/Curriculum
7. "Develop and implement a process to ensure counselors are able to meet the needs of all students and the school community" - Enrollment
8. "Ensure staffing levels in the library/media center to meet the needs of all students" - Enrollment/Curriculum
9. "Develop and implement a plan to ensure the library/media center is appropriately utilized as a resource for students and teachers to be actively engaged in the implementation of the school's curriculum" - Facility/Enrollment/Curriculum
10. "Update, fund, and implement a long-range plan that addresses all building and physical plant needs that ensures delivery of programs" - Facility/Curriculum
11. "Ensure class size does not impede the implementation of curriculum" - Enrollment/Curriculum
12. "Establish educationally conducive environments students can access during free periods" - Facility/Enrollment/Curriculum
13. Ensure the library functions as an area to support the implementation of BHS curriculum an achievement of the 21st century learning expectations" - Enrollment/Facility/Curriculum
14. "Develop and implement a plan that addresses the effective use of existing space" - Facility
15. "Ensure the public announcement system function in every classroom and area of the building and physical plant" - Facility
16. "Bring the building up to ADA compliance" - Facility
17. "Address water inflow issues in all identified areas" - Facility
18. "Ensure the stage area meets OSHA standards" - Facility
19. "Provide heat to the stage area" - Facility
20. "Provide sufficient storage for the music and drama programs" - Facility
21. "Replace the school's fire alarm system to ensure occupant safety" - Facility
22. "Provide an adequate exhaust system in the pool room" - Facility
23. "Replace the outdated boiler system" - Facility
24. "Update the building's heating/ventilation system" - Facility
25. "Replace the water tank in the field house" - Facility
26. "Reconcile the proximity of electric panels and documented water leaks" - Facility
27. "Fix and update all doors in the building that are in poor condition" - Facility

The Belmont High School facility is insufficient to fully implement the curriculum. Below are specific examples that prevent the district from delivering a 21st century education:

1. Science Labs/Classrooms - The science rooms and labs are original to the building and prevent teachers from delivery a 21st century education. Some of the concerns are listed below:
  - a. Science classrooms and labs are located in one room. Because of the limited space and enrollment increase, students must sit in both the lecture and lab tables while the teacher is delivering the instruction. Many students are unable to see the whiteboard clearly and must adjust their location.
  - b. When the students conduct labs, the instruction, curriculum and safety is compromised. The science lab space is limited and students must perform experiments in a limited space in large groups. Often labs are compromised because of the restricted area.
  - c. The majority of the lab stations have no power, limited plumbing, and there are concerns with the gas lines. Often students must share table space while conducting their experiments. Because of these facility obstacles, teachers are limited in delivering instruction and covering the required curriculum.
2. Physics Labs - many physics classes are held in science rooms that do not contain sufficient lab space tantamount to implementing the curriculum. Teachers have been creative in providing labs for students and the delivery of their instruction. The physics rooms prevent the teachers from delivering a 21st century education to students.
3. Open Campus/Enrollment - As stated earlier in the report, enrollment in the District and at Belmont High School has increased steadily and is projected to continue. Due to the limited educational space and to assist in managing students, the school has resorted to an open campus style schedule. When students do not have scheduled class time, they are allowed to roam the building, school grounds and take advantage of off campus privileges. At any given time during the school day, over 700 students may not be assigned to a class, and allowed to congregate in the library, cafeteria, courtyard, on benches in the hallways, and utilize the Little Theater.
4. Library/Media Space - Because of the increase in enrollment, the library/media space is frequently used as a gathering spot for large groups of students who seek out computers for personal and curricular work. While this is a popular location for students to gather, the library/media space functions as a study hall and the large quantity of students makes the media center inaccessible to students that are truly in need of its resources. The library/media center, instead of functioning as inquiry-based, becomes a holding place. The staff do their best to help students access the available resources. Unfortunately, a large majority of their time is spent on crowd control.
5. Technology Access - Equity of access to technology resources to fully implement the curriculum is a concern. Limited space and lack of updated electrical outlets limit the delivery of the curriculum. While technology is embedded in the Belmont High School curriculum and research is one the school's 21st century learning expectations, access to a computer is limited. Teachers are constantly "jockeying" for limited lab space, which is afforded to the fastest and savviest teacher. Without equal access to technology to support the curriculum, students will not be able to become the type of researcher Belmont High School's 21st century learning expectations delineates and the school's curriculum is not fully implemented.

**Please also provide the following:**

**Name of accrediting entity (maximum of 100 characters):**

New England Association of Schools and Colleges (NEASC).

**Current Accreditation Status: Please provide appropriate number as 1=Passed, 2=Probation, 3=Warning, 4=Lost:**

3

**If "WARNING", indicate the date accreditation may be switched to Probation or lost:**

12/1/2015

**If "PROBATION", indicate the date accreditation may be lost:**

**Please provide the date of the first accreditation visit that resulted in your current accreditation status.:**  
3/11/2012

**Please provide the date of the follow-up accreditation visit:** 3/1/2022

**Are facility-related issues related to Media Center/Library? If yes, please describe in detail in Question 1 below.:**  
YES

**Are facility-related issues related to Science Rooms/Labs? If yes, please describe in detail in Question 1 below.:**  
YES

**Are facility-related issues related to general classroom spaces? If yes, please describe in detail in Question 1 below.:** YES

**Are facility-related issues related to SPED? If yes, please describe in detail in Question 1 below.:** YES

**Are facility-related issues related to support spaces? If yes, please describe in detail in Question 1 below.:**  
YES

**Are facility-related issues related to "Other"? If yes, please identify the other area below and describe in detail in Question 1 below.:** YES

**Please describe (maximum of 100 characters).:**

Spaces have been repurposed to accommodate a sharp increase in the ELL population.

**Priority 4**

**Question 1: Please describe the conditions within the community and School District that are expected to result in increased enrollment.**

*The overall increase in the Belmont Public School (BPS) enrollment is a major concern for the district. BPS has seen an increase of 317 and is projected to see at least a total of 800 new students over a ten year period (2009-2019). This projection does not take into effect two building projects within the Town that when completed would bring over 400 units of living space (via apartments and condominiums) to Belmont. The district has organized several research groups to analyze this K-12 dilemma, and one option is to relieve pressure on our overcrowded middle school (serving over 1300 students in grades 5-8) by proposing a high school plan (SOI) to the MSBA that would involve an 8-12 high school facility. Thus, solving two problems (overcrowded middle school, overcrowded and decrepit high school) with one building program.*

*Additionally the district is experiencing an increase in international students which presents two pressures on the district. The first pressure is that the increase of international students is far more complicated to project. This projection is out of the scope of our traditional New England School Development Council (NESDEC) birth rate model – therefore the district has great concern for repeated surges in enrollment. Secondly, a corresponding impact to the district is that the ELL population has spiked (from 91 in 2008 to 220 in 2014) thus creating the need for small group instructional spaces (per DESE mandated policy) for these students.*

*The concerning condition to the community and the district is that enrollment at all three levels of the district is growing rapidly. The makeup of the district is four elementary schools (K-4), one middle school (5-8) and one high school (9-12). The SOI for the high school will hopefully address the 9-12 concerns and potentially the middle school overcrowding by housing grade 8 at BHS. The additional concern for the district is that the schools will need to provide modular classrooms and most likely permanent additions to two of its elementary schools.*

*There are many potential reasons for this increase in enrollment, from proximity to Boston/Cambridge, Level One school district status, and the overall attractiveness of the Belmont community.*



**Priority 4**

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

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*Belmont High School is oversubscribed at the present time. Thirteen teachers share two classrooms and 3 teachers share 3 classrooms. Similar issues arise at our middle school as well. Belmont High School will explore modular classrooms for the 2015/16 school year and will need more modular classrooms for the next five years until a more permanent solution is adopted. Two of our four elementary schools as well as our middle school will have modular classrooms by the 2016/17 school year. For the 2015/16 school year all three levels will share space, provide instruction in non-classroom space like hallways and continue to parcel out space for small group instruction taking space from the libraries and offices.*

*Currently the high school has an overcrowded library (student center), benches in the hallway, and a full cafeteria utilized by students during the day.*

**Priority 4**

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

Because of the increasing enrollment and facility concerns at Belmont High School, the delivery of instruction, the ability to assess students and to simply accommodate the appropriate educational setting for students to be college and career ready, has negatively impacted the delivery of a 21st century education at Belmont High School.

For example, when students are not scheduled for a class, they are allowed to meet with teachers, go to the library or cafeteria. Since the increase in enrollment and the limited facility space available to students, the library will often reach full capacity and be forced to close the doors to additional students. Students will often wait outside the library and wait for other students to exit the space before being allowed to enter.

To help provide additional study space for students during the school day, the Little Theater has been made available. This space traditionally has been reserved for performances, class presentations and lectures only. When the room is not occupied, students are allowed to use the space to socialize and complete their school work. Unfortunately, the space is not supervised and the administration frequently needs to limit the access to students.

To assist in alleviating the school's overcrowding problem, 30 benches have been purchased and placed in the hallway for students to access. The benches are utilized every period of the day and have only shifted the student overflow concerns to the hallways.

For the past several years, Belmont High School has offered open campus to seniors who meet the academic, attendance and discipline criteria. Students who meet the criteria are allowed to leave school during their free time. To help address the student overcrowding concerns, open campus was extended to the junior class. Offering open campus to the both seniors and juniors has assisted in managing the overcrowding concerns during the school day.

Many teachers are teaching in different classrooms instead of delivering instruction in one classroom. Because of the limited classroom space, the number of teachers sharing rooms has increased. Below are the statistics for the past two years:

**Year # of Teachers # of Rooms**

2013-2014 9 Taught in 2 classrooms  
2013-2014 2 Taught in 3 classrooms

2014-2015 13 Taught in 2 classrooms  
2014-2015 3 Taught in 3 classrooms

As a direct result of the enrollment increase and limited facility space, teaching and learning has been impacted. Teachers are restricted in delivering their instruction, number of assessments, and covering the required amount of curriculum. To accommodate the increase in enrollment, students are being taught in modified classroom space. Below are some examples:

1. Original classrooms converted to smaller classroom to add additional space
2. 1970's stadium style classrooms designed originally for science lecture rooms now accommodate wellness classes
3. An originally designed garage attached to the building has been converted to a large orchestra and music classroom
4. Former home economics class rooms have been converted over to art and alternative learning rooms

In 1970, the model for new schools was to create a design which departmentalized the different content areas. Each area has a department office and the subject classes in that wing of the school. As a result of the segregated areas, faculty and staff are not afforded the opportunity to communicate and collaborate with other teachers from different departments. Teachers often make a strong attempt to work with each other but are faced facility challenges i.e. limited classroom space, no school-wide faculty and staff room, limited computer space rooms, no collaborative teacher work rooms.

Below are specific limitations impacting the delivery of a 21st century education  
\*Limits to differentiated instruction

- \*Limits to the development of 21 Century Learning Skills
- \* Limits the ability to meet the Belmont High School student expectations (Communicate, Collaborate, Creativity, Critical Thinking)
- \*Limits to the implementation of a student-centered learning environment
- \*Limits to the capacity for students and teachers to engage in collaborative work teams, thereby impacting the social-emotional development of students
- \*Limits the cross curricular collaboration in developing the curricular (inquiry and problem-solving, higher order thinking, cross-disciplinary learning, authentic learning opportunities both in and out of school, development of heterogeneity classes)
- \*Limits teachers ability to personalize instruction
- \*Limits opportunities to engage students in cross-disciplinary learning, become atice and self-directed learners
- \*Limits teachers from organizing group learning activities
- \*Limits teachers from engaging in cross-curricular discourse on instructional practices

**Please also provide the following:**

<b>Cafeteria Seating Capacity:</b>	650
<b>Number of lunch seatings per day:</b>	4
<b>Are modular units currently present on-site and being used for classroom space?:</b>	NO

If "YES", indicate the number of years that the modular units have been in use:

**Number of Modular Units:**

**Classroom count in Modular Units:**

**Seating Capacity of Modular classrooms:**

**What was the original anticipated useful life in years of the modular units when they were installed?:**

<b>Have non-traditional classroom spaces been converted to be used for classroom space?:</b>	YES
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If "YES", indicate the number of non-traditional classroom spaces in use: 14

**Please provide a description of each non-traditional classroom space, its originally-intended use and how it is currently used (maximum of 1000 characters):.**

Wellness & social studies classes are held in stadium/lecture setting-does not support differentiated instruction and BHS's 21st century learning expectations  
 Science labs are being conducted in general classrooms that were not designed as science labs  
 Full classes (30+ students) are held in smaller modified classrooms  
 Orchestra chorus classes are held in a garage area of the building  
 Science teachers lab preparation rooms are used for storage of science equipment and supplies, which prevents teachers from using those rooms for lab preparation  
 Ceramic classes are being held in previous home economics rooms  
 The Campus Alternative Program now occupies previous home economics rooms and converted storage room  
 Two library/Media rooms are used for storage  
 METCO student work room was previously a storage room  
 ELL classroom was previously an office and teacher work space

Music technology class is taught in a previous piano practice room

Weight room is housed in a former classroom

**Please explain any recent changes to the district’s educational program, school assignment polices, grade configurations, class size policy, school closures, changes in administrative space, or any other changes that impact the district’s enrollment capacity (maximum of 5000 characters). :**

- o At the elementary level the district has over 80% of its classrooms with enrollment over the School Committee voted class size recommendations. Given the complexities of this process the district implemented an assignment plan/ procedure for all elementary students who register new to the district in an attempt to balance class size during this surge of enrollment.
- o The district is exploring changes in grade configuration as it relates to the BHS SOI and the other school buildings. The district has hired an Architectural Firm (SMMA) to analyze enrollment trends, space utilization within our current footprint, repurposing of current space to fit program needs (like ELL and Sped small group instruction), modular use, and the new high school and potential new additions to two or more schools in the district. This analysis has provided options for several grade configurations A) K-4,5-7, 8-12; B) Pre-K-K, 1-5, 6-8, 9-12; C) Our current model with a new elementary school.
- o All six schools have repurposed offices, large class space and different class space to attempt to fit program and instructional needs. This ranges from our high school chorus having their classroom in the old auto shop and our health classes in an old lecture hall, to our middle school small group classrooms being carved out of office space and library space. Next year the elementary schools will carve into the library and computer rooms space for instructional purposes. Small group space is at a premium as we have an increasing enrollment overall and in two areas of mandated need-- special education and English Language Learner classes.
- o The School Committee has allowed the district to exceed the class size recommendations that are stated in their policies in an attempt to provide the district with flexibility during this enrollment surge. The class size limits have been exceeded at all three levels of the district.

**What are the district’s current class size policies (maximum of 500 characters)?:**

The district’s has established class size guidelines for grades K-8. They are as follows:

Grade Guidelines

- K 18-22
- 1 19-23
- 2 19-23
- 3 20-24
- 4 20-24
- 5 20-24
- 6 22-26
- 7 22-26
- 8 22-26

**Priority 5**

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

At a Special Town Meeting in November 2003, the Town voted to appropriate \$90,000 for design services for the development of a Master Plan for future renovations to Belmont High School. The intent of developing the Master Plan was to identify and prioritize necessary renovations while waiting for a comprehensive renovation some time beyond 2010. The architectural firm of Design Partnership of Cambridge, Inc.(DPC) was hired to work with the Superintendent's Advisory Council on the Future Needs of Belmont High School.

In October 2004, Design Partnership presented the *Master Plan and Feasibility Study for Renovations to Belmont High School* to the Advisory Council. The mechanical and electrical engineering analysis was performed by Richard D. Kimball Company, Inc. (RDK). The Executive Summary presented the following Existing Conditions Review and Recommendations:

**Heating, Ventilation and Air Conditioning Systems**

Virtually all components of the building's mechanical and electrical systems need attention. They are all, with minor exceptions, original equipment and have exceeded their design life expectancy. The boilers are oil-fired steam, feeding roof mounted air handling units directly and supplying hot water via converters to unit ventilators on the periphery of the building. Steam systems are difficult to control and to maintain in optimal working order. RDK's strong recommendation is to replace the present boilers with hot water units with dual-fuel capability. Steam piping and controls will also need to be replaced. As the boilers are changed out the steam fed rooftop units must be replaced also. These units are very, very near the end of their lives and may, in fact, need replacement prior to the main part of the project going forward. Another deficiency to be corrected by the mechanical system upgrade is the amount of fresh air available to building occupants. New rooftop units will have a higher intake and distribution capacity to meet present codes. Review of existing conditions indicates the need for new unit ventilators. New air distribution equipment for the Pool and Fieldhouse is also indicated. It will be appropriate to replace the Pool system with a specifically designed, high efficiency "Pool-pak" system combining heating, dehumidification and heat recovery.

Note that since this report, the burners have been changed to dual fuel (natural gas and oil).

**Plumbing System**

- Required plumbing system work within the existing building, per RDK's investigation and analysis, includes new water efficient fixtures, barrier-free compliance and replanning of toilet and shower room fixture layouts, and kitchen upgrades. The domestic hot water system will be replaced in its entirety. The present science labs do not have an acid neutralization system and one must be provided for any new labs.

**Fire Protection System**

- The original design of Belmont High school met the building codes then in place in all respects. Today, codes are more stringent. One of the most glaring differences is in the fire protection system. The facility has no passive or active system to assist fire fighters in controlling an event. While the building itself would, no doubt, be difficult, probably impossible, to burn, its contents and equipment would not. Today, any building approaching the size, use and construction characteristics of the High School would be required to be completely sprinklered and provided with other fire protection measures. A renovation project where the cost is more than 30% of the building's assessed valuation will automatically trigger this requirement. Even if this work were not mandated, it would be very shortsighted to avoid it. The district is currently soliciting cost estimates to replace the fire alarm system. Prior to having received final estimates, the district anticipates that the cost will be in excess of \$500,000.

**Electrical System**

-

The building's electrical and lighting systems are also original equipment, with the exception of some upgrades to the tel/data network made necessary by changing technologies. RDK has determined that to provide a level of amenity, usefulness and efficiency comparable to new construction and thus provide a second 35 to 50-year "useful life-span", all of these systems should be changed out. New lighting, standard and emergency power distribution, data, communications and alarm systems would have to be included in a future project. The fire alarm system is a candidate for accelerated replacement due to its present condition and the difficulty of finding parts that are no longer manufactured or stocked. A daily operational issue is the public address system which is inoperable and presents a building safety issue.

**Priority 5**

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

As indicated in Priority 3, question 2, through the Town of Belmont Capital Budget Committee, the following projects have been funded by Town Meeting to try to alleviate some of the facility problems at Belmont High School:

1. A building envelope study for all school buildings was approved for FY07, and was conducted by the engineering firm of Russo, Barr Associates.
2. Based upon the recommendation of the building envelope study, which recommended repairs to the High School building exterior walls estimated to cost \$370,000, the Town Meeting approved \$81,000 for FY09 to begin these repairs.
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- \$50,000 was appropriated to continue repairs on the univent heating units in each classroom.

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- \$40,000 was appropriated to install an ultraviolet filtration system for the HS pool.
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- \$50,000 was appropriated to continue with the repair and upgrade of classroom univents.



**Priority 5**

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

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Limited budget funds spent unnecessarily on inefficient energy-consuming systems results in less funds being spent for the instructional program. This is becoming more critical in these tight budget times. In addition, unfavorable conditions in air quality and temperature may be distracting to staff and students, thereby potentially being disruptive to the educational process.

**Heating, Ventilation and AirConditioning Systems**

- Inconsistent heating and cooling requires classrooms to be moved often, throughout the different seasons in the school year.
- The frequent maintenance and repair of system components is disruptive to the school schedule and the educational process.
- The overall inconsistent temperature is not conducive to an appropriate learning environment.

**Plumbing System**

- Classrooms and teacher workspaces have needed to be moved due to plumbing system failures including backups, leaks, and environmental concerns.

**Fire Protection System**

- Malfunctions in the current fire alarm system cause false alarms on a regular basis, which require the evacuation of all staff and students, disrupting the school day.
- Resetting the system requires on-site presence of local Fire Department officials.

**Electrical System**

- The lack of a fully functioning public address (PA) system is a life-safety issue when it comes to communicating to the entire student and staff body any lock-down, evacuation, and fire drill procedures.
- The lack of an effective communication system also prevents the building administration from being able to address the staff and students regarding day-to-day announcements.

**Aging windows and leaky roofs contribute to uncomfortable classroom spaces.**

**Priority 5**

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

All of the original systems in the building are now over 40 years old and are beyond their expected lifespan. This is resulting in more frequent breakdowns, greater maintenance costs, and disruption to the instructional process. While improvements have been made, such as the 2006 ESCo lighting fixture replacements and the 2008 Town-funded rooftop HVAC unit replacements, the core of the infrastructure systems can not be remedied without a major renovation project. It is expected that such a renovation project would substantially extend the useful life of the building.

**Please also provide the following:**

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

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

- Richard D. Kimball Engineering - 2004
- Russo Barr Associates - 2007

**The date of the inspection:** 10/15/2004

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

The findings are included in response to Question 1 of Priority 5.

**Priority 7**

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

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Because of the facility concerns and large increase in enrollment, the following courses are no longer offered at Belmont High School:

- \* Introduction to Design and Engineering
- \* Zoology of Aquatic and Terrestrial
- \* Figure Sculpture
- \* History of Popular Music
- \* Gospel Choir
- \* World Music
- \* Dance
- \* Advanced Grammar
- \* Creative Writing
- \* Public Speaking/Debate
- \* Facing History & Ourselves
- \* Introduction to Programming
- \* Computer Spreadsheet Applications

Programs Belmont High School wishes to explore but is unable to due to the facility constraints:

- \* Comprehensive STEM program
- \* Development of a Business and Technology department
- \* An appropriate space for the alternative education Campus program
- \* Expansion of the theatre/arts course offerings
- \* Global Leadership courses
- \* Full sequence of all languages in the foreign language department
- \* Expansion of higher level math courses
- \* State required 4 years of wellness classes
- \* Student internships
- \* Mediation and conflict resolution course
- \* Peer mediation program

**Priority 7**

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

The NEASC report was received in February of 2013. In the report, many of the same facility-related finding from the previous 2002 NEASC report were reiterated.

Through the Town of Belmont Capital Budget Committee, the following projects have been funded by Town Meeting to try to alleviate some of the facility problems at Belmont High School. Below is a list of some to the efforts:

Action Taken to Mitigate the Problem

1. A building envelope study for all school building was approved for FY07, and was conducted by the engineering firm Russo, Barr Associates.
2. Based upon the recommendation of the building envelope study, which recommended repairs to the High School building exterior walls estimated to cost \$375,000, the Town Meeting approved \$81,000 for FY09 to begin these repairs.
3. Town Meeting approved \$125,000 for FY08 plus \$100,000 for FY09 as part of a phased replacement of sections of the translucent panels in the gymnasium and field house. An additional \$112,629 was expended in FY10 and an additional \$125,000 was approved for FY11 for the final phases of translucent panel replacement. The project is completed.
4. The Energy Service Company (ESCO) project in 2006 replaces six of the sixteen rooftop HVAC units.
5. Town Meeting for FY08 authorized the borrowing of \$1,000,000 to replace the remaining ten rooftop HVAC units, which has been completed.
6. In the summer of 2008, in-house maintenance workers removed the fixed lab tables in the science rooms to accommodate more room for student chairs. These rooms were originally designed as combination classrooms and laboratories, but the fixed lab tables had come obstructions.
7. In the summer of 2009, a new Foreign Language lab was installed with equipment and furnishings paid by an \$80,000 grant from the Foundation for Belmont Education with the labor provided by the district's in-house maintenance workers.
8. In FY10:
  - a. \$44,025 was appropriated to begin repairs on the univent heating units in each classroom.
  - b. \$100,943 was appropriated to repave the access road in front of the high school building.
9. In FY11:
  - a. \$93,168 was expended for building envelope work (brick repointing, replacing external sealant, etc.).
  - b. \$72,770 was expended for the final phase of replacing translucent panels.
10. In FY12:
  - a. \$14,979 was expended to rebuild heating units in the gymnasium.
  - b. \$100,000 was appropriated in FY12 to replace the oil-fired burners with natural gas. burners. Since that time National Grid has informed the Belmont Schools that it will cost \$93,000 for the town's share for National Grid to lay over 1,800 feet of high pressure natural gas piping underground and connect it to Belmont High School. This work is necessary for the building to be able to be heated by natural gas, as the current natural gas line that services the building is a smaller line that was designed to supply the science labs with natural gas. The School Department is pursuing options with National Grid as to whether the \$93,000 can be amortized over a series of months to be paid with monthly gas invoices.
11. In FY13:
  - a. \$100,000 was appropriated to repave a portion of the main parking lot.

b. \$50,000 was appropriated to continue repairs on the univent heating units in each classroom.

12. In FY14:

- a. \$200,000 was appropriated to repave a portion of the main lot (for a project total of \$300,000.
- b. \$87,000 was appropriated for the town's share of National Grid to install high pressure natural gas piping underground and connect it to Belmont High School. An alternate pathway over which to run the pipeline was identified, which reduced the cost from the initial estimate of \$93,000.
- c. \$600,000 was spent on repairs to the water and air quality issues with the indoor swimming pool.

Action Taking and Plan on Taking to Mitigate the Problem

13. In FY15:

- a. Through a donation from the Belmont High School PTO and the funds from the Town, student breakout rooms were constructed in the library and mezzanine space.
- b. Hallway and cafeteria door replacement.

14. In FY16

- a. Upgrading the music band room to be more acoustically sound.
- b. Hallway and cafeteria door replacement.

**Priority 7**

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

**Current Programs:**

Belmont High School offers a core academic program focused on college preparatory. Each year approximately 90% of the graduates go on to 4 year schools, 4% go on to two year schools, 1% go on to prep schools or gap year, 1% go into the military or employment, and 4% are categorized as "other". Students must meet the following graduation requirements:

- \* 4 years of English
- \* 4 years of math
- \* 4 years of science
- \* 3 years of social studies
- \* 2 years of a foreign language
- \* 1 year of fine and performing arts
- \* 4 years of physical education
- \* senior thesis
- \* 40 hours of community service

With an emphasis on preparing students for college, there are limited offerings for students to pursue an area of interest, i.e., industrial arts, business, graphic design, etc. The physical constraints of facility allow limited flexibility for students to partake in exploratory electives. Over the years, space has been modified to allow programs to be introduced. For example, the garage space has been converted over to an orchestra and chorus room, home economics rooms have been converted into art rooms, classrooms have been divided up to create small learning community centers for special education, office space has been converted over to a English Language Learner (ELL) classroom, science stadium seating lecture halls have been converted over to wellness classrooms, and storage and office space has been converted over to the METCO student workroom/directors office.

The New England Association of Schools and Colleges (NEASC) reports of 2002 and 2013 both identified the limited space at Belmont High School as negatively impacting the delivery of instruction and curriculum. As a result, Belmont High School was placed on warning for facilities in 2002 and 2013. Since the building poses an obstacle to properly deliver a 21st century education, Belmont High School was also placed on warning in the area of curriculum. Even though modifications have been made to classroom space, Belmont High School remains on warning in the area of facilities and curriculum.

**Art Department**

- \* There are not enough sinks in 4 classrooms to serve all students enrolled
- \* There is insufficient storage space for materials and student work in all the art rooms
- \* The size of the ceramics room is not sufficient for the number of students enrolled in the program
- \* Storage for art supplies and student work is limited and currently being stored in the student work space
- \* There are not enough electrical outlets in the classroom, therefore, multiple power strips are being used on an antiquated electrical system

**Music Department**

- \* There is insufficient storage space for musical instruments and equipment
- \* Because of the limited space, certain instruments can not be introduced to the curriculum
- \* There are not enough electrical outlets, therefore, multiple power strips are being used on an antiquated electrical system

- \* Some converted classrooms do not have electrical outlets
- \* Practice rooms are being used for storage spaces
- \* HVAC is inconsistent in the band and orchestra rooms resulting in relocating classes
- \* Spaces are not wired for instructional technology such as SmartBoards or LCD projectors
- \* There are two structural support columns in the middle of the chorus/orchestra room which prevent students in certain seats from being able to see the conductor

#### Wellness Classes

- \* Taught in a previous science classrooms lecture style design
- \* Differentiated instruction is limited
- \* New course electives are limited due to the structure of the room

#### Weight Room

- \* Weight room was previously a classroom which limits the curriculum
- \* Space is limited and students must utilize the room in shifts
- \* Structure of the room prevents the teachers from delivering a proper 21st century physical education program

#### General Classrooms

- \* Inconsistent HVAC resulting in relocating classrooms
- \* Classroom sizes vary which limits the locations of content classes
- \* A variety of classes are not ADA compliant
- \* Windows leak
- \* Ceilings leak
- \* Electrical system is outdated which limits classes that require electricity to deliver the curriculum

#### Overall Building Concerns

- \* As previously stated, heating and ventilation problems affect all locations in the building.
- \* The inconsistency of the HVAC system forces teachers to relocate students in order to provide a more appropriate education setting.
- \* As previously stated, the NEASC report has cited many issues with the configuration of classroom spaces not being suitable for a 21st century education program.
- \* As previously stated, increased maintenance costs takes funding away from the instructional program in tight budget times.
- \* During the 2007-2008 School Year, there was a loss of two school days resulting from an electrical malfunction which rendered as inoperable a major switch in the main electrical supply room. Replacement parts were difficult to find, and the likelihood of the loss of school time will continue to increase.
- \* Unavailable quiet study spaces in the library impedes the ability of students to study and learn. Also there are not enough seats/tables for students to work resulting in the closing the library due to overcrowding.
- \* Faculty and staff are unable to deliver a 21 century education and to meet the established BHS student expectations.
- \* Ceilings and windows leak and as a result teachers must relocate their classes to a more appropriate education setting. Hallways are closed off where there are leaks.
- \* Fire alarm system is outdated (frequently set off, difficult to reset).
- \* The master scheduling of the school is restricted because of a large increase in enrollment, limited classroom configurations,

limited electrical outlets, and inconsistant HVAC and plumbing.

\* Building restrictions on implementing the 1:1 iPad initiative - resulting in inequity for students, faculty and staff.

\* The current state of the facility limits the implementation of a comprehensive STEM program.



### REQUIRED FORM OF VOTE TO SUBMIT AN SOI

#### REQUIRED VOTES

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

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

#### FORM OF VOTE

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

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

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

\_\_\_\_\_ ; *[Insert a description of the priority(ies) checked off on the Statement of Interest Form and a brief description of the data you described therein for each priority];* and hereby further specifically acknowledges that by submitting this Statement of Interest Form, the Massachusetts School Building Authority in no way guarantees the acceptance or the approval of an application, the awarding of a grant or any other funding commitment from the Massachusetts School Building Authority, or commits the City/Town/Regional School District to filing an application for funding with the Massachusetts School Building Authority.

**CERTIFICATIONS**

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

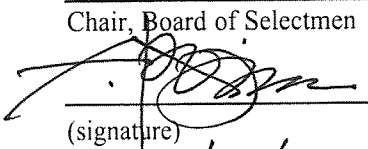
**Chief Executive Officer \***      **School Committee Chair**      **Superintendent of Schools**

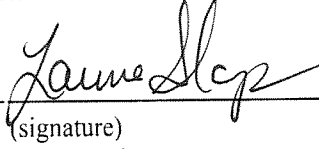
Andrés T. Rojas

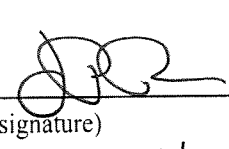
Laurie Q. Slap

John P. Phelan

Chair, Board of Selectmen







(signature)

(signature)

(signature)

Date 04/01/15

Date 4/1/15

Date 4/1/15

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

**LEGAL NOTICE  
REQUEST FOR SERVICES  
OWNER'S PROJECT MANAGER SERVICES**

The **Town of Natick** (the "Owner") is seeking the services of a qualified "Owner's Project Manager" as defined in Massachusetts General Laws Chapter 149, § 44A½(c) and as further defined by provisions stated in the Request for Services (RFS) to provide Project Management Services for the design, construction, demolition, addition to and/or renovation of the John F. Kennedy Middle School (the "Proposed Project"), located at 165 Mill Street, Natick, Massachusetts.

The Town of Natick is requesting the services of an Owner's Project Manager to represent the Owner during the feasibility study and schematic design phases of the contract, which may be amended to include continued Project Management Services through design development, construction documents, bid and award, construction, and final closeout of the Proposed Project. The estimated total project costs of an approved Proposed Project may range from \$90 million to \$110 million depending upon the solution agreed upon by the Owner and the Massachusetts School Building Authority (MSBA) and ultimately approved by a vote of the MSBA Board of Directors.

A voluntary informational meeting and site inspection will be conducted by Peter Gray, Director of Finance, Natick Public Schools, on Thursday, November 14, 2016 at 2:30 PM at the John F. Kennedy Middle School site located at 165 Mill Street, Natick, Massachusetts 01760.

The complete RFS may be obtained on November 9, 2016 electronically by contacting Peter, Gray, Director of Finance, Natick Public Schools [pgray@natickps.org](mailto:pgray@natickps.org), ph. 508-647-6491 from 8:00 a.m. to 4:00 p.m., Monday-Friday.

Proposals will be received at the Natick Town Hall, located at 13 East Central Street – 3<sup>rd</sup> third floor, Natick, Massachusetts 01760 until 1:00 PM on Wednesday, November 23, 2016.

All questions regarding this RFS should be directed to Peter Gray, Director of Finance, by email to: [pgray@natickps.org](mailto:pgray@natickps.org). Questions will be accepted until Wednesday, November 16, 2016 at 4:00 PM.





## REQUEST FOR OWNER'S PROJECT MANAGEMENT SERVICES (RFS)

### 1. Introduction

The Town of Natick ("Owner") is seeking the services of a qualified "Owner's Project Manager" as defined in Massachusetts General Laws Chapter 149, Section 44A½ and as further defined by the provisions of this RFS, to provide Project Management Services for the design, construction, addition to and /or renovation of the John F. Kennedy Middle School ("School") in Natick, Massachusetts ("Project").

The Owner is requesting the services of an Owner's Project Manager to represent the Owner during the feasibility study and schematic design phases of the project initially. Subject to the approval of the Project by the Massachusetts School Building Authority (the "MSBA") and further subject to continued funding authorized by the Town of Natick, the contract between the Owner and the Owner's Project Manager may be amended to include continued Project Management Services through design development, construction documents, bid and award, construction and final closeout of the potential Project. A potential approved Project may include a renovation of the existing School, a renovation and addition of the existing School and/or new construction. The estimated total project costs of an approved potential Project may range from \$90 to \$110 million dollars depending upon the solution that is agreed upon by the Owner and the MSBA and that is ultimately approved by a vote of the MSBA Board of Directors.

### 2. Background

The Town of Natick, incorporated in 1781, is located near the center of the MetroWest region of Massachusetts, with a population of 32,786 at the 2010 census. Only 10 miles west from Boston, Natick is considered part of the Greater Boston area. The town has a total area of 16.1 square miles and has four distinct neighborhoods: Natick Center, East Natick, South Natick and West Natick.

A three school master study was conducted by Dore and Whittier Architects, Inc, in May, 2012, including the John F. Kennedy Middle School. The study documented existing conditions and a physical assessment of each building and site, enrollment projects and the impact on future needs and a review of the educational programming needs and deficiencies of each building. The John F. Kennedy Middle School was chosen by the Town of Natick as the school in need of immediate attention. The School is one of two middle schools that serve the entire town of

Natick. The Wilson Middle School has exceeded its capacity and like the John F. Kennedy Middle School, enrollment projections indicate that enrollments at the Wilson will continue to increase before reaching a peak in 2020.

### 3. Project Description, Objectives and Scope of Services

On May 6, 2011, the Owner submitted a Statement of Interest (Attachment A) to the MSBA for John F. Kennedy Middle School. The MSBA is an independent public authority that administers and funds a program for grants to eligible cities, towns, and regional school districts for school construction and renovation projects. The MSBA's grant program is discretionary, and no city, town, or regional school district has any entitlement to any funds from the MSBA. At the May 26, 2016 Board of Directors meeting, the MSBA voted to issue an invitation to the Owner to conduct a feasibility study for this Statement of Interest to identify and study possible solutions and, through a collaborative process with the MSBA, reach a mutually-agreed upon solution. The MSBA has not approved a Project and the results of this feasibility study may or may not result in an approved Project.

The School was constructed in 1965 to accommodate 600 students as a junior high school. Since 1965, the educational mandates have required districts to add classroom accommodations for many educational purposes such as special education reducing the number of general education classrooms available. The mutually agreed upon enrollment of the proposed project at the John F. Kennedy Middle School shall be based on an enrollment of no more than 1,000 students in grades 5-8.

Project Objectives under consideration by the Owner include:

- Identification of community concerns that may impact study options;
- Review of the Dore & Whittier Architect, Inc. Three School Master Study Report from May 2012;
- Review of Natick Public Schools policies and objectives;
- Identification of specific milestone requirements and/or constraints of the District – e.g. curriculum objectives;
- Life cycle costs of operating the School as it relates to future operational budgets;
- Northeast Collaborative for High Performance Schools (“NE-CHPS”) criteria or US Green Building Council’s LEED for Schools (“LEED-S”) Rating System

The required scope of services is set forth in Article 8 of the standard contract for Owner’s Project Management Services for a Design/Bid/Build project that is attached hereto as Attachment B and incorporated by reference herein. If the Owner determines to use a CM-at-Risk delivery method, this contract shall need to be amended and/or substituted. The work is divided into the Project Phases as listed in Attachment A of this contract. The durations of the Phases shown below are estimates only, based on the Owner’s experience. Actual durations may vary depending upon the Project agreed upon by the Owner and the MSBA. The total duration of the Contract is estimated as follows:

1. Feasibility Study/Schematic Design Phase;	12-24 months
2. Design Development/Construction Documents/Bidding Phase; and	10-12 months
3. Construction Phase.	24-36 months

#### 4. Minimum Requirements and Evaluation Criteria:

##### Minimum Requirements:

In order to be eligible for selection, each Respondent must certify in its cover letter that it meets the following minimum requirements. Any Response that fails to include such certification in its response, demonstrating that these criteria have been met, will be rejected without further consideration.

Each Respondent must designate an individual who will serve as the Project Director. The Project Director shall be certified in the Massachusetts Certified Public Purchasing Officer Program as administered by the Inspector General of the Commonwealth of Massachusetts and must also meet the following minimum requirements:

- The Project Director shall be a person who is registered by the Commonwealth of Massachusetts as an architect or professional engineer and who has at least 5 years experience in the construction and supervision of construction and design of public buildings:

or,

- if not registered as an architect or professional engineer, the Project Director must be a person who has at least 7 years experience in the construction and supervision of construction and design of public buildings.

##### Evaluation Criteria

In addition to the minimum requirements set forth above, all Respondents must demonstrate that they have significant experience, knowledge and abilities with respect to public construction projects, particularly involving the construction and renovation of K-12 schools in Massachusetts. The Owner will evaluate Responses based on criteria that shall include, but not be limited to, the following:

- 1) Past performance of the Respondent, if any, with regard to public, private, DESE funded and MSBA-funded school projects across the Commonwealth, as evidenced by :
  - a) Documented performance on previous projects as set forth in Attachment C, including the number of projects managed, project dollar value, number and percentage completed on time, number and dollar value of change orders, average number of projects per project manager per year, number of accidents and safety violations, dollar value of any safety fines, and number and outcome of any legal actions; (max 10 points)
  - b) Satisfactory working relationship with designers, contractors, Owner, the MSBA and local officials. (max 10 points)
- 2) Thorough knowledge of the Massachusetts State Building Code, regulations related to the Americans with Disabilities Act, and all other pertinent codes and regulations related to successful completion of the project. (max 5 points)
- 3) Thorough knowledge of Commonwealth construction procurement laws, regulations, policies and procedures, as amended by the 2004 Construction Reform laws. Management approach: Describe the Respondent's approach to providing the level and nature of services required as evidenced by proposed project staffing for a potential (hypothetical) proposed project for new construction of 170,000 square feet or renovation of 100,000 square feet; proposed project management systems; effective information management; and examples of problem solving approaches to resolving issues that impact time and cost. (max 5 points)
- 4) Management approach: Describe the Respondent's approach to providing the level and nature of services required as evidenced by proposed project staffing for a potential (hypothetical) proposed project for new construction of 170,000 square feet or renovation of 100,000 square feet; proposed project management systems; effective information management; and examples of problem solving approaches to resolving issues that impact time and cost. (max 15 pts)
- 5) Key personnel: Provide an organizational chart that shows the interrelationship of key personnel to be provided by the Respondent for this project and that identifies the individuals and associated firms (if any) who will fill the

roles of Project Director, Project Representative and any other key roles identified by the Respondent, including but not limited to roles in design review, estimating, cost and schedule control. Specifically, describe the time commitment, experience and references for these key personnel including relevant experience in the supervision of construction of several projects that have been either successfully completed or in process that are similar in type, size, dollar value and complexity to the project being considered. (max 10 points)

- 6) Capacity and skills: Identify existing employees by number and area of expertise (e.g. field supervision, cost estimating, schedule analysis, value engineering, constructability review, quality control and safety). Identify any services to be provided by Sub consultants. (max 10 points)
- 7) Identify the Respondent's current and projected workload for projects estimated to cost in excess of \$1.5 million. (max 5 points)
- 8) Familiarity with Northeast Collaborative for High Performing Schools (NE-CHPS) criteria or US Green Building Council's LEED for Schools Rating System (LEED-S). Demonstrated experience working on high performance green buildings (if any), green building rating system used (e.g., NE-CHPS or LEED-S), life cycle cost analysis and recommendations to Owners about building materials, finishes etc., ability to assist in grant applications for funding and track Owner documentation for NE-CHPS or LEED-S prerequisites. (max 10 points)
- 9) Thorough knowledge and demonstrated experience with life cycle cost analysis, cost estimating and value engineering with actual examples of recommendations and associated benefits to Owners. (max 10 points)
- 10) Knowledge of the purpose and practices of the services of Building Commissioning Consultants. (max 5 points)
- 11) Financial Stability: Provide current balance sheet and income statement as evidence of the Respondent's financial stability and capacity to support the proposed contract. (max 5 points)

In order to establish a short list of Respondents to be interviewed, the Owner will base its initial ranking of Respondents on the above Evaluation Criteria. The Owner will establish its final ranking of the short-listed Respondents after conducting interviews and reference checks.

The Owner reserves the right to consider any other relevant criteria that it may deem appropriate, within its sole discretion, and such other relevant criteria as the MSBA may request. The Owner may or may not, within its sole discretion, seek additional information from Respondents.

This Request for Services, any addenda issued by the Owner, and the selected Respondent's response, will become part of the executed contract. The key personnel that the Respondent identifies in its response must be contractually committed for the Project. No substitution or replacement of key personnel or change in the Subconsultants identified in the response shall take place without the prior written approval of the Owner and the MSBA.

The selected Respondent(s) will be required to execute a Contract for Project Management Services with the Owner in the form that is attached hereto as Attachment B and incorporated by reference herein. Prior to execution of the Contract for Project Management Services with the Owner, the selected Respondent will be required to submit to the Owner a certificate of insurance at the time of the execution of the contract that meets the requirements set forth in the Contract for Project Management Services.

Prior to execution of the Contract for Project Management Services, the fee for services shall be negotiated between the Owner and the selected Respondent to the satisfaction of the Owner, within its sole discretion. The initial fee structure will be negotiated through the Feasibility Study/Schematic Design Phase. The selected Respondent, however, will be required to provide pricing information for all Phases specified in the Contract at the time of fee negotiation.



## 5. Selection Process and Selection Schedule

### Process

- 1) The School Building Subcommittee and the School Procurement Officer will be responsible for initial review of the responses. The responses will be evaluated to determine if they meet the minimum requirements as outlined in Section 4 above. Failure to meet the minimum requirements will disqualify the response from further consideration. Responses that meet the minimum requirements will be further evaluated by the evaluation criteria contained within. All scoring will be documented in writing.
- 2) The School Building Subcommittee (the "Subcommittee") – xxxxxx, xxxxxx, xxxxxx, xxxxx and xxxxx will rank the responses based on the weighted evaluation criteria identified in the RFS and will short-list a minimum of three responses. The three highest responses will be interviewed by the School Building Committee who will recommend a top finalist to the MSBA. The School Building Committee will include an agenda with the interview invitation letter that describes the interview process. Interviewees will be ranked on the following categories: key personnel, experience with past and similar projects, references from past school building projects and answers to specific questions asked by the School Building Committee. The questions to be asked will be provided to the firms prior to the interview. School Building Committee members will evaluate and rank each firm based on their responses to the specific questions. At the conclusion of the interviews the firm with the highest number of points will be considered the first-ranked selection.
- 3) The School Building Committee members are: Jim Kane, Martha White, Julie McDonough, Peter Sanchioni, Jonathan Freedman, Andrew Zitoli, Anna Nolin, John Ciccariello, Mysore Ravindra, Stephen Meyler, Andrew Enright, Richard Foley, Thomas Iskra, John Tracy, Julian Munnich, Peter Gray, William Hurley. ]
- 4) The Owner will commence fee negotiations with the first-ranked selection.
  - a. The Owner will require the hourly rates and role for all proposed professional personnel assigned to the project. The owner will consider fee structures from similar projects from other awarded contracts to add knowledge during negotiations.
- 6) If the Owner is unable to negotiate a contract with the first-ranked selection, the Owner will then commence negotiations with its second-ranked selection and so on, until a contract is successfully negotiated and approved by the Owner.
- 7) First-ranked selection will be submitted to the MSBA for its approval.
- 8) The first-ranked selection may be asked to participate in a presentation to the MSBA and/or submit additional documentation, as required by MSBA, as part of the MSBA approval process.
- 9) The Town of Natick reserves the right to re-advertise if less than three responses are received or to re-advertise if fee negotiations fail.

The following is a tentative schedule of the selection process, subject to change at the Owner's and MSBA's discretion.

11/9/16 Advertise RFS in Central Register of the Commonwealth of Massachusetts and the MetroWest News.

<sup>5</sup>  
11/14/16 Informational meeting and site visit (voluntary)

<sup>2/7</sup>  
11/16/16 Last day for questions from Respondents

<sup>7/14</sup>  
11/23/16 Responses due

<sup>7/21</sup>  
11/30/16 Respondents short-listed

<sup>6/27</sup>  
12/06/16 Interview short-listed Respondents

3/30  
12/09/16 Negotiate with selected Respondent

5/35  
12/14/16 Final selection submitted to the MSBA for review and approval

~~2/08/16~~  
01/09/17 OPM Panel Review with MSBA

01/10/17 Execute contract

Requests for Services may be obtained from:

Peter Gray, MCCPO, School Procurement Officer  
Natick Public Schools  
13 East Central Street  
Natick, MA 01760  
Phone: 508-647-6491 Fax: 508-647-6506  
Email: pgray@natickps.org

On or after November 9, 2016.

Any questions concerning this Request for Services must be submitted in writing to

Peter Gray, MCCPO, School Procurement Officer  
Natick Public Schools  
13 East Central Street  
Natick, MA 01760  
Phone: 508-647-6491 Fax: 508-647-6506  
Email: pgray@natickps.org

no later than 11/16/2016 at 4pm.

Sealed Responses to the Requests for Services for Owner's Project Manager Services must be clearly labeled "Owner's Project Management Services for Kennedy Middle School and delivered to

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no later than 11/23/2016 at 11AM. . The Owner assumes no responsibility or liability for late delivery or receipt of Responses. All responses received after the stated submittal date and time will be judged to be unacceptable and will be returned unopened to the sender.

#### 6. Requirements for content of response:

Submit 17 hard copies of the response to this Request for Services and one electronic version in PDF format on CD.

All responses shall be:

- In ink or typewritten;
- Presented in an organized and clear manner;
- Must include the required forms in Attachment C;

- Must include all required certifications;
  - Must include the following information:
  -
1. Cover letter shall be a maximum of two pages in length and include:
    - a. An acknowledgement of any addendum issued to the RFS.
    - b. An acknowledgement that the Respondent has read the Request for Services. Respondent shall note any exceptions to the RFS in its cover letter.
    - c. An acknowledgement that the Respondent has read the Standard Contract. Respondent shall note any exceptions to the Standard Contract in its cover letter.
    - d. A specific statement regarding compliance with the minimum requirements identified in Item 4 of this Request for Services to include identification of registration, number of years of experience and where obtained (as supported by the resume section of Attachment C), as well as the date of the MCCPO certification. (A copy of the MCCPO certification should be attached to the cover letter).
    - e. A description of the Respondent's organization and its history.
    - f. The signature of an individual authorized to negotiate and execute the Contract for Project Management Services, in the form that is attached to the RFS, on behalf of the Respondent.
    - g. The name, title, address, e-mail and telephone number of the contact person who can respond to requests for additional information.
  2. Selection Criteria: The response shall address the Respondent's ability to meet the "Selection Criteria" Section including submittal of additional information as needed. The total length of the Response (including Attachment C only but excluding Attachments A, B and D) may not exceed twenty (20) single-sided numbered pages with a minimum acceptable font size of "12 pt" for all text.

Respondents may supplement this proposal with graphic materials and photographs that best demonstrate its project management capabilities of the team proposed for this project. Limit this additional information to a maximum of 3 - 8½"x 11" pages, double-sided.

## **7. Payment Schedule and Fee Explanation:**

The Owner will negotiate the fee for services dependent upon an evaluation of the level of effort required, job complexity, specialized knowledge required, estimated construction cost, comparison with past project fees, and other considerations. As construction cost is but one of several factors, a final construction figure in excess of the initial construction estimate will not, in and of itself, constitute a justification for an increased Owner's Project Manager fee.

## **8. Other Provisions**

### **A. Public Record**

All responses and information submitted in response to this RFS are subject to the Massachusetts Public Records Law, M.G.L. c. 66, § 10 and c. 4, § 7(26). Any statements in submitted responses that are inconsistent with the provisions of these statutes shall be disregarded.

### **B. Waiver/Cure of Minor Informalities, Errors and Omissions**

The Owner reserves the right to waive or permit cure of minor informalities, errors or omissions prior to the selection of a Respondent, and to conduct discussions with any qualified Respondents and to take any other measures with respect to this RFS in any manner necessary to serve the best interest of the Owner and its beneficiaries.

### **C. Communications with the Owner**

The Owner's Procurement Officer for this Request for Services is:

Peter Gray, MCCPO, School Procurement Officer  
Natick Public Schools  
13 East Central Street  
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Respondents that intend to submit a response are prohibited from contacting any of the Owner's staff other than the Procurement Officer. An exception to this rule applies to Respondents that currently do business with the Owner, but any contact made with persons other than the Procurement Officer must be limited to that business, and must not relate to this RFS. In addition, such respondents shall not discuss this RFS with any of the Owner's consultants, legal counsel or other advisors. ***FAILURE TO OBSERVE THIS RULE MAY BE GROUNDS FOR DISQUALIFICATION.***

### **D. Costs**

Neither the Owner nor the MSBA will be liable for any costs incurred by any Respondent in preparing a response to this RFS or for any other costs incurred prior to entering into a Contract with an Owner's Project Manager approved by the MSBA.

### **E. Withdrawn/Irrevocability of Responses**

A Respondent may withdraw and resubmit their response prior to the deadline. No withdrawals or re-submissions will be allowed after the deadline.

### **F. Rejection of Responses, Modification of RFS**

The Owner reserves the right to reject any and all responses if the Owner determines, within its own discretion, that it is in the Owner's best interests to do so. This RFS does not commit the Owner to select any Respondent, award any contract, pay any costs in preparing a response, or procure a contract for any services. The Owner also reserves the right to cancel or modify this RFS in part or in its entirety, or to change the RFS guidelines. A Respondent may not alter the RFS or its components.

### **G. Subcontracting and Joint Ventures**

Respondent's intention to subcontract or partner or joint venture with other firm(s), individual or entity must be clearly described in the response.

### **H. Validity of Response**

Submitted responses must be valid in all respects for a minimum period of ninety (90) days after the submission deadline.

## **FURTHER INFORMATION**

None

ATTACHMENTS:

Attachment A: Statement of Interest

Attachment B: Contract for Owner's Project Management Services

Attachment C: OPM Application Form - May 2008

Attachment D: Required Certifications

