

# Massachusetts School Building Authority

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## Next Steps to Finalize Submission of your FY 2014 Statement of Interest

Thank you for submitting your FY 2014 Statement of Interest (SOI) to the MSBA electronically. **Please note, the**

- | 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 Brian McLaughlin at 617-720-4466 or [Brian.McLaughlin@massschoolbuildings.org](mailto:Brian.McLaughlin@massschoolbuildings.org).

# Massachusetts School Building Authority

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School District Wellesley

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

Name of School Ernest F Upham

Submission Date 3/20/2014

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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 e distr13 is required for cities, to contained

**Chief Executive Officer \***

Terri Tsagaris

**School Committee Chair**

Cathryn J. Kato

**Superintendent of Schools**

David F. Lussier

Chair, Board of Selectmen

(signature)

(signature)

(signature)

Date

Date

Date

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

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

There are four critical elements that are supporting the development of a facilities master plan in Wellesley. First, in order to assess the physical needs of all of its school buildings, the Wellesley Public Schools commissioned a Conditions Assessment and Feasibility Study that was performed by Symmes, Maini & McKee Associates (SMMA). This review included a focus on safety, health hazards, maintenance and infrastructure. In the fall of 2012, SMMA presented their findings through an online database. This database provides a robust tool for strategic planning, capital planning and maintenance prioritization, and has been thoroughly reviewed by the newly formed Facilities Maintenance Department (FMD), which has been managing SMMA's work since they were contracted. Second, the district—in collaboration with Town officials—established a School Facilities Master Plan (SFMP) Task Force to review the findings from the Conditions Assessment and Feasibility Study and to develop an appropriate response through short-term and long-term recommendations. The Hardy, Hunnewell and Upham schools, while requiring more work, are examples of longer-term recommendations. Third, the district completed a professional demographic study, conducted by Cropper GIS, to better anticipate student enrollment needs for the next ten years. Based on the report that was received in March 2013 and updated in October 2013, the Wellesley Public Schools is expected to experience an approximately 14 percent decline in elementary enrollment in the next decade. We believe these data will prove to invaluable to an MSBA study of needed renovations at the Upham Elementary School. Fourth, the Wellesley Public Schools has developed a 5-year

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## 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).

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

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

36500

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

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

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**ADDRESS OF FACILITY:** Please type address, including number, street name and city/town, if available, or

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Exterior Window sills are heavily damaged, spalled, and in some places completely missing. Toilet partitions and fixtures are dated and nearing the end of their useful life. Exterior material failures around windows and doors leave surrounding wall construction vulnerable to failure in these areas due to water intrusion. The building is in fair structural condition. There are some minor cracks in some of the CMU corridor walls and the brick walls in the gymnasium. Little if any wall insulation and minimal roof insulation is present.

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

Name of School ----- SAMPLE SCHOOL [DRAFT] -----
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speech, OT/PT, as well as all-school assemblies. These activities must be scheduled around the lunch schedule from 12 noon to 2 p.m. severely restricting delivery of services to students. Additionally, because there are no ramps and bathroom modifications, students with severe physical disabilities are assigned to other schools.

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**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, and a description of the media center/library (maximum of 5000 characters).**

The Upham School has 15 classrooms, including 2 modular classrooms, which would be considered as Core Academic Space. Two rooms are used for kindergarten classes. The sizes of these rooms vary by addition: rooms in the original 1957 wing are approximately 860 sf, rooms in the 1967 addition are about 840 sf and rooms in the 1993 MODS addition are about 900 sf. The two kindergarten classrooms are about 1,080 sf. Additionally, there is a 840 sf Library and a 4,000 sf Multi-purpose room for physical education and health classes that also serves as the cafeteria. Here are a number of smaller SPED spaces for OT/PT, speech, etc. The diversity in the sizes and construction of each space are reflective of the different ages of construction for the various component buildings to the school: 1957 (original), 1967, 1993 (MODS). Aside from roof and boiler replacements in 2009, there have been no recent updates to the remainder of the building.

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

Upham's enrollment for SY2013-14 is 243 students. There are currently two sections at each grade level, for a total of 12 K-5 sections. All education spaces at Upham are currently being utilized.

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

The Wellesley Facilities Maintenance Department (FMD) operates and maintains all school buildings in the District, including the Upham School. The FMD is responsible for custodial service, maintenance and capital projects in all 10 school buildings, which total over 880,000 square feet, with a staff of 63 and an FY14 budget of \$7.5M.

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

The District has a Maintenance Procedure Manual that explains how work is to be accomplished. The FMD relies on powerful, web-based computerized maintenance management systems (CMMS) by SchoolDude to manage maintenance and energy use: Maintenance Direct, Preventive Maintenance Direct, Utility Direct and Portfolio Manager. Our Maintenance Manager oversees 7 tradesmen, which allows quick and cost-effective response for service0 ophlsand

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

Our Project Manager oversees and manages school capital construction projects and fills the role of building operations liaison for larger school projects managed by the Town’s PBC. The District has accomplished a significant amount of capital construction work recently and plans to continue this work at an aggressive pace over the coming years. Using available cashlans to continue this work at an aggressive pace over the coming years. Using

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## 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.***

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The Upham School was built 57 years ago and has had two additions since, including two 21 year old portable classrooms intended for a much shorter use period, and as a result the school has building systems that are well past their service life, unreliable and inefficient users of energy. Most of the windows are single-pane, past service life and have failed in many locations. The heating system is mainly comprised of hot-water, unit ventilators, exhaust louvers in poor locations and outdated pneumatic controls, 2 to 3 times past their service life. The system is unreliable, difficult to control, hugely inefficient and unable to provide proper ventilation –

**Priority 5**

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

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As described in other areas of this SOI, the District has a very well staffed and well funded professional Facilities Maintenance Department, which provides both reactive/repair maintenance services and preventive maintenance services. The Town also funds

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

**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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Beyond the main education programming for grades K-5, Upham houses the district's 'Skills' Program for students on the autism spectrum. At the moment, there are no additional programs considered for the school that cannot be offered due to

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

**Priority 7**

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

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As in interim measure to try to improve the heating and ventilation system, the district performed a comprehensive HVAC maintenance/recommissioning project in 2013-2014. These are clearly stop-gap measures until a more comprehensive renovation can occur.

## **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.***

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

## REQUIRED FORM OF VOTE TO SUBMIT AN SOI

### REQUIRED VOTES

If 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 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).

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

### FORM OF VOTE

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

Resolved: Having convened aw6cis r1Q q 2 41.44056 784 1050 re W n BT /Fabc7 14 Tf 0 0 0 rg 1 0 0 1 10 675.44056 Tm -0.07Fn 1

