

Massachusetts School Building Authority

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Executive Director / Deputy CEO

September 14, 2018

Mr. Jack Morgan, Chair
Wellesley Board of Selectmen
Wellesley Town Hall, Selectmen's Office
525 Washington Street, Third Floor
Wellesley, MA 02482

Re: Town of Wellesley, Ernest F. Upham Elementary School

Dear Mr. Morgan:

I would like to thank representatives of the Town of Wellesley (the "District") for meeting with Massachusetts School Building Authority (the "MSBA") staff on August 10, 2018 to review enrollment projections and methodologies for the Ernest F. Upham Elementary School project (the "Proposed Project"). As discussed, the next critical step is for the MSBA and the District to agree on a study enrollment for the Ernest F. Upham Elementary School.

The Ernest F. Upham Elementary School presently serves a portion of the District's grade K-5 enrollment. In addition to studying options for the Ernest F. Upham Elementary School, the MSBA understands that the District would like its feasibility study to also examine reducing the number of K-5 elementary schools from seven facilities to six facilities combined with the redistricting of K-5 students district-wide to equalize enrollment across the six remaining elementary school facilities. Accordingly, this analysis will be particularly focused on the enrollment projections for grades K-5.

The table below illustrates the District's K-12 enrollment during the most recent ten-year period, including enrollment for the most recent school year (2017-2018) as reported by the Department of Elementary and Secondary Education ("DESE").

Year	K-5	6-8	9-12	Total
2008	2,480	1,059	1,256	4,795
2009	2,413	1,134	1,220	4,767
2010	2,363	1,135	1,294	4,792
2011	2,352	1,176	1,353	4,881
2012	2,309	1,165	1,381	4,855
2013	2,341	1,164	1,434	4,939
2014	2,303	1,178	1,477	4,958
2015	2,303	1,152	1,513	4,968
2016	2,255	1,145	1,512	4,912
2017	2,209	1,128	1,569	4,906



The total K-5 enrollment in the Town of Wellesley as reported by the District for the 2017-2018 school year was 2,209 students which reflects a decrease of 271 students (-10.9%) from the K-5 enrollment reported in 2008-2009, which was the maximum K-5 enrollment reported in the preceding ten years. Additionally, the 2017-2018 K-5 enrollment reflects a decrease of approximately 124 students (-5.3%) from the average K-5 enrollment reported during the preceding ten-year period.

The MSBA understands that the District is proposing an enrollment to accommodate approximately 375 students in grades K-5 at the Ernest F. Upham Elementary School after a district-wide redistricting. The grade K-5 enrollment reported to DESE for the 2017-2018 school year at the Ernest F. Upham Elementary School was 236 students. An equalized enrollment for six K-5 elementary schools in 2017-2018 would have been 368 students.

With respect to future enrollments, the MSBA's base enrollment forecast indicates the District's grade K-5 enrollment will continue to experience a slight declining trend through the 2020-2021 school year, will remain stable through the 2023-2024 school year, and then will begin to increase slightly through 2027-2028. The average grade K-5 base enrollment forecast for the projected period through the 2027-2028 school year is 2,155 students.

As a result of a sensitivity analysis performed by the MSBA on this base enrollment projection and further discussion with the District, the following adjustment has been made to the base enrollment projection:

- Development
 - Based on the discussions between the District and the MSBA, and the anticipated development information provided by the District, the MSBA enrollment model has been adjusted to use the five-year 75th percentile cohort survival rate for 2019 and 2020 rather than the five-year average cohort survival rate which is utilized throughout the base enrollment forecast.
 - This adjustment added approximately 25 students to the average total grade K-5 enrollment as compared to the projection without this adjustment.

As of the 2017-2018 school year, the Ernest F. Upham Elementary School accommodated approximately 11% of the Town of Wellesley's grade K-5 population. Based on the historical enrollment trends of the District, the adjustment, analysis, and discussion with the District described above, the MSBA recommends study enrollments for the Proposed Project as follows:

- One of seven grade K-5 schools: 240 students
- One of six grade K-5 schools with equalized enrollments: 365 students

With regard to current and future utilization of the District's grade K-5 facilities, as noted above, the MSBA understands that the District is considering discontinuing use of one of its seven elementary schools as a K-5 facility, resulting in six K-5 elementary school facilities. As also noted above, the MSBA further understands that the District is then considering a full redistricting of students in order to attain equalized enrollments at each of those six schools. The District has informed the MSBA that it will be undertaking a renovation project at the Hunnewell

Elementary School separate but concurrent with the Ernest F. Upham Elementary School project in order to “right-size” this building according to the needs associated with the proposed redistricting of the District’s elementary school students.

If reducing the number of K-5 elementary schools from seven facilities to six facilities combined with the redistricting of K-5 students district-wide to equalize enrollment across the six remaining grade K-5 facilities is determined to be the Preferred Solution, the MSBA understands that the District would subsequently and immediately discontinue use of one of the elementary schools as a K-5 facility barring an unforeseen long-term shift in enrollment that may result in the need for additional capacity. The MSBA also understands that the District may use the discontinued facility for swing space for this and subsequent construction projects. The MSBA further understands that any issues associated with redistricting, the use of the discontinued elementary school building as swing space, and the potential renovation project at the Hunnewell Elementary School would be addressed outside of the Proposed Project.

If six grade K-5 elementary schools with equalized enrollments is determined to be the preferred solution, as part of the Preferred Schematic Report the District will be required to establish the proposed future use or disposition of any existing spaces vacated or otherwise reprogrammed as a result of the proposed project, submit additional information regarding its proposed redistricting strategy including how it will be implemented, and demonstrate that the School Committee and necessary District officials support the proposed redistricting associated with the change from seven to six K-5 elementary facilities. The MSBA will require a written plan from the District describing the process for determining local support for potential redistricting and/or consolidation. Upon the MSBA’s approval of the District’s Preferred Solution, a design enrollment certification that is specific to the enrollment number associated with the approved Preferred Solution will be forwarded to the District.

Please note that the MSBA’s recommendations for multiple study enrollments do not represent an affirmation by the MSBA for approval and/or funding of any of these options and are intended only to provide a framework to inform the Feasibility Study to be conducted as a means of determining the most cost effective and educationally sound solution to be agreed upon by the District and the MSBA. The MSBA’s study enrollment recommendations assume full utilization of all school facilities that remain on-line. Accordingly, as part of the Feasibility Study, the District will be required to document the enrollment capacity of each existing facility anticipated to remain in service and how the spaces within each existing facility are anticipated to be used once the Proposed Project opens.

The MSBA believes that this study enrollment recommendation will position the District to efficiently meet space capacity needs throughout future enrollment variations. Please sign and return the attached certification within 21 calendar days to confirm agreement on this study enrollment. If the District feels that this study enrollment does not meet the needs of the District, please respond to this letter via e-mail to Jennifer Flynn and propose three meeting/conference call times for which the District can be available to discuss enrollment.

If you have any questions regarding this matter, please do not hesitate to contact me or Jennifer Flynn (Jennifer.Flynn@massschoolbuildings.org) at 617-720-4466.

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September 14, 2018
Ernest F. Upham Elementary School Enrollment Letter

Sincerely,

A handwritten signature in blue ink, appearing to read "Mary Pichetti". The signature is fluid and cursive, with the first name "Mary" written in a larger, more prominent script than the last name "Pichetti".

Mary Pichetti
Director of Capital Planning

Cc: Legislative Delegation
Blythe C. Robinson, Wellesley Town Executive Director
Matt Kelley, Chair, Wellesley School Committee
Dr. David Lussier, Superintendent, Wellesley Public Schools
Sharon Gray, Chair, Wellesley School Building Committee
File: 10.2 Letters (Region 4)
