

ATTACHMENT A
MODULE 3 – PRELIMINARY DESIGN PROGRAM REVIEW COMMENTS

District: Town of Wellesley
School: Ernest F. Upham Elementary School
Owner’s Project Manager: Compass Project Management
Designer Firm: SMMA
Submittal Due Date: December 18, 2019
Submittal Received Date: December 18, 2019
Review Date: December 19, 2019 – January 10, 2020
Reviewed by: A. Alves, A. Proia, K. Brown, J. Jumpe
District Response dated 1/29/20

MSBA REVIEW COMMENTS

The following comments¹ on the Preliminary Design Program (PDP) submittal are issued pursuant to a review of the project submittal document for the proposed project presented as a part of the Feasibility Study submission in accordance with the MSBA Module 3 Guidelines.

3.1 PRELIMINARY DESIGN PROGRAM

| Overview of the Preliminary Design Program Submittal | Complete | Provided; <i>Refer to comments following each section</i> | Not Provided; <i>Refer to comments following each section</i> | Receipt of District’s Response; <i>To be filled out by MSBA Staff</i> |
|--|-------------------------------------|--|--|--|
| OPM Certification of Completeness and Conformity | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Table of Contents | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3.1.1 Introduction | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3.1.2 Educational Program | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3.1.3 Initial Space Summary | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3.1.4 Evaluation of Existing Conditions | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3.1.5 Site Development Requirements | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3.1.6 Preliminary Evaluation of Alternatives | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3.1.7 Local Actions and Approvals Certification(s) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

¹ The written comments provided by the MSBA are solely for purposes of determining whether the submittal documents, analysis process, proposed planning concept and any other design documents submitted for MSBA review appear consistent with the MSBA’s guidelines and requirements, and are not for the purpose of determining whether the proposed design and its process may meet any legal requirements imposed by federal, state or local law, including, but not limited to, zoning ordinances and by-laws, environmental regulations, building codes, sanitary codes, safety codes and public procurement laws or for the purpose of determining whether the proposed design and process meet any applicable professional standard of care or any other standard of care. Project designers are obligated to implement detailed planning and technical review procedures to effect coordination of design criteria, buildability, and technical adequacy of project concepts. Each city, town and regional school district shall be solely responsible for ensuring that its project development concepts comply with all applicable provisions of federal, state, and local law. The MSBA recommends that each city, town and regional school district have its legal counsel review its development process and subsequent bid documents to ensure that it is in compliance with all provisions of federal, state and local law, prior to bidding. The MSBA shall not be responsible for any legal fees or costs of any kind that may be incurred by a city, town or regional school district in relation to MSBA requirements or the preparation and review of the project’s planning process or plans and specifications.

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|--|-------------------------------------|--|--|--|
| Overview of the Preliminary Design Program Submittal | Complete | Provided; <i>Refer to comments following each section</i> | Not Provided; <i>Refer to comments following each section</i> | Receipt of District's Response; <i>To be filled out by MSBA Staff</i> |
| 3.1.8 Appendices | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

3.1.1 INTRODUCTION

| Provide the following Items | | Complete; <i>No response required</i> | Provided; <i>District's response required</i> | Not Provided; <i>District's response required</i> | Receipt of District's Response; <i>To be filled out by</i> |
|-----------------------------|--|--|--|--|---|
| 1 | Summary of the Facility Deficiencies and Current S.O.I. | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Date of invitation to conduct a Feasibility Study and MSBA Board Action Letter | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Executed Design Enrollment Certification | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Narrative of the Capital Budget Statement and Target Budget | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Project Directory with contact information | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 | Updated Project Schedule | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

MSBA Review Comments:

3) *The information provided indicates a Design Enrollment Certification will be submitted as part of the subsequent Preferred Schematic Report (PSR). Please note, a Design Enrollment Certification is issued by the MSBA following a vote by the MSBA Board of Director's regarding a District's Preferred Schematic and should not be submitted or executed prior to this proposed project being presented before the MSBA Board of Director's for consideration as the District's Preferred Schematic.*

District Response: Acknowledged.

4) *The information provided indicates the District is targeting a \$53-65 million total project budget for the proposed project, "exclusive of MSBA reimbursement". In response to these comments confirm the District's target total project budget.*

The information provided indicates the Town can acquire bonded financing in excess of \$65 million if approved by the citizens of Wellesley. In response to these comments clearly indicate the Town's current funding capacity.

District Response: The Town's funding capacity can support a \$71 million school if that is the recommended solution approved by the Town residents. To clarify that Town's Moody's rating is "Aaa" not the "AAA" noted in the submission, that rating relates to Standard and Poor's scale that the Town does not use.

6) The information provided does not include review period information for the PSR submittal nor does it incorporate minimums of twenty-one (21) days for the MSBA to review submittals, and fourteen (14) days for the District to respond to the MSBA's review comments. In response to these comments provide an updated Project Schedule which incorporates these minimums and includes all review dates.

OPM Response: The MSBA review comment period and the minimum response period have been updated in the project schedule. An updated project schedule dated 1/28/20 is attached hereto.

The information provided indicates the District is targeting the June 2020 MSBA Board of Directors meeting for Preferred Schematic approval, and the February 2021 MSBA Board of Directors meeting for Project Scope and Budget approval. Please confirm.

District Response: That is correct. We are targeting the June 2020 MSBA Board of Directors meeting for Preferred Schematic Approval.

No further review comments for this section.

3.1.2 EDUCATIONAL PROGRAM

Provide a summary and description of the existing educational program, and the new or expanded educational vision, specifications, process, teaching philosophy statement, as well as the District's curriculum goals and objectives of the program. Include description of the following items:

| Provide the following Items | | Complete; No response required | Provided; District's response required | Not Provided; District's response required | Receipt of District's Response; To be filled out by MSBA Staff |
|-----------------------------|---|--------------------------------------|---|--|---|
| 1 | Grade and School Configuration Policies | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Class Size Policies | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | School Scheduling Method | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Teaching Methodology and Structure | | | | |
| | a) Administrative and Academic Organization/Structure | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | b) Curriculum Delivery Methods and Practices | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | c) English Language Arts/Literacy | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | d) Mathematics | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | e) Science | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | f) Social Studies | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | g) World Languages | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

| | | | | | |
|----|--|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|
| | h) Academic Support Programming Spaces | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | i) Student Guidance and Support Services | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 5 | Teacher Planning and Professional Development | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 | Pre-kindergarten | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 | Kindergarten | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8 | Lunch Programs | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9 | Technology Instruction Policies and Program Requirements | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Media Center/Library | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Visual Arts Programs | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Performing Arts Programs | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | Physical Education Programs | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | Special Education Programs | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 | Vocation and Technology Programs | | | | |
| | a) Non-Chapter 74 Programming | | | | |
| | b) Chapter 74 Programming | | | | |
| 16 | Transportation Policies | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 17 | Functional and Spatial Relationships | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 | Security and Visual Access Requirements | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

MSBA Review Comments:

As part of the District’s Preferred Schematic Report include two copies of an updated Educational Program, one redlined copy and one clean copy. The updated Educational Program must address the comments below, include District updates, provide a Designer response for each component of the educational program, and align with the proposed Preferred Schematic design.

3) The PDP describes the current school scheduling methodology but does not indicate if this is to remain the same or be changed in the proposed project. Confirm in the updated educational program included with the PSR if the schedule is to remain the same for all programs in the proposed project or describe the proposed changes to be implemented as well as the benefits of the proposed changes.

District Response: Acknowledged. This will be provided with the revised updated Educational Program submitted with the PSR.

4a, b) The information provided includes references to various Wellesley Public Schools (WPS) programs in abbreviated form. For clarity, include the whole program name the first instance each WPS program name appears.

District Response: Acknowledged. This will be provided with the revised updated Educational Program submitted with the PSR.

4c-g) The information provided indicates the District delivers core academic curriculum with integrated curriculum units using project-based learning practices. Provide a more detailed narrative that includes specific examples of curriculum delivery methods regarding each of the subjects described in these sections. Additionally, describe specific core academic activities that will take place outside of general classrooms, identify the spaces required to support those activities, indicate how such spaces will be scheduled and monitored by staff, and explain how those activities will support the District's academic and social/emotional goals in the proposed project.

District Response: Acknowledged. This will be provided with the revised updated Educational Program submitted with the PSR.

Include a description of the District's proposed Science, Technology, and Engineering (STE) space and how it would be used, scheduled, integrated within the existing school schedule. Refer to the MSBA's Review and Recommendations of Best Practices for K–12 Stem Learning Spaces for additional information and recommendations; please provide the updated description as part of the PSR. See attached memo, dated February 6, 2019, "Staff Recommendation for 2018 Science/Technology/Engineering Area Guidelines".

District Response: Acknowledged. This will be provided with the revised updated Educational Program submitted with the PSR.

4h, i) Not included. Provide with the updated educational program to be submitted with the PSR.

District Response: Acknowledged. This will be provided with the revised updated Educational Program submitted with the PSR.

5) The information provided indicates both Hardy and Upham teachers have participated in a project-based learning training program as part of the District's commitment to integrated curriculum units and project-based learning. Provide a more detailed description of the overall professional support and training offered to staff, especially regarding the District's partnership with the Buck Institute.

District Response: The District has partnered with [PBLWorks](#) (formerly the Buck Institute for Education) since 2017. This partnership supports educators and school leaders across all of our schools with project-based learning (PBL) implementation. Their support begins with a

three-day professional course (“PBL 101”) taught by a PBLWorks faculty member at a centralized District location. The course is followed by school-based coaching and workshops which happen periodically throughout the school year. Additionally, PBLWorks provides ongoing support for teachers via an online teaching and learning platform and offers strategic implementation support for the district’s PBL Steering Committee. To date, PBLWorks has trained approximately 200 educators across the District. At Hardy, 13 teachers have been trained; at Upham 6 teachers have been trained. We anticipate an additional 15-20 teachers in these two schools will begin their PBL training over the next five years.

8) *The submittal indicates that the District currently has 2 lunch seatings at the Upham School and 3 lunch seatings at the Hardy School. Please note MSBA guidelines are based on two seatings for elementary school populations in order to provide space for assemblies in the cafeteria. In the updated educational program included with the PSR indicate how many lunch seatings the District proposes to have moving forward, explain the District’s rationale for the proposed number of seatings, how long lunch will be provided, and describe the proposed changes to be implemented as well as the benefits of the proposed changes.*

District Response: Acknowledged. This will be provided with the revised updated Educational Program submitted with the PSR.

9) *Describe any consideration to provide Hearing Assistive Technologies (i.e. FM/digital wireless and audio distribution systems) in the classrooms.*

The educational program describes the current educational technology devices as shared iPads for grades K-2 and classroom iPads for grades 3-5. Explain how all students are accommodated with this policy. Additionally, describe any changes anticipated to the use of educational technology in the classroom in the proposed project and describe how the proposed equipment and updated systems would be managed and maintained by the District.

The information provided includes detailed educational technology specifications. Considering the rapid advancements of technology, in response to these comments confirm these specifications will continue to be reviewed and updated as the proposed project progresses.

District Response: Acknowledged.

All systems described in the section called **Existing conditions of Technology** will need to be replicated in the new schools as outlined in the **Vision for Technology**. This includes the hearing assistive technologies in each classroom comprised of the sound system with a teacher microphone and a student microphone that can interact with existing audio and individual student assistive hearing technology.

Currently we review our mobile device platform annually. Our current choice is iPads and students in grades K-2 share a cart while students in grades 3-5 have a school issued iPad,

which they use and keep in the classroom cart. Apps for these devices are also district funded and specialized apps support students with accommodations and those on Individualized Education Plans. We replace our mobile devices every 4 years through our capital funds and manage them through a mobile device management system, which is funded through operating funds. We maintain these devices in-house with our MAC certified technology staff and do not use insurance for repairs and maintenance. When our devices reach end of life, we trade them in for credit towards parts and service to a vendor specializing in repair and maintenance of technology. This helps support our maintenance of equipment. All technology specifications will need to be reviewed and potentially updated as the proposed project progresses due to the rapid advancement in technology. Annually, we review Internet Service bandwidth, end user devices, network components, servers, audio/visual equipment, Public Address Systems, 2-way radios, security systems, etc. At the time of renovations or new building projects we review our cabling systems. We replace equipment based on its functional life-cycle and work towards having the most future-proofed systems as possible.

10) The educational program describes a Media Center/Library with a carpeted STEAM Lab. As noted in section 4 above, see the attached memo, dated February 6, 2019, “Staff Recommendation for 2018 Science/Technology/Engineering Area Guidelines”. In response to these comments, confirm the Media Center/Library space will continue to be reviewed and developed in subsequent submittals to ensure that it is appropriately designed, equipped, and staffed. Additionally, confirm the proposed STEAM Lab will conform to the MSBA guidelines.

District Response: Confirming that the Media Center/Library space will continue to be reviewed; confirming STE Lab will conform to MSBA guidelines.

13) The information provided notes an essential element of the proposed design is a large regulation-sized gymnasium. Provide further information about the proposed specific uses of the gymnasium, including anticipated users and desired adjacencies.

District Response: The Wellesley Public Schools will utilize the proposed regulation-sized gymnasium space for the primary purpose of Physical Education classes, each day of the week, Monday through Friday. All Elementary grades in WPS, K-5, participate in quality, comprehensive, spiraled and sequenced Physical Education instruction, led by a certified Physical Educator. Due to the nature of the discipline, and the skills that are taught, a regulation-sized space is necessary to account for physical movement and the instruction of different sports and games that require large spaces. For safety reasons, these standard-operating procedures requiring specific space dimensions need to be followed. Other anticipated users of these spaces may include Wellesley’s Recreation Department, Intramural Sports Program, Middle and High School Athletic Programs and other town-wide agencies and groups, such as our town-wide Soccer Program, the Girl Scouts, Boy Scouts, Health Department, or Town Basketball program.

Additionally, these spaces are used daily for classroom instruction in Health & PE as well as performing arts. They are also often used for large group meetings and events. They will need proper Audio visual equipment to suit the large space including wireless assistive listening devices and appropriate signage.

All technology specifications will need to be reviewed and potentially updated as the proposed project progresses due to the rapid advancement in technology.

14) The information provided notes that adaptive physical education (PE) is currently provided but no discussion of how the program operates or will operate in the proposed project is provided. Please provide further information about the District's current and proposed approach to adaptive PE and clarify how it will be scheduled and where it will take place in the proposed project.

District Response: The District's K-12 Physical Education program currently provides Adapted Physical Education (APE) in two ways. First, APE is offered on an individual basis to any students whose Individualized Education Plan (IEP) requires it specifically. Second, APE is offered through our in-district specialized programming housed in specific elementary schools. In both instances, the current APE program is run by the school's certified elementary physical educator.

For Individual Students: APE is taught to all students who call for APE on their IEP plan. These plans are put forth in conjunction with the Special Education department and the student's family, and are signed off on by the District. The elementary physical educator gives a diagnostic assessment called the Test of Gross Motor Development (TGMD-2)) to prepare the type of instruction the student will be given. They teach the student either once or twice per week for 30 minutes each time as determined by the IEP. They work with the Special Education department and the family to set individual goals for the APE students. This practice will continue on into the new spaces.

Specialized Programs: There is also APE instruction for the specialized programs at the Hunnewell, Sprague and Upham elementary schools. These students are in the TLC, PLC, and ISS programs through the Special Education department. In these instances, the physical educator instructs the students in APE who are in these cohorts. Students in these programs receive APE either once or twice per week for 30 minutes. This practice will continue on into the new spaces.

17) The information provided identifies the District's desire for connectivity between indoor and outdoor spaces, with outdoor spaces used not only for play but also as learning space. The District should work with its consultants to ensure that outdoor spaces are designed to be fully accessible. Please acknowledge.

District & SMMA Response: Acknowledged.

The information provided notes the school building should be used as a community resource. Provide further information regarding anticipated uses of the building, as well as which areas of the building might require air conditioning to accommodate use of the building throughout the year.

District Response: Each WPS school is a community asset used for a variety of after-hours activities. With a full-sized gym and separate cafeteria, we anticipate even greater use of the proposed new building, on par with other WPS elementary schools of a similar size. These uses include after-school programs and care, enrichment opportunities offered by our Recreation Department, WPS athletics, league sports, Scouting, and community meetings. We anticipate that the entire building will have conditioned air, allowing access and use throughout the year.

18) In response to these comments confirm that first responding emergency representatives will be consulted in the planning process and associated requirements will be incorporated into the Preferred Schematic.

SMMA Response: First responding emergency representatives will be consulted during the planning process of this study and into the Preferred Schematic. The first meeting will take place in early March.

No further review comments for this section.

3.1.3 INITIAL SPACE SUMMARY

| Provide the following Items | | Complete; <i>No response required</i> | Provided; <i>District's response required</i> | Not Provided; <i>District's response required</i> | Receipt of District's Response; <i>To be filled out by MSBA Staff</i> |
|-----------------------------|---|--|--|--|--|
| 1 | Space summary; one per approved design enrollment | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Floor plans of the existing facility | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Narrative description of reasons for all variances (if any) between proposed net and gross areas as compared to MSBA guidelines | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

MSBA Review Comments:

1) The District provided space summaries for the two study enrollment configurations and each option previously agreed upon by the District and the MSBA. The enrollments include: (1) 240 students in grades K-5 in seven school facilities; and (2) 365 students in grades K-5 in six school facilities with

equalized enrollments. For clarity, these enrollments are identified as “Enrollment 1,” and “Enrollment 2,” respectively, in the comments below.

The MSBA has performed a review of the space summaries provided and offers preliminary comments regarding only the new construction scenarios for the two study enrollments, as outlined below. The final MSBA determination of compliance with MSBA space guidelines in subsequent submittals will vary (in part) depending on the District’s Preferred Schematic and the extent that the proposed spaces are located either in existing construction, substantially renovated existing areas, or newly constructed portions of the proposed facility. The MSBA expects spaces located in substantially renovated or new areas to be compliant with MSBA space standards.

- **Core Academic** – The overall proposed square footage for this category exceeds the MSBA guidelines by 7,250 net square feet (“nsf”) for Enrollment 1 and by 5,930 nsf for Enrollment 2. Per the information provided, the following spaces are proposed for the District to deliver its educational program:

| Anticipated Core Academic Spaces* | Enrollment 1: 240 students Grades K-5 | Enrollment 2: 365 students Grades K-5 |
|-----------------------------------|---|---|
| Kindergarten Classrooms | 2 | 3 |
| General Classrooms | 10 | 15 |
| STE Room* (Grades 3-5) | 1 | 1 |
| STE Storage Room* | 1 | 1 |
| Cloak Room* | 6 | 6 |
| Learning Commons* | 6 | 6 |

*The MSBA will rely on the District’s Educational Program and additional information to understand how proposed spaces that are unique to the District will be utilized in the proposed project.

The information provided for both study enrollments proposes one General Classroom in excess of MSBA guidelines. Based on review of the District’s educational program, and the desire to have 3 sections per grade, the MSBA accepts this variation to the guidelines.

The information provided for Enrollment 2 proposes fifteen 850 nsf General Classrooms which are 50 nsf below the MSBA minimum elementary classroom standard of 900 nsf each. These spaces must meet the MSBA minimum standard in subsequent submittals.

SMMA Response: The District acknowledges the importance of the general classroom size standards (MSBA regulations support a range from 900 – 1,000 nsf) the educational plan seeks to organize that space to maximize the flexibility and utility of our classrooms within a grade level cohort, the Learning Commons with cloak spaces outside of the classrooms places this space where it can be most impactful for learning, the District is comfortable with 850 nsf classrooms in this arrangement, but will comply with the 900 nsf minimum if directed.

The information provided for Enrollment 2 indicates the District is proposing a 900 nsf STE Room, which is 180 nsf below MSBA Guidelines. If the District wishes to include this space in the proposed project it must be in accordance with the minimum standard of 1,080 nsf as noted in the aforementioned MSBA report, *Review and Recommendations of Best Practices for K–12 Stem Learning Spaces*. See attached

memo for more information, dated February 6, 2019, “*Staff Recommendation for 2018 Science/Technology/Engineering Area Guidelines*”.

SMMA Response: We acknowledge the goals and intentions of the STE Room (District’s “Innovation Space”) and will comply with the minimum standard in the next submission, including a 120 nsf storage space, for a total of 1,200 nsf in this category.

The information provided includes six 750 nsf Learning Commons and six 180 nsf Cloak Rooms. Prior to the MSBA making a determination on these variations to MSBA guidelines, provide a narrative in the updated educational program to be included with the PSR describing the anticipated utilization of these spaces which demonstrates the need for both of these in the proposed project.

District Response: Acknowledged. This will be provided with the revised updated Educational Program submitted with the PSR.

Special Education – The overall proposed square footage in this category exceeds the MSBA guidelines by 4,600 for Enrollment 1 and 5,140 nsf for Enrollment 2. Please confirm that all spaces in this category are intended to serve exclusively students with an Individualized Educational Program (IEP). If any spaces in this category are intended to serve students without an IEP at any time, reallocate these spaces in the space summary in subsequent submittals.

Please note that the Special Education program is subject to approval by the Department of Elementary and Secondary Education (“DESE”). The District should provide the required information required with the Schematic Design submittal. Formal approval of the District’s proposed Special Education program by the DESE is a prerequisite for executing a Project Funding Agreement with the MSBA.

District & SMMA Response: All spaces in this category are will serve, exclusively, students with an Individualized Education Program (IEP). In addition to our Learning Centers and other dedicated special education spaces, this elementary school hosts our district-wide Applied Behavior Analysis “Skills” program serving students with autism and related disabilities. The Skills program currently has 32 students enrolled across 4 substantially separate classrooms and enrollment is expected to remain at that level or slightly higher.

Art & Music – *The proposed programmatic spaces appear to align with the MSBA guidelines for both Enrollments. No further preliminary comments.*

Health & Physical Education – *The overall proposed square footage in this category exceeds the MSBA guidelines by 1,000 nsf for both Enrollments. Please note that MSBA may allow additional area beyond that included in the guidelines for renovated spaces, however all areas in excess of the MSBA guidelines will be considered ineligible for reimbursement.*

District Response: Acknowledged.

Media Center – *The overall proposed square footage in this category appears to align with the MSBA guidelines for Enrollment 1 and exceeds the MSBA guidelines by 88 nsf for Enrollment 2. No further preliminary comments.*

SMMA Response: *The Media Center space will be revised to meet the guidelines.*

Dining & Food Service – *The overall proposed square footage in this category falls below the MSBA guidelines by 950 nsf for Enrollment 1 and 1,124 nsf for Enrollment 2, primarily due to the District’s “hub and spokes” food service delivery. Please confirm that the proposed square footage is sufficient for the District to deliver its educational program.*

District & SMMA Response: *Dining space allotment meets the minimum guidelines for 2 seatings and assembly usage, all District elementary school meals are prepared at the middle school’s kitchen and delivered fresh daily, this practice will be continued. Note that the middle school kitchen is currently undergoing a full renovation and will be on-line prior to the completion of the Upham project.*

The size has been reviewed in comparison to current facilities in other buildings that have worked well for the district. The proposed square footage is sufficient for our Food Service program.

Administration & Guidance – *The overall proposed square footage in this category exceeds the MSBA guidelines by 55 nsf for Enrollment 1 and 155 nsf for Enrollment 2. No further preliminary comments*

District & SMMA Response: *An additional 150 nsf BCBA office is required by the SKILLS program – this was incorrectly shown in the Administration section and will be locate with the SPED category for the PSR submission.*

The BCBA office is for a district-wide, itinerant BCBA who will regularly spend time at the school and will require a private office in which to work.

Technology will need an additional 150 nsf to house 2-3 technology staff members with the associated equipment for supporting the technology, staff and students in the building. This office would be best located near the STE instructional space.

Data Closet: As mentioned in the educational specification in The Vision for Technology section, the data closet should be air-conditioned and sized appropriately so it cannot be shared for storage or custodial functions, should have adequate signage, and security card access.

Custodial & Maintenance – *The proposed programmatic spaces appear to align with the MSBA guidelines for both enrollments. No further preliminary comments.*

Other – *The overall proposed square footage in this category includes 50 nsf for a Mother’s Room in both options. The MSBA does not object to the District providing a*

Mother's Room in the project; however, area in this category will be deemed ineligible for reimbursement.

District Response: We note that this is now a Massachusetts state requirement by law and hope it will be considered in subsequent submission.

Note that upon selection of a Preferred Schematic, the District may be required to adjust spaces/square footage that exceeds the MSBA guidelines and is not supported by the Educational Program provided.

No further review comments for this section.

3.1.4 EVALUATION OF EXISTING CONDITIONS

| Provide the following Items | | Complete; <i>No response required</i> | Provided; <i>District's response required</i> | Not Provided; <i>District's response required</i> | Receipt of District's Response; <i>To be filled out by MSBA Staff</i> |
|-----------------------------|---|--|--|--|--|
| 1 | Confirmation of legal title to the property. | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Determination that the property is available for development. | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Existing historically significant features and any related effect on the project design and/or schedule. | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Determination of any development restrictions that may apply. | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Initial Evaluation of building code compliance for the existing facility. | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 | Initial Evaluation of Architectural Access Board rules and regulations and their application to a potential project. | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 | Preliminary evaluation of significant structural, environmental, geotechnical, or other physical conditions that may impact the cost and evaluations of alternatives. | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8 | Determination for need and schedule for soils exploration and geotechnical evaluation. | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9 | Environmental site assessments minimally consisting of a Phase I: Initial Site Investigation performed by a licensed site professional. | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 | Assessment of the school for the presence of hazardous materials. | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Previous existing building and/or site reports, studies, drawings, etc. provided by the district, if any. | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

MSBA Review Comments:

1) *The information provided in the Phase I Environmental Site Assessment (“ESA”) for the Upham School states, “The property is noted to be 11.9 acres, but a note on the assessor’s card suggests that it is actually 12.28 acres of land.” No assessor’s information was included in the submittal. Clarify this discrepancy and provide a copy of all available title and local assessor information in the following submittal.*

SMMA Response: Updates to the base site survey will clarify the discrepancy in the next submission.

3) *The information provided includes a timeline associated with filing a Project Notification Form with the Massachusetts Historical Commission (MHC) as the Hardy School is included on the MHC’s inventory. Note that all construction projects that include state funding are required to file a Project Notification Form with the Massachusetts Historical Commission (“MHC”). In subsequent submittals describe any historically significant features of all proposed buildings and sites. The District should keep the MSBA informed of any decisions and/or proposed actions and should confirm that the proposed project is in conformance with Massachusetts General Law 950, CRM 71.00.*

SMMA Response: Acknowledged

4) *The information provided indicates Wellesley’s SR-10 and SR-20 Zoning Districts have a 40-foot maximum height restriction. The report confirms both the Upham and Hardy schools do not currently have existing non-conformances but does not mention if the proposed project is expected to require Zoning relief. In subsequent submittals, detail the approach and timeline necessary for obtaining a Variance and/or applicability of the Massachusetts General Law Chapter 40A, Section 3 “Dover” Amendment. In addition, describe any impact the proposed building’s height may have on abutters, and any community concerns that may have arisen from this issue.*

SMMA Response: Acknowledged, at this time no zoning relief requests are anticipated.

6) *The information provided includes initial evaluations of Massachusetts Architectural Access Board (MAAB) rules and regulations and their application to the existing buildings. In response to these comments, confirm MAAB rules and regulations will continue to be investigated in order to best inform local decisions regarding Preferred Schematic selection in subsequent submittals.*

SMMA Response: Confirmed. MAAB rules and regulations will continue to be investigated in order to best inform local decisions.

7) *The information provided includes a preliminary geotechnical report by Nobis Group which identifies the over excavation and replacement of a previously filled historical pond and the potential excavation of a significant volume of rock as potential obstacles for developing the Upham School site. A preliminary geotechnical report by Nobis Group for the Hardy School site also identifies the need to address fill and organic materials encountered on the Southern portion of the Hardy School site as a potential obstacle to the development of the site. In subsequent submittals provide the information used to inform discussions surrounding any significant structural, environmental, geotechnical, or other physical conditions that may impact the cost and evaluations of alternatives identified in due diligence performed as part of the proposed project.*

SMMA Response: Acknowledged, Supplemental investigations will occur at the latest during Design Development phase of the project, or during Schematic design if appropriate and authorized by our client.

The information provided does not include any information regarding studies performed in order to better understand the optimal solar orientation of a proposed building and does not include any information regarding historic prevailing winds for either site. In subsequent submittals ensure this information is included.

SMMA Response: Acknowledged, both sites provide optimal orientation opportunities, however that is just one of many criteria that the client is using to select a preferred option.

8) *The information provided in the preliminary geotechnical reports for both the Hardy and Upham Schools by Nobis Group, recommend further investigations depending on proposed final building configurations. In response to these comments, confirm these recommended supplemental investigations will occur and be included in subsequent submittals to best inform local decision making.*

SMMA Response: Confirmed. Supplemental investigations will occur at the latest during the Design Development phase of the project, or during Schematic Design if appropriate and authorized by our Client.

9) *The information provided in the Phase 1 Environmental Site Assessment (ESA) Reports performed by ADS Environmental Engineering, LLC confirms the prior presence and suspected removal of Underground Storage Tanks (UST) at both the Upham and Hardy Schools. The reports note “data gaps”, in which conditions of the soil around the previous USTs were not documented and information confirming the removal of the USTs could not be located. In response to these comments, confirm if the District will perform a Phase 2 ESA in response to these data gaps. If no Phase 2 ESA is anticipated, in subsequent submittals indicate a plan of action in response to any possible Recognized Environmental Conditions (REC) being confirmed which may affect proposed excavation activities. Note that all costs associated with the removal of underground storage tanks, as well as any special waste or*

hazardous or contaminated materials remediation, removal and disposal where associated with site work are ineligible for MSBA reimbursement and should be itemized on all submitted cost estimates.

SMMA Response: A Phase 2 ESA is anticipated after the selection of a preferred site. Any changes in status of the conditions in the field will be noted in subsequent submissions.

10) The Hazardous Materials Identification Study conducted by Nobis Group at the Ernest F. Upham School provided a preliminary asbestos containing material (ACM) abatement cost estimate for this project totaling \$363,760, including approximately \$180,530 for abatement of flooring, flooring mastic, and ceiling tiles/glue. The Hazardous Materials Identification Study conducted by Nobis Group at the John D. Hardy School provided a preliminary ACM abatement cost estimate for this project totaling \$447,750, including approximately \$114,050 for abatement of flooring and ceiling tiles/glue. The MSBA notes that all costs associated with the removal of asbestos containing flooring and ceiling tiles will be ineligible for reimbursement and must be itemized in the cost estimates in subsequent submittals as ineligible for MSBA reimbursement.

SMMA Response: Acknowledged.

No further review comments for this section.

3.1.5 SITE DEVELOPMENT REQUIREMENTS

| Provide the following Items | | Complete; <i>No response required</i> | Provided; <i>District's response required</i> | Not Provided; <i>District's response required</i> | Receipt of District's Response; <i>To be filled out by MSBA Staff</i> |
|-----------------------------|---|--|--|--|--|
| 1 | A narrative describing project requirements related to site development to be considered during the preliminary and final evaluation of alternatives. | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Existing site plan(s) | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

MSBA Review Comments:

- 1) Please review and respond accordingly to comments provided in Section 3.1.4 above.*
- 2) Although the submittal provides topographic site plans which show some of the following features, a comprehensive existing site plan was not provided. In the subsequent PSR provide site plans in 11"x17" format that clearly identify the following features for the site of the Preferred Schematic:*

- Structures and fences;*
- Site access and circulation;*
- Parking and paving;*
- Zoning setbacks and limitations;*
- Accessibility requirements;*
- Easements;*
- Wetlands and/or flood restrictions;*

- Emergency vehicle access;
- Safety and security requirements;
- Utilities and drainage;
- Athletic field and outdoor educational spaces; and
- Site orientation and other location considerations.

If any of these features are not anticipated to affect the proposed project or do not exist, confirm the non-existence of each inapplicable item in a narrative accompanying the site plans.

SMMA Response: Narrative and updated site plans will be included in the PSR.

No further review comments for this section.

3.1.6 PRELIMINARY EVALUATION OF ALTERNATIVES

| Provide the following Items | | Complete; No response required | Provided; District's response required | Not Provided; District's response required | Receipt of District's Response; To be filled out by MSBA Staff |
|-----------------------------|--|--------------------------------------|---|--|---|
| 1 | Analysis of school district student school assignment practices and available space in other schools in the district | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 2 | Tuition agreement with adjacent school districts | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Rental or acquisition of existing buildings that could be made available for school use | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Code Upgrade option that includes repair of systems and/or scope required for purposes of code compliance; with no modification of existing spaces or their function | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Renovation(s) and/or addition(s) of varying degrees to the existing building(s) | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 | Construction of new building and the evaluation of potential locations | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 | List of 3 distinct alternatives (including at least 1 renovation and/or addition option) are recommended for further development and evaluation. | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

MSBA Review Comments:

1) The information provided notes if a consolidation option is chosen as the District's Preferred Schematic it will require redistricting to redraw the attendance zones around the remaining six schools. In subsequent submittals include documentation which describes the analyses performed to determine the required attendance zones, and what factors support/oppose each configuration studied.

The MSBA acknowledges the District's determination that there is no available space in other schools in the District to permanently accommodate the Upham School population. No response required.

District Response: In November, the District contracted with AppGeo to provide technical support to the Superintendent's Advisory Committee on Redistricting. This Committee met throughout December and January to construct possible map scenarios responsive to building a new school on either the Upham or Hardy sites. Community forums were held on January 22 and January 28, 2020 to review these draft maps with the public. The Committee also released a community survey to receive broader feedback. The School Committee is expected to receive a final recommendation from this Redistricting Advisory Committee in February. At that point, the School Committee will approve final maps to be used in the Upham/Hardy feasibility study.

4) The information provided on page 54 of the Preliminary Evaluation of Alternatives (section 6) states Option 4, 6, and 7 "best meet the project goals and educational program". In response to these comments confirm the Code Upgrade Alternative will continue to be explored for cost-comparison purposes and will be included in the Preliminary Design pricing Table included with the PSR.

SMMA Response: The Code Upgrade Alternative at the Upham site will continue to be carried through cost-estimating of the PSR.

5) The information provided indicates Options 2 and 3 do not meet the District's Educational Plan goals. In response to these comments provide more detail including specific examples of how the goals of the Educational Program are not met by these options.

District Response: Options 2 and 3 do not meet the District's Educational Plan goals for many reasons. Option 2 is based on a 240 student enrollment. A core tenant of the WPS Educational Plan is for three classes (sections) per grade level. This scale results in a number of important educational benefits. The first is to allow for a critical mass of students to have an appropriately sized social group as they move through six years of elementary group. This results in a broader range of friendships and increasing the likelihood experiencing more diversity. This scale also allows principals more flexibility in student assignment each year. From a staff perspective, having three grade level teachers per grade level provides for more professional and efficient in-school collaboration. From an operational perspective, three sections per grade level also allows for the school to deal with enrollment increases or decreases without resulting in a lack of space or decreasing to a single class per grade level.

Option 3, while allowing for three sections per grade level, does meet the District's Educational Plan goals for class cohorts there were other reasons that this option was challenging. Due to the location of this existing building on the site surrounded by ledge on two sides it made any addition/renovation difficult to achieve a desirable footprint to respond

to the educational program adjacencies. The current Upham footprint is woefully inadequate in its structure for expansion. More specifically, a renovation would not allow the District to fully realize the elements of the Educational Plan, particularly grade-level neighborhoods and appropriate spaces for specialized services, such as the District’s autism program. When evaluating addition and renovation options for a 365 enrollment, the SBC believed the Hardy site provided more residual value in the existing structure to work with and better location on the site, so they recommended that as the addition/renovation option to proceed for further evaluation.

6) The information provided indicates Option 5 would accommodate “all elements of Upham’s curriculum” in spaces that meet current standards, yet this Option does not meet the District’s Educational Plan goals and “population requirements”. In response to these comments provide more detail including specific examples of how the goals of the Educational Program are not met by this option.

SMMA Response: The Upham floor plan and building has numerous deficiencies that make it unsuitable for expansion. Inflexible and undersized spaces and a “split-level” floor plan without an easy manner to add on to including a need for multiple elevators. The building is approximately 30% of the required area making an addition unusually larger than the original structure, the building is also nestled into a ledge making its expansion prohibitive and exacerbating the level change problem. The District, through its new building program is seeking to create modern educational environments that meet their Ed Plan through a compact footprint - the Upham facility will not allow for this configuration in any manner including cost effectiveness.

Similar to the concerns expressed regarding Option 2, a building based on a 240-student enrollment--even if new--would not allow for appropriate student socialization, professional collaboration, nor operational flexibility. The capacity to offer three sections per grade level is a core tenant of the Educational Plan and would also help the District right-size this new building on par with the expected capacity (18 classrooms) of all other WPS elementary schools.

7) MSBA Module 3, Section 3.1.6 states that “Alternatives shall retain the same title and designation between PDP, PSR, and SD submittal, therefore maintaining clarity in the documentation.” In future submittals, continue to use consistent option designations. The options selected for further development in the PSR submittal should therefore maintain their original designations.

SMMA Response: Acknowledged.

No further review comments for this section.

3.1.7 LOCAL ACTIONS AND APPROVAL

| Provide the following Items | | Complete; <i>No response required</i> | Provided; <i>District's response required</i> | Not Provided; <i>District's response required</i> | Receipt of District's Response; <i>To be filled out by MSBA Staff</i> |
|-----------------------------|---|--|--|--|--|
| 1 | Signed Local Actions and Approvals Certification: (original) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Certified copies of the School Building Committee meeting notes showing specific submittal approval vote language and voting results, and a list of associated School Building Committee meeting dates, agenda, attendees and description of the presentation materials | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

MSBA Review Comments:

No review comments for this section.

3.1.8 APPENDICES

| Provide the following Items | | Complete; <i>No response required</i> | Provided; <i>District's response required</i> | Not Provided; <i>District's response required</i> | Receipt of District's Response; <i>To be filled out by MSBA Staff</i> |
|-----------------------------|--|--|--|--|--|
| 1 | Current Statement of Interest | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | MSBA Board Action Letter including the invitation to conduct a Feasibility Study | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Study Enrollment Certification | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

MSBA Review Comments:

No review comments for this section.

End