

Report to the School Committee by the Hardy, Hunnewell, and Upham Master Planning Committee

March 2017

I. EXECUTIVE SUMMARY

The Hardy, Hunnewell, and Upham (“HHU”) Master Planning Committee (the “MPC”) was formed in April 2016 by the School Committee and the Selectmen. At the 2016 Annual Town Meeting, Town Meeting appropriated \$200,000 from Free Cash under Article 22 of the Warrant to the School Committee and the Selectmen to conduct additional traffic, enrollment, and other studies related to the question of whether to renovate, rebuild, or consolidate the HHU schools. The School Committee recommended that the HHU MPC should review the work of prior committees, conduct additional work and study, and develop a master plan recommendation for the facilities needs of the HHU schools. The School Committee stated that it would review the master plan recommendation by the HHU MPC, make its own recommendation, and return to Town Meeting to seek an appropriation to conduct a feasibility study to implement the proposed master plan. The School Committee stated that it and/or a School Building Committee would seek funds for design and construction of school buildings following the feasibility study. See [Presentation at 2016 Annual Town Meeting](#).

Beginning in April 2016 and continuing to March 2017, the HHU MPC conducted 32 meetings, numerous subcommittee meetings, 5 public forums, and a town-wide survey to which over 2,000 citizens responded. The co-chairs of the HHU MPC met with the Parent-Teacher Organizations at Hardy and Upham, upon their invitation, and made reports to the Advisory Committee, the School Committee, and the Selectmen throughout the year.

At the end of its process, the HHU MPC voted on three motions encapsulating its master plan recommendation:

Motion #1: Moved that the HHU MPC recommend to the School Committee that it seek approval and funds to undertake a feasibility study to build new schools at the Hardy, Hunnewell, and Upham sites, with the plan to build a 19 section school at Hardy or Upham, followed by a 19 section school at Hunnewell, followed by a 19 section school at the remaining site, provided however, that funds will be sought for the design and construction of the first two schools upon completion of the feasibility study, but funds will be sought for the design and construction of the third school only upon further recommendation by the School Committee, which should occur if elementary enrollment reaches or appears likely to exceed 2,350 students on a trending basis and/or the current school configurations are limiting educational needs. **Passed:** 13 – 1

Motion #2: Moved that the HHU MPC recommend to the School Committee that the first new HHU school be built at Hardy. **Failed:** 6 – 12

Motion #3: Moved that the HHU MPC recommend to the School Committee that the first new HHU school be built at Upham. **Passed:** 12 – 6

In sum, the HHU MPC recommends that the School Committee proceed with a feasibility study to build new schools at all three HHU sites. The HHU MPC recommends that the first school be built at Upham, the second school be built at Hunnewell, and if elementary enrollment reaches or appears likely to exceed 2,350 students on a trending basis and/or the current school configurations are

limiting educational needs, the third school be built at Hardy. Current elementary enrollment in the 2016-2017 school year is 2,256 students. The feasibility study would assess the suitability of all three school sites. A feasibility study typically includes, but is not limited to, consideration of current zoning and environmental requirements.

The HHU MPC members believe that if enrollment declines as presently predicted by the demographers, then two consolidated schools of 19-sections each will provide sufficient capacity to replace the three HHU schools, which are respectively 15, 15, and 12-section schools. If and when enrollment increases, however, then the HHU MPC recommends that the town build the third school following construction of the first and second schools, especially in light of the strong support within the community for maintaining all seven elementary schools in town. It is important to note that even if the HHU MPC had recommended building three schools regardless of enrollment trends, given the current swing space constraints, the schools would be built one at a time.

The HHU MPC's recommendation seeks to balance several themes that came out of the public feedback process conducted throughout the year.

First, the community expressed a strong preference to maintain "small, neighborhood schools." The non-HHU elementary schools in town consist of 19-sections (Bates and Sprague) and 18-sections (Fiske and Schofield). Thus, the HHU MPC's recommendation for two or three new 19-section schools to replace the HHU schools maintains the school-size with which the town is familiar and has a successful track record. The HHU MPC's recommendation also reflects the policy recommendation of the school department to operate, on average, 3 class sections per grade at each school, rather than 2 class sections per grade. The HHU MPC understands that the School Committee intends to maintain current class size guidelines in either a six or seven school scenario.

Second, the HHU MPC's recommendation to proceed with building the first two schools – and to reserve judgment on when to build the third school – acknowledges the substantial cost associated with building new schools. Present estimates indicate that two new schools will cost in the range of \$102-107 million, while three new schools will cost in the range of \$150 million. The HHU MPC believes the third school is justified if enrollment increases slightly above the level it is at today, and/or if the educational needs town-wide require the construction of additional capacity. For context, three new 19-section schools would increase elementary school capacity in town from a total of 116 sections system-wide (two 19-section schools, two 18-section schools, two 15-section schools, and one 12-section school), to a total of 131 sections system-wide (five 19-section schools and two 18-section schools). While debating Motion #1, several members expressed concern that two 19-section schools, in a consolidation scenario, represent a decrease in overall capacity of 4 classrooms (four 19-section schools and two 18-section schools provide a total of 112 sections system-wide). A minority of members supported building 21 classrooms in the first building, in order to maintain additional capacity in a consolidation scenario.

The HHU MPC also discussed whether additional capacity in a seven school scenario could be used to accommodate fluctuations in enrollment of the PAWS program (Preschool at Wellesley Schools), which provides an integrated preschool program for special needs and typically developing

students. PAWS presently occupies a 6-classroom building located at the Fiske site, along with two additional satellite classrooms located in the Fiske and Hunnewell buildings during the 2016-2017 school year. The school department is separately conducting a study of the facilities and enrollment needs of the PAWS program (with funds appropriated by the 2015 Annual Town Meeting). The school department has expressed its determination to maintain the PAWS program in a separate site for educational reasons, and not to distribute the PAWS program across multiple elementary schools on a long-term basis.

Third, the HHU MPC's recommendation reflects the unanimous recommendation of its members that the town build new schools to replace the HHU schools. The HHU MPC toured the HHU schools, as well as Sprague and Schofield, in June 2016. The members also received input from the Facilities Maintenance Department and the Superintendent, along with other educators, regarding the shortcomings of the current HHU facilities. Simply put, the HHU MPC believes that, going forward, the town should provide safer and more modern structures for learning.

- The systems of the HHU buildings are old and require substantial and costly updates.
- The HHU buildings lack modern security and fire safety systems (e.g., Hardy and Hunnewell have roofs with wooden frames and no sprinkler systems).
- The HHU buildings should have more modern educational spaces – for example, break-out rooms and special-education work spaces in which to deliver the curriculum.
- The HHU buildings are not fully ADA-accessible and lack appropriate spaces for OT/PT sessions.
- The HHU buildings do not have – but should have – both a gym and a cafeteria. At Hunnewell, not only does one room serve both purposes, it is grossly undersized.

In sum, the HHU MPC recommends new construction in order to provide long-term structures that will serve the town for 50 years or more.

II. MEMBERSHIP AND CHARGE OF THE HHU MPC

The membership of HHU MPC was approved at a joint meeting of the School Committee and the Selectmen on April 11, 2016. As of March 16, 2017, the date of this report, the members are as follows:

School District/Neighborhood Representatives (6):

- Bates – Nancy Calderwood (Education)
- Fiske – Jose Arias Soliva (Architecture)
- Hardy – Sara Jane Shanahan (Law - Litigation)
- Hunnewell – Todd Ofenloch (Finance)
- Schofield – Scott Vaughn (Architecture/Law)
- Upham – Ed Cloaninger (Law - Taxation)

At-Large Representatives (5):

- Seong-Il Ahn – Architecture (Hardy)

- Stephan Gaudie – Market Analysis & Strategic Consulting (Hardy)
- Allan Port – Town Government, Mathematics (Hunnewell)
- David Stern – Architecture (Hunnewell)
- Maura Sullivan – Engineering, Project Management & Planning (Upham)

Town Board & Staff Representatives (7):

- Ellen Gibbs – Board of Selectmen
- Sharon Gray – School Committee
- Matt Kelley – School Committee
- Meghan Jop – Assistant Executive Director
- David Lussier – Superintendent of Wellesley Public Schools
- Jack Morgan – Board of Selectmen
- Lara Pfadt – Planning Board

The HHU MPC was charged with developing a master plan recommendation for the HHU schools that addresses the following criteria:

- Foremost, the plan must adequately support the educational program, with goals of providing a world-class education for all students, maintaining current School Committee class size guidelines, and supporting educators’ needs.
- The plan must preserve Wellesley’s neighborhood school model.
- The plan must take into account enrollment needs, based on the Committee’s evaluation of the various enrollment projections available.
- The plan must account for the need for swing space, with a goal of minimizing disruption to students and their families, staff, and surrounding neighborhoods.
- While redistricting is likely to be a significant consideration in some potential plans, and the Committee may consider various redistricting models, the Committee is not charged with developing a final detailed redistricting recommendation.
- The Committee must consider the plan’s needs and costs with respect to school transportation.
- The Committee must consider any plan’s projected impact on traffic and safety.
- When considering any plan that includes a school closure, the Committee must consider the emotional and cultural impact of closing a school.
- The Committee must consider the historic nature of each of the three buildings.
- The Committee must consider sustainability and environmental factors, and weigh those aspects against other considerations.

- The Committee must consider the relative financial impact on the Town of potential plans, including both capital investment and ongoing operating costs.
- The Committee must consider the recommended plan's potential for gaining approval from Town Meeting and the Wellesley community as a whole.

III. WORK OF THE HHU MPC

From April 2016 through March 2017, the HHU MPC has conducted 32 full-committee meetings, numerous sub-committee meetings, 5 public forums, and a town-wide survey. All but two of the HHU MPC meetings were video-taped by Wellesley Public Media, and are available for viewing at www.wellesleypublicmedia.org. Meeting minutes and materials are available for review at [Town of Wellesley, MA - Hardy Hunnewell Upham Facilities Project](#). The HHU MPC invited citizen-speak at all of its meetings, and provided an email address through which citizens could communicate directly with committee members (hhu@wellesleyma.gov). The school department issued a Request for Information with regard to "swing space." The HHU MPC issued a newsletter summarizing its initial conclusions and process on August 31, 2016. ([See link](#)).

With the funds that Town Meeting appropriated to the School Committee and the Selectmen, the HHU MPC also engaged the following professional consultants to assist with its analysis.

- **Demographer Tracy Healy of FutureThink:** Ms. Healy presented at HHU MPC meetings on [September 8, 2016](#) and September 29, 2016, and delivered reports dated [August 31, 2016 \(and sources\)](#); and [October 25, 2016](#).
- **Architects with SMMA:** Alex Pitkin and Peter Lukacic presented at HHU MPC meetings on [September 8, 2016](#) and [September 22, 2016](#), regarding their review of the HHU sites, as well as the North Forty property, and their conceptual plans of school designs at each site.
- **Architects with SMMA, in conjunction with cost-estimators at Daedalus:** Alex Pitkin and Joel Seeley presented at the HHU MPC meeting on [January 5, 2017](#), regarding cost estimates for various scenarios considered by the committee.
- **Public outreach consultants at The Ciccolo Group ("TCG"):** Representatives of TCG worked with the HHU MPC and the public outreach subcommittee to prepare for a public forum held on [October 27, 2016](#) at the Sprague gymnasium. Materials from that forum were also available for public review and discussion at additional forums held on October 29 and November 18, 2016, at the Wellesley Free Library, and on November 19, 2016, at the Warren School. These materials included results of the enrollment study, a subcommittee's walkability study, the architects' renderings of conceptual plans at the various school sites, and the history of elementary school buildings and enrollment in Wellesley. The October 27, 2016 forum also provided an opportunity for round-table discussions in which over 100 citizens participated.
- **TCG, in conjunction with the HHU MPC and the public outreach subcommittee, developed and conducted a town-wide survey in the Fall of 2016:** The HHU MPC mailed a post-card regarding the survey to all households in town, promoted the survey through email

notifications to town and school department distribution lists, made links to the survey available on the committee’s website, and made hard-copies of the survey available at town facilities. Over 2,000 residents responded to the survey. TCG provided the HHU MPC with an analysis of the survey responses and a summarizing report (including more than a hundred pages of written comments provided by members of the community). The summary report by TCG, as well as appendices containing citizens’ written comments, is available at [\(link\)](#).

- **Town traffic consultants with Beta:** Kien Ho and Tyler deRuiter of BETA Group, Inc. (“Beta”) conducted a traffic study of 21 intersections in town identified by the HHU MPC. The HHU MPC selected intersections for study based upon possible redistricting maps prepared by the School Committee. The maps are labeled scenarios A, B, D, and E, and reflect possible redistricting plans for consolidation scenarios, as well as a continued seven-school scenario. The maps are available at [\(link\)](#). Beta made a presentation regarding its traffic analysis on [February 2, 2017](#). Thereafter, Beta conducted additional traffic analysis and provided updated and revised traffic counts, and queue observations on Weston Road and the Route 9 EB Ramp. Beta provided a report dated March 8, 2017, and a supplemental presentation on March 9, 2017. Materials from the final report are available at [\(link\)](#) and [\(appendix\)](#).

Redistricting Maps: At the end of this report are maps showing the existing elementary school districts, as well as proposed redistricting maps A, B, D, and E. The handwritten annotations are by Beta, the traffic consultant. The red outlines and numbers on the redistricting maps A, B, D, and E show the number of elementary households (using 2016-2017 data), rather than children, redistricted from one elementary school to a new elementary school under the different potential redistricting plans. Map A shows a consolidation scenario where Upham and Hunnewell are rebuilt and Hardy closes. Maps B and D show two possible consolidation scenarios where Hardy and Hunnewell are rebuilt and Upham closes. Map E shows proposed redistricting that might occur if Hardy, Hunnewell, and Upham are all rebuilt, and then certain districts are reformed to rebalance population among the seven schools town wide.

The maps also contain charts showing the number of elementary school children who today live within the various districts depicted in the different scenarios. The student population charts assign children, for purposes of the maps, to their neighborhood schools, even though certain children are placed at other schools in the district in order to attend specialized programs or upon a family’s individual request through the open enrollment process.

During the 2016-2017 school year, enrollment for the individual elementary schools is as follows:

Bates	379
Fiske	335
Hardy	308
Hunnewell	251
Schofield	368
Sprague	393
Upham	222
Total:	2,256

The student population shown on the redistricting maps totals 2,154, which reflects that 102 elementary students enrolled in the system during 2016-2017 are from out of district.

The HHU MPC also received input from other resources within town:

- The Sustainable Energy Committee and Sustainable Wellesley made presentations to the HHU MPC regarding environmental and sustainability considerations on October 20, 2016.
- The Historical Commission made a presentation to the HHU MPC regarding the historical features of the HHU schools on November 10, 2016.
- The School Committee and the Facilities Maintenance Department (“FMD”) conducted a review of possible plans for “swing space,” a term that refers to where we would educate children while a particular school was being rebuilt, and therefore, was closed for construction. The FMD presented its swing space study and plan at the January 5, 2017 HHU MPC meeting. ([See link](#)).
- The seven elementary school principals and the PAWS executive director made a presentation about educational needs at the January 26, 2017 HHU MPC meeting.

On January 12, 2017, the HHU MPC voted to remove the “North Forty” property from consideration as a school site for the committee’s recommendation. Some members believed the location of the site was not advantageous. Other members were concerned that the time frame in which to obtain approval to build a school at the North Forty property was too uncertain. Those members did not wish to see further delay in the planning and building process for the HHU schools. At least one member of the committee felt that a school at the North Forty was a desirable choice and that the School Committee and Selectmen should have worked to accelerate the process to make the site available. Several members were mindful of the concern expressed by citizens that the North Forty should be maintained as open space.

At the January 19, 2017 meeting, the HHU MPC discussed a grid ([see link](#)) analyzing the features of different scenarios remaining under consideration, in light of the criteria identified by the HHU MPC and its charge.

At the February 2, 2017 meeting, the HHU MPC discussed and voted on the overarching master plan recommendation that is contained in Motion #1, which is set forth above in the Executive Summary.

On February 16, 2017, the HHU MPC conducted a public forum regarding its master plan recommendation at the Wellesley Free Library. The co-chairs’ power-point presentation summarizing the work of the committee through that date can be found [here](#). The meeting was videotaped, and therefore, the opening remarks and question and answer session can be viewed at [Wellesley Public Media - Home](#).

On March 9, 2017, the HHU MPC members discussed their individual views regarding which school should be built first, Hardy or Upham. In either a two-school or three-school scenario, given the lack of identified external swing space, the town will need to build a new school at the back of the Hardy site or the back of the Upham site.

The following reflects a sampling of some of the opinions expressed by the members and does not necessarily reflect the consensus of the committee.

Members who voted to build the first school at Upham cited the following issues:

- the benefit of returning to the redistricting map in place before Sprague re-opened in 2001, which was similar to map A and under which fewer students crossed over or under Route 9 to attend elementary school;
- the equity associated with maintaining three schools north of Route 9 and three schools south of Route 9, town-wide, given that approximately half of the elementary students in town live north of Route 9;
- the desire to preserve historic portions of the Hardy building and the mature oak trees at the back of the Hardy lot;
- the traffic benefits identified by Beta, the traffic consultant, that are associated with redistricting map A, which provides for new schools at Upham and Hunnewell, improving traffic flow through the most intersections;
- reduction of queuing on Weston Road during school pick-up and drop-off hours, leading to a potential reduction in carbon emissions;
- dissatisfaction with redistricting map B, which provides for new schools at Hardy and Hunnewell, as it divides the Fells and Generals neighborhoods between Hardy and Sprague;
- traffic safety concerns with redistricting maps B and D along Route 9;
- the expectation that the Upham site is better able to accommodate construction and operation of two schools for a period of years; and
- greater flexibility to design the new school building on the larger, wooded Upham lot.

Members who voted to build the first school at Hardy cited the following issues:

- the benefit of building the first school in the most densely-populated HHU neighborhood, which has more modestly priced homes and a larger public school population (in 2016-2017, Hardy has 308 students, Hunnewell has 251 students, and Upham has 222 students);
- the need to address the Hardy school first because it is overcrowded, as it has been operating 16 or 17 class sections for the past 4 years, and thus has repurposed art and music rooms as classrooms;

- the belief that the overall elementary enrollment will grow, not decline, and the expectation in particular that the elementary school population in the current Hardy district will grow disproportionately, so build a school where kids are;
- the expectation that the elementary school population in the current Hardy district is likely to remain constant, if not grow, in coming years;
- the value of preserving the walk-to-school culture that is prevalent in the Hardy neighborhood, given the smaller lots, flat terrain, and well-maintained sidewalks;
- the ability to route the traffic associated with a consolidation scenario to the main artery of Weston Road (as seen on redistricting map B), rather than into neighborhoods (as seen on redistricting map A, especially on Lowell, Wynnewood, Pilgrim, and Elmwood Roads);
- the desire to protect and preserve the forest and ledge at the Upham site, as the forest will be removed and ledge will be blasted if we build the first new school behind the existing Upham; and
- the estimated \$5 million cost associated with blasting the ledge at the Upham site.

Vote on where to build the first school:

Following this discussion, 12 members of the HHU MPC voted to build the first school at Upham, and 6 members of the HHU MPC voted to build the first school at Hardy.

IV. HHU MPC'S RECOMMENDATIONS TO THE SCHOOL COMMITTEE FOR NEXT STEPS

Following this process and in accordance with the votes described above, the HHU MPC recommends that the School Committee seek funds at a special town meeting in the near term to conduct a feasibility study at the Hardy, Hunnewell, and Upham sites. The HHU MPC understands that a feasibility study will take approximately a year to complete, and will encompass additional environmental and engineering review.

The HHU MPC recommends feasibility on all three sites, instead of two sites, for several reasons.

First, consideration of the needs of the HHU schools began in 2012, and continued delay in beginning the construction process will be costly. Construction costs increase each year and maintenance costs for the existing HHU school buildings will continue until we bring the new buildings on line. Thus, the HHU MPC believes that a feasibility study is warranted for all three sites in order to prevent further delay of the project.


Second, unexpected information may arise during the feasibility study that would impact the School Committee's decision regarding where to build the first school or the size of the schools that can be built at any of the sites.

Third, the HHU MPC is cognizant that short-term enrollment projections could prove to be incorrect. If enrollment increases rather than decreases, it will be advantageous for the town to be in a position to proceed with design and construction of the third school in an efficient manner.

V. ACKNOWLEDGEMENTS

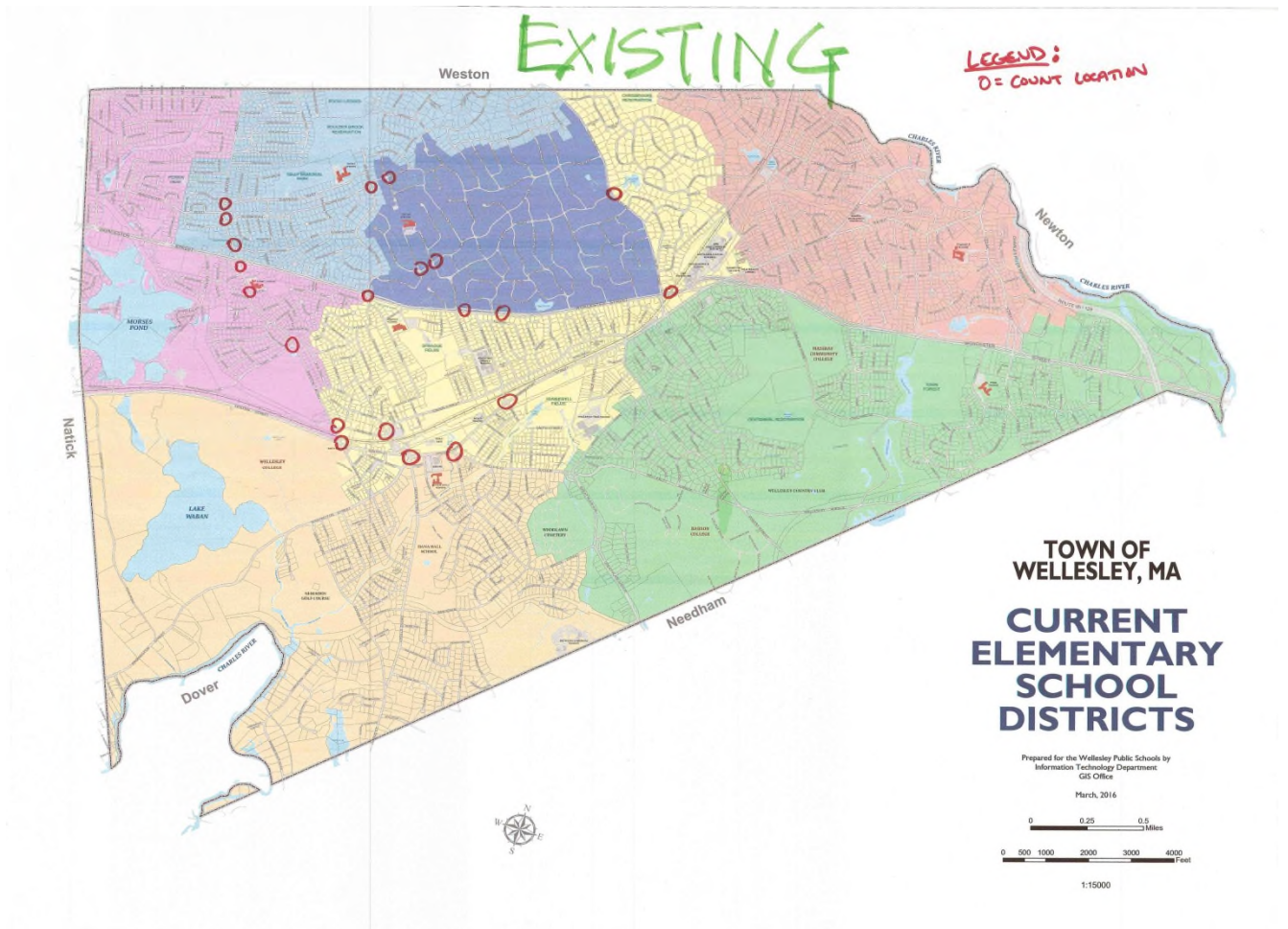
The members of the HHU MPC would like to thank all of the citizens who have taken the time to follow and contribute to the work of this committee, and our predecessor committees, over the last several years. The thoughtful, robust, and respectful engagement of our citizens is a model for our children.

Respectfully submitted to the School Committee by the HHU MPC,

The image shows two handwritten signatures in black ink. The signature on the left is 'Ed Cloaninger III' and the signature on the right is 'Sara Jane Shanahan'. Both signatures are written in a cursive, flowing style.

Ed Cloaninger and Sara Jane Shanahan, Co-Chairs

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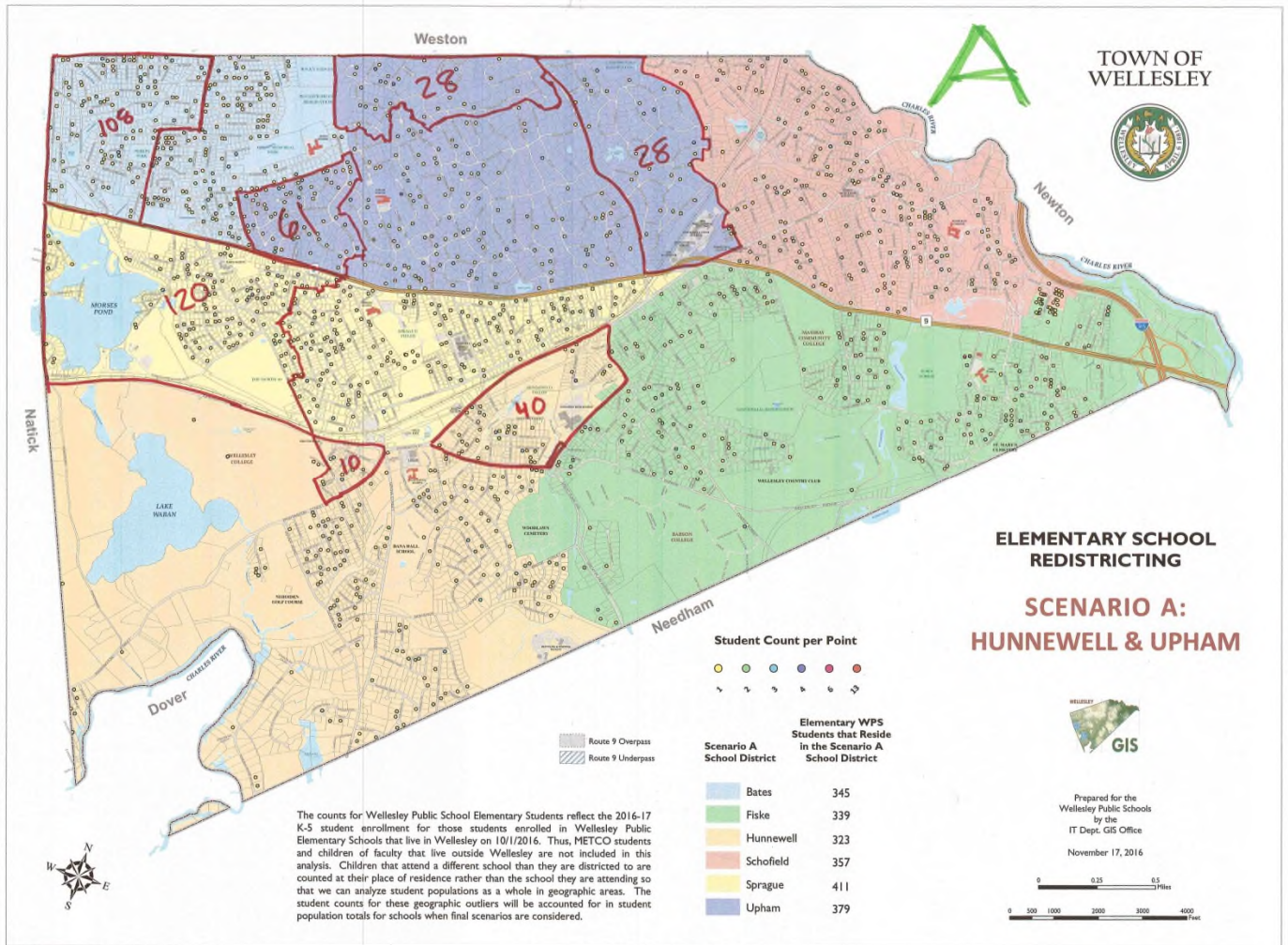


Bates	379 (blue)
Fiske	335 (green)
Hardy	308 (pink)
Hunnewell	251 (beige)
Schofield	368 (salmon)
Sprague	393 (yellow)
Upham	222 (purple)
Total:	2,256

Actual Enrollment by School for 2016-2017

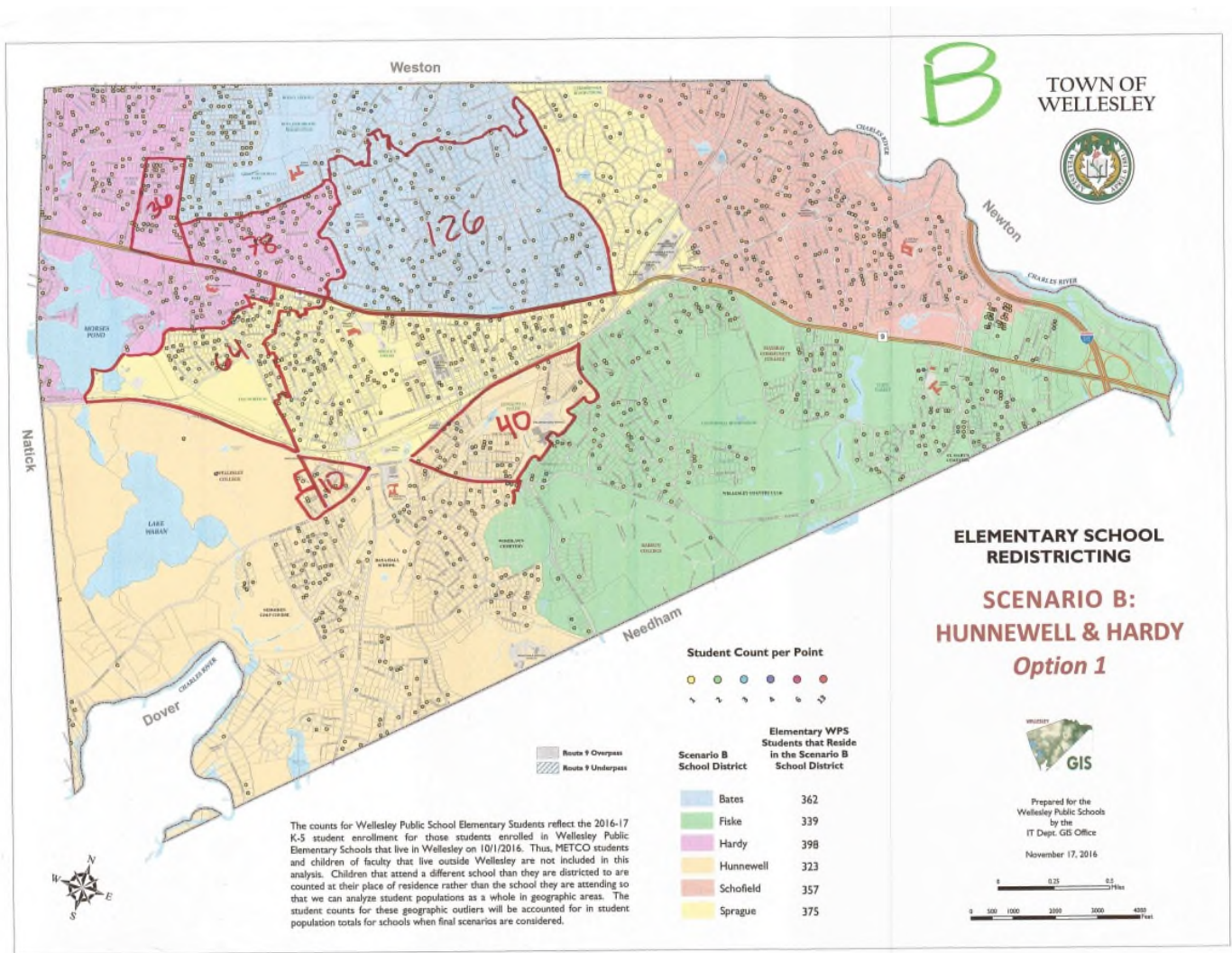
The red circles on this map show the intersections analyzed in the traffic study.

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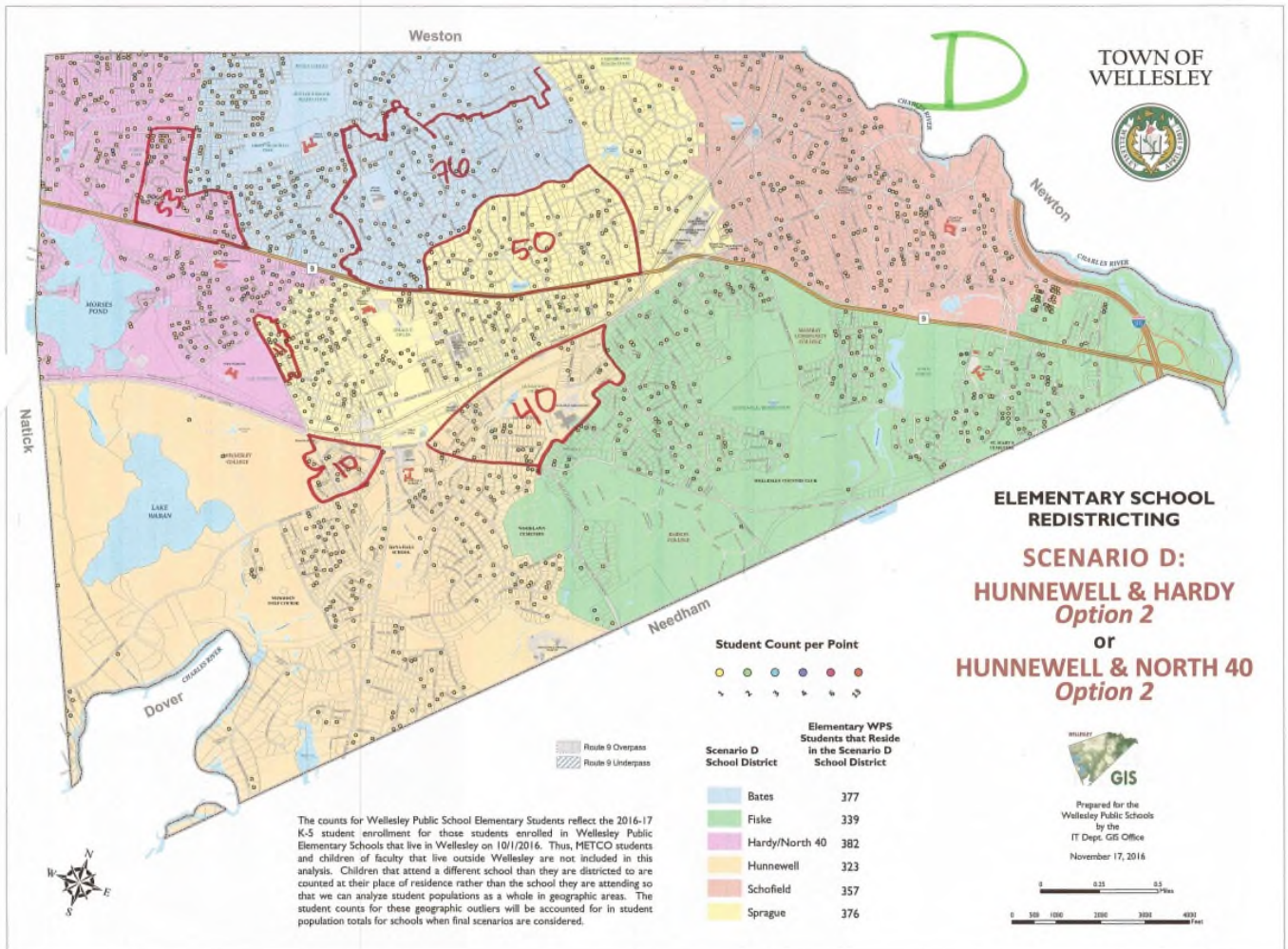
This map shows Scenario A, where Upham and Hunnewell are rebuilt and Hardy closes. The red-outlined boxes show blocks of households assigned to a new school district following closing of Hardy and redistricting. The map shows Hardy families redistricted to Bates and Sprague, Bates families redistricted to Upham, and Sprague families redistricted to Upham and Hunnewell.

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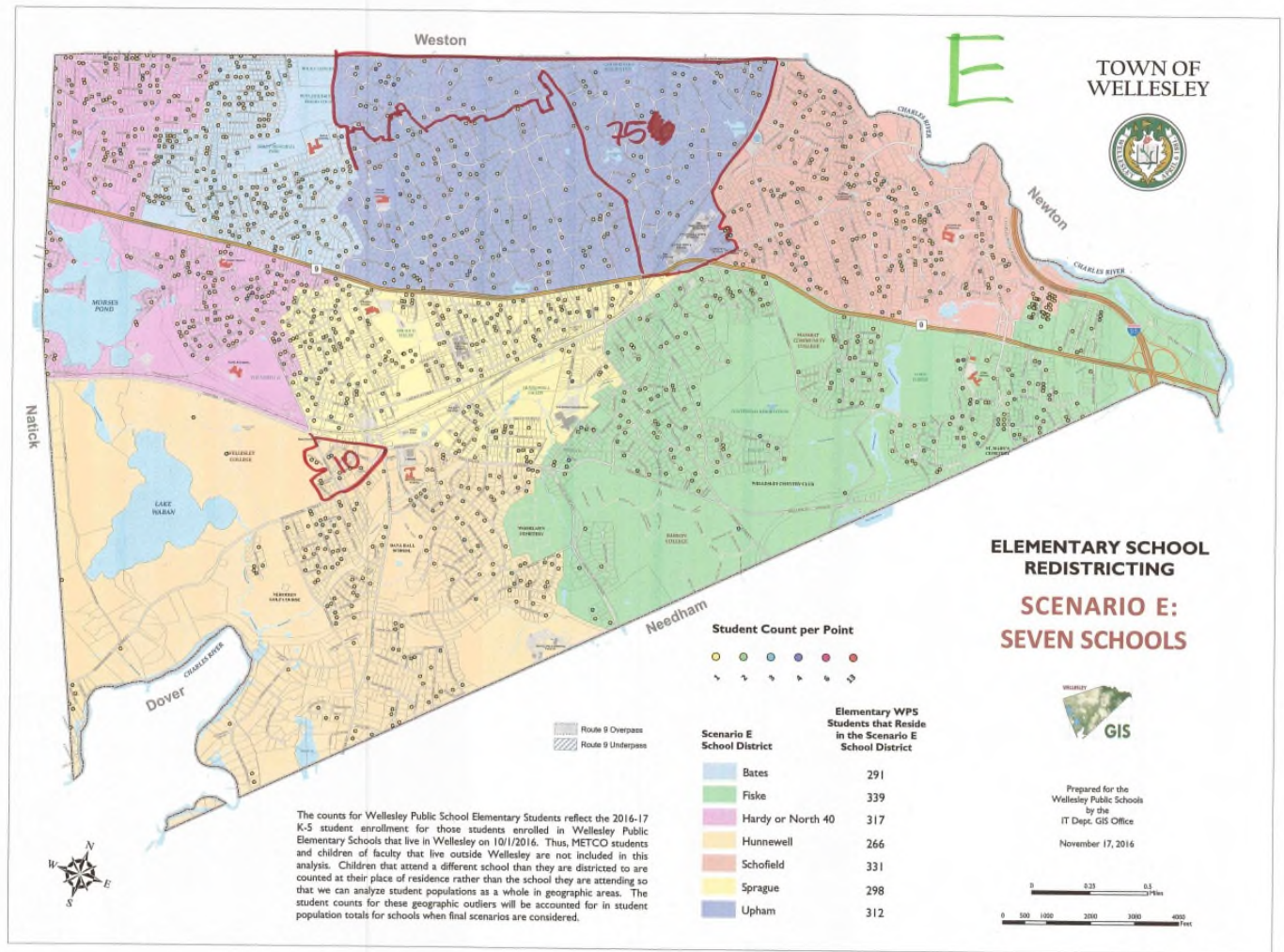
This map shows Scenario B, where Hardy and Hunnewell are rebuilt and Upham closes. The red-outlined boxes show blocks of households assigned to a new school district following closing of Upham and redistricting. The map shows Hardy families redistricted to Sprague, Bates families redistricted to Hardy, Upham families redistricted to Bates, and Sprague families redistricted to Hunnewell.

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This map shows Scenario D, where Hardy and Hunnewell are rebuilt and Upham closes. The red-outlined boxes show blocks of households assigned to a new school district following closing of Upham and redistricting. The map shows Hardy families redistricted to Sprague, Bates families redistricted to Hardy, Upham families redistricted to Bates and Sprague, and Sprague families redistricted to Hunnewell.

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This map shows Scenario E, where Hardy, Hunnewell, and Upham are all rebuilt. The red-outlined boxes show blocks of households assigned to a new school district following construction of all three schools and redistricting. The map shows Bates families redistricted to Upham, Sprague families redistricted to Upham and Hunnewell, and Schofield families redistricted to Upham.