

WPS School Facilities Capital Plan

Presentation to SC and BOS
August 27, 2013

School Facilities Committee

- ▶ Judy Belliveau, WPS Director of Finance
- ▶ Diane Campbell, School Committee
- ▶ Tom Goemaat, Construction Exec, TMM
- ▶ Ann Marie Gross, Advisory
- ▶ KC Kato, School Committee
- ▶ Hans Larsen, Executive Director
- ▶ David Lussier, WPS Supt
- ▶ Jack Morgan, Community Member, TMM
- ▶ Wendy Paul, School Committee
- ▶ Barbara Searle, BOS



Capital Plan Development

- ▶ **Capacity vs. enrollment**
 - ▶ Current Situation
 - ▶ Cropper GIS 2013
- ▶ **Educational Program**
- ▶ **Facilities Infrastructure**
- ▶ **Short and Long Term Elementary Facilities Plan**
- ▶ **WMS analysis still in process**
 - ▶ Cash capital
 - ▶ Longer term project



Capacity vs. enrollment

Current Situation

Class Average Used-22	# Perm CRs	# Mod	Year Add.	Total # of CRs	# Sections 2012-13	Music /Art	SpEd/ ELL Full CR Spaces	Total CRs Needed 2012-13	Over/ Under
Bates (r' 2003)	21	0	n/a	21	19	2	0	21	
Fiske ('52)	17	3	2006	20	18(a)	2	0(a)	20	
Hardy ('24)	13	4	1996 1997	17	15	2	0	17	
Hunnewell ('38)	17	2	1996	19	16	2	2	20	-1
Schofield ('63)	18	4	2006	22	17	2	2	21	+1
Sprague (r'02)	21	0	n/a	21	19	2	0	21	
Upham ('52)	13	2	1993	15	12	2	1	15	
Total	120	15		135	116	14	5	135	0

- a) Fiske ELL non-compliance classroom in Fy13. FY14 will require full classroom.

Capacity vs. enrollment

Current Situation

Class Average Used-22	# Sections Available (a)	Actual Enroll. 2012-13	Maximum Theoretical Enrollment (b)	Peak Projection (year)
Bates (r' 2003)	19	387	418	406 (2011)
Fiske ('52)	17(b)	335	374	382 (2009)
Hardy ('24)	15	328	330	328 (2013)
Hunnewell ('38)	15	298	330	334 (2009)
Schofield ('63)	18	341	396	381 (2008)
Sprague (r'02)	19	394	418	428 (2010)
Upham ('52)	12	226	264	258 (2009)
Total	115	2,309	2,530	

a) Dedicated Space for Music, Art, Library, Specialized Program Spaces and 22 students per class.

b) Fiske converted classroom to ELL space in FY14.

Capacity vs. Enrollment

Current Situation

- ▶ **Variability by School**
 - ▶ Class size 15-25 range
 - ▶ 86%-99% Total Student Capacity
 - ▶ Hardy over 100% Classroom Capacity
- ▶ **5 Classrooms closed to new enrollment (Hardy K & I, Fiske K and Sprague 1 & 5)**
- ▶ **Hardy offering music and art on a cart**
- ▶ **Continuing use of 1990s modulares at Hardy, Hunnewell and Upham**
 - ▶ Expended cash capital investment 2013 extending life 5-7 years



Capacity vs. Enrollment

Section Decline Slower than Enrollment

FY	Enrollment	# Sections
2007	2,320	113
2008	2,406	115
2009	(peak) 2,481	117
2010	2,421	116
2011	2,376	113
2012	2,355	113
2013	2,309	116
2014F	2,253	120
2015F	2,172	116
2016F	2,143	114
2017F	2,101	114
2018F	2,066	115
2019F	2,016	112
2020F	1,968	109

← Language Based Section added to Schofield

← 2 Therapeutic Based CR Sections added to Hunnewell

← ELL Based CR Section added to Fiske



Capacity vs. Enrollment

Section Decline Slower than Enrollment

- ▶ Theoretical maximum capacity and actual classroom needs gap
- ▶ As enrollment declines, bringing mandated programs (ELL and SpEd) in-district – some require full CR space
- ▶ Decline spread across 7 schools, 6 grades, 116 sections
- ▶ Uneven distribution more complicated in smaller schools
- ▶ Guideline versus a maximum



Capacity vs. Enrollment

Cropper GIS Modeling

- ▶ March 2013 Forecast model based on Wellesley census, enrollment, births, in-migration
- ▶ Summer 2013 Feasibility Study impact of redistricting, reconfiguration and long term facilities construction/additions
- ▶ Modeling assumptions scenarios to optimize program
 - ▶ Status Quo
 - ▶ Model 1: Redistricting – changed district lines
 - ▶ Model 2: Reconfiguration – changed district lines and grade configurations (k-2, 3-5)
 - ▶ Model 3: Redistricting with major renovation/addition construction
 - ▶ Model 4: Reconfiguration with major renovation/addition construction



Capacity vs. Enrollment

Cropper GIS Modeling

- ▶ **Still Work in Process: Models 3 & 4 (no earlier than 2020): Several potential new construction, renovation/ additional scenarios possible**
 - ▶ School renovations and replacement of 1990s modulars at each school
 - ▶ Replacement of one, renovations of two others
 - ▶ Replacement and expansion of one, renovation replacement of modulars or expansion of one, removal of one
 - ▶ Replacement and significant expansion of one, removal of two
 - ▶ **NO decision has been made. Further study and MSBA partnership is necessary to determine new versus renovation, size of each building and timing.**
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Capacity vs. Enrollment

Classroom Needs Comparison

Total District	Cap	FY 2013A	SQ – FY2015	MI – FY2015	M2 – FY2015	SQ – FY2020	MI – FY2020	M2 – FY2020
Total	115	116	116	112	106	109	102	94

* Includes 8 older modulars.



Capacity vs. Enrollment

Conclusions

- ▶ Currently over classroom capacity in some schools and grades
- ▶ Uneven distribution in population and population changes resulting in inequity in class size and program delivery
- ▶ Redistricting or reconfiguration could improve educational program equity
- ▶ Even with redistricting or reconfiguration, forecast indicates need for all 7 schools for next 7 years to improve equity and for new programs and/or closing older modulars
- ▶ Redistricting or reconfiguration potentially creates opportunities for improved educational



Educational Program

- ▶ **2013 Strategic Plan Initiatives do not require dedicated or special spaces**
 - ▶ Redistricting or reconfiguration does not require a change in facilities structure
 - ▶ Pre-K does not require a change in facilities structure
- ▶ **Educational program requires dedicated art, music and library spaces**
- ▶ **Changes in educational needs and mandated programs have increased and changed space requirements**
 - ▶ ELL
 - ▶ Special Education
 - ▶ Teacher workspaces
 - ▶ Food service



Educational Program

- ▶ **Over capacity schools unable to provide educational equity**
 - ▶ Class size over guideline or freezing enrollment
 - ▶ Loss of dedicated Art & Music spaces
- ▶ **Only Bates and Sprague accommodate current programming from a facilities perspective**
 - ▶ ADA compliance
 - ▶ Special Education Spaces
 - ▶ Teacher Work Spaces
 - ▶ Cafeteria/food service
 - ▶ Storage



Educational Program

School	Educational Program Deficiencies	ADA Compliance
Bates	Meets needs.	
Fiske	Lacks appropriate SpEd/ELL and teachers work spaces. Inadequate kitchen serverly space.	Lacks elevator
Hardy	Lack of dedicated art & music space. Lacks appropriate SpEd/ELL and teacher work spaces. Lacks cafeteria space. Inadequate kitchen serverly space.	
Hunnewell	Lacks appropriate SpEd and teacher work spaces. Lacks cafeteria space. Inadequate kitchen serverly space. Gym significantly undersized.	
Schofield	Lacks appropriate SpEd and teacher work spaces. Inadequate kitchen serverly space. Lacks cafeteria space.	
Sprague	Meets needs.	
Upham	Lacks appropriate SpEd and teacher work spaces. Inadequate kitchen serverly space. Lacks cafeteria space. Total school capacity undersized for operational and programmatic effectiveness.	



Facilities Infrastructure

- ▶ 2005 SMMA evaluated 5 non-renovated elementary schools
- ▶ 2006 MSBA conducted state wide review of all schools
- ▶ 2007 Debt Exclusion to address school infrastructure issues identified by SMMA and MSBA studies (roofs, boilers, flooring, etc.)
- ▶ 2012 SMMA comprehensive review of all WPS facilities' infrastructures
 - ▶ Engineers and architects evaluated all systems extensively



Facilities Infrastructure

2012 SMMA Building Needs

PHASE I EVALUATION MATRIX - **BUILDING NEEDS**

BUILDING ELEMENT OR SYSTEM	Bates						Fiske						Hardy						Hunnell						Schofield						Sprague						Upham									
	Criteria						Criteria						Criteria						Criteria						Criteria						Criteria						Criteria									
	A = Safety	B = Health	C = Energy/Sustainability	D = Cost of Maintain	E = Learning Environment	F = Aesthetics/ Appearance	A = Safety	B = Health	C = Energy/Sustainability	D = Cost of Maintain	E = Learning Environment	F = Aesthetics/ Appearance	A = Safety	B = Health	C = Energy/Sustainability	D = Cost of Maintain	E = Learning Environment	F = Aesthetics/ Appearance	A = Safety	B = Health	C = Energy/Sustainability	D = Cost of Maintain	E = Learning Environment	F = Aesthetics/ Appearance	A = Safety	B = Health	C = Energy/Sustainability	D = Cost of Maintain	E = Learning Environment	F = Aesthetics/ Appearance	A = Safety	B = Health	C = Energy/Sustainability	D = Cost of Maintain	E = Learning Environment	F = Aesthetics/ Appearance	A = Safety	B = Health	C = Energy/Sustainability	D = Cost of Maintain	E = Learning Environment	F = Aesthetics/ Appearance				
Heating, Ventilation & AC (HVAC)																																														
Modular Classrooms																																														
Bathrooms																																														
Doors																																														
Site (grounds and utilities)																																														
Windows																																														
Lighting																																														
Sprinkler																																														
Fire Alarm																																														
Hazardous Materials																																														
Classroom sinks and cabinetry																																														
Electrical (Power)																																														
Plumbing (all non-bathroom areas)																																														
Tel/Data/ AV infrastructure																																														
Finishes (walls, ceilings, floors)																																														
Other (ex. MS Donizetti, etc)																																														

Facilities Infrastructure *Complexity to Renovate*

OTHER CONSIDERATIONS AND IMPACTS	SHORT-LISTED SCHOOLS						
	Bates	Fiske	Hardy	Hunnewell	Schofield	Sprague	Upham
	Rating	Rating	Rating	Rating	Rating	Rating	Rating
Construction - Site Availability	Green	Yellow	Red	Red	Green	Red	Red
Construction - Phasing	Green	Yellow	Red	Red	Green	Red	Red
Construction - Design Complexity	Green	Green	Red	Red	Green	Red	Red
Square Foot Cost (top 40% = neg)	Green	Green	Red	Red	Green	Red	Red
Floor Plan Efficiency	Green	Green	Red	Red	Green	Red	Red
Site Efficiency	Green	Green	Red	Red	Green	Red	Red
Potential Enrollment Changes							
Potential Educ. Program Changes							
Bundling Opportunities	Red	Red	Green	Green	Green	Red	Red
Funding Opportunities	Red	Red	Green	Green	Red	Red	Red
Major Hurdles	Green	Green	Red	Red	Green	Red	Red
Other							Yellow

Rating Guide

GREEN: Positive Impact

RED: Negative Impact

NO COLOR: Not Applicable

YELLOW: Can be negative or positive depending on approach

- Time

- Summer work
- While students are in session

- Cost

- Annual cash capital
- Debt exclusion
- Partnership with the MSBA



Facilities Recommendations

	Schools	Rationale	Timing
Category 1: MSBA Candidate for major potential renovation, addition, replacement and/or consolidation	Hardy Hunnewell Upham	<ul style="list-style-type: none"> •High cost to renovate •High construction complexity •Difficulty in addressing programmatic and operational issues •Construction for 50 years 	Pending MSBA invite •SOI 2013/2014 IF invited fall 2014 •Feasibility '15 •Design '16 •Debt Excl '17 •Construction '17-20
Category 2: Infrastructure Renovation+	Fiske Schofield	<ul style="list-style-type: none"> •Cost to renovate less than to replace •Potential ability to renovate during summers •Ability to address programmatic issues (excl. cafeteria) •Extend life 15-20 years 	<ul style="list-style-type: none"> •Design '14 •Debt Excl '15 •Construction '15-16
Category 3: Annual cash capital maintenance	Bates Sprague	<ul style="list-style-type: none"> •Facilities in very good condition due to age and date of renovation 	<ul style="list-style-type: none"> •Ongoing
Other: Annual cash capital maintenance and infrastructure renovation	WMS	<ul style="list-style-type: none"> •Facilities in good condition due to renovation but in need of key systems replacement in 10 years. 	<ul style="list-style-type: none"> •Ongoing



Facilities Recommendations

Category 1: MSBA Candidates

Hardy, Hunnewell, & Upham

- ▶ Submit Hardy, Hunnewell & Upham SOIs to MSBA next window
- ▶ Balance MSBA partnership requirements with need to understand more about site and building needs
 - ▶ Request for study funds either at STM or ATM
- ▶ Timing dependent on MSBA invite (5-7+ years to completion) – Student impact not until 2020



Facilities Recommendations

Category 1: MSBA Candidates

Hardy, Hunnewell, & Upham

- ▶ **Many potential scenarios to consider**
 - ▶ School renovations and replacement of modulars at each school
 - ▶ Replacement of one, renovations of two others
 - ▶ Replacement and expansion of one, renovation replacement of modulars or expansion of one, removal of one
 - ▶ Replacement and significant expansion of one, removal of two
- ▶ **Student capacity of individual building projects dependent on future enrollment forecasts and interdependent with each other**



Facilities Recommendations

Category 2: Renovations

Fiske & Schofield

- ▶ **Start now and in parallel**
 - ▶ Needs are today
 - ▶ Similarities in project scope will provide cost and timing efficiencies
 - ▶ Capacity to get done at the same time
- ▶ **Doing them in series will cause delays and increases in cost of the entire plan**



Facilities Recommendations

Category 2: Renovations

Fiske

- ▶ Site improvements
- ▶ Building Envelope
- ▶ Bathrooms
- ▶ Electrical
- ▶ Plumbing
- ▶ Finishes
- ▶ HVAC
- ▶ Life Safety, ADA and Abatement
- ▶ Programmatic Changes



Facilities Recommendations

Category 2: Renovations

Schofield

- ▶ Site Improvements
- ▶ Building Envelope
- ▶ Bathrooms
- ▶ Electrical
- ▶ Plumbing
- ▶ Finishes
- ▶ HVAC
- ▶ Life Safety, ADA and Abatement
- ▶ Programmatic Changes



Facilities Recommendations

Category 3: Annual Cash Capital

Sprague & Bates

- ▶ To be included in 5 year facilities cash capital plan



Facilities Cost Ranges

- ▶ Fiske renovation \$8-10M
- ▶ Schofield renovation \$5-8M
- ▶ Significant renovation/addition for Hardy, Hunnewell and/or Upham \$TBD depending on size and scope
- ▶ New school \$30-40 Million depending on size (350-500 students) before reimbursement



Next Steps

- ▶ Gather feedback from BOS, SC
- ▶ Further refine scope of Fiske & Schofield
- ▶ Work with FMD to develop 5 year Annual Cash Capital Plan for WMS
- ▶ Begin discussions with PBC
- ▶ School Administration and School Committee evaluating Redistricting & Reconfiguration



Facilities Recommendations

Timetable-DRAFT

	Timing
SC/BOS Presentation of School Facilities Committee (SFC) Status (overview, concept, preliminary scope)	TODAY!
BOS/SC Presentation of SFC Recommendations	9/23/13
PBC Presentation of SFC Recommendations	9/26/13
SC & BOS Vote(s)	w/o 10/8
Advisory Presentation of Final Project, Public Hearing and Vote	Oct/Nov
STM	12/9/13



Facilities Recommendations

Timetable-DRAFT

	Timing
Appropriate Design Funds at STM for Fiske & Schofield	12/9/2013
Submit MSBA SOI for Hardy, Hunnewell & Upham	Spring 2014
Appropriate Study Funds for Hardy, Hunnewell & Upham via FY15 Capital Budget at ATM	Spring 2014
Appropriate Construction Funds for Fiske & Schofield via STM debt exclusion	12/2014
Infrastructure Renovation Construction Fiske & Schofield	Summers of 2015 & 2016
MSBA Invite	TBD (process takes 5-7 years)
Hardy/Hunnewell/Upham Construction if MSBA invites 2014	Study 2014/Feasibility 2015/Design ATM 2016/Debt Excl 2017/Complete 2020
WMS	Cash capital FY15-20 and infrastructure replacement TBD
Schofield/Fiske	TBD 2030-2035