



Massachusetts School Building Authority

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FEASIBILITY STUDY GUIDELINES

2008

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1.00 Introduction

The purpose of the Feasibility Study phase is for the District and the MSBA to explore potential solutions to the facility problems that were identified and verified in prior phases of the school construction, renovation and repair grant process. Possible solutions to be explored may include non-construction options such as re-districting, regionalization, or re-programming of existing spaces, as well as repairs to building systems, renovation, building additions and/or new construction. The MSBA is interested in developing solutions that are educationally appropriate and cost effective. Prior to conducting the Feasibility Study, the district and the MSBA will need to agree upon an enrollment projection, scope, cost and schedule of the study. The District will need to articulate its educational program needs, using the MSBA standard forms, in order to determine the types of spaces needed to deliver the required educational program. The District will also be required to develop a Budget Statement for Educational Objectives to demonstrate how the District currently funds the operational and capital costs of school facilities. After analyzing possible solutions, if the District and the MSBA agree on a preferred option, schematic drawings and a cost estimate for that option will be developed. The District will need to demonstrate how it intends to finance the initial capital cost of the agreed upon preferred solution as well as financially support the staffing and operation over time. These guidelines are written to provide information to assist the district and the study designer in understanding the process and the expectations of the MSBA.

1.01 MSBA Approval Requirements

Collaboration with the MSBA throughout the entire process of conducting a Feasibility Study is essential in order to ensure that the conclusions reached are in the best interests of the District as well as those of the MSBA. Prior to beginning a Feasibility Study, the District must enter into a Feasibility Study Agreement with the MSBA which will detail the scope of the study, cost and the agreed upon enrollment to be used as the basis for the study. The Feasibility Study Agreement will also allow a District to begin receiving reimbursement from the MSBA for the MSBA's share of eligible study expenses through the MSBA's Pro-pay system. In order to ascertain MSBA input and approval throughout the study process, the District is required to secure MSBA concurrence and/or approval at the following study milestones before proceeding to the next milestone. Note that some of the approvals to move to the next milestone require a vote of the MSBA Board of Directors.

- MSBA approved Enrollment Projections generated through the MSBA's on-line enrollment projection system
- MSBA Space Summary Template of the current facility
- Scope, Cost and Schedule for the Feasibility Study
- Preliminary Program
- Budget Statement for Educational Objectives

- Development of Alternatives
- Preliminary Evaluation of Alternatives
- Final Evaluation of Alternatives
- Recommendation of Preferred Schematic Design
- Budget Statement for Preferred Schematic Design
- Final Design Program for Preferred Schematic Design
- Preferred Schematic Design and proposed Total Project Budget

1.02 Study Requirements

Due to the variety and nature of proposed appropriate solutions (e.g., non-construction alternatives such as redistricting, repairs to a single building system, renovations to the entire facility, an addition, or a new school), each study will vary as to the specific requirements, scope, cost and schedule. The particular requirements, scope, cost and schedule of a study will be outlined in the Feasibility Study Agreement between the District and the MSBA. The requirements may be based on many factors including the MSBA's due diligence efforts as well as any meetings or conferences that may have occurred between the District and the MSBA.

The following listing of activities should be considered the minimum requirements.

1.03 Justification

The facility deficiencies expressed by the District in the Statement of Interest and confirmed through the MSBA's due diligence process must be documented and quantified during the study process. The study designer, once under contract, is expected to verify and document the extent of these facility deficiencies. Written information should be supplied by the District (if not already submitted) to define the nature of the problem(s) to be addressed (e.g., substantial enrollment growth, as confirmed by the MSBA approved enrollment projection, or inadequate facilities necessary to deliver the required educational program). In order to have a shared understanding of the problem(s) and potential solutions, it may be necessary to investigate the origin and background of the facility deficiencies.

1.04 Statement of Problem

The questions to be answered and issues to be addressed through the study must be clear and well defined. Parameters to the problem should be clearly established. Studies will begin with no pre-conceived idea of what the final result should be. The documents used to inform this process include:

- Budget Statement for Educational Objectives
- Statement of Interest
- MSBA Site visit reports
- MSBA approved Enrollment Projections generated through the MSBA's on-line enrollment projection system

1.05 Objectives, Process and Schedule of Study (work plan)

Define specific objectives and output to be achieved during the study, detail the work tasks and schedule, and allocate staff and costs to ensure completion of the study.

1.06 Existing Conditions

The study designer will analyze existing conditions, including activities, buildings, site and environment. The study designer will assemble sufficient information on the problems and opportunities with existing buildings and site, so that any major implications for future requirements and design can be accurately judged. If the study needs to consider new construction or building expansions, the information should be sufficient to establish beyond reasonable doubt:

- that the District has clear title to the property, or alternatively, the required actions necessary to obtain clear title;
- that the property is available for development;
- what development restrictions apply, if any; and
- whether any serious environmental, geotechnical or other physical conditions exist that might have an impact upon eventual construction.

The District will furnish to the Designer available studies, drawings, surveys, photographs and subsoil exploration reports of the proposed project's existing buildings (if any) and the site or sites.

The Designer shall include in the study report a clear, written statement of the methods and assumptions of, and limitations on the accuracy of, any information provided. The designer shall recommend during the course of the study what further investigatory work should be carried out.

1.07 Educational Program, Standards and Policies

Using the MSBA Space Summary template, the Designer and the District must document the current spaces within the existing facilities, their square footages and their uses. There should also be a description of the current educational program and how it is delivered within the current facility. If the District believes that the current spaces are inadequate to deliver the required educational program, a description detailing the

impact of the inadequacies on the District's educational program is required. This description must include specific examples of how the inadequacies prevent the district from delivering the required educational program and how students and/or teachers are directly affected by the inadequacies identified. If enrollment or overcrowding is an issue, the District and the MSBA must use the MSBA's on-line enrollment projection tool to generate an agreed upon enrollment projection to use for analysis.

The Study shall identify standards and policies for provisions of certain needs including, but not limited to, class size policies, allocation and utilization of specialized spaces such as kindergarten classrooms, science laboratories, art, music, technology, vocational spaces, special education spaces and delivery methods for special education. Where no formal standards or policies exist, the District must articulate their informal policies. The source of standards and policies must be clearly identified.

Program requirements should be in compliance with MSBA standards and guidelines, if possible, and the District should work with the MSBA where compliance with current standards is not achievable. Note that the MSBA Space Standards and Guidelines may not necessarily be applicable to reconstruction, renovation or repair projects. The MSBA Standards and Guidelines were developed by the MSBA for determining maximum size and costs related to new construction and should not be used for assessing safety standards or educational adequacy of existing facilities that were constructed in accordance with standards and guidelines that prevailed at the time of construction.

1.08 Preliminary Design Program

The next step is to create a preliminary design program. The format should use the MSBA Space Summary Template and include supplemental narratives that address the following:

- *Educational Program Activities* - Provide a detailed description of educational program activities in order to determine functional need.
- *Space Summary* – Using the MSBA Space Summary Template, each space in the current facility must be itemized whether or not the existing spaces are intended for re-use or renovation. The Preliminary Design Program shall also include one-line diagrams of each floor with the existing spaces identified in the template clearly labeled. Refer to MSBA Space Summary Templates in Appendix A.
- *Functional Relationship* - Each program space should be described in terms of its functional relationship to other activities. Functional relationships should also be established between departments, such as math and science, English and the media center, and administration and guidance.
- *Instructional Technology* – Provide a listing of the current use of technology in the instructional program. New applications of instructional technology planned for the near future shall be described program by program and in terms of building-wide plans.
- *Security and Visual Access Requirements* - Identify and describe security and supervision deficiencies and goals for the facility.

- *Site Development Requirements* - Identify and describe parking, circulation, service, outdoor activity, signage, utilities and lighting requirements deficiencies and goals.
- *Sustainable Design Features* – Identify and describe high performance green school desires and goals, particularly as they relate to the Massachusetts High Performance Green Schools Guidelines (MA-CHPS).

Criteria should be performance oriented rather than prescriptive, where possible. Conceptual diagrams are required to illustrate the design criteria.

1.09 Development of Alternatives

The District and the MSBA will work in collaboration to define and develop a few, reasonable, educationally sound, economical, and practical solutions to evaluate. Each alternative should satisfy the Educational Program, Standards and Policies. The alternatives considered must address the following as a minimum:

- Analysis of school district student school assignment practices and available space in other schools in the district
- Tuition agreements with adjacent school districts (per MGL c.70B §8)
- Rental or acquisition of existing buildings that could be made available for school use. (per MGL c.70B §8)
- Renovation and/or addition to existing building(s)
- No-build or status quo option, to be used as a benchmark for comparative analysis of all other alternatives
- In some cases, it may also be appropriate to consider construction of new building and the evaluation of potential locations

The specific alternatives to be considered shall be reviewed and approved by the MSBA and the District before they are developed in any detail.

1.10 Preliminary Evaluation of Alternatives

Preliminary evaluation shall include an examination of the degree to which alternatives fulfill stated Educational Program requirements, as well as additional criteria developed specifically to compare and evaluate alternative solutions. Emphasis should be on major criteria which can be used to judge whether alternatives are educationally sound and meet basic requirements, including efficiency and cost effectiveness. Comparative cost analyses for the various schemes are required and cost figures should commence being developed in the early stages of the study. Renovation alternatives shall include an evaluation of the environmental and cost impact of construction phasing on students and staff that may be occupying a building undergoing renovations and evaluations of

relocation requirements or off-hour construction that may be required. Where operating and maintenance costs or life cycle costs are applicable to evaluation of alternatives (for instance, with a choice between repair versus replacement of facilities), these costs should also be addressed in the preliminary evaluation. The level of detail of plans for each alternative should be sufficient for comparative evaluation purposes. The results of the Preliminary Evaluation will be a list of up to three alternatives that will be evaluated in more detail that best meet the Educational Program requirements, are efficient and cost effective. The MSBA and the district shall review the alternatives and agree upon up to three to study further. The final three alternatives shall be distinct from one another and not simply variations of the same option.

1.11 Develop Budget Statement for Educational Objectives

The MSBA will evaluate the municipality's ability to pay for and operate the District's existing educational facilities and the impact on the District's budget of the alternatives being studied.

The Budget Statement for Educational Objectives is a detailed listing of all intended sources and uses of operation and capital funds which will be used to understand the anticipated costs to deliver an educational program in the District, including the proposed options. The Budget Statement shall cover the previous three fiscal years, the current fiscal year and shall project a budget for three years into the future. Refer to Budget Statement for Educational Objectives Template in Appendix C.

In order to have a shared understanding of the fiscal impact of a proposed project on the operating budget and whether the district has the ability to support the operating cost of the proposed project, the cost of additional professional and support staff will be analyzed, including clerical, custodial, nurses, and food service workers who will be assigned to the proposed facility as well as the estimated budget line items for additional building maintenance, equipment maintenance, technology maintenance, building security system maintenance and HVAC maintenance, utilities, transportation or other increases to the operating costs for the proposed facility. In order to determine financing capacity, the District shall provide:

- Information from the Treasurer, Finance Committee and/or Capital Planning Committee regarding the district's current bonding liability and future bonding capacity and any impact on the budget and tax rate.
- A listing of the capital plan for all current and proposed municipal projects with the projected annual expenditure for the next five (5) years.

1.12 Final Evaluation of Alternatives

The Final Evaluation shall include up to three potential options. Unless otherwise approved by the MSBA, at least one of the three potential options shall be renovation and/or addition to existing building(s). Include the following for each option where appropriate:

- Provide an analysis of each prospective site. On a scaled map (1-inch equals 400 feet), show all social, man-made and natural features that fall within a three quarter mile radius surrounding the site. Include clear delineations of any required setbacks from roadways, wetlands, residential neighborhoods, etc.
- Evaluation of the potential impact that construction of the option will have on students and measures required or recommended to mitigate impact including, but not necessarily limited to, provision of temporary facilities, relocation requirements, phased construction, off-hour construction, etc.
- Evaluation of existing conditions including, but not necessarily limited to, existing buildings and systems and the effects the new construction will have on them, legal title to the land, encumbrances, soil conditions, property lines, topography, environmental considerations, and historic building considerations. In addition, existing conditions evaluations shall include:
 - Building code analysis of existing facilities to be renovated or added including seismic studies to assess code compliance and the need for seismic and other building code related improvements.
 - Geotechnical evaluation and soils exploration to determine probable excavation and building foundation requirements as well as septic/sewage treatment system requirements.
 - Environmental site assessments minimally consisting of a Phase I Initial Site Investigation conforming to 310 CMR 40.00, et seq. performed by a licensed site professional. Depending upon the results of the Phase 1 investigation, the Authority may require additional environmental testing.
 - Existing buildings shall be thoroughly assessed for the presence of hazardous materials including, but not necessarily limited to, lead paint and asbestos. Destructive testing shall be employed where hazardous materials potentially exist behind and within existing construction.
- Conceptual architectural and site drawings as required conveying a successful organization of spaces that will satisfy the spatial and organizational requirements of the Education Program.
- An outline of the major building structural systems that are proposed for each alternative.
- The source, capacities and method of obtaining all utilities. For additions and renovations, evaluate the impact on existing utilities.
- A narrative of the major building systems including plumbing, HVAC, electrical (including proposed information technology and/or multi-media systems) with estimated mechanical and electrical loads including applicable heating, cooling, domestic hot water and electrical block loads.
- A proposed total project budget including all identifiable hard and soft costs (refer to Proposed Total Project Budget Template in Appendix D) and a construction cost

estimate using the Uniformat II Elemental Classification format (Level 3) in as much detail as possible.

- A review of the District's Budget Statement for Educational Objectives and the impact of each alternative including:
 - An analysis of the ability of the District to support the operating and capital costs of each alternative, including the increased costs of instructional, utilities, maintenance and transportation support and any debt service associated with each alternative, which may be in addition to costs already being incurred.
 - A proposed plan for each alternative showing how the district intends to fund all costs (capital and operating) associated with each alternative.
- Permitting requirements including the estimated time to acquire each of the required permits.
- Proposed project design and construction schedule including consideration of phasing of the proposed project.
- Preliminary evaluation of Massachusetts High Performance Green School Guidelines (MA-CHPS) Criteria including completing a MA-CHPS Scorecard and describing each high performance green school prerequisite and credit included in the proposed design.

1.13 Recommendation of Preferred Schematic Design

The district and the MSBA shall meet to review the study and work in collaboration to determine which of the solutions studied may be recommended to the MSBA Board of Directors as the preferred solution in the final study report. The solution may be phased in order of priority of need, if appropriate. It is possible, in some cases, that the study may recommend a "no-build" solution. If the MSBA and the district cannot agree upon a preferred solution, no final study recommendations shall be issued. The MSBA and the district will begin a review of the options presented to determine if there are actions that can be taken to reach consensus on a final recommendation.

Once the MSBA and the district have concurred on a preferred solution, the preferred option will be presented to the MSBA Board of Directors for approval of a Preferred Schematic Design.

1.14 Final Design Program for the Preferred Schematic Design

After receiving the approval from the MSBA Board of Directors, the District will begin to develop the Final Design Program for the Preferred Schematic Option. The purpose of the Final Design Program for the Preferred Schematic Design is to define the programmatic, functional, spatial, and environmental requirements of the educational facility, whether new or remodeled, in written and graphic form for review, clarification,

and agreement as to scope of work and design requirements by the architects, engineers, and other professionals that will be working on the building design.

The Final Design Program shall be based on the District's Preliminary Design Program previously established by the District and the MSBA.

The Final Design Program shall include a project rationale statement explaining why a project is being proposed. The project rationale shall define the problem and explain the proposed project's intended use.

Minimum requirements for the Final Design Program include:

- Philosophy Statement. A statement of how the specific educational program, including the building design and each instructional program, meets the MSBA's guidelines and also meets the educational philosophy of the district.
- Program Goals. The educational goals of each instructional program shall be clearly defined. This includes learning objectives and the psychological and emotional concerns of students, when appropriate (as in the guidance suite and special education rooms).
- Program Activities. Provide a detailed description of program activities in order to determine functional need and ultimately the design of the building.
- The general and specific architectural characteristics desired.
- Space Summary. Using the MSBA's guidelines, create an itemization of each functional space and determination of square footage allocations to determining total building square footage and establish a realistic construction budget. Refer to MSBA Space Summary Templates in Appendix A.
- Desired visual or aesthetic focal point or features of the school, including primary and secondary focal points, i.e., commons, media center, auditorium, lobby, etc.
- Instructional Technology. New applications of instructional technology planned for the near future and considered for the distant future shall be described program by program and in terms of building-wide plans.
- Functional Relationship. Each program space should be described in terms of its functional relationship to other activities. Functional relationships should also be established between departments, such as math and science, English and the media center, and administration and guidance.
- Security and Visual Access Requirements. Outline security and supervision requirements for the facility.
- Site Development Requirements. Describe parking, circulation, service, outdoor activity, signage, and lighting requirements.

The Final Design Program should include requirements for individual spaces (Refer to Sample Room Data Sheets in Appendix B) including, but not necessarily limited to, the following:

- Describe specific utility requirements. Include the number of electrical outlets needed and their desired` locations. Identify specific water, gas, compressed air, and dry and wet waste disposal requirements as applicable to the specific space;
- Identify special acoustic and lighting requirements;
- Identify specific surface material performance requirements for floors, walls and ceilings;
- Identify bulletin case, writing board and tack board requirements. Mounting height should be specific for size of students;
- Identify requirements for wall maps, projection screens, chart rails and other fixed teaching aids together with utilities, communications and control features required therefore. Describe relationships of teacher activity to student activity areas and note teacher demonstration areas if required;
- Note specific environmental requirements such as special ventilation/exhaust, natural lighting, special heating and heat control;
- Note specific safety and health features required such as emergency eyewash stations, fume hoods or ventilation in shops and laboratories. Note requirements where the instructor controls gas, compressed air and water. Note where automatic shutoff to specialized equipment is required, i.e., saws, lathes, planers, grinders;
- Explain audio-visual, television access and public address requirements as well as computer equipment and stations;
- Specify equipment, furnishings and casework to be located within the activity area.
- Identify and describe internal areas and support spaces needed, including general storage requirements for each space;
- Identify special graphics, colors, textures and shapes required within an area. This is of particular importance for kindergarten, special education, pre-school, and primary classrooms;
- Identify provisions for storage of staff and/or student garments, personal property;
- Identify area needed for display of student projects and project storage, large and small.
- Identify and describe any other requirement that may be unique to the activity setting.

The Final Design Program should include a summary of spatial relationships. This should be illustrated through either a bubble diagram or a matrix showing the desired spatial relationships of the entire facility. This is not intended to be a scaled school design plan; it is merely intended to demonstrate the desired adjacencies

among the activity settings. Consider the following factors when establishing the spatial relationships for the facility:

- Public vs. private spaces – Grouping public spaces together, and providing direct relationships between them, makes it easier to keep the private spaces private.
- Noisy vs. quiet spaces – Grouping of like spaces to enhance the overall effectiveness of a building's ability to provide spaces that facilitate learning.
- Consolidation of like spaces – Consolidate mechanical intensive areas such as restrooms, kitchens, etc.
- Joint-use spaces – Consideration should be given to utilization of a space to fulfill two or more purposes.
- Academic discipline spatial relationships. i.e. science suites composed of classrooms, laboratories, chemical storage, specimen storage, animal rooms and a plant room; or metal shops composed of multiple task areas such as welding, forging, storage, finishing, grinding, instruction, clean-up, student project, tools, etc.

The Final Design Program should address the Massachusetts High Performance Green School Guidelines including a discussion of the high performance green school objectives for the proposed project. Include a preliminary MA-CHPS Scorecard and a description of each prerequisite and credit to be included in the final design.

The Design Program shall be approved by the district school committee prior to submission to the Authority for approval, and shall be in a form suitable to the Authority.

1.15 Preferred Schematic Design

The Schematic Design shall be based on the Final Design Program and shall include:

- Site Development Plan – Site plan shall be at a minimum scale of 1"=40' and include property lines with bearings and distances, building setbacks, site acreage, wetlands information, proposed and existing topography, proposed and existing buildings and site features, ground floor elevations for all buildings, proposed and existing utilities and utility connections, emergency equipment access.
- Environmental Assessment – Provide additional site and building assessments as may be required by the Authority to quantify presence of unsuitable materials and scope of possible remediation efforts.
- Geotechnical and Geoenvironmental Analysis – Provide additional geotechnical analysis as may be required by the District or the Authority to establish soil conditions, remediation requirements and appropriate foundation requirements.
- Code Analysis – Determine the impact of all federal, state, regional and local codes, regulations and ordinances having jurisdiction, including a listing of permitting and other regulatory filing requirements.

- Utility Analysis – Determine the availability and capacity of all required building utilities. Provide soils analysis and preliminary design for on-site septic/sewage treatment facilities, if required.
- Massing Study – an analysis of the building's integration into its surroundings and neighborhood with drawings, models, or photographs.
- Schematic Building Floor Plans of all floors and roof at a minimum scale of 1/8"=1'-0" showing all elements of the building, overall dimensions, gross square footage of each floor and net square footage of each space.
- Schematic Exterior Building Elevations for all sides and orientations indicating all exterior finishes and fenestration.
- Narrative Building Systems Descriptions – Describe basic information relative to:
 - Sustainable Design Elements
 - Building Structure
 - Plumbing
 - HVAC
 - Fire Protection
 - Electrical (including power, lighting, communications, fire alarm, video/CATV, security/surveillance)
 - Information Technology
- MA-CHPS Scorecard – Pursuant to the Massachusetts Green School Guidelines, complete a MA-CHPS Scorecard and describe each high performance green school prerequisite and credit included in the proposed design.
- Accessibility - an analysis of the design's compliance with the Americans with Disabilities Act (ADA) and the Massachusetts Architectural Access Board requirements (MAAB)
- Outline specifications in accordance with CSI MasterFormat 2004 50-Division and MGL c.149 filed sub-bid format that clearly define the scope of construction, establish the quality of materials, finishes, products, equipment and workmanship, and the special or unique conditions of construction.
- Project Schedule - Provide a schedule for the proposed project in the form of a graphic representation (Gantt Chart) of the duration of all tasks, activities and phases of the design and construction processes against the progression of time up to a proposed occupancy date. Dependencies between activities and tasks shall be delineated. Individual tasks and activities shall be rolled up to the major project milestones. Highlight priority actions and activities that may have a major impact on the schedule.
- Proposed Total Project Budget (See Appendix D) including a construction cost estimate – Unifomat II, Level 3 format.

Appendix A

Space Summary Templates

Appendix B

Sample Room Data Sheets

sample

CLASSROOM – Grades 1 through 5

FUNCTIONAL CRITERIA

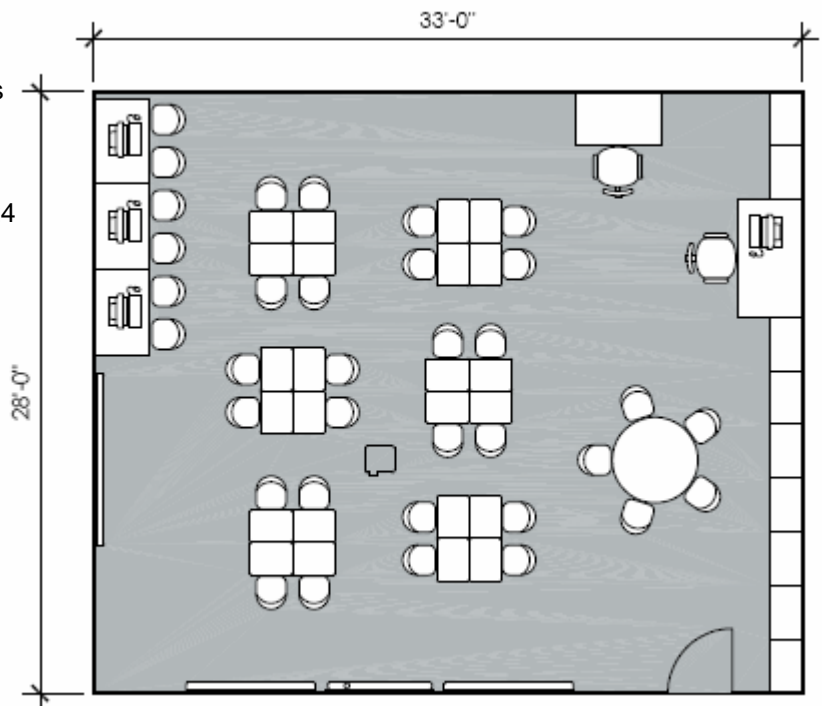
Description: General instructional classrooms for grades 1-5
Area: 925 SF net
Quantity: 24
Occupant Load: 26 (1 teacher, 1 aid, 24 students)

LOCATIONAL CRITERIA

Users: teachers, students
Adjacency: grades grouped
Orientation/Views:

TECHNICAL CRITERIA

Floor: VCT
Walls: Painted
Ceiling: Acoustical
Acoustical:
Doors:
Windows: required
Mechanical: low noise
Plumbing/FP:
Lighting:
Electrical: clock system
Communication: telephone, Internet access



FIXTURES/FURNISHINGS

Casework/Specialties:
Furnishings: 1 teacher's desk, 1 aid's desk, 2 task chairs, 24 student desks, 30 stacking chairs, 3 computer tables, small group tables
Equipment: 1 teacher's computer, 3 student computers, 1 printer, white boards, telephone
Shelving/Storage:

OTHER INFORMATION

Note: Include additional content as indicated in the MSBA Final Design Program criteria.

sample

CLASSROOM – Kindergarten and Pre-Kindergarten

FUNCTIONAL CRITERIA

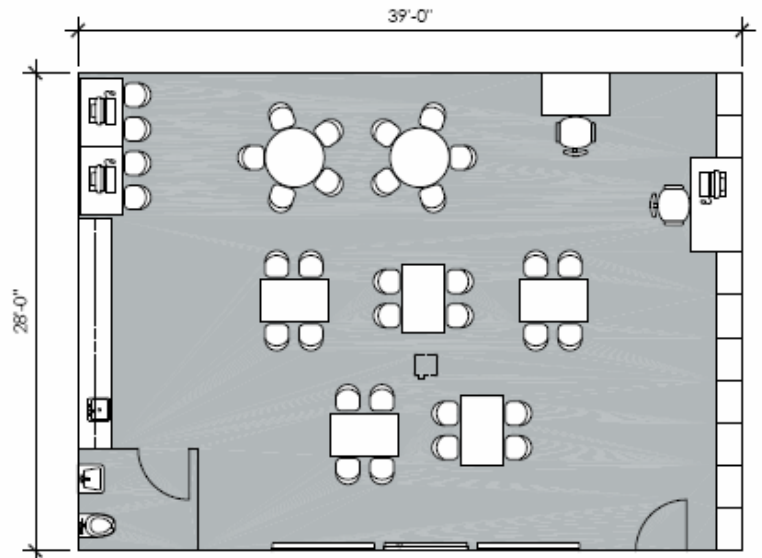
Description: Instructional classrooms Pre-K & Kindergarten
Area: 1,100 SF net
Quantity: 4
Occupant Load: 22 (1 teacher, 1 aid, 20 students)

LOCATIONAL CRITERIA

Users: teachers, students
Adjacency: grades grouped, ground floor
Orientation/Views:

TECHNICAL CRITERIA

Floor: VCT
Walls: Painted
Ceiling: Acoustical
Acoustical:
Doors:
Windows: required
Mechanical: low noise
Plumbing/FP: CR sink, toilet room (lavatory & water closet)
Lighting:
Electrical: clock system
Communication: telephone, Internet access



FIXTURES/FURNISHINGS

Casework/Specialties:
Furnishings: 1 teacher's desk, 1 aid's desk, 2 task chairs, 20 student desks, 24 stacking chairs, 2 computer tables, small group tables
Equipment: 1 teacher's computer, 2 student computers, 1 printer, white boards, telephone
Shelving/Storage:

OTHER INFORMATION

Note: Include additional content as indicated in the MSBA Final Design Program criteria.

GYMNASIUM

FUNCTIONAL CRITERIA

Description: Physical education, Sports activities space, occasional assemblies, community use
Area: 5,400 SF net
Quantity: 1
Occupant Load:

LOCATIONAL CRITERIA

Users: gym teacher, students, community, school teams, adaptive PE
Adjacency: Gym office, gym storage, OT/PT, playground, public toilets, night entry, ground floor
Orientation/Views: visual connection from corridor

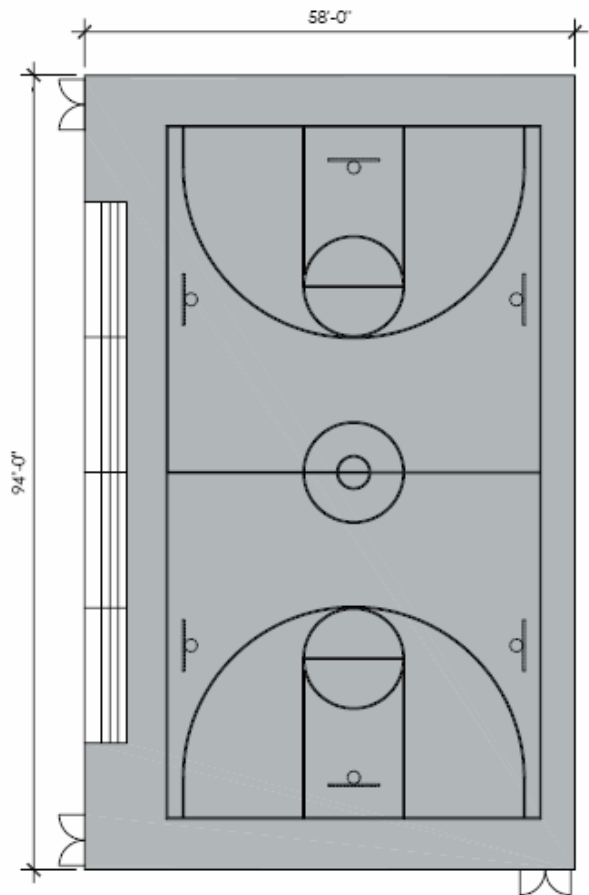
TECHNICAL CRITERIA

Floor: wood or epoxy
Walls: Painted block with some mats
Ceiling:
Acoustical:
Doors:
Windows: clerestory, glare control
Mechanical:
Plumbing/FP: drinking fountain
Lighting:
Electrical: clock system
Communication:

FIXTURES/FURNISHINGS

Casework/Specialties: pull-out bleachers
Furnishings:
Equipment: retractable basketball backboards, divider curtain
Shelving/Storage:

OTHER INFORMATION separate access for night use



Note: Include additional content as indicated in the MSBA Final Design Program criteria.

Appendix C

Budget Statement for Educational Objectives Template

Massachusetts School Building Authority

Form for Budget Statement for Educational Objectives

School District _____

Date _____

Prior to moving into schematic design, it is important for the MSBA and the district to have a complete understanding of implications to the district's operating budget for the preferred facility solution, and to confirm the district's financial resources and ability to support the proposed solution. This Budget Statement requests information regarding the operating costs related to staffing, equipment and supplies, maintenance and utilities; and information regarding municipal and capital planning and resources.

1. For the preferred option, provide an itemized list of additional professional and support staff, including clerical, custodial, nurses, and food service workers who will be assigned to the project building.

Professional Staff:	Current Year Existing School	Year 1 New School	Year 2 New School	Year 3 New School
Administrators				
Dept. Heads/Team Leaders/Curriculum Specialists				
Classroom Teachers				
Specialist Teachers: (art, music, phys. ed health)				
Library/Media				
Technology Teachers				
World Language				
School Nurse				
Others				
Support Staff	Current Year Existing School	Year 1 New School	Year 2 New School	Year 3 New School

Paraprofessionals

Clerical

Custodial/Maint.

Food Service

Others

2. For the preferred option, provide estimated budget line items for educational support accounts for the project school.

Educational Supports	Current Year Existing School	Year 1 New School	Year 2 New School	Year 3 New School
Equipment				
Textbooks				
General supplies				
Subject area supplies				
Library materials				

3. For the preferred option, provide estimated budget line items for additional building maintenance, equipment maintenance, technology maintenance, building security system maintenance, HVAC maintenance, utilities, or other extraordinary costs for the project school.

Building Related	Current Year Existing School	Year 1 New School	Year 2 New School	Year 3 New School
Building Maintenance				
Equipment Maintenance				
Technology Maintenance				
Building Security Maintenance				
HVAC Maintenance				

District Name: _____

Utilities:

Provide the energy conservation goals and the actual energy consumption profile (in terms of KWH (electricity) therms (gas) or gallons (oil) and dollars of the current facility and for the preferred option for the next three years.

	Current Year	Year 1	Year 2	Year 3
	Existing School	New School	New School	New School
Heating Oil				
Natural Gas				
Electricity				
Telephone				

Extraordinary Maintenance

4. Calculate the net operating cost impacts on the district of the preferred option, including the effect of changes in professional and support staffing, supplies, and maintenance and utility costs.

Net \$ increase in professional and support staff _____.

Net \$ increase in supplies and equipment _____.

Net \$ increase in maintenance _____.

Net \$ increase in utilities _____.

5. Submit a spreadsheet(s) displaying the following information:

a.) The current maintenance budget for the district, the percentage of current maintenance budget of the current district budget, and the percentage of the current maintenance budget for the subject school to the current maintenance budget of the district. Please provide the estimated maintenance budget for the district for the next three years, the percentage of current maintenance budget of the district budget for the next three years, and the percentage of the maintenance budget for the proposed school to the estimated maintenance budget of the district.

b.) A comparison of net school spending, per pupil expenditures and maintenance budgets from year to year and as compared to state averages.

6. As reported on the school district's most recent End of Year Pupil and Financial Report schedule 1, please report sources of district funds and the percentage of these funds in the current budget of the subject school, and provide an estimate of the sources for funds for the next three years and the percentage of these funds that will be targeted to the budget of the proposed school:

a.) **Total revenue from local sources** \$_____.

Itemize the sources of revenue as reported.

District Name: _____

- b.) **Total revenue from state aid** \$ _____.
Itemize the sources of state aid revenue as reported.
- c.) **Total revenue collected for choice students** \$ _____
- d.) **Total revenue from federal grants** \$ _____.
Itemize the sources of reported Federal revenue.
- e.) **Total revenue from state grants** \$ _____.
Itemize the sources of revenue reported.
- f.) **Total revenue revolving and special accounts** \$ _____.
Itemize the sources of revenue reported.

7. Capital Spending and Financing Options

- a.) Provide the history of debt exclusions or tax overrides sought to support the existing school operating budget and what measures were passed and the dollar amount approved for each measure.
- b.) Provide a brief history of how the district has identified and met its capital funding obligations for the past five (5) years – include a sources and uses table. Include a discussion on capital projects that were deferred due to funding constraints.
- c.) Summarize and prioritize the anticipated capital improvements for the existing facilities in the district over the next 5 years that are needed to address growth, renewal of existing facilities, technology and educational and programmatic requirements. Discuss the short and long term capital costs and financing options for the existing school facilities in the district. This should include alternatives to MSBA funding, as well as the operating consequences of the capital decisions being considered.
- d.) Provide a listing of the capital plan for all current and proposed municipal projects for the next five (5) years with a breakout of the projected annual expenditure planned for the District.
- e.) Provide information regarding the availability of new non-public funds for school facility purposes.
- f.) Provide information from the Treasurer, Finance Committee and/or Capital Planning Committee regarding the municipality's current bonding liability and future bonding capacity and any impact of the proposed new project on the budget and tax rate.

8. For the preferred option, the following signatories are hereby providing a good faith statement of future financial support for the project:

Mayor, or Town Manager, or Chairperson of Board of Selectmen

_____ Date _____
(Signature)

School Committee Chairperson

_____ Date _____
(Signature)

School Superintendent

_____ Date _____
(Signature)

DRAFT

District Name: _____

Appendix D

Proposed Total Project Budget Template

Proposed Total Project Budget

District: _____

Proposed Project: _____

Date: _____

100	0000	ADMINISTRATION	
101	0000	Legal Fees	0
102	0000	Owner's Project Manager	
	0100	<i>Programming</i>	0
	0200	<i>Feasibility Study</i>	0
	0300	<i>Schematic Design</i>	0
	0400	<i>Design Development</i>	0
	0500	<i>Construction Contract Documents</i>	0
	0600	<i>Bidding</i>	0
	0700	<i>Construction Contract Administration</i>	0
	0800	<i>Closeout</i>	0
	0900	<i>Extra Services</i>	0
	1000	<i>Reimbursable Services</i>	
	9900	<i>Other Project Manager Costs</i>	0
103	0000	Advertising	0
104	0000	Permit Fees	0
105	0000	Owner's Insurance	0
199	0000	Other Administrative Costs	0
Subtotal			0

200	0000	ARCHITECTURE & ENGINEERING	
201	0000	Basic Services	
	0100	<i>Programming</i>	0
	0200	<i>Feasibility Study</i>	0
	0300	<i>Schematic Design</i>	0
	0400	<i>Design Development</i>	0
	0500	<i>Construction Contract Documents</i>	0
	0600	<i>Bidding</i>	0
	0700	<i>Construction Contract Administration</i>	0
	0800	<i>Closeout</i>	0
	9900	<i>Other Basic Services</i>	0
202	0000	Extra Services	
	0100	<i>Programmatic Changes</i>	0
	0200	<i>Construction Change Orders</i>	0
203	0000	Reimbursible Services	
	0100	<i>Construction Testing (Forensics)</i>	0
	0200	<i>Printing (over minimum)</i>	0
	0300	<i>Other Reimbursable Costs</i>	0
204	0000	Subconsultants (not in Basic Services)	
	0100	<i>Civil Engineering</i>	0
	0200	<i>Hazardous Materials</i>	0
	0300	<i>Geotechnical</i>	0
	0400	<i>Site Survey</i>	0
	0500	<i>Wetlands</i>	0
	0600	<i>Landscaping</i>	0
	0700	<i>Technology</i>	0
	0800	<i>Equipment</i>	0
	0900	<i>Accoustical</i>	0
	1000	<i>Food Service</i>	0
	1100	<i>Cost Consultants</i>	0
	1200	<i>Traffic Consultants</i>	0
	1300	<i>Commissioning</i>	0
	9900	<i>Other Consultants</i>	0
Subtotal			0

Proposed Total Project Budget

District: _____

Proposed Project: _____

Date: _____

300	0000	SITE ACQUISITION	
301	0000	Land/Building Purchase	0
302	0000	Appraisal Fees	0
303	0000	Recording Fees	0
Subtotal			0

500	0000	CONSTRUCTION COSTS	
501	0000	Pre-Construction Services	0
502	0000	Construction	
502	0100	Division 1 - General Requirements	0
502	0200	Division 2 - Existing Conditions	0
502	0300	Division 3 - Concrete	0
502	0400	Division 4 - Masonry	0
502	0500	Division 5 - Metals	0
502	0600	Division 6 - Wood, Plastics & Composites	0
502	0700	Division 7 - Thermal & Moisture Protection	0
502	0800	Division 8 - Openings	0
502	0900	Division 9 - Finishes	0
502	1000	Division 10 - Specialties	0
502	1100	Division 11 - Equipment	0
502	1200	Division 12 - Furnishings	0
502	1300	Division 13 - Special Construction	0
502	1400	Division 14 - Conveying Systems	0
502	2100	Division 21 - Fire Suppression Systems	0
502	2200	Division 22 - Plumbing	0
502	2300	Division 23 - HVAC	0
502	2500	Division 25 - Electrical	0
502	2700	Division 27 - Communications	0
502	2800	Division 28 - Electronic Safety & Security	0
502	3100	Division 31 - Earthwork	0
502	3200	Division 32 - Exterior Improvements	0
502	3300	Division 33 - Utilities	0
503	0000	CM Fee	0
504	0000	Head Office Overhead	0
505	0000	Contingencies	
505	0100	Construction Contingency	0
505	0200	Design Contingency	0
Subtotal			0

600	0000	MISCELLANEOUS PROJECT COSTS	
601	0000	Utility Company Fees	0
602	0000	Testing Services	0
603	0000	Swing Space / Modulars	0
699	0000	Other Project Costs	0
Subtotal			0

Proposed Total Project Budget

District: _____

Proposed Project: _____

Date: _____

700	0000	FURNISHINGS & EQUIPMENT	
701	0000	Furnishings	0
702	0000	Maintenance Equipment	0
703	0000	Computer Equipment	0
	0100	<i>Student Use</i>	
	0101	Hardware	
	0102	Software	
703	0200	<i>Administrative Use</i>	0
	0201	Hardware	
	0202	Software	
0799	0000	Other Furnishings and Equipment	
<i>Subtotal</i>			0

800	0000	OWNER'S CONTINGENCY	
801	0000	Owner's Contingency	0
<i>Subtotal</i>			0

PROPOSED PROJECT TOTALS			0
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