



Business, Finance and Planning

TO: School Committee

FROM: Liam Hurley, Assistant Superintendent/Chief Financial & Administrative Officer
Julie Kirrane, Director of Business and Planning
David Stickney, Director of Facilities

DATE: September 17, 2018

RE: Facilities Update: Cabot, Summer Projects
FY19 Update to the Long-Range Plan
FY19 Capital Improvement Plan (FY20-FY24)

This memo provides the latest update on major facilities projects in the district, including a status report on summer projects. A report on recommended updates to the Long-Range Facilities Plan and Project Timeline is included, as well as information from the draft FY19 Capital Improvement Plan (FY20-FY24). Josh Morse, Public Buildings Commissioner, will be attending the meeting to provide information and answer questions on all topics.

Facilities Update

The Cabot School project continues to be on schedule and budget. The bid list for Furniture, Fixtures and Equipment is being finalized in the next two months, including technology for the new school. This process involves review by school principal and user groups, as well as final color selection guided by the architect. Generally 30-35% of the maintenance budget is allocated to summer projects and numerous projects were completed this summer. A status update is attached.

FY19 Update to the Long-Range Plan

The annual review and updating of the long-range plan was an extensive process, done together with the city. As Newton's next major school building project, a large focus has been on the start of the Lincoln-Eliot/NECP School Building Project, Newton's fourth major school building project. The full project team, including OPM and Designer, is now on board while the School Building Committee has been formed and held a kick-off meeting this past June. In addition to the next project, the project timing and sequencing of all school projects during the next five-year period has been thoroughly reviewed and is illustrated on the updated FY19 Recommended Long-Range Facilities Planning Timeline. This timeline, which does recommend some significant changes outlined below, will be discussed in detail at the School Committee meeting.

FY19 Capital Improvement Plan (FY20-FY24)

The City of Newton Capital Improvement Plan (CIP) will be presented to the City Council in October 2018. Each year, the School Committee reviews and votes to approve the draft five-year financial forecast in advance of this presentation. Then between October and April, the CIP continues to be refined. Because this document is dynamic, updates to the five-year forecast spreadsheets are posted on the [Capital Improvement Plan](#) web area at www.newtonma.gov throughout the year. A final CIP five-year funding schedule is approved with the city budget in April. Finally, approved projects for the upcoming fiscal year are then docketed so that funding can be appropriated on a timeline that works for the project schedule.

The draft FY19 CIP Five-Year Financial Forecast (FY20-FY24) is provided and includes all planned school renovation and construction projects as well as customary maintenance projects (e.g., roofs, mechanicals,

boilers). All customary maintenance projects that were funded in FY18 continue to be funded, with some changes to timing that are responsive to updates to the Long-Range Plan or changes in project risk factor. For example, the Newton North Pool Air Handling Unit has been reviewed by the CIP committee and has risen in priority. The amount of funding for this project and its timing in the next five years is still under consideration, but is currently estimated at \$350,000 in FY20.

The financial forecast is fully coordinated with the Newton Public Schools Long-Range Facilities Plan. Funding Source is included and denotes whether funding source is bonding, MSBA, Capital Stabilization Fund, or Alternate Funding when funding does not currently fall within city debt limits and a voted debt exclusion may be needed. A team from the schools met with the City's Capital Improvement Plan (CIP) committee in August and September to discuss ongoing school priorities and changes since the prior year for ongoing and planned school building projects. Customary maintenance projects funded by the CIP also were reviewed with the CIP committee.

A draft of the updated FY18 Recommended Long-Range Facilities Planning Timeline is attached. There are several changes to highlight.

Lincoln-Eliot and NECP Project

The Lincoln-Eliot / NECP feasibility study has begun this fall and the project team will review the Educational Program for both elementary and preschool. The elementary education program has been well developed in conjunction with the Angier, Zervas and Cabot projects, but will be reviewed and updated. The student services team has been working for some time on a draft integrated preschool educational program for this project; its final development will be supported by the project team.

Following the education programming phase, which always comes first in Newton's feasibility studies, the team will be tasked with evaluating options for site selection for Lincoln-Eliot and NECP. Since 150 Jackson Road has two full years of experience housing the preschool program and pre-planning work has been fairly extensive at the site, the project team will be directed to evaluate two main concepts which include the original idea of co-locating the programs at 150 Jackson Road and an option for permanently locating the NECP program at the Horace Mann building. This newer option has been explored internally by Public Buildings and the Schools and has promise to meet program needs at a significant cost savings that would be generated from a full renovation at 687 Watertown Street versus a new addition at 150 Jackson Road. The feasibility process for 150 Jackson Road will support decision making, as outlined above, as well as further project considerations including traffic and circulation.

The feasibility study will next consider district wide and local enrollment trends to determine the number of classrooms for Lincoln-Eliot and NECP that are needed to sustain projected enrollment, longer-term growth and anticipated program needs in the future. The city is considering an active phase of redevelopment not seen since the early 2000s when three 200+ unit apartment complexes were built in Newton. Trends in new development, existing home turnover, and other demographic trends are being analyzed extensively by a joint city and school team to best inform the next five-year Newton Public Schools enrollment projections. This work is also being supported by demographic and economic consultants.

Project Timing

Project schedule and duration has been reviewed with the experience gained from Angier, Zervas and Cabot. The Lincoln-Eliot / NECP and subsequent projects now have a five-year project duration to ensure that sufficient time for the feasibility phase is included. If any phases of the project take less time than anticipated, schedule will be adjusted. The feasibility process is projected to take a full two years to evaluate. This adds one year to most projects. The planned date to complete the project at 150 Jackson Road is now September 2023 versus September 2022 in the prior year timeline.

Countryside Feasibility Study

A feasibility study for Countryside is now planned ahead of Franklin. The city and school teams have been studying the building and have determined that condition at Countryside is a higher need. The Countryside Elementary School is located at 191 Dedham Street in Newton. The 35,910 gross square foot school was constructed in 1953 as a small neighborhood school consisting of 13 classrooms, a gym, library, auditorium, main office, two sets of girls and boys restrooms, and a pair of staff bathrooms. A 6 classroom annex addition was constructed in 1958 to address the rising school enrollment. A single bathroom with one fixture was added as part of this project. In 1986, two additional annex classrooms were constructed on the north end of the annex. In 1991, 1999, and 2000 a total of four modular classrooms and two offices were constructed. In total, the number of classrooms doubled while existing support spaces in the main building continued to serve a larger student population (e.g., cafeteria, library/media, bathroom facilities, nurse, administration). Like all older Newton Public Schools facilities, program space for small group instruction and special education is lacking.

In addition, records appear to have overstated the square footage of the building, annex and modular additions; field measuring is not supporting the stated square footage of 69,400 as documented in both the HMFH facilities assessment performed by NPS in 2011 and the 2016 MSBA facilities assessments.

Preparations for a feasibility phase will begin this year and the feasibility study has been moved up to 2019-20 (FY20) and 2020-21 (FY21).

Franklin and Ward

These schools are next on the project timeline following Countryside. As was done for Lincoln-Eliot to address condition concerns as they await a full school renovation, Public Buildings is evaluating what improvements can be built into the CIP for Franklin and Ward, particularly in the Kindergarten addition at Franklin. City and schools are currently evaluating what specific improvements can be built into the CIP for Ward. \$150,000 in storm water improvements were added to the CIP in the late spring in time to perform immediate work at Franklin which was completed this past summer. This work is expected to improve ground level moisture issues within the building. Ward is now Newton's oldest school building and its location on a tight site with challenging accessibility issues makes it a priority project based on age and condition.

Continuing CIP Investments

- Boilers, roofs and critical school customary maintenance projects and MSBA Accelerated Repair Projects (both committed MSBA ARPs and anticipated) are listed on the timeline.
- The CIP continues investment in the Lincoln-Eliot building heating, ventilation and widows with work spread over multiple summers.
- The Horace Mann access/elevator project has been planned after the upcoming relocation of the school to the Carr building in June 2019.
- Horace Mann is being looked at as a school building in the Lincoln-Eliot / NECP feasibility study.
- Air conditioning will be installed at Carr in summer 2019.
- Customary Maintenance projects have been reviewed and prioritized; the same projects are scheduled for funding during the next five years.
 - Ed Center stairs (Crafts Street – Main entrance at parking lot)
 - Day VAV coil work (classroom fresh air system)
 - North Pool Air Handling Unit
 - Williams School Mechanical Upgrades

FY19 CIP (FY20-FY24) for Schools, By Priority

A draft spreadsheet will be forwarded for review as soon as it is available. Please note that the document will remain in the draft stage as it is still being refined.

A vote will be requested at the October 1, 2018 School Committee meeting.



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September 17, 2018

Summer Projects 2018 Update

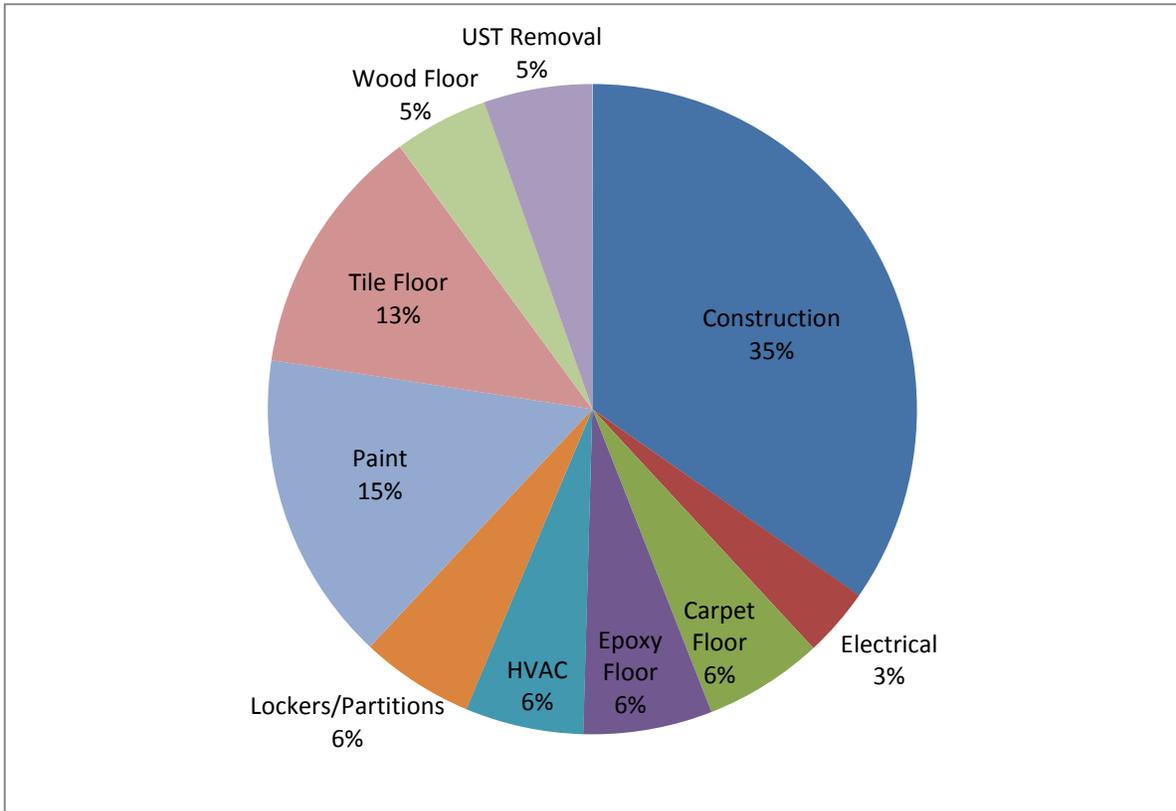
In a break from the traditional practice of asking each of our twenty three facilities for their “Top 3” summer requests, we opened up the process to help identify greater concentrations of need. We initially settled on 180 projects across the district. Included were carpeting, floor tiles, lockers, painting, partitions, space reconfigurations, ceilings, and other improvements that we believe enhance the teaching and learning experience.

Along the way, we took on an additional 70 projects that came to us after June 15th. We had some newly identified issues at Ward, North, Countryside, and Zervas. With a total of 250 projects to complete in the 34 work days between June 26th and August 17th, we completed 95% of the work. None of the remaining work conflicts with teaching space, and all staff were able to access their space well before the contract date. We anticipate completion of the few remaining items by the end of September.

The preventive maintenance program remains robust as we completed over 200 PM projects. We continue to expand the program as we open new facilities and as budget allows.

Our sincere appreciation is extended to all the Public Buildings staff and our contracted vendors for their concerted effort to make all the improvements in our schools. Special appreciation to the Facilities staff for investing their knowledge, expertise, and energy to make this a truly successful summer. A special note of thanks goes to Arthur Cabral without whose guidance and support we could not have made the finish line.

Percentage of Capital Outlay based on \$1,225,000



Number of Work Orders Based on Trade

