



Massachusetts School Building Authority

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Module 3

Feasibility Study

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INTRODUCTION

Module 3 – Feasibility Study:

If the District has completed all tasks defined in Module 1 – Prerequisites and Module 2 – Project Team and submitted the Module 2 Completion Checklist, the District may now proceed with the Feasibility Study as outlined in this Module. Module 3 – Feasibility Study is one of eight MSBA modules intended to provide a guide to the procedures and approvals needed to work collaboratively with the MSBA. (The Program Overview and listing of eight modules is provided in Appendix A for reference.)

Welcome to Module 3 – Feasibility Study

During the Feasibility Study, the District and its team collaborate with the MSBA to generate an initial space summary, document existing conditions, establish design parameters, develop and evaluate alternatives, and recommend the most cost effective and educationally appropriate solution to the MSBA Board of Directors. The MSBA Board of Directors must approve the preferred schematic for a project before the preferred schematic may advance into schematic design. See this Module for additional detail.

Module 3 has been provided as a general guide for Districts and their teams to plan their work in a collaborative effort in accordance with the MSBA's procedures and requirements. This Module is not intended to replace and/or supersede the services required by the OPM and/or Designer contracts. The Designer and OPM each shall be solely responsible for performing the services required by its contract with the District, respectively, and nothing in this Module shall be construed as relieving the Designer or OPM from its duties and responsibilities.

Feasibility Study Participants include:

- **The School Building Committee** as submitted by the District and approved by the MSBA in its School Building Committee Approval form.
- **The Owner's Project Manager** as submitted by the District and approved by the MSBA in accordance with MSBA regulations and policies.
- **The Designer** as selected locally by the District and approved by the MSBA for projects under \$5 million or as selected through the MSBA's Designer Selection Panel for projects over \$5 million.
- **The MSBA**, through the assigned MSBA Project Manager and Field Coordinator.

Feasibility Study Submittal Procedures

All documents and materials submitted to the MSBA during the course of the Feasibility Study must be transmitted by the Owner's Project Manager ("OPM"). The OPM is

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required to compile and coordinate all submittals prior to delivery to the MSBA. This includes those items required to be provided by the OPM, as well as those of the Designer and the District.

For each submittal to the MSBA, the Designer and District must submit the required materials to the OPM. The OPM shall compile the submittal with the items indicated in the Designer and OPM Contracts, confirm that the District's School Building Committee has officially approved the submittal and verify its completeness and conformity to MSBA requirements. The OPM shall then forward this submittal to the assigned MSBA field coordinator under a separate cover letter signed by the OPM, including a certification from the OPM that the OPM has reviewed and coordinated the materials, and the submittal is complete, and a confirmation that the District has approved the materials for submission to the MSBA, in accordance with Section 8.1.1.2 of the OPM Contract which requires the OPM to "... assist the Owner in the preparation of all information, material, documentation and reports that may be required or requested by the Authority..." Submittals shall be in the form of two hard copies (with half-sized drawings) and one electronic file in PDF format.

Incomplete submittals or submittals not reviewed by the OPM will not be accepted. Partial submittals will no longer be accepted without prior approval by the MSBA.

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3.0 Feasibility Study

After all tasks defined in Module 1 – Prerequisites and Module 2 – Forming the Team have been completed by the District and acknowledged by the MSBA, a District may proceed with the Feasibility Study. Please remember that an invitation from the MSBA’s Board of Director to collaborate on a Feasibility Study is **not** approval of a project. The purpose of the Feasibility Study is for the District, its Owner’s Project Manager (“OPM”) (for projects with estimated construction costs in excess of \$1.5 million), its Designer, and the MSBA to explore potential solutions that meet the requirements of the District’s Educational Program, and to determine the most cost effective and educationally appropriate solution to recommend to the MSBA Board of Directors for its consideration and approval to proceed into schematic design. Moving forward in the MSBA’s process requires collaboration with the MSBA, and communities that “get ahead” of the MSBA without MSBA approval will not be eligible for grant funding. To qualify for any funding from the MSBA, local communities must follow the MSBA’s statute and regulations, which require MSBA collaboration and approval at each step of the process.

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 Feasibility Study will vary slightly as to the specific requirements, scope, cost and schedule. The particular requirements, scope, cost and schedule of a Feasibility 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 review and evaluation of any previous studies as well as any meetings and discussions between the District and the MSBA.

In order to ascertain MSBA input and approval throughout the Feasibility Study process, the District is required to secure MSBA concurrence and/or approval of each of the following study milestones/reports before proceeding to the next:

- Preliminary Design Program
- Preferred Schematic Report

A Sample Project Schedule that includes major milestones during the Feasibility Study and Schematic Design process has been provided for your reference in Appendix B.

3.1 Preliminary Design Program

The purpose of the Preliminary Design Program is to define the programmatic, functional, spatial, and environmental requirements of the educational facility necessary to meet the District’s educational program, and perform the review and investigation required to clearly define the existing building deficiencies. Based upon a review of the District’s educational program, the Designer will identify and prepare in written and graphic form for review, clarification, and agreement the educational goals and programmatic space needs for the subject school. The space needs along with an evaluation of existing conditions and site development requirements will form the basis of the Designer’s recommendation for an evaluation of alternatives upon which the most educationally appropriate and cost effective solution may be recommended.

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The Preliminary Design Program shall include the following:

- Table of Contents
- Introduction
- Educational program
- Initial space summary
- Evaluation of existing conditions
- Site development requirements
- Proposed List of Preliminary Alternatives
- Appendix

3.1.1 Introduction

The introduction shall present a brief overview of the reason for the Feasibility Study, a list of all project participants, an outline of key data that informs the basis of the Study, and a summary of the process undertaken to examine, analyze and conclude upon the findings of this Preliminary Design Program. The following shall be included:

- A brief summary of the facility deficiencies identified by the District in the Statement of Interest (SOI) at the time when the SOI was submitted. Include a copy of the most recent associated SOI in the Appendix of the submittal;
- The date of the invitation from the MSBA Board of Directors to conduct a Feasibility Study. Include a copy of the MSBA Board Action letter in the Appendix of the submittal;
- The agreed-upon design enrollment. (If the enrollment certification included multiple enrollments, then include the conditions associated with each enrollment). Include a copy of the executed design enrollment certification in the Appendix of the submittal;
- A narrative summary of the Capital Budget Statement (refer to Module 1 – Pre-Requisites) and the target budget for the proposed project;
- An overview of the process undertaken locally that concludes with the submittal of the Preliminary Design Program, including when the OPM and Designer were engaged, key community outreach activities, committee meetings, votes, and decisions;
- A project directory with contact information for representatives of all District stakeholders (e.g., Mayor/Board of Selectmen, Superintendent, School Building Committee, School Committee, Local officials, and others involved in the project), Designer (point of contact and key support staff and sub-consultants) and OPM (and key support staff);
- Updated project schedule including: 1) projected MSBA Board of Directors meeting for approval to proceed into Schematic Design, 2) projected MSBA Board of Directors meeting for approval of Project Scope and Budget Agreement, and 3) projected Town/City Vote for Project Scope and Budget Agreement. Identify any variances from the schedule outlined in the District's Feasibility Study Agreement with the MSBA.

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3.1.2 Educational Program

The District will work with the Designer to evaluate the existing educational program currently offered by the District and define the educational activities planned to be offered. The Preliminary Design Program must include documentation of the District's existing educational program, or if the District pursues development of an educational vision and possibly a new set of educational specifications, the Preliminary Design Program must include the process of collaboration, outcomes, and documentation of support among the stakeholders.

The Educational Program shall include a statement of the teaching philosophy and methods; a thorough, in-depth explanation of the district's curriculum goals; and, objectives of the program elements associated with the subject facility. Through the use of narratives, figures and charts, the Educational Program shall describe and include, but not necessarily be limited to, the following:

- Grade and school configuration policies
- Class size policies
- School scheduling method
- Teaching methodology and structure (e.g., academies, departments, houses, teams, etc.)
- Teacher planning and room assignment policies
- Pre-kindergarten (SPED only, tuition programs, locations, if applicable)
- Kindergarten (full day, half day, locations, if applicable)
- Lunch programs (district kitchen, full service kitchens, warming kitchens, etc.)
- Technology instruction policies and program requirements (labs, in-classroom, media center, required infrastructure, etc.)
- Art (in-classroom, specialized area)
- Music/Performing Arts (in-classroom, specialized area)
- Physical Education
- Special Education (in-house, collaborative, facility restrictions)
- Vocational Education programs
- Transportation policies
- Functional and spatial relationships and adjacencies
- Security and visual access requirements

3.1.3 Initial Space Summary

Based upon the District's Educational Program as described above and the agreed-upon enrollment, the District, working with its Designer, must complete the initial space summary to identify the educational spaces the District believes are needed. Once agreed upon by the MSBA, this initial space summary will help inform the development of alternatives to be studied, upon which the most educationally appropriate and cost effective solution may be recommended.

The initial space summary must be based on the agreed-upon design enrollment and must include the following:

- An itemization of each existing educational space;

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- The total gross square footage of the existing facility;
- An itemization of each proposed educational space; and
- A total gross square footage for the proposed renovated/added-to/new facility.

MSBA regulations, 963 CMR 2.00, establish allowable gross square footage per student for different types of school facilities of varying scale. To assist Districts and their design teams in developing proposed initial space summaries, the MSBA has created three space summary templates (in Excel format), one each for elementary, middle, and high schools. Each template includes three separate columns as follows:

- The first column documents existing conditions;
- The second column documents proposed spaces subdivided by existing spaces proposed to remain, new spaces and total;
- The third column is the MSBA's guidelines. Other than inserting the agreed upon enrollment at the bottom, this column is not to be altered.

Refer to Appendix 3C Space Summary Standards & Guidelines for additional information on using and updating the proposed space summary to reflect design conditions at each milestone of the project.

As an attachment to the initial space summary, Districts must provide scaled floor plans of the existing facility and narrative descriptions of the reasons for any variance between the District's proposed program/educational spaces and the MSBA guidelines for each category of spaces. Districts and their teams should consider the following when completing the initial space summary:

- The initial space summary does not have to differentiate between existing spaces to remain and new spaces when generating the proposed program;
- The values for allowable spaces within the MSBA Guidelines column must not be adjusted as this will prevent a clear understanding of how the proposed program compares to the guidelines and potential limitations on MSBA participation. If this column is adjusted or edited, the initial proposed space summary will be returned, without MSBA review comments, for correction and resubmission;
- The spreadsheet may be expanded by adding rows within the appropriate category to include entries for existing programs and spaces as needed to accurately describe existing educational spaces;
- Categories of space or room type not included in the initial space summary template (e.g., ROTC, computer lab, etc.) should be listed under the "Other" category; and
- If the MSBA and the District agree that more than one design enrollment is to be considered (i.e., grade reconfigurations or redistricting) as part of the Feasibility Study, a separate spreadsheet of the space summary must be generated for each potential enrollment.

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3.1.4 Evaluation of Existing Conditions

The Designer will analyze existing conditions of all buildings that comprise the school, site and environment. The Designer will assemble sufficient information on the problems and opportunities with the existing school building(s) and site, so that any major implications for future requirements and design can be accurately judged. This information is required to be of a level sufficient enough to assist in the development of the preliminary alternatives to be evaluated and must include, at a minimum, an outline of the potential scope, budget, and schedule impacts. The information should include the following:

- Determination that the District has legal title to the property, or alternatively, the required actions necessary to obtain clear title or to control, in accordance with the provisions of 963 CMR 2.05(1), and operate the Assisted Facility and Project Site for the useful life of the Assisted Facility;
- Determination that the property is available for development;
- Determination of any historic registrations and/or potential local and/or state interest/requirements in historic preservation and the associated potential impact on scope and time;
- Determination of any development restrictions that may apply;
- Evaluation of building code compliance for the existing facility;
- Evaluation of Architectural Access Board Rules and Regulations and their application to a potential project;
- Evaluation of significant structural, environmental, geotechnical or other physical conditions that may impact the cost and evaluation of alternatives;
- Determination for need and schedule for soils exploration and geotechnical evaluation;
- Environmental site assessments consisting of, at a minimum, a Phase I Initial Site Investigation conforming to 310 CMR 40.00, et seq. performed by a licensed site professional. (Results of the Phase I investigation may require additional environmental testing); and
- Assessment of the school for the presence of any 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.

The District will furnish the Designer with all 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 Preliminary Design Program 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 Feasibility Study what further investigatory work should be carried out prior to recommending an option as the Preferred Schematic and what work should be carried out prior to submittal of the Schematic Design.

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3.1.5 Site Development Requirements

In narrative form, the Designer shall describe in general terms project requirements related to site development to be considered during the preliminary and final evaluation of alternatives, including, but not limited to:

- Site access and circulation
- Parking
- Facility service
- Code issues and limitations
- Zoning issues and limitations
- Emergency vehicle access
- Utilities
- Athletic fields and outdoor educational spaces
- Site orientation and location considerations and issues

3.1.6 Proposed List of Preliminary Alternatives

Based upon the Educational Program, initial space summary, evaluation of existing conditions and site development requirements, the District, working with its Designer, shall propose a list of preliminary alternatives to be evaluated for the MSBA's consideration. To ensure that the Feasibility Study determines the most cost effective and educationally appropriate solution, it is imperative that the proposed preliminary alternatives to be investigated are sufficiently comprehensive in scope to initially consider all possible solutions. Each alternative should satisfy the Educational Program, Standards, Policies and Guidelines of the MSBA, unless specifically authorized in writing by the MSBA.

The initial list of alternatives to be considered in the preliminary evaluation should include at least the following:

- 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
- Construction of new building and the evaluation of potential locations

3.2 MSBA Review of Preliminary Design Program

After a District has submitted a Preliminary Design Program that meets the requirements set forth above, the MSBA will review the Program to determine if it concurs with the initial space summary for an evaluation of preliminary alternatives and accepts the District's recommendation of proposed preliminary alternatives to be evaluated.

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Initial Space Summary:

The MSBA will provide a written response that: provides the MSBA's evaluation of the extent to which the initial space summary conforms to the MSBA guidelines and regulations; states the approval status of the proposed initial space summary; and, if applicable, lists the specific conditions that the MSBA will be monitoring as the Statement of Interest moves forward in the grant process.

The MSBA is committed to working with Districts to determine the most cost effective and educationally appropriate solution to meet their specific needs. To this end, the MSBA is willing to work with a District to better understand its Educational Program and any unique needs the District may have. As part of the Preliminary Design Program, the District should supply a sufficient description and substantiation of the educational program needs in order for the MSBA to consider variations to MSBA guidelines that are reasonable, required to deliver the educational curriculum and are likely to be financially supported by the community. To bolster the likelihood of success, foster a clear understanding of the MSBA's willingness to financially participate and define the conditions upon which alternatives will be developed, it is essential that the MSBA and the District reach agreement on the initial space summary. Therefore, MSBA approval of the initial space summary, or potentially a conditional approval, is required for the MSBA to continue working with the District on the Preferred Schematic Report. The MSBA may issue a conditional approval of the initial space summary solely for the purposes of evaluating the preliminary alternatives. The final approval of the space summary and the agreed upon square footages will be determined upon submission of the Preferred Schematic Report.

Proposed List of Preliminary Alternatives:

The MSBA will review the District's proposed list of preliminary alternatives and either accept the proposed list and/or propose additional alternatives for the District to consider during the next part of the Feasibility Study process. The MSBA anticipates that the study of the preliminary alternatives may result in additional and/or refined alternatives as may be suggested by the District or the MSBA.

3.3 Preferred Schematic Study and Report

3.3.1 Preferred Schematic Study

Once the MSBA has accepted the Preliminary Design Program, the District and its Designer should proceed with the preliminary evaluation of the proposed alternatives. This evaluation shall include an examination of the degree to which each alternative fulfills stated Educational Program requirements and complies with MSBA guidelines and any additional criteria developed specifically to compare and evaluate the 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. The preliminary evaluation of alternatives shall also include a comparative cost analysis, including:

- Evaluation of the environmental and cost impact of construction
- Evaluation of relocation requirements (i.e., swing space) or off-hour construction
- Operating and maintenance costs or life cycle costs

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- Costs associated with site acquisition (if applicable)

The results of the preliminary evaluation shall be presented in narratives and tables to clearly demonstrate to the District and the MSBA the evaluation criteria (e.g., existing space issues, the educational program, site requirements, etc.), how each alternative did or did not address the criteria, the advantages and disadvantages of each alternative and the comparative cost analyses. The preliminary evaluation shall conclude with a list of at least three distinct alternatives that are recommended for further development and evaluation.

The MSBA and the District shall meet and discuss the preliminary alternatives and agree upon the alternatives that will be further developed and studied as part of the final evaluation of alternatives, prior to the finalization of the Preferred Schematic Report.

3.3.2 Preferred Schematic Report

The purpose of the Preferred Schematic Report is to finalize the Preliminary Design Program, summarize the process and conclusions of the preliminary evaluation of alternatives and substantiate and document the District's selection and recommendation for a preferred solution. The Preferred Schematic Report shall include the Preliminary Design Program as an appendix, with all updates and changes identified during the preferred schematic study presented as appropriate within the report. The report should address all concerns and questions raised by the MSBA during its review of the Preliminary Design Program and clearly identify any changes incorporated by the District based on further evaluations and considerations.

The District, through its OPM, must submit the Preferred Schematic Report by the deadline established by the MSBA for a proposed Board action. This schedule is posted on the MSBA website and should have been incorporated as part of the updated schedule required in part 3.1.2 of the Preliminary Design Program. The MSBA will not accept any submittals that have not been reviewed by the OPM or are incomplete. Partial submittals will no longer be accepted without prior approval by the MSBA.

The Preferred Schematic Report shall include the following:

- Table of Contents
- Executive Summary
- Introduction
- Evaluation of Existing Conditions
- Educational Program
- Proposed Space Summary
- Site Development Requirements
- Final Evaluation of Alternatives

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3.3.2.1 Executive Summary

The Executive Summary shall include an executive level summary of each section of the Preferred Schematic Report. The Executive Summary shall highlight the key items that informed the District's recommendation for its Preferred Schematic alternative and shall incorporate the following:

- Overall planning/functional relationship diagrams
- Existing Facility Floor Plans
- Existing Site Plan (conceptual)
- Documentation and required approvals for grade restructuring and/or redistricting required, if applicable
- Narrative describing how this solution provides the most educationally appropriate and cost effective solution
- Updated and signed Space Summary document printed in color on 11" x 17" paper
- Budget Statement for Educational Objectives (refer to Appendix 3B – Budget Statement for Preferred Schematic)
- Conceptual site and floor plans of preliminary alternatives
- Summary Table of Preliminary Design Pricing for Construction as well as an estimated Total Project Budget for each final alternative
- Schedule for Proposed project
- Conceptual floor plans of the Preferred Alternative, printed in color, clearly labeled to identify educational spaces and the types and locations of special education and vocational technology spaces.

3.3.2.2 Introduction

The introduction shall update the data that informs the basis of the Feasibility Study, and summarize the process undertaken and conclusions of this Preferred Schematic Report. The introduction of the Preferred Schematic Report shall include:

- Overview of the process undertaken since submittal of the Preliminary Design Program that concludes with submittal of the Preferred Schematic Report, including any new information and changes to previously submitted information;
- Overview of the community outreach program and community feedback regarding the recommendation of the Preferred Schematic since submittal of the Preliminary Design Program;
- Updated project schedule including: 1) projected MSBA Board of Directors Meeting for Approval to proceed into Schematic Design, 2) projected MSBA Board of Directors Meeting for Approval of Project Scope and Budget Agreement, and 3) projected Town/City Vote for Project Scope and Budget Agreement; and
- Organization of the Preferred Schematic Report.

3.3.2.3 Evaluation of Existing Conditions

Refer to the appended Preliminary Design Program and describe in narratives and graphic form any changes resulting from additional evaluation or new information that

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informs the conclusions of the evaluation of the existing conditions. If the changes are substantive, provide an amended report noted as final.

3.3.2.4 Educational Program

Refer to the appended Preliminary Design Program and describe in narratives, tables and graphic form any changes resulting from additional evaluation or new information. If the changes are substantive, provide an amended report noted as final.

3.3.2.5 Proposed Space Summary

Refer to the appended Preliminary Design Program and describe in narratives, tables and graphic form any new or updated information. The proposed space summary included at this point shall have been updated based on comments from the MSBA as appropriate, and it shall serve as the basis for both the preliminary and final evaluation of alternatives and the MSBA Board's approval for authorization for a preferred schematic design.

3.3.2.6 Site Development Requirements

Refer to the appended Preliminary Design Program and describe in narratives, tables and graphic form any changes resulting from additional evaluation or new information that informs the conclusions of site development requirements. If the changes are substantive, provide an amended report noted as final.

3.3.2.7 Final Evaluation of Alternatives

The Final Evaluation shall include at least three potential alternatives. Unless specifically approved in writing by the MSBA, at least one of the three potential alternatives shall be renovation and/or addition to existing building(s) that maximizes use of the existing facility. Include the following for each alternative where appropriate:

- Provide an analysis of each prospective site. On a scaled map (1 inch equals 40 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.
- 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.

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- 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 and a construction cost estimate using the Uniformat II Elemental Classification format (to as much detail as the drawings and descriptions permit, but no less than Level 2).
- 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.
- Completed MA-CHPS or LEED-S scorecard
 - Provide a statement from the Designer identifying the level of MA-CHPS verification or LEED-S certification goals and the corresponding reimbursement goals of the District.
 - Verify in writing that the building narratives, drawings, and cost estimates provided include systems described in the MA-CHPS / LEED-S scorecard.

The Final Evaluation of Alternatives shall present in detailed narratives and tables as appropriate to present clearly how and to what degree each alternative addresses each evaluation criteria and shall include a cost comparison table in the format presented below.

Summary of Preliminary Design Pricing

Option (Description)	Enrollment (Grades)	Total Gross SF	SF of Renovated Space (Cost/SF)	SF of New Construction (Cost/SF)	Est. Total Construction (Cost/SF)
Option A					
Option B					
Option C					

3.4 Approval by MSBA Board of Directors to Proceed into Schematic Design

In order for the MSBA Board of Directors to consider a District's Preferred Schematic Design for approval, the following must occur prior to the date of the Board meeting, in accordance with the deadlines established by the MSBA:

- The District, through its OPM, must submit its Preferred Schematic Report to the MSBA in accordance with the deadlines published on the MSBA's website (www.MassSchoolBuildings.org).

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- MSBA staff must complete its review of the Report, and the District must submit responses to any questions or issues raised by the MSBA in a timeframe adequate to support the schedule for the Board's meetings.
- The District and its Designer may be required to present an overview of its Report at an MSBA Facilities Assessment Subcommittee meeting.
- The District and its Designer must respond to any concerns or issues identified at the MSBA Facilities Assessment Subcommittee in a timely fashion, prior to the deadline established by the MSBA.

3.4.1 MSBA staff review

The District and the MSBA shall 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 Preferred Schematic 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 preferred schematic design shall be forwarded to the Board for its consideration. The MSBA and the District will begin a review of the alternatives presented to determine if there are actions that can be taken to reach consensus on a final recommendation.

The MSBA review process for the Preferred Schematic Report includes:

- Written response comments based on staff review
- Conference call with the District and their design team to discuss the report
- Written responses from the District addressing staff comments as required.

3.4.2 Facility Assessment Subcommittee review:

Upon receipt and review of the Preferred Schematic Report, MSBA staff will schedule the District for presentation at a Facilities Assessment Subcommittee ("FAS") Meeting. The FAS meeting is an informational meeting only and is intended to provide an opportunity for Districts to present information and further the MSBA's understanding of the proposed project. No votes will be taken and any formal actions required by the MSBA Board of Directors to fulfill MSBA procedures will be taken at the regularly scheduled Board meetings. FAS meeting dates are posted on the MSBA website, which should be consulted when preparing the overall work plan and schedule for the Feasibility Study.

FAS meetings are limited to one, 2-hour meeting per month. MSBA staff will determine which districts will present at an FAS meeting based upon the complexity of the proposed project, staff's review of the Preferred Schematic Report and the time available. It is possible that not all Districts will be asked to present their proposed project at a FAS meeting.

If the MSBA is going to ask a District to present at a FAS meeting, staff will notify the District, Designer and OPM by e-mail. The e-mail will include an outline of the material

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that should be presented, which typically includes an overview of the project that explains the basis of the project, the evaluation conducted to arrive at the recommended preferred schematic, and if applicable, responses to specific questions regarding potential concerns noted during review of the Preferred Schematic Report.

3.4.3 MSBA Board approval

After the District has presented at the Facilities Assessment Subcommittee, MSBA staff will present the preferred option to the MSBA Board of Directors for its consideration and approval of a Preferred Schematic Design. If the Board approves a Preferred Schematic Design, a Board Action Letter shall issue, summarizing the Board's actions. Upon receipt of the Board Action Letter, the District should complete and sign the checklist provided in Appendix D and submit it to the MSBA for acceptance. Once this checklist has been completed, the District may proceed into Schematic Design – see Module 4.

3.5 Conclusion of Module 3

The District should maintain the following checklist throughout the Feasibility Study process as each step is submitted, reviewed and completed. Upon receipt of the MSBA Board Action letter, the District should sign the checklist as noted on the form, submit the signed checklist to MSBA and prepare to proceed to Schematic Design (Module 4).

APPENDIX 3A

Program Overview

(Bold denotes current module)

Program Overview

The Massachusetts School Building Authority's ("MSBA") grant program for school building construction and renovation projects is a non-entitlement competitive program based on need. The MSBA's Board of Directors (the "Board") approves grants based on need and urgency, as expressed by the City, Town, Regional School District, or independent agricultural and technical school ("District") and validated by the MSBA. Once the MSBA Board of Directors invites a District to participate in the MSBA's grant program, the collaborative process includes the following eight Modules:

Module 1 – Pre-Requisites: Before a District can progress in the MSBA's grant approval process, it must complete the following Pre-Requisites: certification of the District's understanding of the grant program rules; a summary of the District's funding capacities; a summary of the District's existing maintenance practices; certification of a design enrollment for the proposed project agreed upon by the MSBA (may not be applicable for Repair Assessments depending on the proposed scope of work); confirmation of community authorization and funding to proceed; and, execution of the MSBA's standard Feasibility Study Agreement, which establishes a process for the District to be reimbursed for eligible expenses.

Module 2 – Forming the Project Team: Once all of the Pre-Requisites have been completed to the satisfaction of the MSBA, the District procures the team of professionals utilizing MSBA specific procurement processes and standard Request for Services ("RFS") templates and Contracts to work with the District as the proposed project advances through the MSBA's grant process.

Module 3 – Feasibility Study: The District and its team collaborate with the MSBA to generate an initial space summary, document existing conditions, establish design parameters, develop and evaluate alternatives, and recommend the most cost effective and educationally appropriate solution to the MSBA Board of Directors. Approval by the MSBA Board of Directors is required for all projects in order to advance the preferred schematic into schematic design. *See this Module for additional detail.*

Module 4 – Schematic Design: The District and its team develop a final design program and robust schematic design of sufficient detail to establish the scope, budget and schedule for the Proposed Project.

Module 5 – Project Scope and Budget and Project Funding Agreements: Based upon the completed Feasibility Study the District and the MSBA staff establish and document the project scope, budget, schedule, and MSBA financial participation to

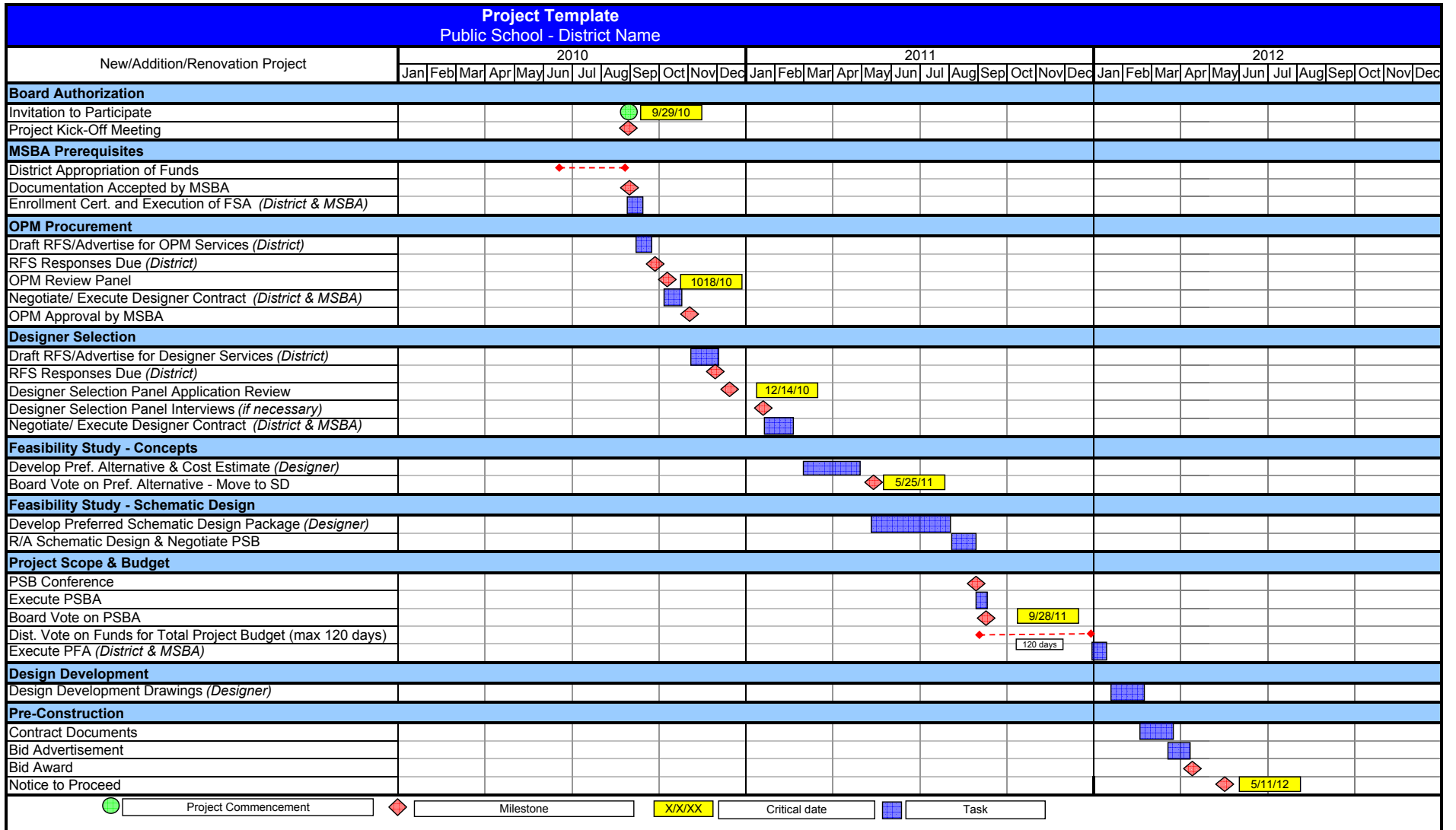
7/15/10

forward to the MSBA Board of Directors for their approval. Approval by the MSBA Board of Directors establishes the MSBA participation in the proposed project. Once the District secures community authorization and financial support, the MSBA and the District enter into a Project Funding Agreement, which defines the scope, budget and schedule for the Proposed Project.

Module 6 – Design Development, Construction Documentation & Bidding: The District and its team advance the design, generate construction documentation, procure bids and award a construction contract in accordance with the agreed upon project scope, budget and schedule as documented in the Project Funding Agreement, and the requirements contained in the MSBA’s standard contracts for Owner’s Project Management and Designer Services. The MSBA continues to monitor the project to ensure it remains on track and meets the expectation of both the District and the MSBA as defined in the Project Funding Agreement

Module 7 – Construction Administration: The MSBA continues to monitor progress of the project to confirm that it remains on track and meets the expectation of both the District and the MSBA as defined in the Project Funding Agreement.

Module 8 – Project Closeout: The MSBA performs final audit to determine final total grant amounts and make final payment.



*Note: This schedule contains only estimated dates and durations based upon the District being voted into the Capital Pipeline on September 29, 2010. Schedule subject to change.

Proposed Space Summary- Elementary Schools

FILL IN SCHOOL NAME HERE	Existing Conditions		
ROOM TYPE	ROOM NFA ¹	# OF RMS	area totals
Custodian's Workshop			
Custodian's Storage			
Recycling Room / Trash			
Receiving and General Supply			
Storeroom			
Network/Telecom Room			
OTHER			0
Other (specify)			
Total Building Net Floor Area (NFA)			0
Proposed Student Capacity/Enrollment			
Total Building Gross Floor Area (GFA) ²			
Grossing factor (GFA/NFA)			#DIV/0!

PROPOSED								
Existing to Remain/Renovated			New			Total		
ROOM NFA ¹	# OF RMS	area totals	ROOM NFA ¹	# OF RMS	area totals	ROOM NFA ¹	# OF RMS	area totals
		0			0			0
		0			0			0
								#DIV/0!

MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
ROOM NFA ¹	# OF RMS	area totals	Comments
375	1	375	
375	1	375	
400	1	400	
200	1	200	
200	1	200	
200	1	200	
		0	
		15,895	
		-	
		-	
		0.00	

¹ Individual Room Net Floor Area (NFA)

Includes the net square footage measured from the inside face of the perimeter walls and includes all specific spaces assigned to a particular program area including such spaces as non-communal toilets and storage rooms.

² Total Building Gross Floor Area (GFA)

Includes the entire building gross square footage measured from the outside face of exterior walls

Architect Certification

I hereby certify that all of the information provided in this "Proposed Space Summary" is true, complete and accurate and, except as agreed to in writing by the Massachusetts School Building Authority, in accordance with the guidelines, rules, regulations and policies of the Massachusetts School Building Authority to the best of my knowledge and belief. A true statement, made under the penalties of perjury.

Name of Architect Firm: _____

Name of Principal Architect: _____

Signature of Principal Architect: _____

Date: _____

Proposed Space Summary - Middle Schools

FILL IN SCHOOL NAME HERE	Existing Conditions		
ROOM TYPE	ROOM NFA ¹	# OF RMS	area totals
CORE ACADEMIC SPACES			0
<i>(List classrooms of different sizes seperately)</i>			
Classroom - General			
Small Group Seminar (20-30 seats)/ Resource			
Science Classroom / Lab			
Prep Room			
SPECIAL EDUCATION			0
<i>(List classrooms of different sizes seperately)</i>			
Self-Contained SPED			
Self-Contained SPED Toilet			
Resource Room			
Small Group Room / Reading			
ART & MUSIC			0
Art Classroom			
Art Workroom w/ Storage & kiln			
Band / Chorus - 100 seats			
Music Practice / Ensemble			
VOCATIONS & TECHNOLOGY			0
Tech. Cirm. - (E.G. Drafting, Business)			
Tech. Shop - (E.G. Consumer, Wood)			
HEALTH & PHYSICAL EDUCATION			0
Gymnasium			
Gym Storeroom			
Health Instructor's Office w/Shower & Toilet			
Locker Rooms - Boys/Girls w/Toilets			
MEDIA CENTER			0
Media Center/Reading Room			
DINING & FOOD SERVICE			0
Cafetorium/Dining			
Stage			
Chair/Table/Equipment Storage			
Kitchen			
Staff Lunch Room			
MEDICAL			0
Medical Suite Toilet			
Nurses' Office/Waiting Room			
Examination Room / Resting			
ADMINISTRATION & GUIDANCE			0
General Office / Waiting Room/Toilet			
Teachers' Mail and Time Room			
Duplicating Room			
Records Room			
Principal's Office w/ Conference Area			
Principal's Secretary / Waiting			
Assistant Principal's Office - AP1			
Assistant Principal's Office - AP2			
Supervisory / Spare Office			
Conference Room			

PROPOSED								
Existing to Remain/Renovated			New			Total		
ROOM NFA ¹	# OF RMS	area totals	ROOM NFA ¹	# OF RMS	area totals	ROOM NFA ¹	# OF RMS	area totals
		0			0			0

MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
ROOM NFA ¹	# OF RMS	area totals	Comments
		0	
950	0	-	850 SF min - 950 SF max
500	0	-	
1,200	0	-	1 period / day / student
80	0	-	
		500	
950	0	-	assumed 8% of pop. in self-contained SPED
60	0	-	
500	0	-	1/2 size Genl. Cirm.
500	1	500	1/2 size Genl. Cirm.
		200	
1,200	0	-	assumed use - 50% population 2 times / week
150	0	-	
1,500	0	-	assumed use - 50% population 2 times / week
200	1	200	
		0	
1,200	0	-	Assumed use - 25% Population - 5 times/week
2,000	0	-	Assumed use - 25% Population - 5 times/week
		8,400	
6,000	1	6,000	
150	1	150	
250	1	250	
1,000	2	2,000	
		2,680	
2,680	1	2,680	
		3,600	
0	1	-	2 seatings - 15SF per seat
1,600	1	1,600	
200	1	200	
1,600	1	1,600	1600 SF for first 300 + 1 SF/student Add'l
200	1	200	20 SF/Occupant
		310	
60	1	60	
250	1	250	
100	0	-	
		2,400	
300	1	300	
100	1	100	
200	1	200	
200	1	200	
375	1	375	
125	1	125	
150	1	150	
150	0	-	
150	1	150	
350	1	350	

Proposed Space Summary - High Schools

FILL IN SCHOOL NAME HERE	Existing Conditions		
	ROOM NFA ¹	# OF RMS	area totals
ROOM TYPE			
CORE ACADEMIC SPACES			0
<i>(List classrooms of different sizes separately)</i>			
Classroom - General			
Teacher Planning			
Small Group Seminar (20-30 seats)			
Science Classroom / Lab			
Prep Room			
Central Chemical Storage Rm			
SPECIAL EDUCATION			0
<i>(List classrooms of different sizes separately)</i>			
Self-Contained SPED			
Self-Contained SPED Toilet			
Resource Room			
Small Group Room			
ART & MUSIC			0
Art Classroom - 25 seats			
Art Workroom w/ Storage & kiln			
Band - 50-100 seats			
Chorus - 50-100 seats			
Ensemble			
Music Practice			
Music Storage			
VOCATIONS & TECHNOLOGY			0
Tech Cirm. - (E.G. Drafting, Business)			
Tech Shop - (E.G. Consumer, Wood)			
HEALTH & PHYSICAL EDUCATION			0
Gymnasium			
PE Alternatives			
Gym Storeroom			
Locker Rooms - Boys/Girls w/Toilets			
Phys. Ed. Storage			
Athletic Director's Office			
Health Instructor's Office w/Shower & Toilet			
MEDIA CENTER			0
Media Center/Reading Room			
AUDITORIUM / DRAMA			0
Auditorium			
Stage			
Auditorium Storage			
Make-up / Dressing Rooms			
Controls / Lighting / Projection			
DINING & FOOD SERVICE			0
Cafeteria / Student Lounge/ Break-out			
Chair / Table Storage			
Scramble Serving Area			
Kitchen			
Staff Lunch Room			
MEDICAL			0
Medical Suite Toilet			
Nurses' Office/Waiting Room			
Interview Room			
Examination Room / Resting			
ADMINISTRATION & GUIDANCE			0
General Office / Waiting Room/Toilet			

PROPOSED								
Existing to Remain/Renovated			New			Total		
ROOM NFA ¹	# OF RMS	area totals	ROOM NFA ¹	# OF RMS	area totals	ROOM NFA ¹	# OF RMS	area totals
		0			0			0
								2,100
								850 2 1,700 825 SF min - 950 SF max
								100 2 200
								500 0 -
								1,440 0 - 3 x85% ut=20 Seats-1 per /day/student
								200 0 -
								200 1 200
		0			0			0
								950 0 - assumed 8% of pop. in self-contained SPED
								60 0 -
								500 0 - 1/2 size Genl. Cirm.
								500 0 - 1/2 size Genl. Cirm.
		0			0			3,625
								1,200 0 - Assumed use - 25% Population - 5 times/week
								150 0 -
								1,500 1 1,500 Assumed use - 25% Population - 5 times/week
								1,500 1 1,500
								200 1 200
								75 -1 (75)
								500 1 500
		0			0			-3,200
								1,200 -1 (1,200) Assumed use - 50% Population - 5 times/week
								2,000 -1 (2,000) Assumed use - 50% Population - 5 times/week
		0			0			16,200
								12,000 1 12,000
								3,000 1 3,000
								300 1 300
								0 - 5.6 sf/student total
								500 1 500
								150 1 150
								250 1 250
		0			0			3,650
								3,650 1 3,650
		0			0			2,650
								0 1 - 2/3 Enrollment @ 10 SF/Seat - 750 seats MAX
								1,600 1 1,600
								250 1 250
								300 2 600
								200 1 200
		0			0			2,900
								0 1 - 3 seatings - 15SF per seat
								300 1 300
								600 1 600
								1,600 1 1,600 1600 SF for first 300 + 1 SF/student Add'l
								400 1 400 20 SF/Occupant
		0			0			210
								60 1 60
								250 1 250
								100 -1 (100)
								100 0 -
		0			0			2,920
								300 1 300

MSBA Guidelines (refer to MSBA Educational Program & Space Standard Guidelines)			
ROOM NFA ¹	# OF RMS	area totals	Comments
		2,100	
850	2	1,700	825 SF min - 950 SF max
100	2	200	
500	0	-	
1,440	0	-	3 x85% ut=20 Seats-1 per /day/student
200	0	-	
200	1	200	
		0	
950	0	-	assumed 8% of pop. in self-contained SPED
60	0	-	
500	0	-	1/2 size Genl. Cirm.
500	0	-	1/2 size Genl. Cirm.
		3,625	
1,200	0	-	Assumed use - 25% Population - 5 times/week
150	0	-	
1,500	1	1,500	Assumed use - 25% Population - 5 times/week
1,500	1	1,500	
200	1	200	
75	-1	(75)	
500	1	500	
		-3,200	
1,200	-1	(1,200)	Assumed use - 50% Population - 5 times/week
2,000	-1	(2,000)	Assumed use - 50% Population - 5 times/week
		16,200	
12,000	1	12,000	
3,000	1	3,000	
300	1	300	
0		-	5.6 sf/student total
500	1	500	
150	1	150	
250	1	250	
		3,650	
3,650	1	3,650	
		2,650	
0	1	-	2/3 Enrollment @ 10 SF/Seat - 750 seats MAX
1,600	1	1,600	
250	1	250	
300	2	600	
200	1	200	
		2,900	
0	1	-	3 seatings - 15SF per seat
300	1	300	
600	1	600	
1,600	1	1,600	1600 SF for first 300 + 1 SF/student Add'l
400	1	400	20 SF/Occupant
		210	
60	1	60	
250	1	250	
100	-1	(100)	
100	0	-	
		2,920	
300	1	300	

Budget Statement for Preferred Schematic - Expenditures

Category	2007-2008		2008-2009		2009-2010		Change from Previous Year		Post-Construction Budget		New Facility vs. Current	
	FY2007		FY2008		FY2009		Staff (FTE)	Budget	Staff	Budget	Staff (FTE)	Budget
	Staff (FTE)	Budget	Staff (FTE)	Budget	Staff	Budget						
Salaries												
Administration												
Admin. Secretary	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Assistant Principal	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Business Office	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Curriculum Director/Coord.	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Custodians/Maintenance Staff	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Executive Secretary	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Facilities Manager	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Guidance	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Adjustment Counselor	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Guidance Counselors	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Guidance Director	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Legal	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Nurse	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Other	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Principal	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Special Education Admin	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Superintendent/Asst. Superintendent	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Transportation	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Treasurer	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Total Administration	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Instruction - Teaching Services												
Arts	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Business	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Communications	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Coping Instructor	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Culinary Arts	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
ELL	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
English Language	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Family Consumer Services	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Foreign Language	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Health Services	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
History & Social Science	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Instructional Assistant/Paraprofessionals	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Library/Media	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Mathematics	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
MCAS	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Music	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Other	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Physical Education	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Reading	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
School Adjustment Counselor	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Science												
Biology	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Botany	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Chemistry	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Geology	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Physics	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Special Education	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Substitute Teachers	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Technology	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Vocational Tech.	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Total Instruction - Teaching Services	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Total Salaries Administration & Instruction	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-	0.00	-
Employee Benefits												
All employee-related fringe (health insurance, retirement etc)		-		-		-		-		-		-
Materials & Services												
Materials												
Audio-Visual Materials		-		-		-		-		-		-
Culinary Arts Materials		-		-		-		-		-		-
General Office Supplies		-		-		-		-		-		-

Budget Statement for Preferred Schematic - Expenditures

Category	2007-2008		2008-2009		2009-2010		Change from Previous Year		Post-Construction Budget		New Facility vs. Current	
	FY2007		FY2008		FY2009		Staff (FTE)	Budget	Staff	Budget	Staff (FTE)	Budget
	Staff (FTE)	Budget	Staff (FTE)	Budget	Staff	Budget						
Information technology		-		-		-		-		-		-
Hardware		-		-		-		-		-		-
Software		-		-		-		-		-		-
Library Materials		-		-		-		-		-		-
Non info-tech equipment		-		-		-		-		-		-
Testing Materials & Supplies		-		-		-		-		-		-
Textbooks		-		-		-		-		-		-
Vocational Program Materials		-		-		-		-		-		-
Total Materials		-		-		-		-		-		-
Services		-		-		-		-		-		-
Athletics		-		-		-		-		-		-
Attendance		-		-		-		-		-		-
Food Service		-		-		-		-		-		-
Health Services		-		-		-		-		-		-
Other Student Activities		-		-		-		-		-		-
Psychological Services		-		-		-		-		-		-
School Security		-		-		-		-		-		-
Student Transportation		-		-		-		-		-		-
Total Services		-		-		-		-		-		-
Total Material & Services		-		-		-		-		-		-
Facility Costs & Capital Improvements		-		-		-		-		-		-
Facility Costs		-		-		-		-		-		-
Custodial Supplies		-		-		-		-		-		-
Electricity		-		-		-		-		-		-
Heating Oil		-		-		-		-		-		-
Maintenance		-		-		-		-		-		-
Building Security Maintenance		-		-		-		-		-		-
Elevator		-		-		-		-		-		-
Equipment Maintenance		-		-		-		-		-		-
Exterminating		-		-		-		-		-		-
Facility Maintenance		-		-		-		-		-		-
Fire Alarm		-		-		-		-		-		-
Fire Extinguisher Inspection		-		-		-		-		-		-
Generator		-		-		-		-		-		-
HVAC Maintenance		-		-		-		-		-		-
Other		-		-		-		-		-		-
Site Maintenance (Grounds)		-		-		-		-		-		-
Technology		-		-		-		-		-		-
Trash Removal		-		-		-		-		-		-
Natural Gas		-		-		-		-		-		-
Snow Removal		-		-		-		-		-		-
Telephone		-		-		-		-		-		-
Water/Sewer		-		-		-		-		-		-
Total Facility Costs		-		-		-		-		-		-
Capital Improvements		-		-		-		-		-		-
Capital Improvements		-		-		-		-		-		-
Total Facility Costs & Capital Improvements		-		-		-		-		-		-
Debt Service		-		-		-		-		-		-
Short-term		-		-		-		-		-		-
Long-term		-		-		-		-		-		-
Total Debt Service		-		-		-		-		-		-
Total Budget & Staff	0.00	-	0.00	-	0.00	-	0	-	0	-	0	-

7/15/10

Budget Statement for Preferred Schematic - Revenue

As reported on the school district's most recent three End of Year Pupil and Financial Reports schedule 1, please report sources of revenue in the field

	FY08 End of Year Financial Report						
	Regular Day	Special Education	C74 Occupational Day	Adult Education	Other Programs	Un-distributed	Total
A. Revenue from Local Sources							
Assessments received by Regional Schools	-	-	-	-	-	-	-
E&D Fund Appropriations	-	-	-	-	-	-	-
Tuition from Individuals	-	-	-	-	-	-	-
Tuition from Other Districts in Comm.	-	-	-	-	-	-	-
Tuition from Districts in Other States	-	-	-	-	-	-	-
Previous Year Unexpended Encumbrances (Carry Forward)	-	-	-	-	-	-	-
Transportation Fees	-	-	-	-	-	-	-
Earnings on Investments	-	-	-	-	-	-	-
Rental of School Facilities	-	-	-	-	-	-	-
Other Revenue	-	-	-	-	-	-	-
Medical Care and Assistance	-	-	-	-	-	-	-
Non Revenue Receipts	-	-	-	-	-	-	-
Total Revenue From Local Sources	-	-	-	-	-	-	-
B. Revenue from State Aid							
School Aid (Chapter 70)	-	-	-	-	-	-	-
Mass School Building Authority - Construction Aid	-	-	-	-	-	-	-
Pupil Transportation (Ch. 71, 71A,71B,74)	-	-	-	-	-	-	-
Charter Tuition Reimbursements & Charter Facilities Aid	-	-	-	-	-	-	-
Circuit Breaker	-	-	-	-	-	-	-
Foundation Reserve	-	-	-	-	-	-	-
Total Revenue From State Aid	-	-	-	-	-	-	-
C. Revenue from Federal Grants							
ESE Administered Grants	-	-	-	-	-	-	-
Direct Federal Grants	-	-	-	-	-	-	-
Total Revenue Federal Grants	-	-	-	-	-	-	-
D. Revenue from State Grants							
ESE Administered Grants	-	-	-	-	-	-	-
Other State Grants	-	-	-	-	-	-	-
Total Revenue From State Grants	-	-	-	-	-	-	-
E. Revenue - Revolving & Special Funds							
School Lunch Receipts	-	-	-	-	-	-	-
Athletic Receipts	-	-	-	-	-	-	-
Tuition Receipts - School Choice	-	-	-	-	-	-	-
Tuition Receipts - Other	-	-	-	-	-	-	-
Other Local Receipts	-	-	-	-	-	-	-
Private Grants	-	-	-	-	-	-	-
Total Revenue Revolving & Special Funds	-	-	-	-	-	-	-
Total Revenue All Sources	-	-	-	-	-	-	-

7/15/10

Budget Statement for Preferred Schematic - Revenue

As reported on the school district's most recent three End ds below

	FY09 End of Year Financial Report						Total
	Regular Day	Special Education	C74 Occupational Day	Adult Education	Other Programs	Un-distributed	
A. Revenue from Local Sources							
Assessments received by Regional Schools	-	-	-	-	-	-	-
E&D Fund Appropriations	-	-	-	-	-	-	-
Tuition from Individuals	-	-	-	-	-	-	-
Tuition from Other Districts in Comm.	-	-	-	-	-	-	-
Tuition from Districts in Other States	-	-	-	-	-	-	-
Previous Year Unexpended Encumbrances (Carry Forward)	-	-	-	-	-	-	-
Transportation Fees	-	-	-	-	-	-	-
Earnings on Investments	-	-	-	-	-	-	-
Rental of School Facilities	-	-	-	-	-	-	-
Other Revenue	-	-	-	-	-	-	-
Medical Care and Assistance	-	-	-	-	-	-	-
Non Revenue Receipts	-	-	-	-	-	-	-
Total Revenue From Local Sources	-	-	-	-	-	-	-
B. Revenue from State Aid							
School Aid (Chapter 70)	-	-	-	-	-	-	-
Mass School Building Authority - Construction Aid	-	-	-	-	-	-	-
Pupil Transportation (Ch. 71, 71A,71B,74)	-	-	-	-	-	-	-
Charter Tuition Reimbursements & Charter Facilities Aid	-	-	-	-	-	-	-
Circuit Breaker	-	-	-	-	-	-	-
Foundation Reserve	-	-	-	-	-	-	-
Total Revenue From State Aid	-	-	-	-	-	-	-
C. Revenue from Federal Grants							
ESE Administered Grants	-	-	-	-	-	-	-
Direct Federal Grants	-	-	-	-	-	-	-
Total Revenue Federal Grants	-	-	-	-	-	-	-
D. Revenue from State Grants							
ESE Administered Grants	-	-	-	-	-	-	-
Other State Grants	-	-	-	-	-	-	-
Total Revenue From State Grants	-	-	-	-	-	-	-
E. Revenue - Revolving & Special Funds							
School Lunch Receipts	-	-	-	-	-	-	-
Athletic Receipts	-	-	-	-	-	-	-
Tuition Receipts - School Choice	-	-	-	-	-	-	-
Tuition Receipts - Other	-	-	-	-	-	-	-
Other Local Receipts	-	-	-	-	-	-	-
Private Grants	-	-	-	-	-	-	-
Total Revenue Revolving & Special Funds	-	-	-	-	-	-	-
Total Revenue All Sources	-	-	-	-	-	-	-

7/15/10

Budget Statement for Preferred Schematic - Revenue

As reported on the school district's most recent three End of Year Financial Reports

	FY10 End of Year Financial Report						Total
	Regular Day	Special Education	C74 Occupational Day	Adult Education	Other Programs	Un-distributed	
A. Revenue from Local Sources							
Assessments received by Regional Schools	-	-	-	-	-	-	-
E&D Fund Appropriations	-	-	-	-	-	-	-
Tuition from Individuals	-	-	-	-	-	-	-
Tuition from Other Districts in Comm.	-	-	-	-	-	-	-
Tuition from Districts in Other States	-	-	-	-	-	-	-
Previous Year Unexpended Encumbrances (Carry Forward)	-	-	-	-	-	-	-
Transportation Fees	-	-	-	-	-	-	-
Earnings on Investments	-	-	-	-	-	-	-
Rental of School Facilities	-	-	-	-	-	-	-
Other Revenue	-	-	-	-	-	-	-
Medical Care and Assistance	-	-	-	-	-	-	-
Non Revenue Receipts	-	-	-	-	-	-	-
Total Revenue From Local Sources	-	-	-	-	-	-	-
B. Revenue from State Aid							
School Aid (Chapter 70)	-	-	-	-	-	-	-
Mass School Building Authority - Construction Aid	-	-	-	-	-	-	-
Pupil Transportation (Ch. 71, 71A,71B,74)	-	-	-	-	-	-	-
Charter Tuition Reimbursements & Charter Facilities Aid	-	-	-	-	-	-	-
Circuit Breaker	-	-	-	-	-	-	-
Foundation Reserve	-	-	-	-	-	-	-
Total Revenue From State Aid	-	-	-	-	-	-	-
C. Revenue from Federal Grants							
ESE Administered Grants	-	-	-	-	-	-	-
Direct Federal Grants	-	-	-	-	-	-	-
Total Revenue Federal Grants	-	-	-	-	-	-	-
D. Revenue from State Grants							
ESE Administered Grants	-	-	-	-	-	-	-
Other State Grants	-	-	-	-	-	-	-
Total Revenue From State Grants	-	-	-	-	-	-	-
E. Revenue - Revolving & Special Funds							
School Lunch Receipts	-	-	-	-	-	-	-
Athletic Receipts	-	-	-	-	-	-	-
Tuition Receipts - School Choice	-	-	-	-	-	-	-
Tuition Receipts - Other	-	-	-	-	-	-	-
Other Local Receipts	-	-	-	-	-	-	-
Private Grants	-	-	-	-	-	-	-
Total Revenue Revolving & Special Funds	-	-	-	-	-	-	-
Total Revenue All Sources	-	-	-	-	-	-	-

Appendix 3E
 Module 3 Feasibility Study Completion Checklist

Submittal	Submittal Date	Review comments addressed
3.1 Preliminary Design Program		
3.1.8 MSBA status letter on initial space summary and acceptance of alternatives	N/A	N/A
3.2.2 Preferred Schematic Report		
3.3.1 MSBA Review Comments		
3.3.1 Conference Call		
3.3.2 Facilities Assessment Committee Meeting		
3.3.3 MSBA Board approval	N/A	
3.3.3 MSBA Board Action Letter denoting approval of authorization to proceed to schematic design	N/A	N/A

By signing this Feasibility Study Checklist, I hereby certify that I have read and understand the checklist and further certify that the information supplied by the District in the tables is true, accurate and complete.

By signing this Feasibility Study Checklist, I hereby certify that I have read and understand the checklist and further certify that the information supplied by the District in the tables is true, accurate and complete.

By signing this Feasibility Study Checklist, I hereby certify that I have read and understand the checklist and further certify that the information supplied by the District in the tables is true, accurate and complete.

By:

Title: Chief Executive Officer

Date:

By:

Title: Superintendent of Schools

Date:

By:

Title: Chair of the School Committee

Date: