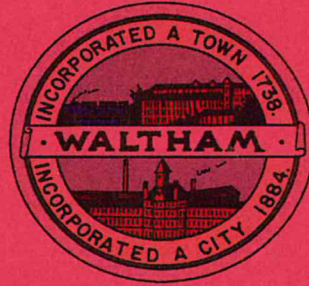


The City of Waltham



2013
Contract

For the service or product herewith described:

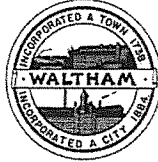
Symmes Maini & McKee Associates

**Education Consultant to Evaluate Six (6) Elementary
Schools and Two (2) Middle Schools**

*City of Waltham
Waltham, Massachusetts
Purchasing Department*

*Joseph P. Pedulla, MCPPO
Chief Procurement Officer*

*610 Main Street
Waltham, MA 02452
Tel: 781-314-3244*



BID AWARD LETTER

December 12, 2013

Mr. Alex Pitkin, Senior Vice President
SMMA/ Symmens, Maini & McKee
1000 Massachusetts Avenue
Cambridge, MA 02138

**RE: Education Consultant to Evaluate Six (6) Elementary Schools,
Two (2) Middle Schools, High School and Optional Analysis of the
Additional Sites**

Dear Mr. Pitkin,

This is to notify you that your bid for the "**Education Consultant to Evaluate Six (6) Elementary Schools, Two (2) Middle Schools, High School and Optional Analysis of the Additional Sites**" submitted to the City of Waltham November 26, 2013 has been accepted by the Mayor and awarded to your Company. Congratulations! This contract is for the **Not-To Exceed Total Amount of \$81,500 which includes \$75,500 for the Base 1 & 2 Services and \$6,000 for the Optional Service.**

Please note that the award of this project is subject to the RFP terms specified in paragraph 12 of the Instructions to Bidders Section which reads: "*The Contract Obligation on Behalf of the City is Subject to Prior Appropriation of Monies from the Governmental Body and Authorization by the Mayor*". Contracts are being prepared for your signature and will be sent to you shortly. In the meantime, please submit to my office a copy of the insurance certificate showing your compliance with the insurance requirement including the following description in the Service Box: "*The City of Waltham is a named additional insured for all insurances under the contract, excluding Automobile and Workers Compensation coverage*".

No work is to commence until the contract between our two organizations is signed by Mayor McCarthy.

Thank you for your response and interest in conducting business with the City of Waltham.

Very truly yours,

Joseph P. Pedulla,
Chief Procurement Officer

CC: Mayor McCarthy
Susan Nicholson, Ed.D.
Lorraine Finnegan, SMMA

AGREEMENT

AGREEMENT

CITY OF WALTHAM

ARTICLE 1. This agreement, made this 14th day of January, 2014 by and between the CITY OF WALTHAM, party of the first part, hereinafter called the CITY, by its MAYOR, and

SMMA/Symmens, Maini & McKee 1000 Massachusetts Avenue, Cambridge, MA 02138

hereinafter called the CONTRACTOR.

ARTICLE 2. Witnesseth, that the parties to this agreement, each in consideration of the agreement on the part of the others herein contained, do hereby agree, the CITY OF WALTHAM for itself, and said contractor for his heirs, executors, administrators and assigns as follows:

To furnish all equipment, machinery, tools and labor, to furnish and deliver all materials required to be furnished (except as otherwise specified) and deliver in and about the project and to do and perform all work in strict conformity with the provisions of this Contract and of the Notice to Bidders, bid, Project Manual, and Drawings hereto annexed. The said Notice to Bidders, bid, Project Manual, and Drawings are hereby made a part of this contract as fully and to the same effect as if the same had been set forth at length and incorporated in the contracts.

ARTICLE 3. In consideration of the foregoing premises the CITY agrees to pay and the CONTRACTOR agrees to receive as full compensation for everything furnished and done by the CONTRACTOR under this contract, including all work required by not included in the items herein mentioned, and also for all loss or damage arising out of the nature of the work aforesaid, or from the action of the elements, or from any unforeseen obstruction or difficulty encountered in the prosecution of the work, and for all expenses incurred by or in consequence of the suspension or discontinuance of the work specified, and for well and faithfully completing the work, and the whole thereof, as herein provided, such prices as are set forth in the accompanying bid.

This Agreement entered into as of the day and year first written above.

CITY OF WALTHAM, MASSACHUSETTS

Received

FOR THE CITY

JAN 14 2014

FOR THE COMPANY

Jeannette A. McCarthy

Mayor's Office

Jeannette A. McCarthy, MAYOR, Received
City of Waltham

Date: 1/14/14

JAN 13 2014

Mayor's Office

Alex P. Han

DESIGNER (Signature),

Date: 12/3/13

SMMA

Company

100 MASS AVE CAMBRIDGE MA.

Address

JMA

John B. Cervone, City Solicitor *Asst*

Date: 1-13-14

APPROVED AS TO FORM ONLY

Susan Nicholson

Susan Nicholson, Superintendent of Schools

Date: 1/7/14

Joseph Pedulla

Joseph Pedulla, Chief Procurement Officer

Date: DEC 30, 13

Paul Centofanti

Paul Centofanti, Auditor

Date: 1/10/2014

#330 300 2006 6610

I CERTIFY THAT SUFFICIENT FUNDS
ARE AVAILABLE FOR THIS CONTRACT

City Charter – See attached Charter
Section 3-12

Change Orders are not effective until if,
as and when signed by mayor. No work
is to commence until change orders are
fully executed by all parties.

the provisions of this section, he shall exercise all the rights and powers of mayor including compensation and shall be sworn to the faithful discharge of his duties and a vacancy shall exist in his seat on the city council.

Section 3-8. Mayor's attendance at council meeting.

The mayor, when requested by the city council to be present at a council meeting to answer questions relative to matters properly within the jurisdiction of the council, shall be informed, in writing, of the subject matter to be discussed. The mayor shall personally, or through the head of a department or a member of a board, attend such meeting and publicly answer all such questions. The person so attending shall not be obliged to answer any questions relating to any other matter. The mayor may attend and address the city council in person or through the head of a department, or a member of the board, upon any subject.

Section 3-9. Adoption of measures, mayor's veto.

Every measure relative to the affairs of the city adopted by the city council, except such measures as relate to the internal affairs of the city council, the election of officers whose election by the city council is authorized by law or by the charter, or budgets submitted under section thirty-two of chapter forty-four of the General Laws or to appropriations by the city council under section thirty-three of said chapter, shall be presented to the mayor for his approval. If the mayor does approve it, he shall signify his approval by signing it. If he does not approve of it, he shall return it, with his objections in writing, to the city council. The city council shall enter the objections of the mayor upon its records and shall again consider the measure. If the city council, notwithstanding such disapproval of the mayor, shall pass such measure by a two-thirds vote of all its members, it shall be considered approved and shall then be in force, but such vote shall not be taken for at least seven (7) days after the measure has been returned to the city council. If any measure is not returned by the mayor within ten (10) days following the date it is presented to him, it shall be considered

approved. A filing with the clerk of the council shall be considered a return by the mayor to the city council. All votes taken on measures returned by the mayor shall be by roll call.

Section 3-10. Call of special council meeting by mayor.

The mayor may at any time call a special meeting of the city council by causing a notice of such meeting, specifying the matters which he desires to be considered, to be delivered in hand or to the place of residence of each councillor. Public notice of said meeting shall be posted at least forty-eight (48) hours in advance of the time set for such meeting; however, in the event of an emergency, of which the mayor shall be the judge, a lesser period shall suffice and no other business except as provided shall be in order.

Section 3-11. Employees in mayor's office not subject to civil service.

The civil service laws shall not apply to the appointment of the mayor's secretaries or of the stenographers, clerks, administrative assistant, and other employees in the mayor's office, and the mayor may remove such appointees without a hearing and without making a statement of the cause of their removal.

Section 3-12. Approval of contracts by mayor.

All contracts made by any department, board or commission where the amount involved is two thousand dollars (\$2,000.00) or more shall be in writing, and no such contract shall be deemed to have been made or executed until the approval of the mayor is affixed thereto. Any construction contract shall, and all other contracts may, where the amount exceeds five thousand dollars (\$5,000.00) be required to be accompanied by a bond with sureties satisfactory to the mayor or by a deposit of money, certified check or other security for the faithful performance thereof, and such bonds or other securities shall be deposited with the city treasurer until the contract has been carried out in all respects; and no such contract shall be altered except by a written agreement of the contractor, the sureties on his bond, if any, and the officer, department or board, as the case may be,

making the contract, with the approval of the mayor affixed thereto. Any cash deposit or check payable to a city received as security for performance under this section may be deposited by said treasurer in any bank or trust company under a separate account to be known as a performance deposit account.

The provisions of this section shall be deemed to have been complied with on all purchases made under the provisions of sections twenty-two A and twenty-two B of chapter seven of the General Laws when one municipality acting on behalf of other municipalities complies with the provisions of this section, or when purchases are made for a vendor holding a contract with the commonwealth for the item or items being purchased.

ARTICLE 4. SCHOOL COMMITTEE

Section 4-1. Composition, election, terms, organization, dual employment.

The school committee shall consist of seven (7) members, one (1) of whom shall be the mayor, who shall be chairman. The remaining six (6) members shall be elected at large, each to serve four (4) years, three (3) of whom shall be elected biennially. The members of the school committee shall elect one (1) of its members to serve as vice chairperson annually. The committee shall organize annually on the first Sunday in January, and shall elect one of its members as vice chairman, who shall preside at all meetings of the committee at which the mayor is not present. No member of the school committee shall, while a member thereof, hold any other office or position in the school department the salary or compensation for which is payable out of the city treasury.

Section 4-2. Powers and duties.

Except as otherwise provided in this charter and subject to any laws which limit the amount of money that may be appropriated in any city for school purposes, the school committee, in addition to the powers and duties conferred and imposed by law on school committees, may provide, when necessary, temporary accommodations for school purposes, may make all repairs, the ex-

penditures for which are made from the regular appropriation for the school department, shall have control of all school buildings and grounds connected therewith and shall make all reasonable rules and regulations, consistent with law, for the management of the public schools of the city and for conducting the business of the committee.

Section 4-3. School committee vacancy.

If a vacancy occurs at any time in the office of school committee by failure to elect, or otherwise, the city council and the remaining members of the school committee shall meet in joint convention, which shall be called by the city clerk forthwith, and elect a suitable person to fill the vacancy until the first Sunday in January following the next regular municipal election; and, if there would be a vacancy on said first Sunday, it shall be filled at such regular municipal election for the balance of the unexpired term. The mayor, if present, shall preside at the convention.

Section 4-4. Open and public meetings, roll call vote.

All meetings of the school committee shall be open to the press and to the public, except as otherwise authorized by section twenty-three A and twenty-three B of chapter thirty-nine of the General Laws. The vote in any particular measure taken in open session shall be recorded by roll call vote when requested by two (2) members. All votes taken in executive session shall be recorded by roll call vote.

Section 4-5. Superintendent of schools, selections, appointment, duties and compensation of other school employees.

The school committee shall elect a superintendent of schools annually, except as provided in section forty-one of chapter seventy-one of the General Laws, and may under chapter thirty-one of the General Laws appoint, suspend, or remove at pleasures such subordinate officers or assistants, including janitors of school buildings, as it may deem necessary for the proper discharge of its duties and the conduct of its business; it shall define their terms of service and their duties and shall fix their compensation.

PRICE PROPOSAL

Section 8: Price Proposal

BID PRICE FORM

Place in a Separate Sealed Envelope

My Company bids the following all inclusive price to provide the services described within this bid document.

1) **Base Bid 1. Evaluation of 6 Elementary Schools** \$: 66,500

2) **Base Bid 2. Potential Impact study of two (2) Middle Schools and High School** \$: 9,000

TOTAL BASE BID \$: 75,500

3) **Optional Bid Item: Analysis of any available City site such as Fitch School, MacArthur Elementary School, Kaotoujian Playground and any School land at the High School (see Scope of Work Section).**

\$: 6,000

My company recognizes receipt of addenda # , , , ,

Company Name: SMMA | Symmes Maini & McKee Associates

Authorized Signature: _____

Print Name: Philip J. Poinelli, FAIA, CEFP, LEED AP BD+C

E-Mail Address: ppoinelli@smma.com

Date: November 26, 2013

Hourly Billing Rates

Principal-in-Charge.....	\$160.00
Project Manager.....	\$150.00
Project Architect.....	\$140.00
Civil Engineer.....	\$125.00
Data / Communications / Security Specialist.....	\$135.00

INSURANCE CERTIFICATE



CERTIFICATE OF LIABILITY INSURANCE

OP ID: SS

DATE (MM/DD/YYYY)

01/14/2014

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Poole Professional Ltd. 107 Audubon Rd. #2, Ste. 305 Wakefield, MA 01880 Thomas M. Mullard	CONTACT NAME:		
	PHONE (A/C, No, Ext):	FAX (A/C, No):	
E-MAIL ADDRESS:			
PRODUCER CUSTOMER ID #: SYMME-1			
INSURED Symmes, Maini, & McKee Associates, Inc. 1000 Massachusetts Avenue Cambridge, MA 02138	INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A: Travelers Indemnity Co of CT		25682
	INSURER B: Charter Oak Fire Ins. Co.		25615
	INSURER C: Travelers Indemnity Co.		25658
	INSURER D: Travelers Casualty & Surety		19038
	INSURER E: Safety Insurance Company		39454
INSURER F:			

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	GENERAL LIABILITY <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR	X	680-7516L233 COVERAGE IS PRIMARY	01/01/2014	01/01/2015	EACH OCCURRENCE \$ 1,000,000
	DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000					
E	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS		1023835 BA-7515L574	11/15/2013	11/15/2014	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
	<input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS					BODILY INJURY (Per person) \$
D	UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE	X	UP13T87108 Y	01/01/2014	01/01/2015	EACH OCCURRENCE \$ 10,000,000
	DEDUCTIBLE RETENTION \$					AGGREGATE \$ 10,000,000
D	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input checked="" type="checkbox"/> N	UB5837Y121	05/01/2013	05/01/2014	<input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	Professional Office Package		680-7516L233	01/01/2014	01/01/2015	Valuable Papers 450,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)
The City of Waltham is a named additional insured for all insurances under the contract, excluding Automobile, Workers Compensation and Professional Liability coverage.

CERTIFICATE HOLDER	CANCELLATION
CITYW18 City of Waltham Attn: Joseph Pedulla Purchasing Department 610 Main Street Waltham, MA 02452	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE <i>Stacey Seward</i>

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CERTIFICATE OF LIABILITY INSURANCE

OP ID: SS

DATE (MM/DD/YYYY)

01/14/2014

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IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Poole Professional Ltd. 107 Audubon Rd. #2, Ste. 305 Wakefield, MA 01880 Thomas M. Mullard	CONTACT NAME:		
	PHONE (A/C, No, Ext):	FAX (A/C, No):	
E-MAIL ADDRESS:			
PRODUCER CUSTOMER ID #: SYMME-1			
INSURED Symmes Maini & McKee Assoc., Inc. 1000 Massachusetts Avenue Cambridge, MA 02138	INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A : XL Specialty Insurance Company		37885
	INSURER B :		
	INSURER C :		
	INSURER D :		
	INSURER E :		
INSURER F :			

COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	GENERAL LIABILITY <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (PER ACCIDENT) \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DEDUCTIBLE RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				WC STATU-TORY LIMITS <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Arch. & Engrs. Prof. Liab.			DPR9708744	06/10/2013	06/10/2014	Per Claim 2,000,000 Aggregate 2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)
 For professional liability coverage, the aggregate limit is the total insurance available for all covered claims presented within the policy period. The limit will be reduced by payments of indemnity and expenses.
 RE: City of Waltham-Educational Consultant

CERTIFICATE HOLDER**CANCELLATION**

CITYW18 City of Waltham Attn: Joseph Pedulla Purchasing Department 610 Main Street Waltham, MA 02452	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE <i>Stacey Seward</i>
--	---

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COMPLIANCE FORMS

Compliance

The compliance documents in this section must be completed, signed and returned with your bid package.

Purchasing Department

City of Waltham

610 Main Street

Waltham, MA 02452

Failure to submit the completed documents will cause the disqualification of the proposal.

Section Index

	Check when Complete
• Non-collusion form and Tax Compliance form.....	<u>✓</u>
• Corporation Identification Form.....	<u>✓</u>
• Certificate of Vote Authorization.....	<u>✓</u>
• CORI background Check	<u>✓</u>
• Certificate of Insurance (showing all limits of WC &GL).....	<u>✓</u>
• Three (3) References.....	<u>✓</u>
• Debarment Certificate	<u>✓</u>
• Designer Truth in Negotiation Certificate.....	<u>✓</u>
• Prevailing Wage Certificate.....	<u>✓</u>
• Right-to-know Law.....	<u>✓</u>

Your Company's Name: SMMA | Symmes Maini & McKee Associates, Inc.

Service or Product Bid Architecture, Engineering, Educational Programming for School Building Evaluations

NOTE: Failure to submit any of the required documents, in this or in other sections, with your bid response package may cause the disqualification of your proposal.

NON-COLLUSION FORM AND TAX COMPLIANCE FORM

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity or group of individuals. The undersigned certifies that no representations made by any City officials, employees, entity, or group of individuals other than the Purchasing Agent of the City of Waltham was relied upon in the making of this bid

Alex P. He..., November 26, 2013
(Signature of person signing bid or proposal) Date

SMMA | Symmes Maini & McKee Associates, Inc.
(Name of business)

TAX COMPLIANCE CERTIFICATION

Pursuant to M.G.L. c. 62C, & 49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Alex P. He..., November 26, 2013
Signature of person submitting bid or proposal Date

SMMA | Symmes Maini & McKee Associates, Inc.
Name of business

NOTE

Failure to submit any of the required documents, in this or in other sections, with your bid response package may cause the disqualification of your proposal.

CERTIFICATE OF VOTE OF AUTHORIZATION

Date: 1/26/13

SMMA | Symmes Maini & McKee

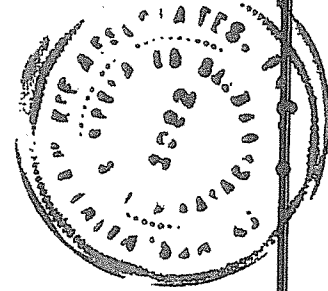
I Joel Seeley, AIA, LEED AP, Clerk of Associates, Inc. hereby certify that at a meeting of the Board of Directors of said Corporation duly held on the 3rd day of May, 2013 at which time a quorum was present and voting throughout, the following vote was duly passed and is now in full force and effect:

VOTED: That Alex Pitkin, AIA (name) is hereby authorized, directed and empowered for the name and on behalf of this Corporation to sign, seal with the corporate seal, execute, acknowledge and deliver all contracts and other obligations of this Corporation; the execution of any such contract to be valid and binding upon this Corporation for all purposes, and that this vote shall remain in full force and effect unless and until the same has been altered, amended or revoked by a subsequent vote of such directors and a certificate of such later vote attested by the Clerk of this Corporation.

I further certify that Alex Pitkin, AIA is duly elected/appointed Senior Vice President of said corporation

SIGNED: *Joel Seeley*

(Corporate Seal)



Clerk of the Corporation:

Print Name: Joel Seeley, AIA, LEED AP

COMMONWEALTH OF MASSACHUSETTS

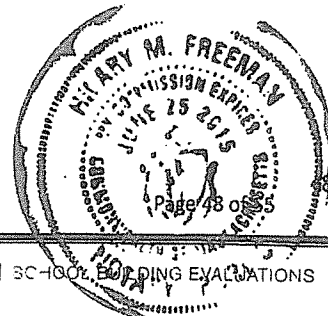
County of Middlesex

Date: November 26, 2013

Then personally appeared the above named and acknowledged the foregoing instrument to be their free act and deed before me, Henry M. Freeman

Henry M. Freeman
Notary Public;

My Commission expires: June 25, 2015



CORPORATION IDENTIFICATION

The bidder for the information of the Awarding Authority furnishes the following information.

If a Corporation:

Incorporated in what state Massachusetts

President Ara Krafian, PE

Treasurer Brian Lawlor, PE, LEED AP

Secretary Joel Seeley, AIA, LEED AP

Federal ID Number 04-2745179

If a foreign (out of State) Corporation – Are you registered to do business in Massachusetts?

Yes _____, No _____

If you are selected for this work you are required under M.G.L.ch. 30S, 39L to obtain from the Secretary of State, Foreign Corp. Section, State House, Boston, a certificate stating that you Corporation is registered, and furnish said certificate to the Awarding Authority prior to the award.

If a Partnership: (Name all partners)

Name of partner _____

Residence _____

Name of partner _____

Residence _____

If an Individual:

Name _____

Residence _____

If an Individual doing business under a firm's name:

Name of Firm _____

Name of Individual _____

Business Address _____

Residence _____

Date _____

Name of Bidder SMMA | Symmes Maini & McKee Associates, Inc.

By 

Signature

Alex Pitkin, AIA, MCPPO

Title

1000 Massachusetts Avenue

Business Address (POST OFFICE BOX NUMBER NOT ACCEPTABLE)

Cambridge, Massachusetts 02138 (617) 547-5400 November 26, 2013

City State Telephone Number Today's Date

CORI CHECK VERIFICATION

NOTICE TO ALL CONTRACTORS

ALL CONTRACTORS AWARDED A CONTRACT MUST PROVIDE THE WALTHAM PURCHASING DEPARTMENT WRITTEN CONFIRMATION OF ITS FULL COMPLIANCE WITH M.G.L. CHAPTER 71, SECTION 38R, WHICH REQUIRES CORI CHECKS FOR ALL SCHOOL EMPLOYEES AND VOLUNTEERS, AS WELL AS ANY AND ALL CONTRACTORS OF ANY KIND, OR LABORERS WHO PERFORM WORK ON SCHOOL GROUNDS, AND WHO MAY HAVE DIRECT AND UNMONITORED CONTACT WITH CHILDREN PLEASE SIGN BELOW TO INDICATE THAT THE ABOVE MASSACHUSETTS GENERAL LAW HAS BEEN ADDRESSED BY YOUR COMPANY.

PLEASE SIGN BELOW TO INDICATE THAT THE ABOVE MASSACHUSETTS GENERAL LAW HAS BEEN ADDRESSED BY YOUR COMPANY

COMPANY NAME: SMMA | Symmes Maini & McKee Associates, Inc.

ADDRESS: 1000 Massachusetts Avenue, Cambridge, Massachusetts 02138

Signature , Date November 26, 2013

Print Name Alex Pitkin, AIA, MCPPO, Title Principal | Senior Vice President

NOTE

Failure to submit any of the required documents, in this or in other sections, with your bid response package may cause the disqualification of your proposal.

PROVIDE THREE (3) SERVICE APPROPRIATE REFERENCES

1. Company Name: East Longmeadow Public Schools
Address: 180 Maple Street, East Longmeadow, MA 01028
Contact Name: Mr. Gordon Smith
Phone # (413) 525-5450
Type of service/product provided to this Company:
District-Wide School Facility Master Plan
Dollar value of service provided to this Company: \$74,200

2. Company Name: Hamilton-Wenham Regional School District
Address: 5 School Street, Wenham, MA 01984
Contact Name: Dr. Michael Harvey
Phone # (978) 468-5310
Type of service/product provided to this Company:
Regional School District Master Plan Study
Dollar value of service provided to this Company: \$100,700

3. Company Name: Sharon Public Schools
Address: 75 Mountain Street, Sharon, MA 02067
Contact Name: Mr. Glenn Brand
Phone # (781) 784-1570
Type of service/product provided to this Company:
Sharon High School Conditions Study
Dollar value of service provided to this Company: \$117,000

NOTE

Failure to submit any of the required documents, in this or in other sections, with your bid response package will be cause for the disqualification of your company.

DEBARMENT CERTIFICATION

In connection with this bid and all procurement transactions, by signature thereon, the respondent certifies that neither the company nor its principals are suspended, debarred, proposed for debarment, declared ineligible, or voluntarily excluded from the award of contracts, procurement or non procurement programs from the Commonwealth of Massachusetts, the US Federal Government and /or the City of Waltham. "Principals" means officers, directors, owners, partners and persons having primary interest, management or supervisory responsibilities with the business entity. Vendors shall provide immediate written notification to the Purchasing Agent of the City of Waltham at any time during the period of the contract of prior to the contract award if the vendor learns of any changed condition with regards to the debarment of the company or its officers. This certification is a material representation of fact upon which reliance will be placed when making the business award. If at any time it is determined that the vendor knowingly misrepresented this certification, in addition to other legal remedies available to the city of Waltham, the contract will be cancelled and the award revoked.

Company Name SMMA | Symmes Maini & McKee Associates, Inc.

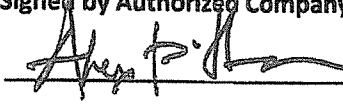
Address 1000 Massachusetts Avenue

City Cambridge, State Massachusetts, Zip Code 02138

Phone Number (617) 520-9220

E-Mail Address apitkin@smma.com

Signed by Authorized Company Representative:



Print name Alex Pitkin, AIA, MCPPO

Date November 26, 2013

DESIGNER'S TRUTH-IN-NEGOTIATIONS CERTIFICATE

The Designer for design services for:

City of Waltham School Building Evaluations

hereby certifies and agrees to the following:

- a) The Designer certifies that the wage rates and other costs used to support the Designer's compensation are accurate, complete, and current at the time of contracting; and
- b) The Designer agrees that the original contract price and any additions to the contract may be adjusted within six years of completion of the contract to exclude any significant amounts if the City of Waltham determines that the fee was increased by such amounts due to inaccurate, incomplete, or noncurrent wage rates or other costs.

Designer Firm:

SMMA | Symmes Maini & McKee Associates, Inc.

By: 

Duly authorized

Print Name Alex Pitkin, AIA, MCPPO

Date: November 26, 2013

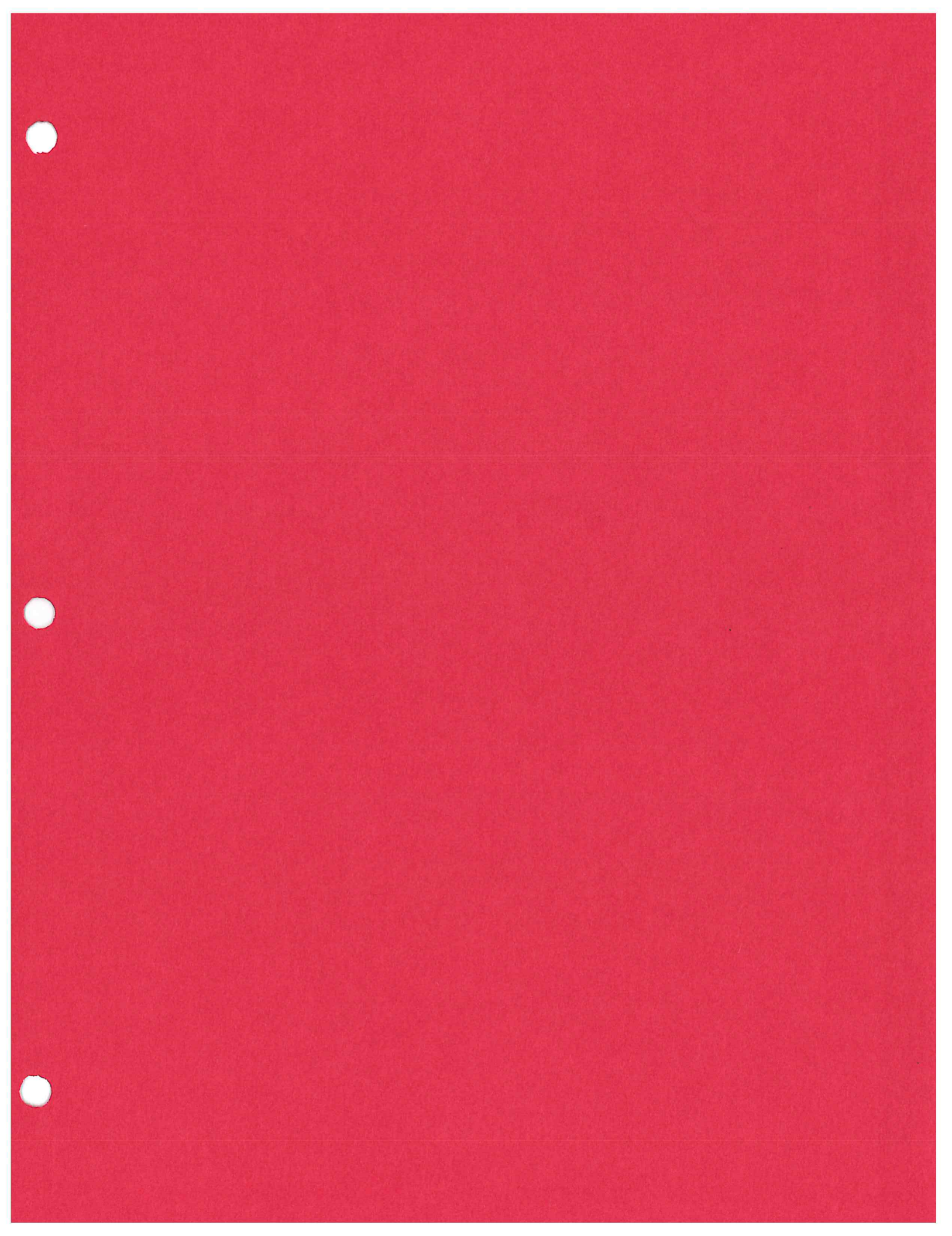


Table of Contents:

- Invitation to Bid
- Intent of the Project
- Agreement
- Instructions
- General Conditions
- Specifications
- Compliance
- Bid Price

Invitation to Bid

The City of Waltham

Purchasing Department

REQUEST FOR QUALIFICATIONS (RFB)

Under the rules of M.G.L. Chapter 30B, the Chief Procurement Officer of the City of Waltham Purchasing Department hereby requests sealed bids for:

Education Consultant to Evaluate Six (6) Elementary Schools and Two (2) Middle Schools

Price Proposals will be received at the office of the Purchasing Agent, City Hall,
610 Main Street, Waltham MA 02452, until,

10 AM Tuesday November 26, 2013

At which time and place the bids will be publicly opened and read.

Specifications and information available on line by visiting the Waltham
Purchasing Department web site at www.city.waltham.ma.us/open-bids

**BIDS MUST BE SIGNED AND ENCLOSED IN A SEALED ENVELOPE AND MARKED:
BID FOR: Education Consultant**

If the Bidder is a corporation, state your correct corporate name and State of incorporation. If Bidder is a partnership, state names and addresses of partners. If Bidder is a trust or other legal entity, state correct names and addresses of trustees or names and address of those legally authorized to bid and enter into contracts.

Bids must be signed and enclosed in **two (2) sealed envelopes**. One envelope shall be marked **QUALIFICATIONS** for the Education Consultant. **The second (2d) envelope** shall be marked **PRICE** for the Education Consultant

EXCEPTION OR ALTERNATES TO SPECIFICATIONS, TERMS OF SALE, AND DISCOUNTS AVAILABLE, MUST BE INCLUDED IN THE BID PRIOR TO OPENING DATE.

Intent of Project

The City of Waltham wishes to enter into a service agreement with an education consultant and Architect to evaluate the six (6) elementary schools in conjunction with the potential impact on two (2) two middle schools and the high school

Instructions

INSTRUCTIONS FOR BIDDERS

1. READ ALL DOCUMENTS.

Bidders should familiarize themselves with all the documents contained herein; it is mandatory that all Bids be in compliance with all the provisions contained in said documents.

2. FORMS AND ATTACHMENTS.

Bids are to be completed on the forms provided or referenced ONLY and enclosed in a sealed envelope marked on the outside "BID (title)" and the name and address of bidder. Attachments submitted in addition to the Waltham Purchasing Department produced forms may not be considered.

3. PRINTED OR TYPED RESPONSE.

All information must be typewritten or printed in ink, including the price the bidder offers in the space as provided on the bid form.

4. CORRECTIONS.

Bids that are submitted containing cross outs, white outs or erasures, will be rejected. All corrections or modifications to the original bid are to be submitted in a separate envelope, properly marked on the outside, "CORRECTION/ MODIFICATION TO BID (title)" and submitted prior to the bid opening.

ALL DOCUMENTS SUBMITTED WITH YOUR RESPONSE WILL BE INCORPORATED INTO THE CONTRACT.

5. PRICE IS ALL INCLUSIVE.

Bid prices shall encompass everything necessary for furnishing all items, materials, supplies or services as specified, and in accordance with the specifications, including proper packing, cost of delivery, and in the case of services, completion of same, as per specifications.

6. EXPLANATIONS, EXCEPTIONS

Explanations, exceptions or other information pertinent to the specifications may be made in writing and included in the same envelope with the bid.

7. WITHDRAW.

A Bid may be withdrawn by written request prior to the schedule for the Bid Opening. No withdrawals are permitted after the bid opening date and time. Withdrawals after the bid opening date will cause the forfeit of the bid Deposit.

8. AWARD.

Bids will be awarded not later than (90) ninety days after the scheduled bid opening date, unless otherwise stated, in the specifications. Unless otherwise specified, bids will be evaluated on the basis of, qualifications, completeness of your RFP response, responsiveness, responsibility, best price and experience.

9. DISCOUNTS.

Discounts for prompt payments will be considered when making awards.

10. TAX EXEMPT.

Purchases by the City of Waltham is exempt from any Federal, State or Massachusetts Municipal Sales and/or Excise Taxes.

11. ACTIVE VENDOR LIST.

Vendors who wish to remain on the Active Bid List must either submit a Bid, No Bid, or a letter requesting same, no later than the Official Bid Opening. This is applicable to those vendors who have received the Invitation to Bid.

12. FUNDS APPROPRIATION.

THE CONTRACT OBLIGATION ON BEHALF OF THE CITY IS SUBJECT TO
PRIOR APPROPRIATION OF MONIES FROM THE GOVERNMENTAL BODY
AND AUTHORIZATION BY THE MAYOR.

13. THE AWARDING AUTHORITY RESERVES THE RIGHT TO REJECT ANY OR ALL BIDS, OR ANY PART OF ANY BID, WHICH IN THE OPINION OF THE AWARDING AUTHORITY, IS IN THE BEST INTERESTS OF THE CITY OF WALTHAM.

14. THE TAX ATTESTATION CLAUSE, CERTIFICATION OF NON-COLLUSION AND THE CERTIFICATE OF VOTE AUTHORIZATION, are required by statute and are an integral part of the Invitation for Bid and must be completed and signed by the person submitting the Bid, or by the person/persons who are officially authorized to do so. Failure to do so may disqualify the bid.

15. MODIFICATION.

No agreement, understanding, alteration or variation of the agreement, terms or provisions herein contained shall bind the parties, hereto unless made and executed in writing by the parties hereto.

16. ASSIGNMENT.

The final payment for work done under this Contract shall be made only after the Contractor has signed a statement under the penalty of perjury, certifying that he has completed the work described in the final estimate. Neither party hereto shall assign this Contract or sublet it in part or as a whole without the prior written consent of the other party hereto. The Contractor shall not assign any sum or sums due or becoming due to him hereunder without the prior written consent of the City.

17. CHANGE ORDERS.

Change orders are not effective until, if, as and when signed by the Mayor and no work is to commence until the change orders are fully executed.

18. BID OPENING INCLEMENT WEATHER

If, at the time of the originally scheduled bid opening, City Hall is closed to inclement weather or another unforeseeable event, the bid opening

will be extended until 2:00 PM on the next normal business day. Bids will be accepted until that date and time.

19. RESPONSIBILITIES OF THE CITY OF WALTHAM

1. Approvals. The City of Waltham shall without unreasonable delay either i) render to the Designer any Approval required by this Contract or ii) notify the Designer in writing why such Approval is being withheld. The City of Waltham shall not unreasonably withhold any Approval, acceptance, or consent required under this Contract.

2. Payment. For satisfactory performance of all of the Designer's obligations under this Contract, the City of Waltham shall compensate the Designer in accordance with the provisions of this Contract.

3. Surveys and Data. The City of Waltham shall furnish to the Designer existing and available surveys of the Project's building site or sites, showing the grades and lines of streets, pavements and adjoining properties; the rights, restrictions, easements, boundaries and contours of the site or sites; reports from any borings, test pits; chemical, mechanical or other tests; photographs and information as to water, sewer, electricity, steam, gas, telephone and other services; and data and drawings regarding existing buildings. All items and data provided to the Designer by the City of Waltham shall remain the property of the City of Waltham or the Public Entity. The Designer may use items and data provided by the City of Waltham only for the purposes of this Contract, unless the City of Waltham shall give the Designer specific written permission for some other use. The City of Waltham does not guarantee nor does it make any express or implied warranties concerning the accuracy of any such information furnished to the Designer.

4. No Waiver. The City of Waltham's review, Approval, acceptance of, or payment for, any of the services furnished by the Designer shall not be construed as a waiver of any rights under this Contract or of any cause of action arising out of the performance of this Contract. The City

of Waltham's Approval shall not in any way relieve the Designer from performing all work required under this Contract in accordance with the standard of care set forth in Section 3.3 herein.

5. Right to Rescind Approval of Consultant. The City of Waltham may rescind the City of Waltham's prior consent to a Consultant if a Consultant or subcontractor is incompetent, irresponsible or otherwise unsatisfactory, and the Designer shall remove such Consultant or subcontractor from the work. If a Consultant is so removed, the Designer shall provide another Consultant with similar credentials and qualifications (including but not limited to MBE/WBE) that meets with the Approval of the City of Waltham. The removal of such Consultant or sub consultant shall not relieve the Designer from its responsibilities for services of its Consultants and sub consultants under this Contract.

20. DESIGNER'S BASIC SERVICES -- GENERAL

1. General. The Designer shall perform professional services in accordance with the terms of this Contract, the Study for the Project which is incorporated herein by reference, the Scope of Services set forth in Attachment A, the City of Waltham requirements , and in accordance with the procedures set forth in Attachment B. If the Designer did not perform the Study for the Project, then the Designer Selection Board advertisement is also incorporated herein by reference and the Designer shall perform its services in accordance with such advertisement. In the case of conflict between the terms of this Contract and any of the provisions incorporated herein by reference, the provisions of this Contract shall control. The Designer shall be responsible for the professional accuracy and coordination of all designs, drawings, specifications, cost estimates, and other services and submittals furnished by Designer and by its Consultants in accordance with the standard of care set forth below in paragraph 3.3. The Basic Fee shall compensate Designer for all of Designer's obligations specified in this Contract except as otherwise specifically provided herein. Unless

otherwise specified in the Scope of Services the Designer's Basic Services do not include prequalification services required for either a Construction Manager At-Risk Project in accordance with M.G.L. c. 149A or prequalification services required or decided upon by the City of Waltham under M.G.L. c. 149 §§44D1/2 or 44D3/4.

2. Staffing; Time of Essence. The Designer's personnel who shall provide services under this Contract. The Designer shall provide sufficient personnel to complete the services required by this Contract in a continuous and timely manner, and shall meet the Approved Contract Schedule agreed upon in accordance with Section 4.1 of this Contract. Time is of the essence of this Contract.

3. Standard of Care, Compliance with Laws. The Consultant agrees that the services provided hereunder shall conform to the standard of care and practice exercised by design professionals or consultants engaged in performing comparable services; that the personnel furnishing said services shall be qualified and competent to perform adequately the services assigned to them; and that the recommendations, guidance and performance of such personnel shall reflect such standards of care and practice. In addition to and without limiting the foregoing, the Designer agrees that the work and services performed hereunder shall conform to the standards set forth in this Contract and will endeavor to conform to all applicable Laws.

4. Quality Assurance. The Designer shall demonstrate to the Authority the presence and implementation of quality assurance procedures. The Designer shall identify individual(s) responsible for bid document review and cost estimating, as well as methods utilized to determine the completeness, accuracy, and coordination of drawings, specifications, cost estimates, and other data and documentation.

5. Fixed Limit Construction Cost. The Designer shall determine the materials, equipment, component systems and types of construction included in the design of the Project so that it may be awarded within

the Fixed Limit Construction Cost without alternates (unless Approved by the City of Waltham) and without allowances of any nature. Such determination shall be subject to the Approval of the City of Waltham, which shall not be unreasonably withheld. If the City of Waltham has appointed a construction manager or an independent cost estimator for the Project, the Designer shall validate its Construction Cost Estimates with such person. Construction Cost Estimates shall be subject to the Approval of the Authorized Representative. The decision of the City of Waltham shall be final in matters pertaining to this section but the Designer shall not be responsible for any decision by the City of Waltham that is inconsistent with generally accepted standards of professional practice provided that the Designer shall have advised the City of Waltham in writing of the inconsistency at the time of the Approval. If within three (3) months after approval of Construction Documents, in final form, the bids of the lowest responsible and eligible bidders exceed the Fixed Limit Construction Cost, the Designer shall, if so instructed in writing by the City of Waltham, provide such revised construction drawings and specifications and Construction Cost Estimates as the City of Waltham shall require for the purpose of bringing the cost within the Fixed Limit Construction Cost; provided that Designer may in connection with such revision make reasonable adjustments in the scope of the project subject to the written approval of the City of Waltham, which approval shall not be unreasonably withheld. The Designer shall not be paid additional compensation for such services.

6. Designer to Evaluate Surveys and Data. The Designer shall analyze and evaluate the information furnished by the City of Waltham pursuant to Section 2.3 above. If items or data of the type identified in Section 2.3 are not available or are, in the reasonable opinion of the Designer, insufficient to permit the Designer properly to perform its services hereunder, the Designer shall submit a written request to the City of Waltham for permission to obtain the services of one or more

Consultants to perform the necessary services, in which case unless the services are included in the Scope of the Contract, the Designer shall be reimbursed in accordance with the article -Reimbursable Costs and Expenses, or to perform the services with the Designer's own employees, in which case the Designer shall be compensated in accordance with Article 6 (Additional Services; Additional Compensation). In no case shall the Designer commence or authorize a Consultant to commence such services without the prior Approval of the City of Waltham.

7. Corrections by City of Waltham. The Designer shall furnish appropriate competent professional services for each of the phases of the Project to the point where detail checking or reviewing by the City of Waltham is not necessary. Any changes, corrections, additions, or deletions made by the City of Waltham shall be incorporated into the design of the Project unless specific written objections thereto are made by the Designer and Approved by the City of Waltham. The decision of the City of Waltham shall be final in matters pertaining to this section, but the Designer shall not be responsible for any such decision by the City of Waltham that is inconsistent with generally accepted standards of professional practice provided that the Designer advised the City of Waltham in writing of the inconsistency at the time the decision was made.

8. Employment of Consultants. Subject to the provisions of this Contract and the Approval of the City of Waltham, whenever the services of the following Consultants, and any other Consultants listed in Attachment A or in the Designer Selection Board's advertisement for the Project, are required, the Designer shall employ them and be responsible for their work and the coordination and supervision thereof: structural engineers, electrical engineers, mechanical engineers, civil engineers, plumbing engineers, sanitary engineers, architects, landscape architects, code specialists, cost estimators, specification writers, interior designers, and [insert others, if required]:

Consultants shall be registered in Massachusetts in their respective disciplines if registration is required by the applicable Laws. If the City of Waltham directly employs an independent cost estimator, Owner's Project Manager, and/or other consultant(s), the Designer and its Consultants shall work directly with the City of Waltham's consultant(s) to ensure that optimum cost, scheduling, and ease of construction objectives are met.

9. Approval of Consultants. Except as specifically provided in this Contract, the Designer shall not employ Consultants, or sublet, assign or transfer any part of its services or obligations under this Contract without the prior Approval of the City of Waltham.

The Designer shall provide the City of Waltham with complete copies of its contracts with each of its Consultants within 14 calendar days of the execution of such contracts.

12. Copyrights, Patents, Intellectual Property Rights. The Designer hereby grants to the City of Waltham an irrevocable royalty-free license to use for any purpose the following items developed or made part of the work or services performed under this Contract: all drawings, designs, specifications, photographs, images, notes, materials and other work and ideas of the Designer and its Consultants and subcontractors related to the performance of this Contract which are or may be covered by copyright, patent, or other intellectual property Laws or as to which Designer and its Consultants and subcontractors may assert any rights or establish any claim under any such Laws. The Designer agrees on behalf

of itself and its Consultants and subcontractors that the City of Waltham and the Public Entity shall have unlimited royalty-free rights, for the benefit of the City of Waltham and the Public Entity and any public entity to which the City of Waltham or the Public Entity may grant the right to share such rights, in any and all drawings, designs, specifications, photographs, images, notes, materials and other work and ideas developed in the performance of this Contract, including the right to use the same on any Public Entity or other public entity projects. The Designer shall incorporate by reference this provision into all contracts with its Consultants and subcontractors on this Project including, but not limited to, architects, engineers, estimators, designers and photographers. The Designer and its Consultants and subcontractors shall not be responsible for changes made in the documents without the Designer's authorization, nor for the City of Waltham's or other public entity's use of the documents on projects other than the Project, unless this is a contract for design services for a master plan or prototype. The City of Waltham assumes the risk resulting from any such changes made in the documents without the Designer's authorization, or for the City of Waltham's or other public entity's use of the documents on projects other than the Project.

10. Security and Confidentiality. The Designer and its Consultants and subcontractors shall maintain the confidentiality of Project records, including, but not limited to, all prints, plans, policies, procedures, studies, specifications and drawings, which relate to internal layout and structural elements, electrical and mechanical systems, security measures, emergency preparedness, threat or vulnerability assessments, and any other records relating to the security or safety of persons or buildings, structures, facilities, utilities, transportation or other infrastructure located within the City of Waltham, the disclosure of which, in the reasonable judgment of the City of Waltham, is likely to jeopardize the safety of persons or property. Without limiting the

foregoing, if the Project is a designated "Security Sensitive Information" project, the Designer shall execute a separate Security Sensitive Information Procedures and Confidentiality Agreement and shall comply with such document protection requirements as may be referenced in said agreement

21. DESIGNER'S BASIC FEE

1 Basic Fee. For the performance of all services required in this contract and excluding those services specified, the Designer shall be paid a negotiated lump sum Fee.

2 Equitable Adjustments to Basic Fee. If there is a substantial change in the services provided in this Contract as determined by the City of Waltham, the Designer and the City of Waltham will agree to an equitable adjustment in the Designer's Basic Fee. For the purposes of this Contract, a "substantial change" in services shall include:

- i. a substantial change in the scope of Designer's services that is not the fault of the Designer; or
- ii. a significant increase in the duration of the Project as provided in the Study, or as otherwise agreed upon, that is not the fault of the Designer. Increase will be negotiated.

22. OTHER SERVICES

1 Other Services. With the prior Approval of the City of Waltham, the Designer shall perform all or any of the following services in addition to the Basic Services:

- i. revise previously Approved drawings, specifications or other documents to accomplish changes authorized by the City of Waltham or required by changes in applicable Laws, and revisions not occasioned by the Designer's errors or omissions;
- ii. attend permit or public hearings and preparing presentation renderings and presentation models in connection therewith that are authorized by the City of Waltham;

iii. prepare documents for alternate bids requested by the City of Waltham except or alternates required to be prepared by the Designer to adjust the Estimated Construction Cost to within the Fixed Limit Construction Cost;

iv. assist the City of Waltham with the pre-qualification of bidders in accordance with M.G.L. c. 149, §§ 44E1/2 and 44D3/4 or M.G.L. c. 149A

iv. to the extent not specified in the Scope of Services, provide prequalification services required in accordance with M.G.L. c. 149A for the Construction Manager At-Risk Delivery Method;

v. provide consultation concerning replacement of any work damaged by fire or other cause during construction and furnishing professional services of the type set forth in Article 3 as may be required in connection with the replacement of such work;

vi. provide professional services necessary to evaluate substitutions proposed by the general contractor and preparing subsequent revisions to drawings and other documents resulting there from or furnishing professional services made necessary by the default of the general contractor;

vii. provide services after final payment to the general contractor, except for services occasioned by the Designer's errors or omissions;

viii. prepare special documents for or appearing as a witness in change order appeal hearings under M.G.L. c. 30, s. 39Q or in judicial litigation arising out of the Construction Contract, except for litigation arising from the Designer's negligent acts or omissions;

ix. prepare change orders and supporting data.

x. revise construction drawings and specifications submitted in their final and complete form for which bids were not received within six months after submission;

xi. make studies other than those normally required and preparing applications and reports to assist the City of Waltham in obtaining federal aid;

Prior to performing any Additional Services the Designer shall agree with the City of Waltham upon the fee for such services in accordance with Section 6.3 of this Contract. No authorization by the City of Waltham for the performance of any Additional Services shall be valid unless it contains a "not to exceed" amount.

2 Additional Site Visits. Additional services shall also include additional site visits by the Designer or its Consultants at the request of the City of Waltham at no additional cost to the City.

3 Compensation for Other Services. The services provided pursuant to sections 6.1 and 6.2 of this Article are part of the basic services rendered by the Designer and no additional compensation will be made. The cost of other services, if any, shall be incorporated in the basic fee.

23. REIMBURSABLE COSTS AND EXPENSES

1 General. The Designer shall be reimbursed by the City of Waltham ONLY for:

i. The actual cost to the Designer for special consultants. No reimbursement for such expense shall be made unless the rates of compensation for said consultant services shall have been previously approved by the City of Waltham. The City of Waltham may approve a lump sum fee.

ii. Permit filing fees and other actual costs for items not included in the Basic Fee.

iii. For document copies in excess of 6.

The City of Waltham shall not reimburse the Designer for any telephone or other out-of-pocket expenses.

2. Travel. The City of Waltham shall not reimburse the Designer for travel expenses under this Contract.

24. PAYMENTS TO THE DESIGNER

1 Applications for Payment. All invoices may be submitted monthly and will be promptly processed by the City of Waltham if they are in conformity with this Contract and properly documented; if not they will

final payment to Designer under this Contract) shall be required to be so submitted or processed when the net amount due is less than \$200. Amounts of less than \$200 shall be added to the subsequent month's invoice.

2 Right of Offset. If the City of Waltham finds that services previously paid for by the City of Waltham contained deficiencies, errors or omissions then the City of Waltham may withhold from any future payment an amount reasonably calculated by the City of Waltham to cover the cost of correcting the deficiency, error or omission until the services have been corrected. The City of Waltham may also offset against any payment due to the Designer the amount of any costs incurred by the City of Waltham arising from the Designer's failure to provide required services, deficiencies, errors or omissions.

If the City of Waltham shall discover that the charge for any previously paid-for services was calculated based upon incorrect salary rates or other incorrect information, the City of Waltham may offset any overcharges against any future payment. Any disputes related to offsets taken by the City of Waltham shall be subject to resolution pursuant to Section 3.19 of this Contract. Nothing in this paragraph shall limit any legal remedies of the City of Waltham against the Designer for default, errors, omissions, erroneous claims, false claims, tort claims, or any breach by the Designer of the terms of this Contract or applicable Laws.

25. TERMINATION

1 City of Waltham's Right to Terminate. By written notice to the Designer, the City of Waltham may terminate this Contract, in whole or in part, at any time for either the City of Waltham's convenience or for the failure of the Designer to fulfill its obligations under this Contract.

2 Termination by City of Waltham for Convenience. If any such termination shall occur without the fault of the Designer, all compensation and reimbursable expenses due to the Designer up to the date of termination, in accordance with all Contract terms, including

proportionate payment for partially completed work, shall be paid to the Designer by the City of Waltham. The payments to the Designer shall not exceed the fair value of the Designer's work, as the City of Waltham shall determine. No amount shall be allowed for anticipated profit on unperformed services.

3 Termination by City of Waltham for Cause. If this Contract is terminated due to the failure of the Designer to fulfill the Designer's obligations under this Contract, the City of Waltham may assume the design work and replace it and/or prosecute the same to completion by contract or otherwise. In such case, the Designer shall be liable to the City of Waltham for any additional cost incurred by the City of Waltham thereby. These rights and remedies of the City of Waltham are in addition to any rights and remedies provided by law or under this Contract.

4 Termination by Designer. By written notice to the City of Waltham, the Designer may terminate this Contract (i) if the City of Waltham, within sixty (60) days following written notice to the City of Waltham from the Designer of any default by the City of Waltham hereunder, shall have failed to remove such default, or (ii) if, after the Designer shall have performed all services required of the Designer in the schematic design phase, the design development phase, or the construction documents phase of the Project as described in this Contract, at least six months shall have elapsed without receipt by the Designer of a Notice to Proceed with the next phase of the Designer's services. Upon any such termination by the Designer all compensation and reimbursement payable to the Designer in accordance with this Contract up to and including the date of termination shall be paid to the Designer by the City of Waltham. The payments to the Designer shall not exceed the fair value of the Designer's work, as the City of Waltham shall determine. No amount shall be allowed for anticipated profit on unperformed services.

5 Designer's Duties upon Termination. Upon any termination of this Contract the Designer shall deliver to the City of Waltham all data, drawings, specifications, reports, estimates, summaries, and such other information and materials, whether completed or in process, as may have been accumulated by the Designer in performing this Contract.

26. RECORDS, DISCLOSURE STATEMENTS, ACCOUNTING CONTROLS, AUDITS

1 Records to be Kept for Six Years. The Designer shall make, and keep for at least six (6) years after final payment, books, records, and accounts which in reasonable detail accurately and fairly reflect the transactions and dispositions of the Designer [M.G.L. c. 30, §39R(b)(1)-(2)]

2 Records Open to Inspection. Until the expiration of six (6) years after final payment, the Governor or his designee, the Secretary of Administration and Finance, the State Auditor, the Office of the Inspector General, the Commissioner of DCAM, the City of Waltham and any other public official authorized by law, shall have the right to examine any books, documents, papers or records of the Designer or of its Consultants and subcontractors that directly pertain to, and involve transactions relating to, the Designer or its Consultants and subcontractors. [M.G.L. c. 30, §39R(b)(1)-(2); Executive Order 195]

3 Changes in Method of Accounting. If this Contract is a contract for an amount exceeding \$10,000 or is a contract for the design of a Project with an Estimated Construction Cost exceeding \$100,000, and if the Designer shall make any change in its method of maintaining records that would materially affect any statements filed by the Designer with the City of Waltham, the Designer shall forthwith deliver to the City of Waltham a written description of such change, the effective date thereof, and the reasons therefore. The Designer shall submit with such description a letter from the Designer's independent certified public accountant approving or otherwise commenting on the change. [M.G.L. c. 30, §39R(b)(3)] The Designer hereby represents that there have been

no such changes to date that have not been so reported to the City of Waltham.

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5 Filing of Statement of Management on Internal Accounting Controls. If this is a Contract for an amount exceeding \$10,000 or is for the design of a Project with an Estimated Construction Cost exceeding \$100,000, the Designer maybe requested to file with the City of Waltham a statement of management as to whether the system of internal accounting controls of the Designer and its subsidiaries reasonably assures that: (1) transactions are executed in accordance with management's general and specific authorization; (2) transactions are recorded as necessary i) to permit preparation of financial statements in conformity with generally accepted accounting principles, and ii) to maintain accountability for assets; (3) access to assets is permitted only in accordance with management's general or specific authorization; and (4) the recorded accountability for assets is compared with the existing assets at reasonable intervals and appropriate action was taken with respect to any difference. The Designer may also be requested to file with the City of Waltham a statement prepared and signed by an independent certified public accountant, stating that the accountant has examined the statement of management on internal accounting controls, and expressing an opinion as to (1) whether the representations of management in response to this section and sections 1 and 2 above are consistent with the result of management's evaluation of the system of internal accounting controls; and (2) whether such representations of management are, in addition, reasonable with respect to transactions and assets in amounts which would be material when measured in relation to the applicant's financial statements. [M.G.L. c. 7, §38H(e)(iv); M.G.L. c. 30, §39R(c)]

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8 Records Not Public. Records and statements required to be made, kept or filed under the provisions of this Article shall not be public records and shall not be open to public inspection; provided, however, that such records and statements shall be made available pursuant to the provisions of above sections.

27. INSURANCE

1 General Requirements .The Designer shall purchase and maintain insurance of the type and limits listed in this Article with respect to the services to be performed under this Contract. This insurance shall be provided at the Designer's expense and shall be in force and effect for the full term of the Contract or for such longer period as this Article requires.

All policies shall be issued by companies lawfully authorized to write that type of insurance under the Laws of the City of Waltham with a financial strength rating of "A-" or better as assigned by A.M. Best Company, or an equivalent rating assigned by a similar rating agency acceptable to the City of Waltham, or otherwise acceptable to the City of Waltham.

The Designer shall submit three originals of each certificate of insurance acceptable to the City of Waltham simultaneously with the execution of this Contract. The certificate of Insurance shall have written in the description of Services box, through a policy endorsement, the following language: "The City of Waltham is a named additional insured for General Liability". **Failure by the contractor to provide a current and updated insurance policy, during the entire duration of the contract, may result in additional legal liability.**

The Certificate of Insurance must be mailed directly to:

Office of the Purchasing Agent

Purchasing Department

City of Waltham

610 Main Street

Waltham, MA 02452

Certificates shall show each type of insurance, insurance company, policy number, amount of insurance, deductibles/self-insured retentions, and policy effective and expiration dates.

The Designer shall submit updated certificates prior to the expiration of any of the policies referenced in the certificates so that the City of Waltham shall at all times possess certificates indicating current coverage. Failure by the Designer to obtain all policy renewals and to provide the respective insurance certificates as required shall constitute just cause for termination of Designer's services under this Contract. Termination, cancellation, or material modification of any insurance required by this Contract, whether by the insurer or the insured, shall not be valid unless written notice thereof is given to the City of Waltham at least thirty days prior to the effective date thereof, which shall be expressed in said notice.

The Designer is responsible for the payment of any and all deductibles under all of the insurance required below. The City of Waltham shall not be responsible for the payment of deductibles, self-insured retentions or any portion thereof.

2. Workers' Compensation, Commercial General Liability, Automobile Liability, and Valuable Papers. The Designer shall purchase and maintain at its own expense during the life of this Contract the following insurance:

- i. Workers' Compensation Insurance in accordance with M.G.L. chapter 152.
- ii. Commercial General Liability Insurance, with a minimum limits of \$1,000,000 each occurrence. The Public Entity and the City of Waltham shall each be listed as an additional insured.
- iii. Automobile Liability Insurance at a limit of not less than \$1,000,000 each accident.

iv. Valuable Papers insurance in an amount sufficient to assure the restoration of any plans, drawings, computations, field notes, or other similar data relating to the work covered by this Contract in the event of loss or destruction while in the custody of the Designer until the final fee payment is made or all data is turned over to the City of Waltham, and this coverage shall include coverage for relevant electronic media including, but not limited to, documents stored in computer aided design drafting (CADD) systems.

3 Professional Liability. The Designer shall maintain professional liability insurance covering errors and omissions and negligent acts of the Designer, and of any person or entity for whose performance the Designer is legally liable. Unless an alternate amount is otherwise specified in the documents incorporated by reference into Section 3.1 of this Contract, the minimum amount of such insurance shall equal the lesser of \$5,000,000 or 10% of the Project's Fixed Limit Construction Cost but in no event less than \$250,000 per claim. Unless the Designer is specifically required to provide project specific insurance in the documents incorporated by reference into Section 3.1, the policy may be in a "claims made" format. If the policy is a "claims made" policy, it shall include a retroactive date that is no later than the effective date of this Contract, and an extended reporting period of at least six years after the earlier of: (1) the date of official acceptance of the completed Project by the City of Waltham; (2) the date of the opening of the Project to public use; (3) the date of the acceptance by the general contractor of a final pay estimate prepared by the City of Waltham pursuant to M.G.L. chapter 30; or (4) the date of substantial completion of the Construction Contract and the taking of possession of the Project for occupancy by the City of Waltham which requirement can be met by providing renewal certificates of professional liability insurance to the City of Waltham as evidence that this coverage is being maintained.

4 Liability of Designer. Insufficient insurance shall not release the Designer from any liability for breach of its obligations under this Contract. Without limitation, the Designer shall bear the risk of any loss if its valuable papers insurance coverage is insufficient to cover the loss of any work covered by this Contract.

28. INDEMNIFICATION

The Designer shall indemnify and hold harmless the City of Waltham and all of their agents and employees from and against all claims, damages, losses and expenses, including but not limited to court costs, reasonable attorneys' fees, interest and costs arising out of or resulting from the wrongful and/or negligent acts or omissions of the Designer in performance of the services covered by this Contract and/or of failure to comply with the terms and conditions of this Contract, whether by Designer or its employees, Consultants or subcontractors.

29. NON-DISCRIMINATION IN EMPLOYMENT AND AFFIRMATIVE ACTION

1 Compliance. The Designer shall comply with all Laws promoting fair employment practices or prohibiting employment discrimination and unfair labor practices and shall not discriminate against any qualified employee or applicant for employment because of race, color, national origin, ancestry, age sex, religion, physical or mental handicap, or sexual orientation or for exercising any right afforded by Law. The Designer shall comply with all applicable Laws prohibiting discrimination in employment including but not limited to: Title VII of the Civil rights Act of 1964; the Age Discrimination in Employment Act of 1967; Section 504 of the Rehabilitation Act of 1973; M.G.L. c. 151B, s. 4(1); and all relevant administrative orders and executive orders, including Executive Order 227 and Executive Order 246. If a complaint or claim alleging violation of such statutes, rules or regulations is presented to the Massachusetts Commission Against Discrimination (MCAD), the Designer and its agents agree to cooperate fully with MCAD in the investigation and disposition of such complaint or claim. In the event of the Designer's noncompliance

with the provisions of this section, the City of Waltham shall impose such sanctions as it deems appropriate, including, but not limited to, withholding of payments due the Designer under this Contract until the Designer complies, and termination or suspension of this Contract.

2 Material Breach. Any breach of this Article shall be regarded as a material breach and shall be subject to all other sections of this Contract. The City of Waltham shall have access to all records which are necessary to document compliance with this Article.

30. NON-APPROPRIATION

The City of Waltham certifies that at the time of the execution of this Contract, sufficient appropriations exist and shall be encumbered to fund the Contract Price. Payments are subject to appropriation and shall be made only for work performed in accordance with the terms of this Contract. The Designer shall not be obligated to perform, and may not perform, services outside the duration and scope of this Contract without an appropriate amendment to this Contract, and a sufficient appropriation(s) to support such additional services. The City of Waltham may immediately terminate or suspend this Contract in the event that the appropriation(s) funding this Contract is eliminated or reduced to an amount which will be insufficient to support anticipated future obligations under this Contract.

31. CERTIFICATIONS OF DESIGNER MADE UNDER PAINS AND PENALTIES OF PERJURY

No changes shall be made in the matters represented in this Article at any time during the life of this Contract without written notification to the City of Waltham and when required, receipt of written Approval from the City of Waltham. (Attach additional sheets if necessary for each section.)

1 Designer's Beneficial Owners. By signing this Contract, the Designer certifies under the penalties of perjury that the following

named entities and individuals are the legal and beneficial owners of the Designer as of the date of the execution hereof :

CORPORATION: (Names of Officers and Shareholders of Corporation, including their titles,

Federal ID Number: _____

PARTNERSHIP: (Names of all Partners):

Federal ID Number: _____

INDIVIDUAL (Name of Owner):

2 Persons Having an Interest in this Contract.

By signing this Contract, the individual executing this Contract on behalf of the Designer hereby certifies under the penalties of perjury that the following sets forth the names and addresses of all persons having a financial interest in this Contract, not including any person whose only financial interest herein consists of the holding of one percent or less of

the capital stock of Designer if Designer is a corporation, in addition to the persons listed in section 21.1 above:

Name

Address

3 Professional Registrations. By signing this Contract, the individual executing this Contract on behalf of the Designer certifies under the penalties of perjury that the following named individuals are registered as architects, landscape architects, or engineers pursuant to the provisions of General Laws Chapter 112, §§ 60A - 60O and further that i) if the Designer is an individual the Designer is the individual named below, ii) if the Designer is a partnership, the majority of all the partners are persons who are registered architects, landscape architects, or engineers, iii) if the Designer is a corporation, sole proprietorship or joint stock company or other entity, the majority of the directors or a majority of the stock ownership and the chief executive officer, are persons who are registered architects, landscape architects, or engineers and the person to have the Project in his or her charge is registered in the discipline required for the Project, or iv) if the Designer is a joint venture, each joint venturer satisfies the requirements of the preceding clauses i – iii as the case may be .

<u>Name</u>	<u>Title</u>	<u>Mass.</u>
<u>Registration</u>		
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

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5 Tax Returns. By signing this Contract, the Designer certifies under the penalties of perjury that pursuant to General Laws Chapter 62C §49A, the Designer has filed all state tax returns, paid all taxes and complied with all Laws of the City of Waltham relating to taxes; and that pursuant to General Laws Chapter 151A, § 19A, the Designer has complied with all Laws of the City of Waltham relating to contributions and payments in lieu of contributions to the Employment Security System.

32. EVALUATION AND RANKING OF PROPOSALS

A selection committee comprised of at least three members, appointed by the Mayor, shall review each proposal. Proposals will be evaluated upon the basis of the evaluation criteria for selection set forth and other appropriate factors. Submissions will then be ranked in the order of qualification. The first, second and third ranked proposals will be further reviewed and evaluated, including reference checks, by the committee. This further review and evaluation will include interviews or the opportunity to provide additional information to the committee.

All proposals must have a section labeled COMPARATIVE CRITERIA (separate envelope from the Price Proposal) and must provide all

necessary documentation as evidence that they meet each of the following criteria. If you have placed your documentation elsewhere in this technical proposal, you shall indicate the page number where that documentation can be found. If documentation or identification of page number is not clearly evident for each criterion the proposal may be deemed unresponsive. The evaluation of the Technical Proposals will be based on the “comparative criteria” described in this section.

1. Cost. (50 points).

Appropriateness, reasonableness and competitiveness of the cost proposal, including the proposed optional price for the study of other municipal sites. Costs associated with enhancements and/or deletions to the Scope of Services may be considered under this criterion.

2. Qualifications of key personnel. (25 points).

The identity and qualifications of key personnel, team members and associated sub-consultants available to work on this project, including their expected project assignments.

The quality (appropriateness, capability and relevant project experience) of key personnel for both the Education Consultant and Architect and continuity of the project team, key personnel and sub-consultants throughout the project. The Company’s long term commitment of keep the same team in place until the completion of the project.

3. Similar experience/past performance on similar projects. (15 points).

The proposer’s prior similar experience, including the work which best illustrates the team’s most relevant experience, ability and expertise to perform the services requested in this RFP; and the proposer’s past performance on similar municipal projects, ongoing and completed within the past five years. The committee will review project descriptions and references from 3 communities in Massachusetts for systems of similar in size and complexity where the consultant has performed services similar to those included in this request.

4. Technical Approach, Capacity, Management Approach. (10 points).

The quality, completeness and methodology of the technical approach envisioned for the project in response to the Scope of Services. The proposer's capacity to apply and commit itself successfully to the project tasks and to complete required services; its absence of conflicting commitments to concurrent projects; and its scheduling. The clarity, completeness and effectiveness of the proposed organizational structure and the proposed management approach required to successfully manage this project. The demonstrated ability of the team to work together effectively, to maintain schedule and cost control on this project, to resolve resource constraints.

33. SUBMISSION OF PROPOSAL:

Please submit six (6) copies of the proposal.

The proposal shall begin with a cover letter, which confirms that the proposer understands and agrees to the provisions of this RFP and which furnishes the following statements or information:

1. Cost proposal (In a separate sealed envelope market "Price Proposal").
2. confirm that all individuals listed in its proposal are committed to performance on the projects
3. state that it will meet the insurance requirements for this project from office of the Chief Procurement Officer
4. say if the firm, its subcontractors or any member of the firm is currently debarred from doing business with any government entity or is a party to any pending or current litigation that might adversely affect performance on this project.
5. declare if the firm or its subcontractors has filed for the protection of U. S. Bankruptcy Court in the last seven years
6. include in the cover letter an explanation of the legal relationship between the primary service provider and it sub contractor

7. complete the entire COMPLIANCE section of this document and submit it with your response.

8. describe why the City of Waltham should hire your company and its subcontractors for this project.

Submission must include resumes of team members with examples of relevant experience and a description of the individual roles and responsibilities of each. Submission must also include hourly staffing rates.

GENERAL CONDITIONS

GENERAL CONDITIONS

1. **INFORMATION**

All information shall come from the Office of the City Purchasing Agent. The Contractor shall inquire at this office for any information needed. Wherever the words "or equal as approved" are used, it is to be understood that the opinion of the City Purchasing Agent shall govern.

2. **SUITS**

The Designer shall indemnify and hold harmless the City of Waltham and all of their agents and employees from and against all claims, damages, losses and expenses, including but not limited to court costs, reasonable attorneys' fees, interest and costs arising out of or resulting from the wrongful and/or negligent acts or omissions of the Designer in performance of the services covered by this Contract and/or of failure to comply with the terms and conditions of this Contract, whether by Designer or its employees, Consultants or subcontractors.

3. **LAWS AND REGULATIONS**

The Contractor shall conform to all the applicable rules, regulations, laws and ordinances of the City of Waltham, the Commonwealth of Massachusetts, the United States of America and all agencies having jurisdiction over this contract.

4. **PROTECTION OF PROPERTY**

The Contractor shall take all proper precautions to protect the City's property from damage and unnecessary inconvenience. Any City property damaged by the Contractor in carrying out the provisions of this contract shall be restored to its original condition, by and at the expense of the Contractor.

5. **PROTECTION OF PERSONS**

The Contractor shall take all proper precautions to protect persons from injury, unnecessary inconvenience, and shall be responsible for

his failure to do so. The Contractor agrees to hold the City harmless from any and all liabilities of every nature and description, which may be suffered through bodily injury, including death, to any person, by reason of negligence of the Contractor, his agents or employees, or any subcontractor.

6. **PERSONNEL:**

The Contractor shall employ a competent supervisor and all properly licensed personnel necessary to perform the services required in this contract. The City Purchasing Agent shall have the right to require the Contractor to remove and/or replace any of the personnel for nonperformance or for unprofessional behavior. The City Purchasing Agent may require the Contractor to submit a weekly performance record of the areas and of the work performed, on forms approved by the City Purchasing Agent. The Contractor or his supervisor shall be available to inspect such work as required by the City Purchasing Agent.

7. **BIDDER EXPERIENCE EVALUATION**

Each bidder shall submit with his bid, all the information relative to their experience and qualifications in performing the work required under this contract and shall have been in business for a minimum of five (5) years, in order for their bid to be considered.

8. **NOT-TO-EXCEED AMOUNT**

The bid amount proposed in your company's response is a "not-to-Exceed" amount unless the City makes changes, in writing, to the scope of work to be performed. The Change Order must be signed and approved by the City's Purchasing Agent, City Auditor, Law Department and the Mayor prior to the commencement of the change order work. No work is to begin until the proper approvals have been obtained. A change order will be priced at the unit price. Failure to comply with this procedure will result in the cancellation of the contract and the non-payment of services provided.

9. **BREACH OF CONTRACT/ NON PERFORMANCE**

If the Contractor shall provide services in a manner, which is not to the satisfaction of the City, the City may request that the Contractor refurnish services at no additional cost to the City until approved by the City. If the Contractor shall fail to provide services, which are satisfactory to the City, the City in the alternative may make any reasonable purchase or Contract to purchase services in substitution for those due from the Contractor. The City may deduct the cost of any substitute Contract for nonperformance of services together with incidental and consequential damages from the Contract price and shall withhold such damages from sums due or to become due to the Contractor. If the damages sustained by the City exceed sums due or to become due, the Contractor shall pay the difference to the City upon demand. The Contractor shall not be liable for any damages sustained by the City due to the Contractor's failure to furnish services under the terms of this Contract if such failure is in fact caused by the occurrence of a contingency the nonoccurrence of which was a basic assumption under which this Contract was made, including a state of war, embargoes, expropriation of labor strike or any unanticipated federal, state or municipal governmental regulation of order, provided that the Contractor has notified the City in writing of such cause within seven (7) days after its occurrence.

10. **RIGHT TO AUDIT**

The City of Waltham has the right to review and audit documents related to this contract. This right extends to any subcontractor, supplier or other entity used by the prime contractor to fulfill the obligations under this contract.

11. **CITY ORDINANCE. APPROVAL OF CONTRACTS BY MAYOR, SEC. 3-12 OF THE CITY ORDINANCES.**

All contract made by any department, board or commission where the amount involved is two thousand dollars (\$2,000) or more shall be in

writing, and no such contract shall be deemed to have been made or executed until the approval of the Mayor is affixed thereto. Any construction contract shall, and all other contracts may, where the contract exceed five thousand dollars (\$5,000) be required to be accompanied by a bond with sureties satisfactory to the Mayor.

12. **TWO-ENVELOPS BID.**

Bids must be signed and enclosed in two (2) sealed envelopes. One envelope shall be marked **QUALIFICATIONS** for the Education Consultant. The second (2d) envelope shall be marked **PRICE** for the Education Consultant

Specifications

SCOPE OF WORK

The City of Waltham has 9 schools:

Waltham High School (9 -12) (comprehensive)
Kennedy Middle (6-8)
McDevitt Middle (6-8)
MacArthur Elementary (K-5)
Fitzgerald Elementary (K-5)
Plympton Elementary (K-5)
Northeast Elementary (K-5)
Stanley Elementary (K-5)
Whittemore Elementary (K-5)

All 6 elementary schools and the 2 middle schools are new and were designed to hold 500 – 550 students. Stanley and Northeast Elementary Schools were also designed to accommodate a pre-school as well. A Statement of Interest (SOI) for the Waltham High School renovation has been filed with the MSBA. According to the last budget report, there are 5,098 students and a \$68,750,952 budget.

Many of the elementary schools are experiencing a population increase. Additionally, space for program demands has also increased.

The City of Waltham is seeking proposals from an education consultant and architect to evaluate the 6 elementary schools in conjunction with the potential impact on the 2 middle schools and the high school.

The consultant shall examine:

- (1) current space allocation within the buildings
- (2) current program allocation within the buildings
- (3) current enrollment data and projected enrollment data
- (4) current program data and projected enrollment data and (% of total population)
- (5) proposed November data regarding kindergarten enrollment projections (3 years of data)
- (6) Special Education ELL, pre-K, and inclusion model (least restrictive setting)
- (7) current pre-K data and projected pre-K data
- (8) homeless population (June 2014 anticipated change)
- (9) current bus routes and computer technology upgrade
- (10) redistricting (home base) and/or (program shifts)
- (11) compilation of all data and process going forward

Attached exhibits:

- A. School Committee votes regarding consultant and capital improvement funding votes
- B. Waltham High School SOI application
- C. Current space allocation
- D. Current program allocation
- E. Current enrollment data
- F. Current program data
- G. Projected enrollment data
- H. Projected program data
- I. Special Education ELL, Pre-K and inclusion model data
- J. Current Pre-K data
- K. Projected Pre-K data
- L. Current and proposed homeless population data including anticipated June 2014 adjustment
- M. Current bus routes and school maps
- N. Current districts (home base and program)
- O. District profile
- P. November 2013 data (3 year kindergarten enrollment data) which will be provided to the consultant as an addendum by the Superintendent when the same is available
- Q. DESE October 1 data for the current and past 2 years
- R. Facilities Inventory
- S. Floor Plans

The City is seeking proposals to critically analyze the current space allocation from a program as well as population standpoint, and to make recommendations with regard to the existing six elementary schools; and in conjunction with the potential impact upon the two middle schools and high school. The eight existing buildings will be examined.

As a separate optional price, once the consultant reaches conclusions regarding the existing eight school buildings, an analysis of any available city sites would be requested. A list of potential municipal sites includes the locations at Fitch School, , Kaotoujian Playground, MacArthur Elementary School and any school land at the Waltham High School.

Proposals due by: 10 AM Tuesday November 26, 2013

All questions during the bid process shall be directed in writing only to Jpedulla@city.waltham.ma.us.

Contact entities: Waltham School Committee and Dr. Susan Nicholson, Superintendent of Schools

The respondents shall provide six (6) copies of the report for all members of the Waltham School Committee, Superintendent of Schools and Mayor of the City of Waltham.

THE BUDGET FOR THIS STUDY IS NOT TO EXCEED \$90,000, INCLUSIVE OF ALL EXPENSES

November 26, 2013

City of Waltham
Office of the Purchasing Agent
City Hall
610 Main Street
Waltham, Massachusetts 02452

Re: City of Waltham — School Building Evaluations

Dear Dr. Nicholson, Mayor McCarthy, and members of the Waltham School Committee:

The City of Waltham is committed to a study of its existing school facilities to better equip them to respond to the rising enrollments and the challenges of education in the 21st Century. Symmes Maini & McKee Associates (SMMA) is well-qualified to support this challenge. Specifically, SMMA can provide:

▪ **Broad Experience in Educational Planning**

Our Educational Planning Group has conducted over 15 district-wide Master Plans and programmed, designed, and implemented nearly \$1 billion in Massachusetts school projects in the past decade. The majority of these projects have commenced with a first phase master plan or feasibility assessment similar to that which you propose. Additionally, to better ensure this outcome we have included Frank Locker, PhD, and Tracy Healy, REFP as members of our programming team. Dr. Locker is both an internationally-respected educational planner and an architect who through a collaborative “visioning” process assists communities in defining their educational goals and the means of attaining them. Ms. Healy is highly regarded by school districts throughout the nation for her ability to develop and validate multi-year enrollment projections.

▪ **Interdisciplinary Design Services**

Your study, as advertised, will require the services of educational programmers, planners, engineers, and technical specialists in addition to architects with K-12 design experience. As we do for each of our clients, SMMA will provide these integrated design services from within our 153-member professional staff to maximize effective project coordination and delivery.

▪ **Commitment to Design Excellence**

SMMA's Educational Planning Group is committed to the programming and design of K-12 facilities that perform at a high level for pupils, teachers, administration, and the broader community. SMMA is pleased to have its comprehensive high school in Quincy, Massachusetts named a “Green Ribbon School” by the U.S. Department of Education. Quincy High School is one of only four schools in Massachusetts to be honored with this award. Additionally, Grafton High School received the prestigious “Project of Distinction” Award from the Council of Educational Facility Planners International (CEFPI).

▪ **Educational Visioning (Optional, Additional Service)**

We understand the challenge to Waltham in positioning its schools in the forefront of 21st Century education. If desired, we can provide Educational Visioning as an additional service.

▪ **Developing a Community-Wide Consensus**

SMMA is dedicated to gaining a political consensus for K-12 projects endorsed by their planning committees. We have developed strategies for engaging the broader community to ensure gathering support and successful Town Meeting votes and approvals.

We are certain that much of the teaching and learning that goes on throughout the Waltham Schools already embraces 21st Century goals, but is restricted by spatial constraints. The purpose of this Study is to identify how your facilities can be enhanced both to respond to rising enrollments and the challenge of new modes of learning.

Sincerely,
SMMA | Symmes Maini & McKee Associates



Philip J. Poinelli, FAIA, CEFP, LEED AP, MCPPO
Principal-in-Charge | Educational Programmer



Lorraine Finnegan, AIA, GRP, LEED AP, MCPPO
Project Manager

We hereby certify that we meet all Minimum Submission Requirements as outlined in the Request for Qualifications.

Cost Proposal: Our cost proposal is included in a separate sealed envelope marked "Price Proposal".

Commitment of Proposed Staff: SMMA is very selective in the projects we pursue. Moreover, we pursue those projects to which we can provide dedicated time and effort to ensure a successful outcome for our clients. We feel our specialized skills are well suited for this project, and our staff is available and committed should we be fortunate enough to be awarded this opportunity. Lorraine Finnegan, our Project Manager for this project, is a Waltham resident, and is both personally and professional dedicated to ensuring a successful Study that achieves the City's goals.

Insurance Requirements: We can meet the insurance requirements for this project as set forth by the City of Waltham's Office of the Chief Procurement Officer.

Debarment / Litigation: Neither SMMA, nor our proposed sub-consultants, is debarred from doing business with any government entity. Additionally, neither SMMA, nor our proposed sub-consultants, is a party to any pending or current litigation.

Bankruptcy: Neither SMMA, nor our proposed sub-consultants, has filed for the protection of U.S. Bankruptcy Court in the last seven years.

Legal Relationship Between Primary Service Provider & Sub-Consultants: SMMA will hire Frank Locker and FutureThink, directly as sub-consultants.

Qualifications for:

SCHOOL BUILDING EVALUATIONS
WALTHAM PUBLIC SCHOOLS

Waltham, Massachusetts

1. Firm Background
2. Project Team
3. Project Understanding & Approach
4. 21st Century Education
5. Similar Projects & References
6. Comparative Criteria
7. Compliance Documents
8. Price Proposal
(Submitted in Separate Envelope)

ORIGINAL

Prepared by:

SMMA | Symmes Maini & McKee Associates



Firm Background

SMMA is a multidisciplinary design firm offering architecture, engineering, interior design, and planning services to a broad range of institutional, corporate, and technology-based clients. Founded in 1955, SMMA today is a company of over 170 professionals, headquartered in Cambridge, Massachusetts.

Building Design and Construction, Interior Design, Boston Business Journal, Architectural Record, and Engineering News Record magazines consistently rank SMMA among the leading multidisciplinary design firms in the United States. Repeat commissions from established clients has averaged over 70 percent for the last five years.

Approach

SMMA is dedicated to creating places and spaces that contribute measurable value to each project. We do so by thoroughly listening to our clients, maintaining close relationships with them, and providing dedicated service that responds directly to their unique needs and aspirations. Our organization is focused around three client-centered practice groups:

- Institutional
 - Educational/K-12
 - Higher Education
 - Government
- Corporate + Technology
 - Advanced Technology/ Mission Critical
 - Corporate + Commercial
 - Health + Science

SMMA's integrated approach in project delivery means that team members from all disciplines work together – from project initiation to completion.

This collaborative process results in coordinated and tailored solutions to each client's challenges, and facilitates support of the quality, schedule, and financial goals uniquely defined by each client.

Scope of Services

SMMA provides four core design services across our practice studios:

1. Architectural design and educational programming
2. Master planning, site design, urban planning, and landscape architecture
3. Engineering – civil, structural, mechanical, electrical, tel-data, plumbing, and fire protection
4. Interior design and space planning

Collaboration between these specialties allows our designers to share ideas and design solutions of benefit to clients in each of our practice groups.

Technology

Computer-based design, analysis, and communication tools facilitate the sharing of information internally with SMMA's design teams and externally with appropriate members of the client's team. This enhances design creativity and productivity and provides the framework for reliable information storage, retrieval, and publication. Integrated web and database technologies are utilized to distribute information, and project extranet sites provide secure, online meeting places for immediate communication to SMMA team members and to the client.

Quality Control

SMMA was one of the first New England design firms to become ISO 9001 certified. The firm's rigorous review process successfully integrates site and architecture, systems design, energy conservation, construction phasing/schedules, and cost control, resulting in a product that meets and/or exceeds client expectations.

Sustainable Design

As a member of the US Green Building Council, SMMA is committed to sustainable design practices such as energy efficiency, indoor environmental quality, environmentally friendly material selection, improved recycling programs, and sustainable site design.

Our LEED Accredited Professionals maintain a green reference library, publish a weekly "Green Tips" article, monitor office recycling, and participate in regional seminars and workshops in sustainable design.



SMMA Project Team Meeting

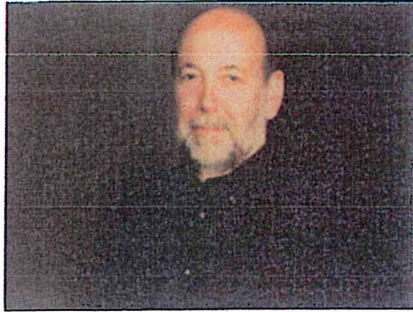


*SMMA's LEED Accredited Professionals
-Steadily Growing*

WALTHAM SCHOOL COMMITTEE

PROJECT LEADERSHIP	
PRINCIPAL-IN-CHARGE	PROJECT MANAGER
Philip Poinelli, FAIA, LEED AP, CEFPI, MCPPO	Lorraine Finnegan, AIA, GRP, MCPPO, LEED AP

KEY PERSONNEL	
EDUCATIONAL PROGRAMMER	EDUCATIONAL VISIONING
Philip Poinelli, FAIA, LEED AP, CEFPI, MCPPO	Frank Locker Educational Planning Frank Locker, AIA, Ph.D.
ENROLLMENT CONSULTANT	PROJECT ARCHITECT
FutureThink Tracy Healy, REPP	Alex Pitkin, AIA, MCPPO
CIVIL ENGINEERING - SITE SELECTION	DATA COMMUNICATIONS - SECURITY
Erin Prestileo, PE	Patrick Weygint, RCDD



PHILIP J. POINELLI, FAIA, CEFP, LEED AP

Principal-in-Charge / Educational Programmer

PROFILE

Mr. Poinelli has over 40 years experience in the programming design and execution of projects for education, science and research. He is President of the Northeast Region of CEFPI, an international organization dedicated to the programming and design of responsive learning environments and has completed instructional requirements qualifying him as a Certified Educational Facilities Planner.

Most recently, he has developed the design program for major high school projects in West Springfield, Great Barrington, and Winchester, MA. Mr. Poinelli serves as primary Educational Programmer to SMMA's K-12 design group and is a founding member of the Boston Society of Architects Education Facilities Committee, which serves as liaison to the MSBA, the Massachusetts School Building Authority. He authored an article published in the book *Breaking the Mold of School Instruction and Organization*, in 2010.

EXPERIENCE

Hamilton-Wenham Regional School District | Wenham, MA, District-wide Master Plan

East Longmeadow School District | East Longmeadow, MA, District-wide Master Plan

Sharon High School | Sharon, MA, Feasibility Study

North Middlesex Regional High School | Townsend, MA, feasibility study of 192,000 sf high school for 870 students

Turners Fall High School/Great Falls Middle School | Montague, MA, Renovations and Additions of the Existing Middle/High School (198,000 sf), 750 Pupils, Grades 7-12

West Springfield High School | West Springfield, MA, (254,000 sf), 1380 Pupils

Grafton School District | Grafton, MA, District-wide Master Plan

Grafton High School | Grafton, MA, (186,000 sf), 900 Pupils

Tewksbury School District | Tewksbury, MA, District-wide Master Plan

Tewksbury Memorial High School | Tewksbury, MA, (218,000 sf), 1,100 Pupils

Stow School District | Stow, MA, Elementary/Middle School Master Plan

Center Elementary School | Stow, MA, (98,000 sf), 600 Pupils, Grades PK-5

Swampscott School District | Swampscott, MA, School Master Plan Study

Swampscott New High School | Swampscott, MA, Master Plan Study and Full Design Services for New High School and Playfields, (205,000 sf), 850 Pupils

Norwood High School | Norwood, MA, High School Master Plan Study

Concord-Carlisle High School | Concord, MA, Feasibility Study 1,350 Pupils

Argenziano School at Lincoln Park | Somerville, MA, Pupils K-8

New Wood Elementary School | Plainville, MA, Grades 3-6

Mashpee Junior/Senior High School | Mashpee, MA, New Junior and Senior High School (190,000 sf), 1,100 Pupils, Grades 7-12

EDUCATION

San Diego State University,
Advanced Certificate in Educational
Facilities Planning

Associate of Science in Architecture,
Wentworth Institute of Technology

REGISTRATIONS

Connecticut, Massachusetts, New
Jersey, North Carolina, Rhode Island

National Council of Architectural
Registration Boards (NCARB)

Massachusetts Public Purchasing
Official Program (MCPPO)

Certified Educational Facility Planner
(CEFP)

AFFILIATIONS

American Institute of Architects (AIA)

Co-chair, Committee on Architecture
for Education, K-12 Subcommittee

Boston Society of Architects,
Educational Facilities Committee

Council of Educational Facilities
Planners International



LORRAINE B. FINNEGAN, AIA, LEED AP, MCPPO

Project Manager

PROFILE

Ms. Finnegan has over twenty years of design and project management experience. Her background has predominantly encompassed the educational sector where she has led projects both in the public and private sectors on a variety of projects types and levels of complexity. Ms. Finnegan's experience has enabled her to have an in-depth understanding and proven approach to the management of project scope, quality, budget and schedule. As Project Manager, she is responsible for the design implementation, coordination of the design team, facilitation of communication while serving as the day-to-day contact.

EXPERIENCE

Bancroft Elementary School | Andover, MA, Full Design Services for New Elementary School, (106,486 sf) 680 pupils, Grades K-5

Marblehead High School | Marblehead, MA, Facilities Master Plan and Full Design Services for New High School, (215,000 sf), 900 Pupils, Grades 9-12

Sharon High School | Sharon, MA, Feasibility Study

Winchester High School | Winchester, MA, Feasibility Study, Renovations and Additions to 280,000 sf high school for grades 9-12 and approximately 1,300 students

North Middlesex Regional High School | Townsend, MA, Feasibility Study, Renovations and Additions of the Existing Middle/High School (198,000 sf), 750 Pupils, Grades 7-12

West Springfield High School | West Springfield, MA, (254,000 sf), 1380 Pupils

Quincy High School | Quincy, MA, Feasibility Study & Design of New Comprehensive High School, 1,500 Students, Grades 9-12

Norwood High School | Norwood, MA, Feasibility Study

Swampscott High School | Swampscott, MA, Master Plan Study and Full Design Services for New High School and Playfields, (90,000 sf), 850 Pupils

Tewksbury School District | Tewksbury, MA, District-wide Master Plan

Tewksbury Memorial High School | Tewksbury, MA, (218,000 sf), 1,100 Pupils

Turners Fall High School/Great Falls Middle School | Montague, MA, Renovations and Additions of the Existing Middle/High School (198,000 sf), 750 Pupils, Grades 7-12

Wareham Middle School | Wareham, MA, 114,000 sf renovations and 32,000 sf additions, 1,100 Pupils, Grades 6-8

Cole Middle School | East Greenwich, RI, New middle school (108,000 sf) for 680 pupils

Argenziano Community School | Somerville, MA

New 110,000 sf school on challenging urban site for 600 students in grades K through 8. Project completed in September 2007.

The Center School | Stow, MA, (98,000 sf), 600 Pupils, Grades PK-5

Alcott Elementary School | Concord, MA, Full Design Services for New Grades K-5 Elementary School, 500 Pupils (75,000 sf)

EDUCATION

Bachelor of Science in Architecture,
Limerick Institute of Technology,
Ireland

REGISTRATIONS

Massachusetts

CERTIFICATIONS

National Council of Architectural
Registration Boards (NCARB)

Massachusetts Public Purchasing
Official Program (MCPPO)

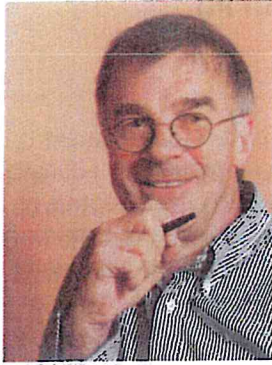
USGBC LEED Accredited
Professional

AFFILIATIONS

American Institute of Architects (AIA)

Boston Society of Architects (BSA)

Council of Educational Facilities
Planners International



EDUCATION

PhD in Architecture, University of Edinburgh, Scotland

Bachelor of Architecture, University of Oregon

FRANK LOCKER, PH.D

Educational Visioning Consultant

PROFILE

Honored as Planner of the Year by the Council of Educational Facility Planners International for his comprehensive planning approach, consensus building process, and state-of-the-art school design, Mr. Locker leads clients to position their schools for the long term future through visioning, master planning, educational program development, educational specifications and collaborative concept design.

A former college educator, certified facilitator, and registered architect, Frank bases his approach on research in effective learning. Mr. Locker is a frequent speaker at international, national, and regional school planning conferences, conceived and co-teaches the Learning Environments for the Future course at Harvard University, and produces the annual Project-Based Learning Conference, Boston area. He is an affiliate of the Partnership for 21st Century Schools, which is devoted to fostering and facilitating 21st century teaching and learning.

EXPERIENCE

Winchester High School | Winchester, MA, Feasibility Study, Renovations and Additions to 280,000 sf high school for grades 9-12 and approximately 1,300 students Consultant to SMMA

Needham Public Schools Master Plan | Needham, MA, Visioning for Elementary Master Plan & Leadership Team consultation

Wellesley Public Schools | Wellesley, MA, Visioning for High School Educational Specifications, and Middle School utilization analysis,

Chelmsford Public Schools Master Plan | Chelmsford, MA, Elementary and Preschool Master Plan

Sacramento City Unified School District | Sacramento, CA, Educational Visioning for K-12 Sustainable Master Plan

Randolph Public Schools | Randolph, MA, Educational Visioning for District-wide Master Plan

Billerica Public Schools | Billerica, MA, Educational Visioning for K-12 Master Plan

East Longmeadow Public Schools | East Longmeadow, MA, Educational Visioning for K-12 Master Plan

Duxbury Public Schools | Duxbury, MA, Visioning, Educational Specifications, and Staff Professional Development. Led Educational Visioning for new co-located high school and middle school, followed by development of Educational Specifications. He collaborated with the architect on developing building plans.

Franklin Public Schools | Franklin, MA, Franklin High School Visioning, Educational Specifications, and Collaborative Design

Forest Avenue K-2 Learning Center | Middletown, RI, Educational Planner for a district facility master plan and for the renovation of a wing of a 1960s elementary school. The renovation was developed as a collaborative, multi-age learning center supporting teachers working as a team, with varied learning spaces for multiple learning modalities, a motor activity/commons area, computer/science applied learning area, and a teacher planning center. Student behavior was markedly improved within months of move in date, state test score have gone up, and parents value the teacher collaboration.



EDUCATION

Bachelor of Arts, English, The Ohio State University

Master of Arts, Rhetoric & Composition, The Ohio State University

AFFILIATIONS

Council of Educational Facilities Planners International

TRACY HEALY, REFP

Enrollment Consultant

PROFILE

Tracy Healy is the current president of FutureThink. Previously, she served as a vice president at DeJONG and was one of its founding members. Tracy continues to focus on demographics and facility planning projects.

With a master's degree in English, experience in city and regional planning, and time spent teaching in the classroom, Tracy is well-equipped to meet the needs of clients. She combines over 18 years of experience with her desire to enhance learning environments for students around the world.

One major area of focus for Tracy is in projecting student enrollment for school districts involved with the Ohio School Facilities Commission. To date, projections for over 450 districts have been completed, including the six major urban districts: Columbus, Cleveland, Cincinnati, Akron, Toledo, and Dayton. District enrollments in Ohio range from less than 100 to approximately 50,000 students. Tracy has worked with the Ohio School Facilities Commission team to develop ten-year enrollment projections for school districts entering one of its many programs since 1998.

Tracy is involved with CEFPI, the Council of Educational Facility Planners, International. She currently serves on the Leadership Team for the Midwest/ Great Lakes Region and was the program co-chair of the 2009 regional conference held in Columbus. She has received several awards from CEFPI, including a Distinguished Service Award.

EXPERIENCE

Olentangy Local Schools | Ohio

Tracy has worked with Olentangy Local Schools, one of the fastest growing districts in the state of Ohio, since 1998. During that time, enrollment has increased from just under 5,000 students to over 18,000—an increase of over 260 percent. Each year, ten-year enrollment projections for the District are updated. In addition, Tracy has developed a build-out scenario as well as projections by housing subdivision for the elementary and middle school grades. She has also assisted in ongoing redistricting activities.

Ohio School Facilities Commission

In addition to projecting enrollment, Tracy has also provided a variety of educational planning services to OSFC. A sampling of these services includes: 21st Century Learning Environments Research & Planning Process, Survey of OSFC Districts regarding Community Use of Facilities, Switzerland of Ohio Local School District Community Engagement Process, and Educational Specifications for the Ohio School for the Deaf and the Ohio State School for the Blind.

Chelmsford Public Schools | MA

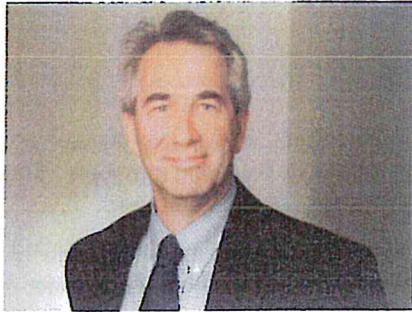
Reading Public Schools | MA

Northwood Schools | NH

Baltimore County Public Schools | MD

Queen Anne's County Public Schools | MD

Newark Public Schools | NJ



ALEX C. PITKIN, AIA, NCARB

Project Architect

PROFILE

Mr. Pitkin serves as Director of SMMA's Institutional Practice Group, with nearly 25 years of experience in the design of K-12 facilities at all grade levels.

Most recently, Mr. Pitkin has served as Design Principal on new high schools for Hudson, Bridgewater-Raynham, Quincy and Wellesley, MA; schools whose public access, plan organization, and program spaces have been shaped to serve a broad range of Community needs and interests in addition to their primary function for Grades 9-12.

His work has been recognized by an American Institute of Architects (AIA) Honor Award for the Science and Technology Center at Noble & Greenough School, the 2006 KnowledgeWorks Foundation Award for the Hudson High School, and the Council of Educational Facilities Planners International (CEFP) Northeast Region Design Concept Award for Planning and Design Excellence honoring Quincy High School.

EXPERIENCE

High Plain Elementary/Wood Hill Middle School | Andover, MA, Full Design Services for New Elementary and Middle School, (176,500 sf), 1,000 Pupils, Grades K-5 Elementary and Grades 6-8 Middle Schools

Hamilton-Wenham Regional School District | Wenham, MA, District-wide Master Plan

East Longmeadow School District | East Longmeadow, MA, District-wide Master Plan

North Middlesex Regional High School | Townsend, MA, feasibility study of 192,000 sf high school for 870 students

Alcott Elementary School | Concord, MA, Full Design Services for New Grades K-5 Elementary School, 500 Pupils (75,000 sf)

Thoreau Elementary School | Concord, MA, Full Design Services for new Grades K-5 Elementary School, 500 pupils (70,000 sf new, 10,000 sf existing)

Upper Middle School | Marblehead, MA, Conversion from former existing High School, 540 Pupils, Grades 7 - 8 (150,000 sf), Full Design Services

McGovern Elementary School | Medway, MA, Feasibility Study and Full Design Services for New Elementary School (77,000 sf), 500 Pupils, Grades PK-5

Noble & Greenough School | Dedham, MA, Science and Technology Center (27,000 sf) and New Middle School Arts and Sciences Building (22,000 sf)

Quincy High School | Quincy, MA, New Comprehensive High School, 1,500 Students, Grades 9-12

Argenziano Community School | Somerville, MA

New 110,000 sf school on challenging urban site for 600 students in grades K through 8. Project completed in September 2007.

Turners Fall High School/Great Falls Middle School | Turners Falls, MA, Renovations and Additions of the Existing Middle/High School (198,000 sf), 750 Pupils, Grades 7-12

Wellesley High School | Wellesley, MA, New Comprehensive High School (280,000 sf), 1,500 Pupils

EDUCATION

Master of Architecture, University of Colorado at Denver

Bachelor of Arts, State University of New York at Buffalo

REGISTRATIONS

Connecticut, Massachusetts, New Jersey, New York, North Carolina, Rhode Island

National Council of Architectural Registration Boards (NCARB)

Massachusetts Certified Public Purchasing Official Program (MCPPO)

**ERIN PRESTILEO, PE***Civil Engineer / Site Selection Specialist***PROFILE**

Ms. Prestileo works as a designer in the Civil Engineering Department at SMMA. Her responsibilities include design, site layout, grading, utility design, storm water management design, sanitary system design, and plan detailing.

EXPERIENCE

West Springfield High School | West Springfield, MA
(254,000 sf), 1380 Pupils, 68 acre site

Wellesley High School | Wellesley, MA
Master Plan, Feasibility Study, and Design of New Comprehensive High School (280,000 sf), 1,500 Pupils, four off-site projects all including work within riverfront areas and the floodplain

Tewksbury Memorial High School | Tewksbury, MA
(218,000 sf), 1,100 Pupils

Winchester High School | Winchester, MA
Feasibility Study, Renovations and Additions to 280,000 sf high school for grades 9-12 and approximately 1,300 students

North Middlesex Regional High School | Townsend, MA
Feasibility Study, Renovations and Additions of the Existing Middle/High School (198,000 sf), 750 Pupils, Grades 7-12

Quincy High School | Quincy, MA
New Comprehensive High School, 1,500 Students, Grades 9-12, wetlands and coastal floodplain work

Marblehead Upper Middle School | Marblehead, MA
Conversion from former existing High School, 540 Pupils, Grades 7 - 8 (150,000 sf), Full Design Services

Ayer-Shirley Regional High School | Ayer, MA
Feasibility Study and 145,000 sf addition/renovation to High School for 495 students in grades 9-12.

Argenziano Community School | Somerville, MA
New 110,000 sf school on challenging urban site for 600 students in grades K through 8.

The Center School | Stow, MA
98,000 sf renovation/addition to a elementary school serving 600 pupils, grades PK-5, MA-CHPS

Parker Elementary School | Billerica, MA
Full design services for new 89,000 sf elementary school serving 500 pupils in grades 1-5. School received MA-CHPS verification.

EDUCATION

Bachelor of Science in Civil Engineering, Worcester Polytechnic Institute

REGISTRATIONS

Massachusetts

AFFILIATIONS

American Society of Civil Engineers - Associate Member

Boston Society of Civil Engineers



PATRICK L. WEYGINT, RCDD

Data / Communications / Security Specialist

PROFILE

Mr. Weygint is an Registered Communications Distribution Designer with more than 25 years of accumulated expertise in the design and use of communications and network technology systems. He has provided voice, data and video infrastructure solutions for numerous medium and large scale facilities throughout Massachusetts. Mr. Weygint has served as a video producer and manager of desktop publishing and the manager of video conference services at MIT's Center for Advanced Educational Services (CAES).

Mr. Weygint has presented on communications design and techniques and on MEP/S 101. He is accustomed to presenting at client interviews and presentations, including several conducted at MIT.

EXPERIENCE

Bancroft Elementary School | Andover, MA, Full design services for new elementary school, 106,486 sf, 680 pupils, Grades K-5

Wellesley High School | Wellesley, MA, New Comprehensive High School (280,000 sf), 1,500 Pupils

Parker Elementary School, Feasibility Study | Billerica, MA, Includes all alternatives for final design program, space summary, budget statement for educational objectives, and a proposed total project budget.

Quincy High School | Quincy, MA, New Comprehensive High School, 1,500 Students, Grades 9-12

Sharon High School | Sharon, MA, Feasibility Study

North Middlesex Regional High School | Townsend, MA, feasibility study of 192,000 sf high school for 870 students

Grafton High School | Grafton, MA, (186,000 sf), 900 Pupils

Tewksbury Memorial High School | Tewksbury, MA, (218,000 sf), 1,100 Pupils

West Springfield High School | West Springfield, MA, (254,000 sf), 1380 Pupils

Armed Forces Reserve Center | Ft. Devens, Ayer, MA, 285,000 sf, three buildings design-build

Armed Forces Reserve Center | Rutland, VT, 50,000 sf training building, 5,000 OMS building and full site development

East Greenwich School District | East Greenwich, RI, New Middle School and Renovations to Existing High School

East Longmeadow School District | East Longmeadow, MA, District-wide Master Plan

East Providence Schools Facilities Assessment Study | East Providence, RI, Study to identify and verify the district's infrastructure needs; develop and recommend solutions for the district's aging facilities.

EDUCATION

Bachelor of Arts, Empire State College

AFFILIATIONS

Member Building Industry Consulting Service International, Inc. (BICSI)

Registered Communications Distribution Designer (RCDD)



*Parker Elementary School
Billerica, Massachusetts*

Project Understanding & Approach

Our approach to the evaluation of the Waltham elementary, middle, and high schools is based on your Request for Qualifications, and will include the following schools that make up the Waltham School District:

- MacArthur Elementary School
- Fitzgerald Elementary School
- Plympton Elementary School
- Northeast Elementary School
- Stanley Elementary School
- Whittemore Elementary School
- Kennedy Middle School
- McDevitt Middle School



*Archie R. Cole Middle School
East Greenwich, Rhode Island*

The Waltham High School will also be included in the Study as advised by the Committee in regard to an increasing school population throughout the City and its impact on the High School.

We understand the study goals to be as follows:

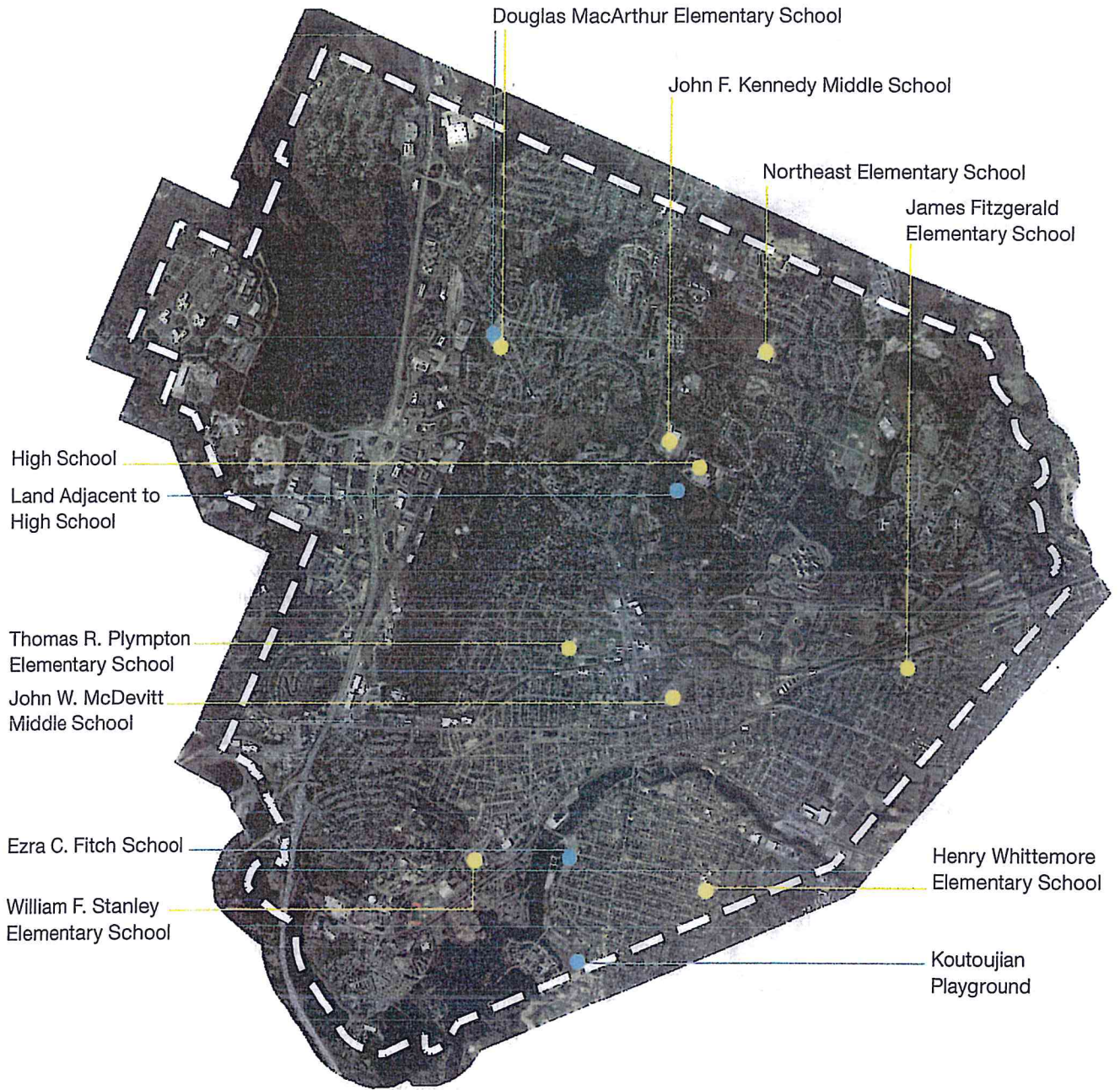
- Clearly define project objectives, stakeholders to be engaged, the process for the evaluation study, identifying key milestones, timeline, and deliverables.
- Conduct a visioning study to identify educational and community use goals to equip the Waltham School District so as to promote the 21st Century learner.
- Incorporate data from all previous studies so as not to duplicate previous efforts. This shall include updating or validating data as may be appropriate.
- Formulate space utilization options and recommendations of all schools as appropriate.
- Provide a comprehensive facilities utilization plan that provides a set of alternative options to respond to rising enrollments and to the challenges of 21st Century education.



*Swampscott High School
Swampscott, Massachusetts*

If selected, we will, as appropriate, further tailor our approach and our services to meet the objectives of the City of Waltham, Superintendent of Schools, and the Waltham School Committee.

The description and tasks to be performed in your Request for Qualifications is well-focused and follows the outlines of the majority of school needs studies which SMMA has conducted for many other Massachusetts communities and will further customize for Waltham.



Legend:

- Available Site for Optional Analysis
- Existing School Sites



*Quincy High School
Quincy, Massachusetts*

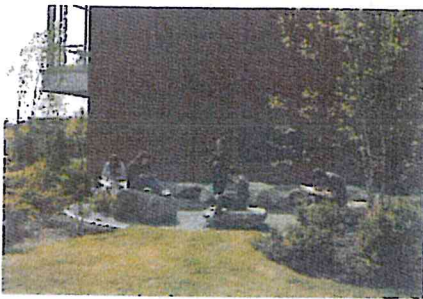
Project Approach / Work Plan

Task 1 — Project Definition

- Meet with School Committee and Administration to confirm project objectives and timelines. Identify stakeholders to be engaged. Set progress review meetings for all tasks through completion of services and submission of final reports for all planning phases.

Task 2 — Educational Program Review

- Although the primary focus of the school study is to identify options to accommodate a rapidly rising enrollment in the Waltham schools it may be valuable for the study committee to participate in a concise overview of the challenges and opportunities of 21st Century education as they impact the way “space” is used in the school of the future — and of today.
- Identify key “stakeholders” or focus groups for input to the development of an educational program for Waltham. These should include parents, students, teachers, administrators, school staff, and elected officials. Meet to discuss and document how education will be delivered in the future and the educational environments needed to accomplish these goals.
- Develop an agenda for public meeting(s) with the above groups to identify the key challenges of education in the 21st Century to which the community might respond. Circulate to all previously identified stakeholders.
- Conduct “visioning” session (optional Frank Locker-facilitated one to three full-day sessions) with the stakeholder groups to match challenges against strategies and to identify the degrees to which each level of the Town’s public education is responsive, such as:
 - Collaborative application of knowledge to problem solving i.e. “project based learning”;
 - Synthesis of once separate subjects to reflect real world interdependence such as that between Science, Technology, Engineering, and Mathematics (“STEM”) or between English, Social Studies, History, and Foreign Languages;
 - Recognition of differing individual aptitudes for learning without stigmatization of the individual child;
 - Understanding that school is as much about socialization as it is about learning. Along with “leaving no child behind” we must not “lose” any child along the way.
 - New ways of defining “Educational Space”



*Grafton High School
Grafton, Massachusetts*



*Parker Elementary School
Billerica, Massachusetts*



*Grafton High School
Grafton, Massachusetts*

Task 3 — Knowledge Consolidation

- Obtain all existing original and as-built drawings of the Waltham Public Schools, engineering surveys and reports, precedent studies and investigations.
- Site review to include available area for additions or new buildings and impact on neighbors.

Task 4 — Formulate Space Utilization Options / Recommendations

- Obtain from Waltham School Department projected enrollments (revised 2014-2024) for total system and each individual school based on present distinctions
- Develop options including alternative grade configurations site and building utilizations for each school
- For each option test such spatial adjustments against MSBA space standards and identify means of accommodation. Schedule meeting for School Committee and Administration as well as MSBA review.
- Develop summary of spaces for each school and each option to consolidate existing space and reprogrammed space acceptable to MSBA and meeting Waltham’s goals for 21st Century education.
- Confirm projected population for each option based on selected summary of spaces. Identify any variations in square footage in response to selected program.
- Based on review of projections and experience with other school districts, assist the Waltham School Department in projecting enrollments for each option including any potential grade reconfiguration or school consolidation.
- Formulate space utilization options and recommendations for all buildings and sites.



*Parker Elementary School
Billerica, Massachusetts*



*Bridgewater-Raynham Regional High School
Bridgewater, Massachusetts*



Task 5 – Development of Comprehensive Facility Utilization Options & Plan

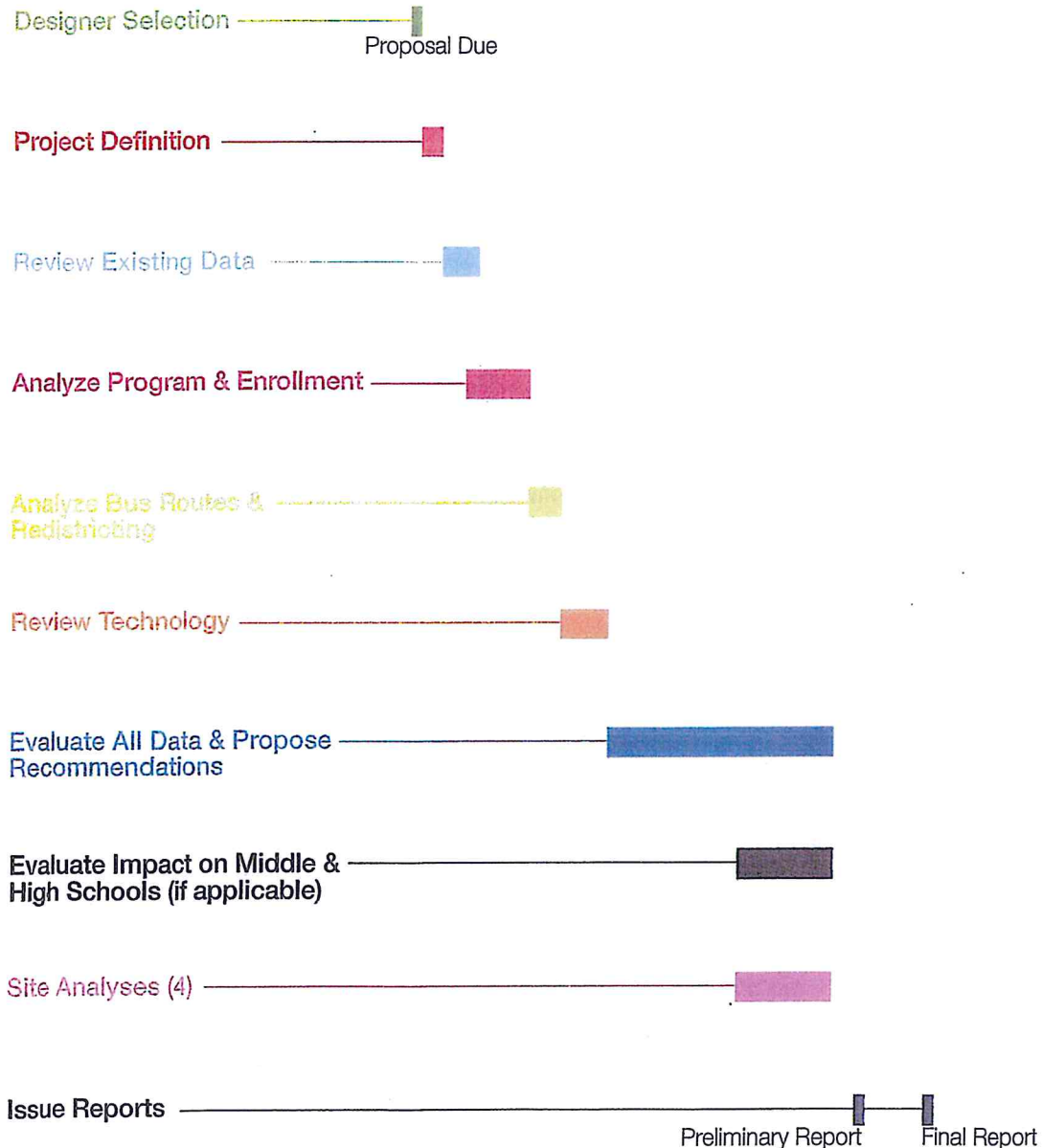
- Propose options to meet the approved space requirement through renovation/addition or new construction including grade re-configuration or consolidation in each of the schools and the High School
- Provide for each option:
 - A Conceptual Site Plan for schools involving additions
 - A Summary of Spaces document
- Provide order of magnitude cost assessment for each option.
 - Estimate of project costs for each option to include all costs normally a part of Massachusetts school project:
 - Construction costs (“brick and mortar”)
 - Soft costs such as fees, furnishings, and equipment, clerk of works, project manager, contingencies, etc.;
 - Relocation and phasing costs as applicable.
- Assist the stakeholders in selecting most appropriate option. This may include renovations and additions, or new construction, including grade re-configuration, consolidation or re-districting.
- Assist the School Committee and Administration in resolving “differences” in approach or detail between various parties or stakeholders involved.
- Provide a summary of recommendations to the School Committee and Administration for review and approval. Incorporate comments and recommendations as proposed.
- Assist the School Committee and Administration review findings with Town Boards and Commissions as identified.
- Prepare graphic and narrative material for public presentations by the School Committee and Administration as requested.
- Incorporate all relevant information and recommendations included into the final Evaluation Study.



Project Process

We anticipate the following milestones for the Evaluation:

PROJECT MILESTONES



Notes:

The above diagram outlines a process that we anticipate. This process will be developed into a calendar schedule in coordination with the City of Waltham, Waltham Public Schools Administration and School Committee's expectations and goals.



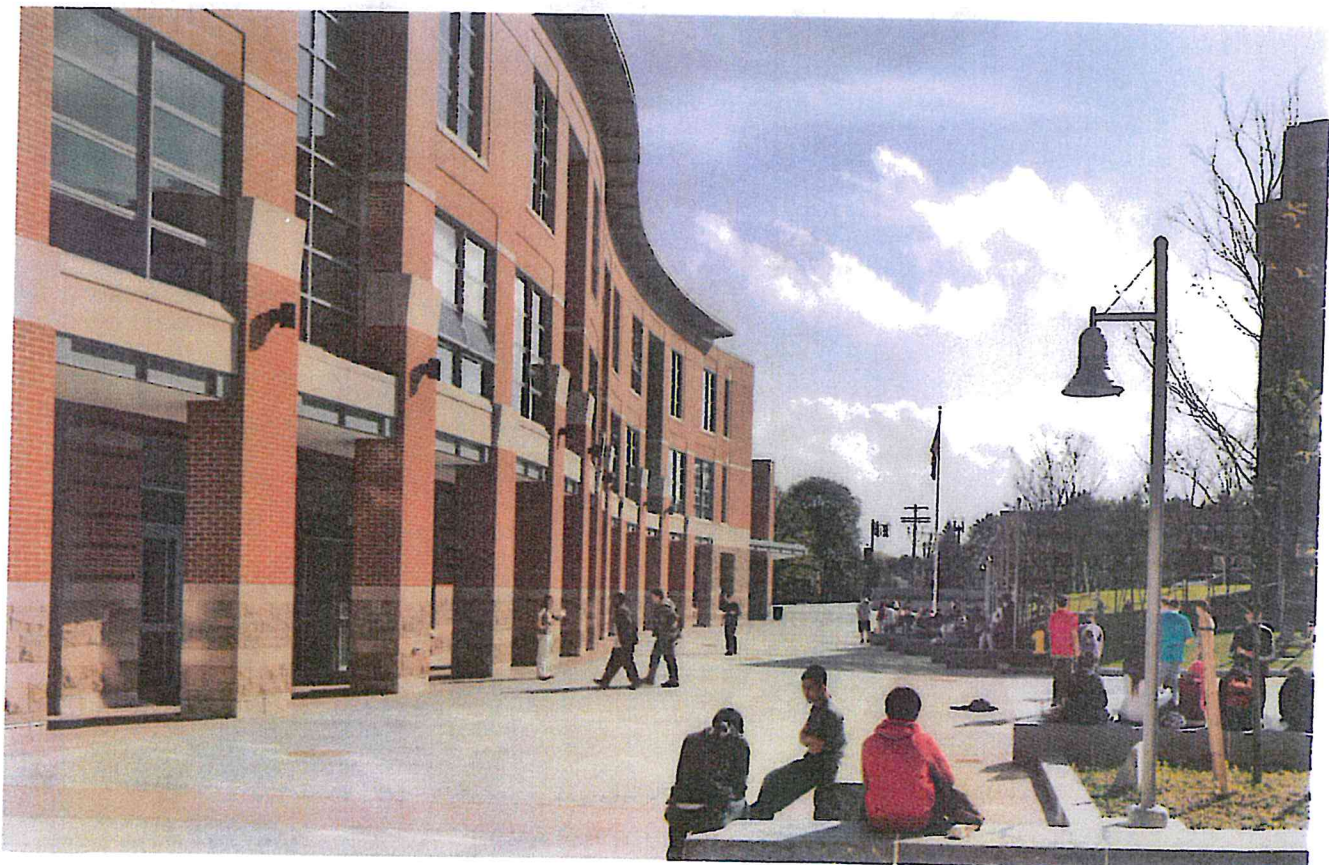
Specialized Experience: 21st Century Education

SMMA's Educational Planning Group provides expertise in the planning, design, and construction administration of educational facilities serving all grade levels, from pre-school through Grade 12.

In the past decade, SMMA has provided these design services on multiple school projects from early feasibility studies and site selection to completion of the finished project.

Although each of our school projects brings a unique set of client expectations and design challenges, SMMA has identified key issues that have shaped our approach to these projects - critical experience we will bring to your project.

- How can Waltham's schools best respond to new modes of learning at every age level?
- How can we integrate technology as an essential and flexible tool in the learning process?
- How can we adapt Waltham's schools to respond to the developmental needs of the individual student as he/she transitions from early childhood through adolescence and young adulthood?
- How can we design environments that meet the need of all learners, especially those with special needs?
- How can we achieve sustainability and conservation of the earth's finite resources in the programming, construction, and long-term operation of our schools?
- How can a public school, often the major investment in a community, best serve all its citizens?





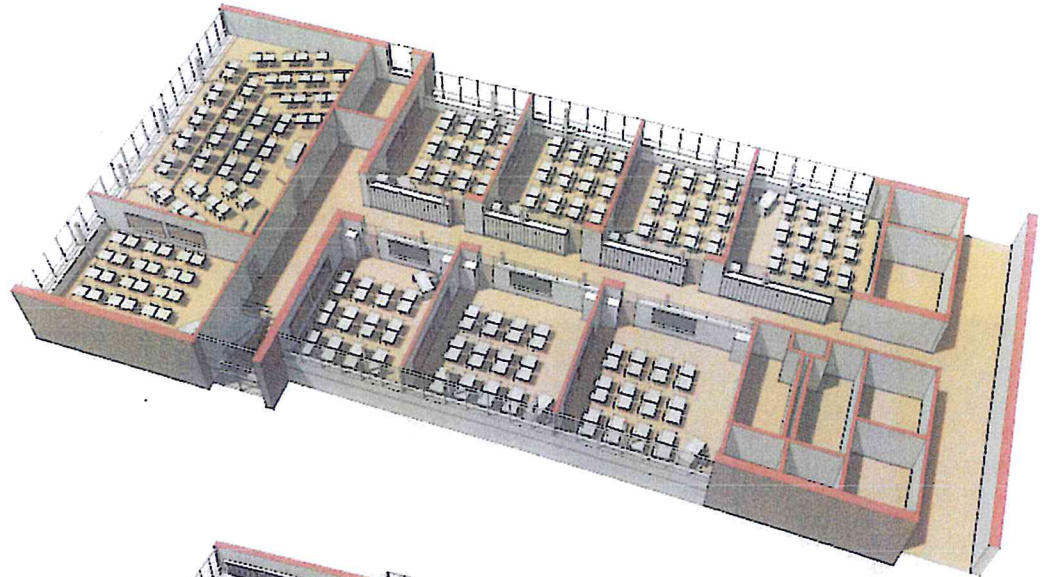
Grafton High School "Five-sided Classroom" promotes flexible teaching layouts

New Methods of Teaching and Learning

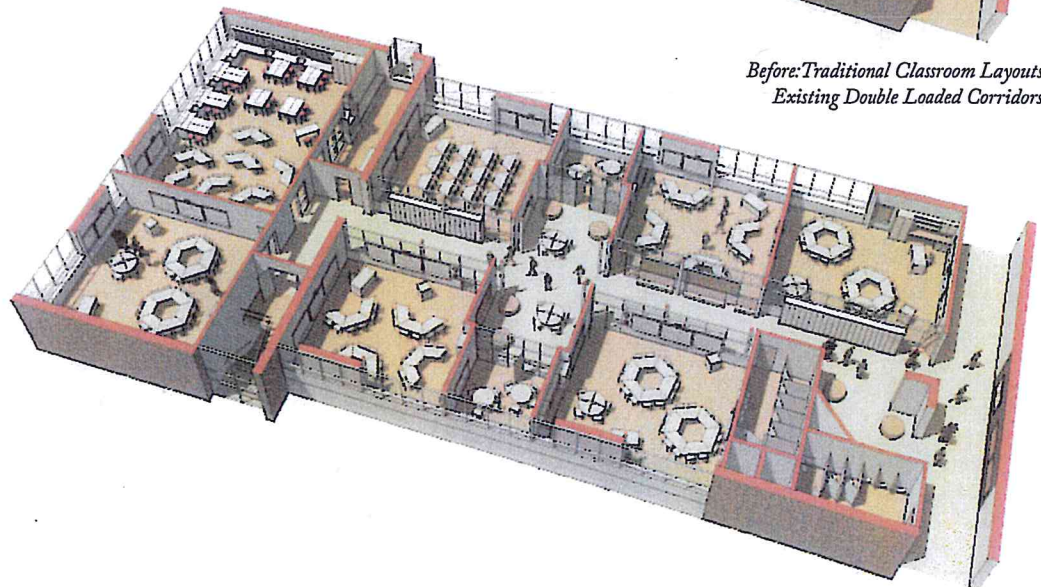
We have a national mandate to better prepare young people for the challenges of higher education and work beyond K-12, for adaptability to career changes during one's working life, and for the satisfaction of lifelong learning.

As a result, school curricula is shifting from a traditional teacher-focused, subject-driven separation of disciplines (mathematics, language, science, etc.) to a more self-directed, student-centered, multidisciplinary approach. Here the student combines academic skills to solve real life problems involving investigation, analysis, computation, and communication. In this way, traditional academic subjects are made relevant to the world and the student is better prepared to meet its challenges.

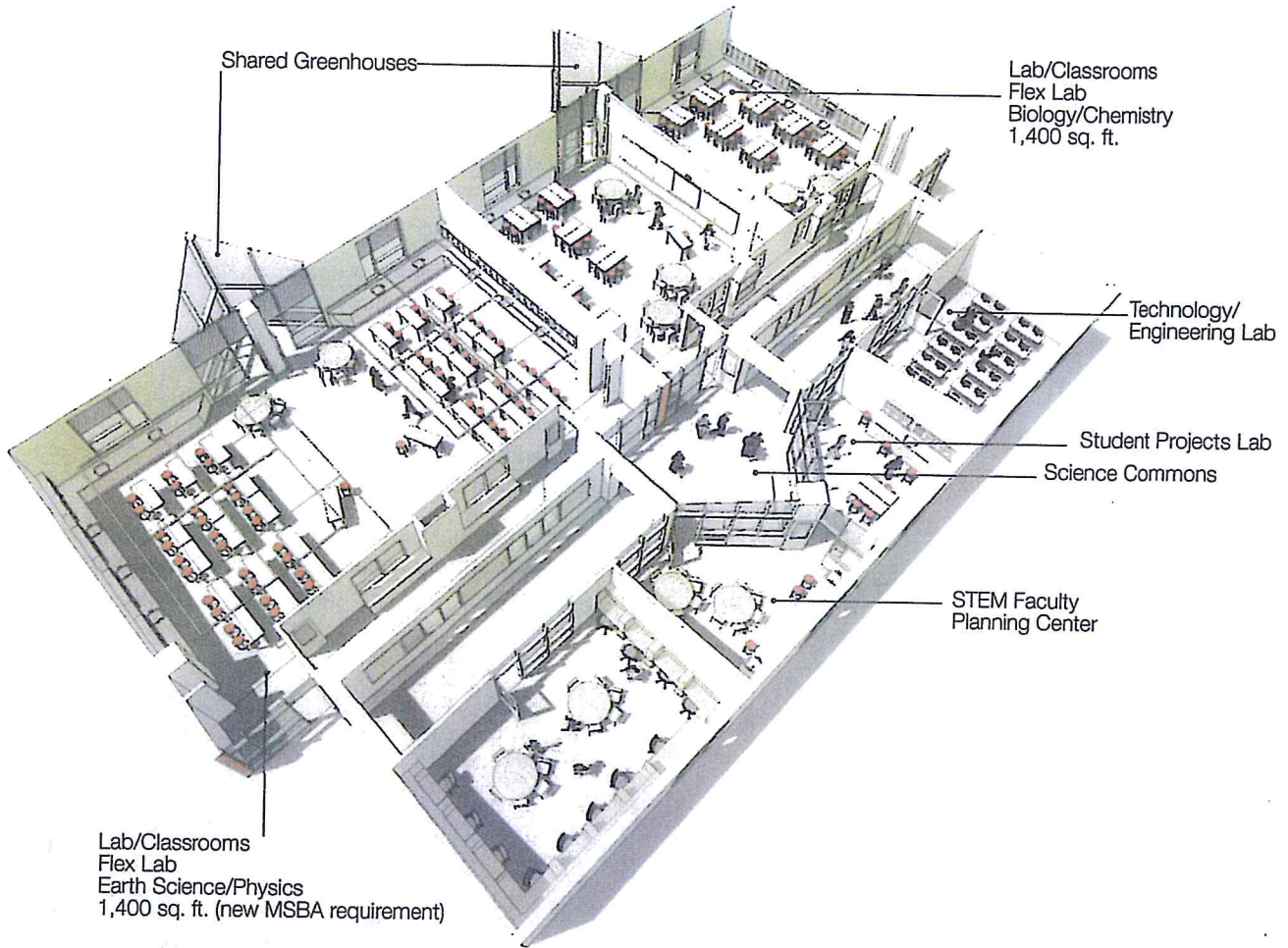
Within the classroom, "lectures" have been replaced by "projects", and interaction between teacher and pupil has shifted from *passive* to *active*. Classroom space within our new schools must be shaped and equipped to respond flexibly to many more learning options than the traditional "seats in a row" layout that most of us remember from our own school days.



Before: Traditional Classroom Layouts Existing Double Loaded Corridors



After: Flexible Classroom Layouts Renovated for Collaborative, Interdepartmental Learning



S.T.E.M. and the Integration of Science, Mathematics, Engineering, and Technology Spaces

Designing high school science spaces to accommodate 21st Century learning strategies and techniques requires a re-evaluation of existing physical spaces and adjacencies to meet the demand for scientifically literate students with lifelong inquisitiveness and learning skills. We have addressed these issues on each of our recent high school projects, assisting clients to enhance their “science” facilities to meet new, complex program demands. Whenever possible our planning reflects S.T.E.M. principles, which group science, technology, engineering, and mathematics studies in a mutually supportive classroom arrangement.



Recent SMMA Science Classrooms with “Flexible” Interiors

S.T.E.M. and S.T.E.A.M. (the Inclusion of Arts)

SMMA has recently programmed additions and renovations for three Massachusetts high schools with STEM and STEAM programs: Ayer-Shirley Regional, Monument Mountain, and Winchester. STEM and STEAM, the integration of the Arts within the STEM program, are rapidly being recognized as a critical organizing element for high school curriculum.

We will study and evaluate design opportunities for creating 21st Century science spaces within the program of spaces developed for a revitalized high school while recognizing that other options for “connecting” related subjects may exist in the location of classrooms for English, History, Social Studies, and Foreign Languages.



*Large Group Instruction, Grafton High School
Grafton, MA*

SMMA's "Communities of Learning" plan for Hudson High School was selected by the MSBA as a model school. It has been interpreted in the recently completed Grafton and Tewksbury High Schools, as well as the ongoing West Springfield High School.



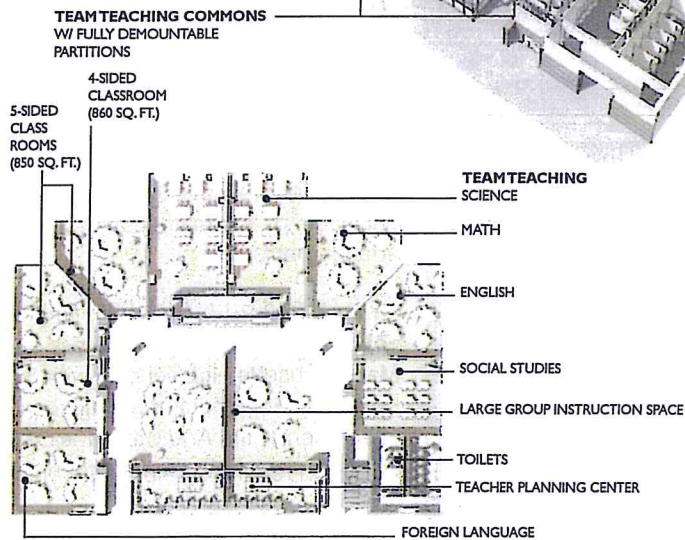
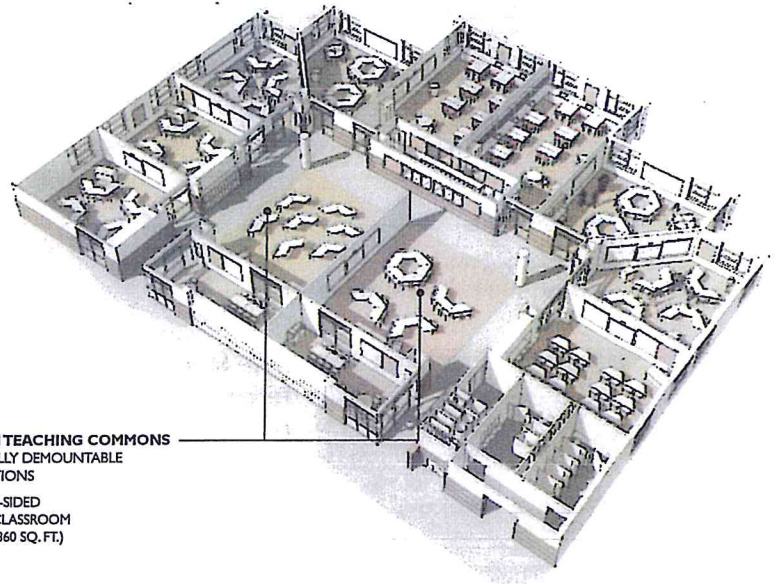
*Flexible Science Lab, Wellesley High School
Wellesley, MA*

Communities of Learning / Concern for the Individual

The "socialization" of each student toward becoming a responsible member of a democratic society is probably the most important mission of our nation's schools. Most schools, whether elementary, middle, or high school, must be of a certain critical size to offer the breadth of facilities and programs essential to learning at each grade level. The challenge for both the designers and staff of these schools is to keep students from becoming "lost" as they transition from home to school, and from the lower grades to larger school environments.

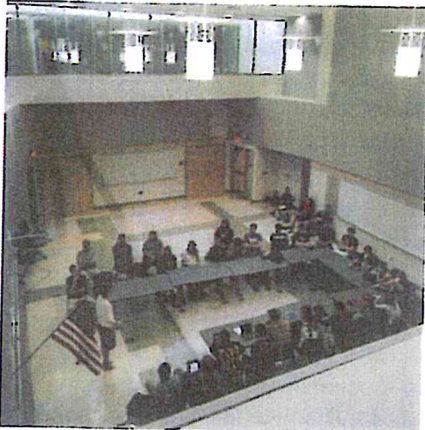
As a result, SMMA has explored a variety of school design strategies appropriate to the age level of the student. These include "neighborhood" clusters of elementary classrooms grouped around their own common area, pupil support spaces, and toilets; middle school suites of core subjects and science classrooms with dedicated teacher planning spaces for teams of 75-100 students; and, at the high school level, literal "school-within-a-school" layouts that might group students by career path or academic major together with a satellite group of school counselors and guidance personnel.

Each of these design strategies has a common goal, which is to create a learning environment in which the individual student - at any age shares a supportive bond with his/her peers and with a "family" of teachers and staff.



Communities of Learning: One Option

The "Communities of Learning" module with the flexible Large Group Instruction Space at its center. This configuration shows the center space being used as open student commons space with the center demountable partition in place.



Large Group Instruction Spaces

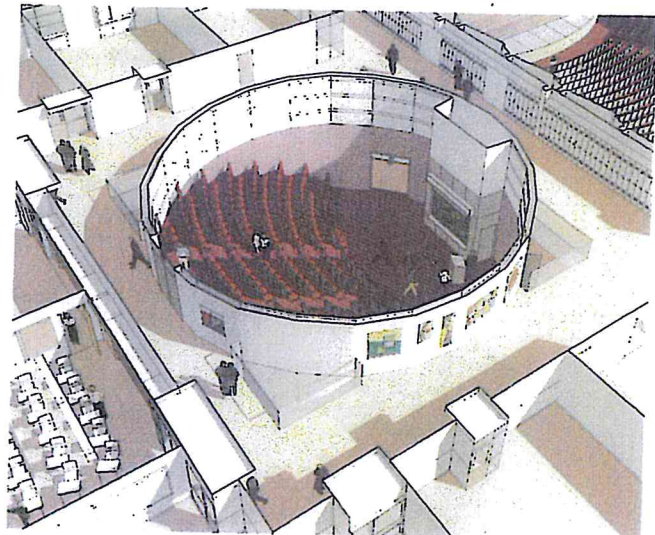
The Large Group Instruction space at the center of each “Community of Learning” module can be used in many different ways. Uses can include: a teacher planning center, technology laboratory, special education center, or ESL resource site. At the Hudson High School, one of the Large Group Instruction spaces has been developed as a “mini-theatre” - and is a widely used space for staff and student programs, as well as often being used as a community space and revenue generator after school hours. During our schematic design work with you, we will explore what Large Group Instruction uses might best suit your educational program.

Other school program uses that have been adapted to the “Large Group Instruction” space include:

- **Computer Labs**
Daylight not required, can be co-located with teacher planning center
- **Foreign Language Lab**
Co-located with foreign language department or ELL
- **TV Studio and Classroom + Editing Suite**
Adjacent to the performing arts and auditorium
- **Robotics Laboratory**
Located at the center of a Science and Technology academy



*Mini-Theatre,
Quincy High School*



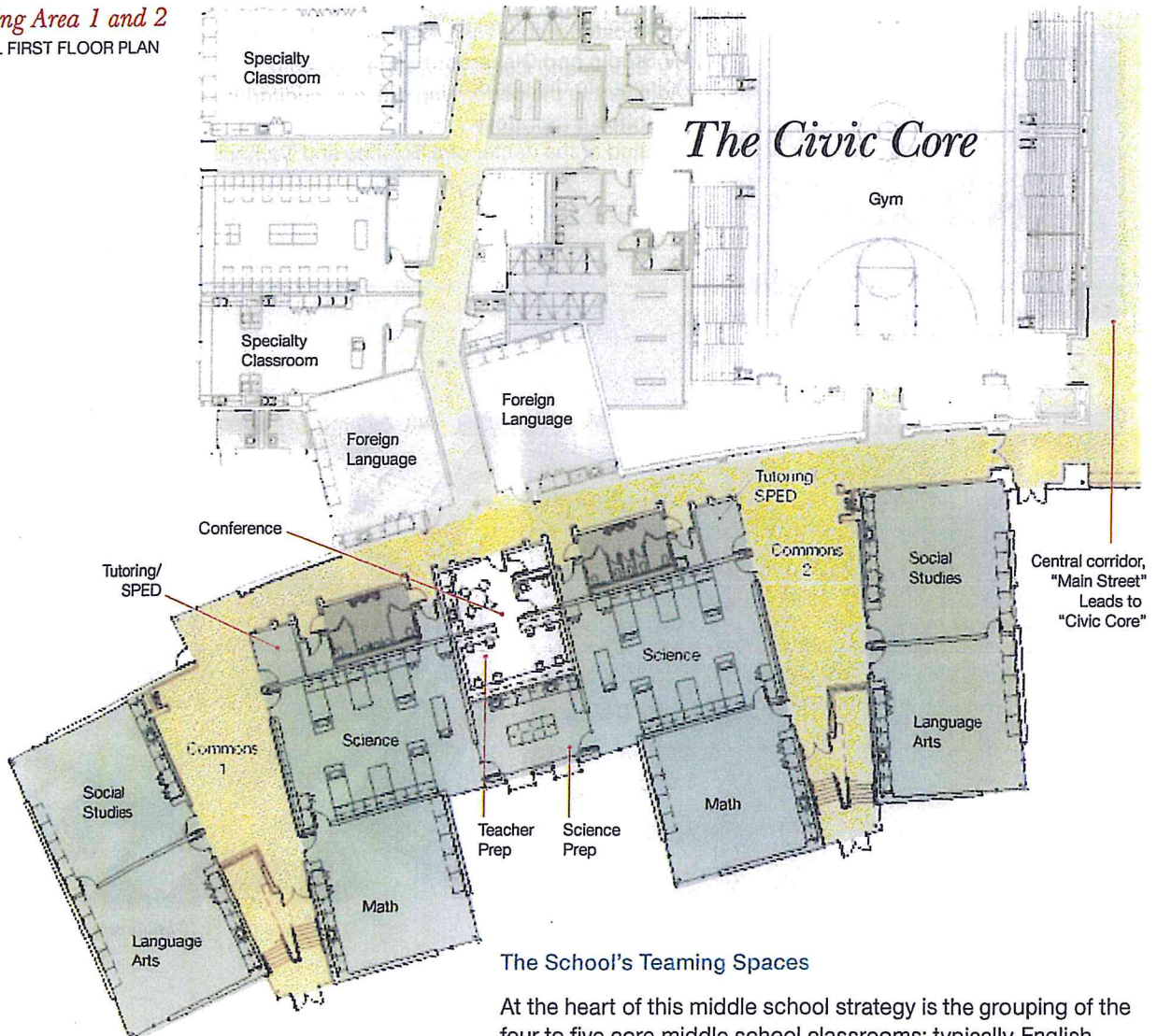
*Mini-Theatre with art gallery display,
West Springfield High School*

The 21st Century Middle School

In a succession of middle school projects designed over the past two decades, SMMA has developed a prototypical arrangement of the spaces which form the “home” for the individual middle school team of teachers and students within the larger school. At the heart of this strategy is the “team” grouping of the four to five core middle school classrooms; typically English, Math, Science, Social Studies; around a shared Commons or group space—usually a widened exit corridor off the main corridor leading to the “civic core” of the school: its library, auditorium, gymnasium, and cafeteria. Foreign Language classrooms are typically shared between teams and located outside of, but adjacent, to the teaming spaces.

In reinforcing this concept of a “school-within-a-school,” each team is provided with appropriate smaller spaces for teacher planning, tutoring, SPED, and parent conferences. Toilet rooms, which can often be the source of behavioral problems in a larger setting, are located as “team” spaces close to the team commons. If the “turf” for each team can be seen as its neighborhood within the larger school, the central spaces of the school—its library, auditorium, cafeteria, and gymnasium—comprise the “civic core” of the middle school and should be linked as closely as possible to the teaming areas to reduce travel time and “risky” behavior between one’s neighborhood of classrooms and the more public center of the school.

Teaming Area 1 and 2
PARTIAL FIRST FLOOR PLAN



The School’s Teaming Spaces

At the heart of this middle school strategy is the grouping of the four to five core middle school classrooms; typically English, Math, Science, Social Studies; around the shared Commons or group space.

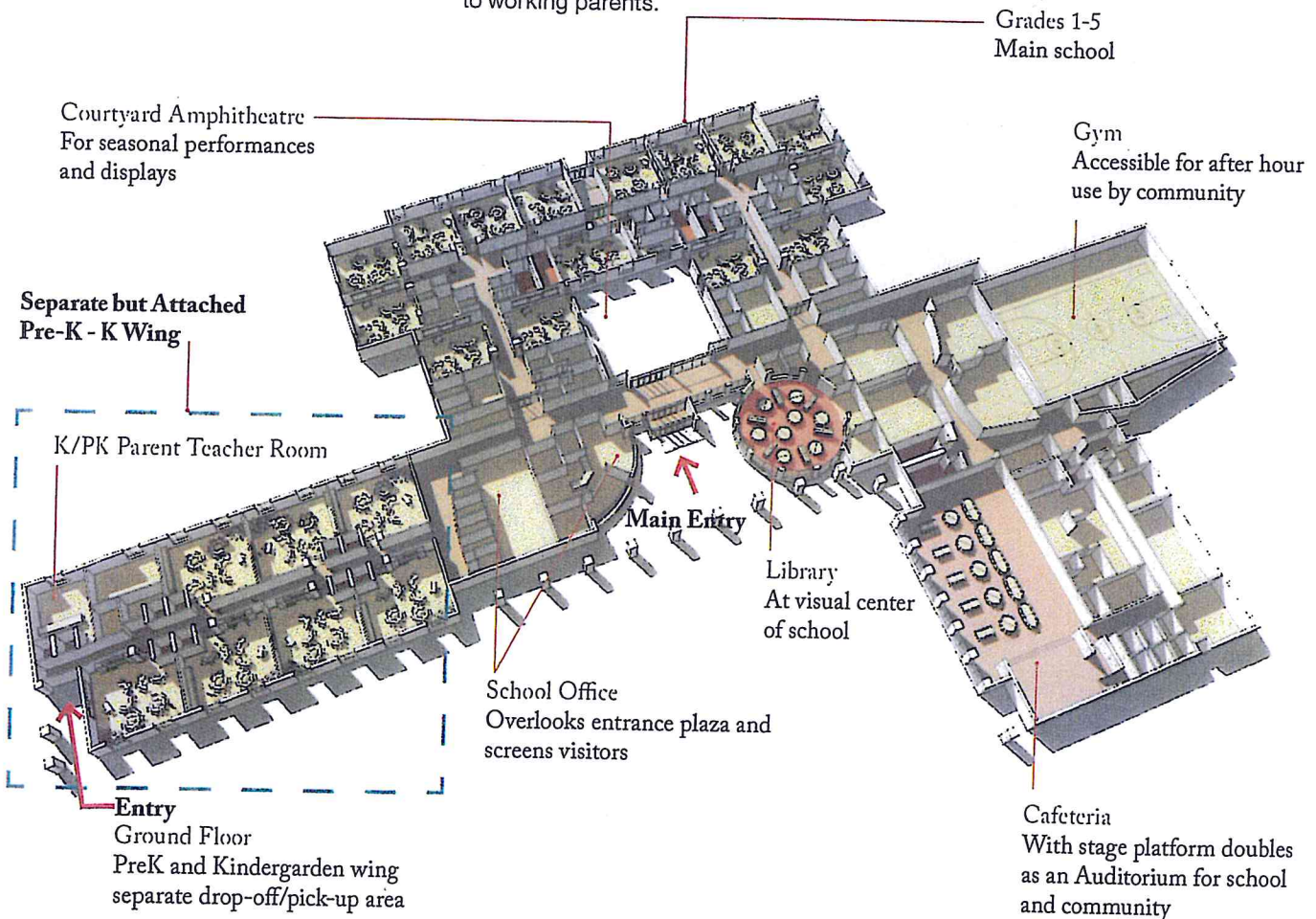
The Integrated Pre-K / Elementary School Complex

The small scale elementary school is increasingly a thing of the past. As elementary schools have grown in both resources and size, care must be taken to ensure an appropriately intimate scale for the age groups they serve.

To create an intimate sense of place for young children, and to limit redundant corridor travel, classrooms are grouped into neighborhood clusters of like grades, each with their own toilets, SPED, tutoring, and teacher planning rooms.

In consolidating these older but separate schools in Salisbury, Massachusetts, SMMA programmed and designed a new school complex for grades Pre-K through 6, with an autonomous Pre-K through Kindergarten wing separate from but physically connected to the main school.

Features include a drop-off and parking area for Pre-K through Kindergarten parents separate from the main entrance, a parent/teacher conferencing area and directors office, a “motor room” for indoor active play, and seven 1,200 sf classrooms with in-room toilet. During the summer months, the Pre-K through Kindergarten wing can be operated independently of the main school — a benefit to working parents.



*Salisbury Memorial Elementary School, Salisbury, Massachusetts
 Grades Pre-K to K
 Grades K-6
 850 Students*



*Auditorium Renovation—BEFORE
Turners Falls High School*



*Auditorium Renovation—AFTER
Turners Falls High School*



*Photovoltaic Panels Supplement Conventional Fuel Sources
Turners Falls High School*

Sustainable School Design

It is clear that the earth’s resources are finite. It is equally clear that action must be taken now to preserve these resources for future generations. This is the focus of SMMA’s sustainable or “green” design initiatives from our initial design concepts through the selection of materials and infrastructure systems intended to extend long-term use and improve efficiency.

In response to the *Massachusetts’ Green Schools Initiative*, a pilot program of the Massachusetts Technology Collaborative and the *Renewable Energy Trust (RET)*, SMMA has assisted its school clients in integrating green design into the program for their schools.

SMMA’s renovation and addition of the regional high school/middle school in Montague, MA, was one of 10 schools selected by RET for designation as a *Massachusetts Green School*, receiving over \$500,000 for additional construction funding and study grants. Sustainable elements include increased daylighting of teaching spaces, heat recovery from exhaust classroom air, energy conserving lighting and plumbing fixtures, and rooftop photovoltaic installation to heat the water in the school’s indoor pool.

Similarly, SMMA assists each of its K-12 clients in securing Green Design grants for their projects. Our mutual goal is to maximize the value of sustainable initiatives in the design, construction, and operation of school facilities.

Classroom Air Supply — the Key to Better Academic Performance

We know how much healthy air quality is an issue for communities today. One sustainable design approach we would recommend incorporating in the design of a new or renovated school is **Displacement Air Ventilation System**. SMMA has used “Displacement Ventilation” as a preferred HVAC system in a number of recent schools. It provides a more comfortable environment with improved indoor air quality to the occupants, while being more energy efficient to operate. It also provides an inexpensive way to cool spaces. It can provide either partial air conditioning or full air conditioning and can be coupled to multiple types of heating and cooling sources, from geothermal to conventional gas fired systems.

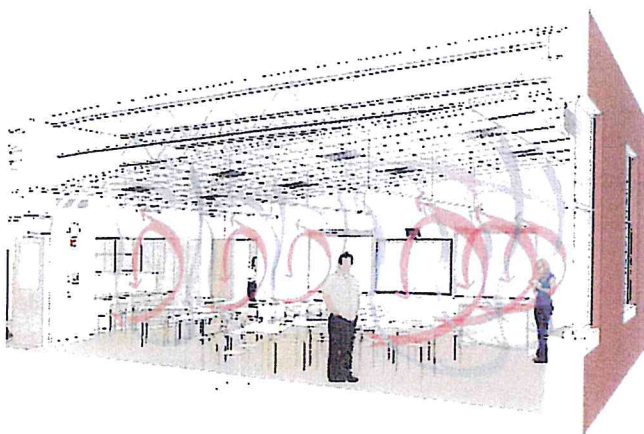


Diagram of air flow in a conventional air system.

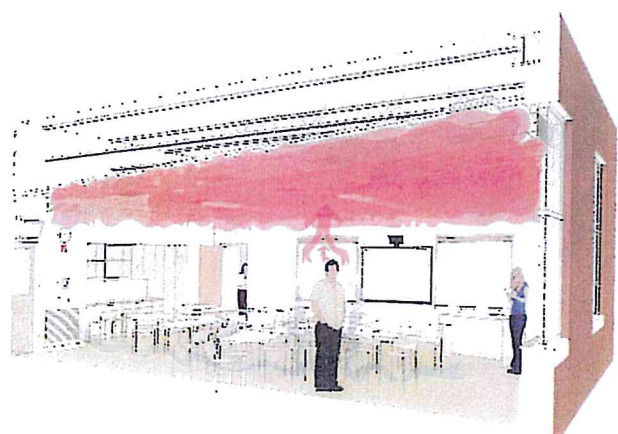


Diagram of air flow in a displacement air system.

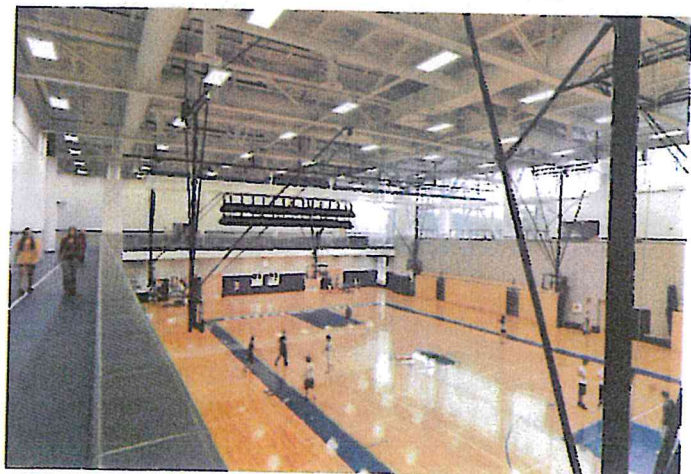
- Lower energy use
- Tempured air
- Improved air quality

The School As Community Resource

Public schools at every grade level are often the most visible symbol of the community, whether that be at the scale of the neighborhood, town, or city. As such, schools should serve their daytime population of students and teachers as well as a broader community on interests with the potential for active use well beyond the school day and school calendar.

In planning our high schools, the Building Committees are comprised of a broad constituency representing community recreation, adult education, performing arts, child-care, elderly and handicapped affairs, and town government.

As a result, each new school drew broad support from the community in its funding. And now it serves as a diversified community resource as well as a state-of-the-art high school. SMMA encourages broad community representation in programming to ensure that the public will be clearly welcome and the visitor access, parking, rest rooms, and large group spaces like the gym, auditorium, and cafeteria all facilitate public-use, year round. A community that uses its schools intensively will inevitably strengthen its support for public education—a goal we all seek!



21st Century Learning | READING LIST

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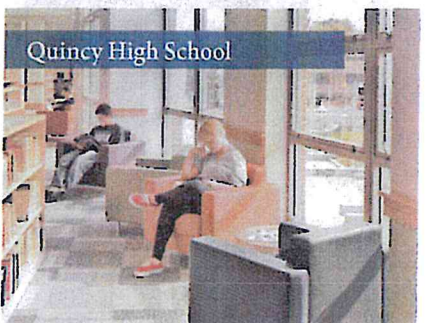
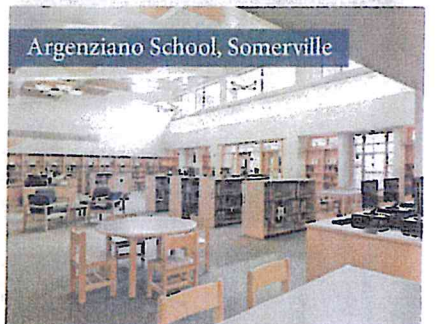
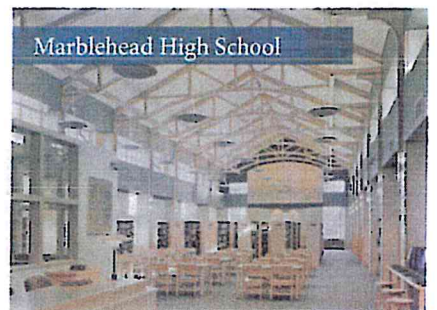
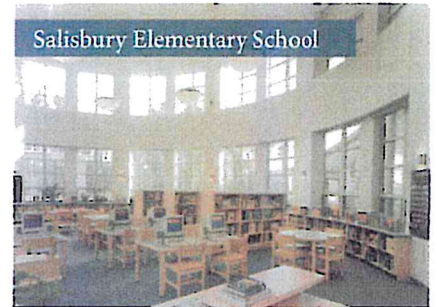
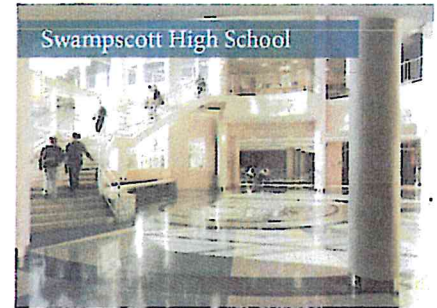
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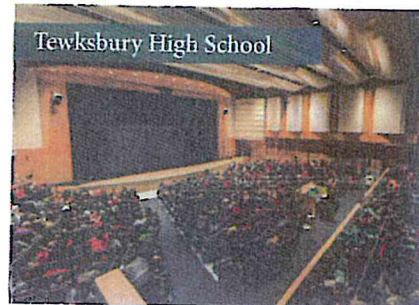
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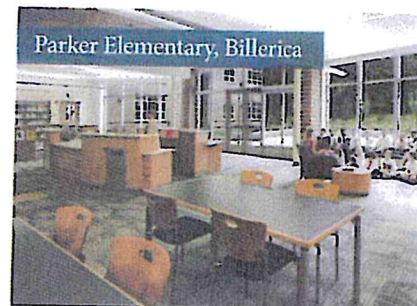
Wellesley High School



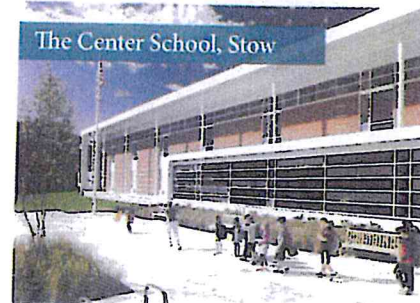
Tewksbury High School



Parker Elementary, Billerica



The Center School, Stow



Grafton High School





Similar Projects & References

First-Phase Feasibility or Master Plan Studies

On the following pages, we include information on our educational master planning and K-12 projects at all educational levels - elementary, middle, and high schools.

Although each of these projects brought a unique set of design issues and client expectations, we can identify key challenges that have shaped our approach to these projects - critical experience we will bring to the Bellingham Public School District's Educational Facilities Best Use Study.

- Classroom spaces shaped to accommodate a broad range of teaching and learning strategies
- Pupil support spaces (SPED, remedial, ELL) with proximity to classroom neighborhoods to maximize the effectiveness of student-teacher interaction
- Cafeteria/gymnasium/auditoriums grouped for convenient use during the school day and after hours use by the community
- Digital technology (voice/video/data networks) throughout all spaces in the building
- Classroom wings designed with "open ends" to facilitate future expansion
- Environmental comfort and safety provided by 100% fresh air circulated throughout the building
- Controlled use of daylighting to reduce energy consumption, enliven interior spaces, and orient movement throughout the building
- And increasingly, a higher degree of "sustainability" and operating efficiency engineered into each of our schools

“*The strength of the new elementary school is how well it lends itself to the community at large. It has become the centerpiece of government activities. Local boards of government meet there - the public is constantly coming into the school whether they have children attending there or not - important forums of future needs of the town are addressed there and of course town meeting is now held at least twice a year in the Salisbury Elementary School.*

We would be remiss if we did not mention the benefit to the students. We have created spacious classrooms. Art, computer, and music suites - something that did not exist before - but does now and thus demonstrates to the youth the importance placed on all educational avenues.”

~Henry Richenburg, Building Committee Chair and current Chair Board of Selectman

~Fred Knowles, Building Committee Member and current Clerk Board of Selectman



Front Entrance, Salisbury Elementary School, Salisbury, MA

SMMA has conducted multiple school facility master plan assessments over the past fifteen years. Our K-12 School Design Studio is built on the team’s nationally respected leadership in the design of 21st Century Learning Environments. Each project is supported by our integrated practice of architects and engineers - experts in the planning and design of inviting, healthy, and sustainably-functioning schools. We will work with the Bellinghamschool administration at each school; parents, community leaders, and other key stakeholders to develop options to optimize school facilities in Bellingham.

School District Wide Master Plans

Client: Bedford Public Schools
 Project Description: -Elementary School Master Plan
 -High School Feasibility Study

Client: Beverly Public Schools
 Project Description: -High School Master Plan

Client: Concord Public Schools
 Project Description: -Elementary/Middle School Master Plan
 Concord-Carlisle Regional High School Master Plan

Client: East Longmeadow Public Schools
 Project Description: -School District Master Plan

Client: Sandwich Public Schools
 Project Description: -School District Master Plan

Client: Stoneham Public Schools
 Project Description: -Elementary School Master Plan

Client: Stow Public Schools
 Project Description: -Elementary School Feasibility Study
 -K-8 Master Plan

Client: Swampscott Public Schools
 Project Description: -School District Master Plan

Client: Templeton Public Schools
 Project Description: -Elementary Schools Master Plan

Client: Tewksbury Public Schools
 Project Description: -Elementary Schools Master Plan

Client: Wellesley Public Schools
 Project Description: -Elementary School Master Plan
 -High School Master Plan Study

ELEMENTARY SCHOOLS

Note: Renovation/Addition Projects shown highlighted.



*Thoreau Elementary School,
Concord, Massachusetts*

“The School Building Committee hired the architectural firm of Symmes Maini & McKee Associates to provide educational programming and design services for Concord’s kindergarten through eighth grade schools. This involved four school buildings. The designs for each building were completed with the involvement of each school’s administration, teachers, and parent advisory groups.

We are impressed with the architects and engineers from SMMA that have worked on our schools...

[They] assisted the building committee in communicating with citizens about the need for new buildings and securing favorable votes at Town Meeting. We highly recommend Symmes Maini & McKee Associates to other communities. They know school construction: they care about providing top quality service and are very easy to work with.”

~James Terry, Chair,
Alcott School, & Fred Wersan, Chair,
Thoreau School

Client:	Town of Stow, MA
Project Description:	Renovation/Addition to The Center School
Building Area:	98,000 sf
Site Area:	15 Acres
Design Population:	630 + 30 pre-K
Construction Cost:	\$29M (est.)
Project Status:	Completed 8/12

Client:	Town of Andover, MA
Project Description:	New Bancroft School (Grades K-6)
Building Area:	102,754 sf
Site Area:	17 acres
Design Population:	500-700
Construction Cost:	\$32M (est.)
Project Status:	Construction Administration

Client:	Town of Billerica, MA
Project Description:	New Parker School
Building Area:	89,000 sf
Site Area:	8.6 Acres
Design Population:	500
Construction Cost:	\$27M (est.)
Project Status:	8/12

Client:	Town of Marblehead, MA
Project Description:	Renovations to Village School (Grades 4-6)
Building Area:	122,000 sf
Site Area:	10 acres
Design Population:	736
Construction Cost:	\$11M
Project Status:	Phased Construction, Completion 8/10

ELEMENTARY SCHOOLS

“The project team that worked with us was exceptional. They designed a building that exceeded our expectations and reflected the culture of our community. Throughout the project SMMA has been outstanding... One of SMMA’s strengths is the value engineering review. This review process is effective and extremely beneficial to the community they represent.”

~Margaret Myers, Principal,
Beatrice H. Wood School



Aerial view, Wood Elementary School,
Plainville, Massachusetts

Client: Town of Concord
Project Description: New Thoreau Elementary School with Renovation of Existing Wing (Grades K-5)
Building Area: 70,000 sf new 10,000 sf existing
Site Area: 10 acres
Design Population: 520
Construction Cost: \$12M
Project Status: Completed 9/06

Client: Town of Bedford, MA
Project Description: Renovations and Additions to the Lt. Job Lane School (Grades 3-5)
Building Area: Existing 53,000 sf, addition 22,000
Site Area: 34 acres
Design Population: 550
Construction Cost: \$8M
Project Status: Completed 9/01

Client: Town of Salisbury, MA
Project Description: New Gr. PK-5 Elementary School
Building Area: 106,000 sf
Site Area: 22 acres
Design Population: 850
Construction Cost: \$12.8M
Project Status: Completed 12/99

Client: Town of Westwood, MA
Project Description: Renovations and Additions to the Martha Jones School (K-5)
Building Area: 53,000 sf
Site Area: 6 acres
Design Population: 400
Construction Cost: \$5.6M
Project Status: Completed 5/02

Client: Town of Westwood, MA
Project Description: Downey School
Building Area: 48,000 sf
Site Area: 6 acres
Design Population: 400
Construction Cost: \$4.9M
Project Status: Completed 5/02

ELEMENTARY SCHOOLS



Front Entrance, Hobomock Elementary School, Pembroke, Massachusetts

“During the past two years, the building committee has been working closely with SMMA on three elementary school projects. We have been pleased with their performance. The bid for the school came in under budget and we were able to purchase alternate (extra) items because of the bid strategy recommended by SMMA. Their firm knows what the state is looking for regarding plans and documents. We are comfortable knowing that our school projects will get on the state reimbursement list the first time around without any problems.”

~Scott Hamer, Chairman,
Pembroke Elementary School
Building Committee

Client: Town of Pembroke, MA
Project Description: Renovations and Additions to the North Pembroke Elementary School
Building Area: 109,000 sf total (57,000 sf new)
Site Area: 25 acres
Design Population: 800
Construction Cost As Bid: \$11.9M
Project Status: Completed 9/02

Client: Town of Pembroke, MA
Project Description: Renovations and Additions to Hobomock Elementary School (Grades K-5)
Building Area: 82,000 sf total (15,300 new)
Site Area: 12 acres
Design Population: 600
Construction Cost: \$5.9M
Project Status: Completed 9/00

Client: Town of Plainville
Project Description: New Wood Elementary School (Grades 3-6)
Building Area: 68,500 sf
Site Area: 22 acres
Design Population: 450
Construction Cost: \$9.1M
Project Status: Completed 1/04

Client: City of Somerville DPW
Project Description: Argenziano Community School
Building Area: 110,000 sf
Site Area: 2.25 acres
Design Population: 600
Construction Cost: \$25M
Project Status: Completed 9/07

Client: Town of Concord, MA
Project Description: New Alcott School
Building Area: 75,000 sf (total)
Site Area: 12 acres
Design Population: 500 (K-5)
Construction Cost: \$10.5M
Project Status: Completed 9/04

ELEMENTARY SCHOOLS

“SMMA engaged in the actual design of the building. They provided necessary personnel to obtain input from all segments of the school population. SMMA worked very well with staff in determining the building needs as well as with the Building Committee to keep them on track to maintain project schedules.

One of the many strengths of SMMA is the full-service nature of the company. SMMA was always able to provide necessary personnel for the various aspects of design and permitting of a difficult site.”

~Dr. Robert J. Calabrese,
Superintendent, Billerica Public
Schools



*Cafetorium, Ditson Elementary School
Billerica, Massachusetts*

Client: Town of Billerica, MA
Project Description: New Ditson Elementary School
Building Area: 105,000 sf
Site Area: 10 acres
Design Population: 800
Construction Cost: \$12.9M
Project Status: Completed 9/01

Client: Town of Medway, MA
Project Description: New Elementary School (Gr. PK-5)
Building Area: 77,000 sf
Site Area: 10 acres
Design Population: 500
Construction Cost: \$7.8M
Project Status: Completed 9/96

Client: City of Fitchburg, MA
Project Description: Renovations and Additions to existing K-5 Elementary School
Building Area: 31,000 sf (new addition)
Site Area: 9 acres
Design Population: 900
Construction Cost: \$3.9M
Project Status: Completed 9/96

Client: Town of Deerfield, MA
Project Description: New Elementary School (Gr. K-6)
Building Area: 67,000 sf
Site Area: 12 acres
Design Population: 600
Construction Cost: \$6.3M
Project Status: Completed 1/92

MIDDLE SCHOOLS



Front Entry, Veterans Middle School, Marblehead, Massachusetts

“As the second major phase of the overall School Facilities Master Plan, it was critical that this project be a success from all points of view. It was critical to have SMMA’s architectural guidance and project experience in order to deliver the new Middle School on time and on budget. They recognized their role on the project and were consummate team players in keeping the collective focus on the successful completion of the renovation.”

~Michael Rockett, Chairman, Building Oversight Committee, Veterans Middle School

Client: Town of East Greenwich, RI
Project Description: New Cole Middle School (Grades 6-8)
Building Area: 110,000 sf
Site Area: 15.3 acres
Design Population: 600
Construction Cost: \$25M
Project Status: Construction began 11/09

Client: Town of Wareham
Project Description: Renovation and Additions to Middle School (Grades 6-8)
Building Area: 146,000 sf
Site Area: 9 acres
Design Population: 1,100
Construction Cost: \$16.4M
Project Status: Completed 9/05

Client: Town of Marblehead
Project Description: Conversion of Old High School to Upper Middle School (Grades 7-8)
Building Area: 150,000 sf
Site Area: 6 acres
Design Population: 540
Construction Cost: \$16.1M
Project Status: Completed 9/05

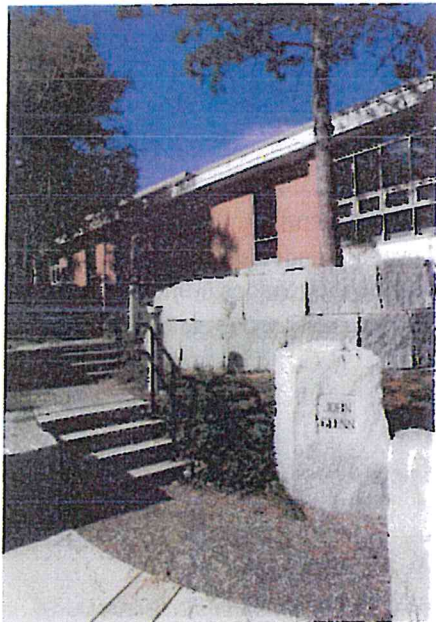
Client: Town of Bedford, MA
Project Description: Renovations and Additions to John Glenn Middle School (Grades 6-8)
Building Area: 120,000 sf total (28,000 sf new)
Site Area: 10 acres
Design Population: 625
Construction Cost: \$15 M
Project Status: Completed 9/04

Client: Town of Andover, MA
Project Description: New Gr. K-5 Elementary/Gr. 6-7-8 Middle Schools
Building Area: 176,500 sf
Design Population: 1000
Construction Cost: \$25 M
Project Status: Completed 9/02

MIDDLE SCHOOLS

“During the course of our two-year building project, the news was filled with many school building projects in Massachusetts that were delayed, over budget and failed to make the deadline for substantial completion. The John Glenn Middle School was completed on time and under budget. In my opinion, there was one clear reason why our school stood apart from the rest, and that was the leadership and oversight that SMMA brought to the project.”

~Thomas F. Campbell, Principal,
John Glenn Middle School



Courtyard, John Glenn Elementary School,
Bedford, Massachusetts

Client: Town of Raynham, MA
Project Description: New (Grades 5-8) Middle School

Building Area: 149,000 sf
Site Area: 30 acres
Design Population: 900
Construction Cost: \$19.8M
Project Status: Completed 9/01

Client: Town of Norton, MA
Project Description: New Grades 6-8 Middle School

Building Area: 152,000 sf
Site Area: 70 acres
Design Population: 900
Construction Cost: \$18.2M
Project Status: Completed 9/98

Client: Town of Wellesley
Project: New High School
Building Area: 280,000 sf
Site Area: 18.5 acres
Design Population: 1500
Construction Cost: \$83 M
Project Status: Completed 2/2012



Raynham Middle School,
Raynham, Massachusetts

HIGH SCHOOLS

SMMA designed the renovation of the original school building constructed in 1971. The building was originally planned as an open classroom facility, but this was an experiment that quickly became obsolete. The current renovation creatively upgraded the open structure by developing the center of the building for large room type education spaces such as computer labs and the library. The classrooms were placed on the outer sides of the building to take advantage of natural lighting.

The incorporation of green technologies into our school building project is amazing. With the help of a \$600,000 Massachusetts Green Schools Grant, a panel of photo voltaic cells was installed on the roof of the swimming pool.

A major component of the renovation project was to create community accessibility. The entrance was upgraded to improve traffic flow and provide central access for all activities. More community organizations are using the facility during non-school hours as a result.

~Ann Banash / Michael A. Kociela, Co-Chairs, Building Committee, Turner Falls High School / Great Falls Middle School



Quincy High School, Quincy, Massachusetts

Client:	City of Quincy
Project Description:	Comprehensive High School
Building Area:	325,000 sf
Site Area:	18 acres
Design Population:	1500 (Grades 9-12)
Construction Cost:	\$127 M
Project Status:	Completed 9/2010

Client:	Bridgewater/Raynham Regional School
Project Description:	New Regional High School
Building Area:	325,000 sf
Site Area:	40 acres
Design Population:	2000
Estimated Construction Cost:	\$54.9M
Project Status:	Completed 9/07

Client:	Town of Swampscott, MA
Project Description:	New High School
Building Area:	190,000 sf
Site Area:	20 acres
Design Population:	850
Estimated Construction Cost:	\$43M
Project Status:	Completed 6/07



Renovated Auditorium, Turners Falls High School, Montague, Massachusetts

HIGH SCHOOLS

“It is a privilege for me to write a letter confirming the outstanding work Symmes, Maini, & McKee Associates (SMMA) has completed for the Bedford Public Schools. Bedford has completed significant addition renovation work at two schools and is currently constructing a \$51,000,000 addition renovation project at Bedford High School. In each of these projects the SMMA team has ensured that the work is of the highest quality and consistent with the contract documents. In addition, the team has been diligent in monitoring both the costs and timeline to keep very complicated projects on time and within budget.

The Bedford Public Schools have benefitted from the professionalism, tenacity, and high standards of a firm that takes great pride in its work. The complicated nature of addition renovation projects challenges school personnel, the architect, and the general program for the students who reside in the building during construction. In Bedford we have been fortunate to have SMMA as a key player on our team.”

~Maureen LaCroix, Ed.D,
Superintendent of Schools,
Bedford Public Schools



Exterior Perspective, Bedford High School, Bedford, Massachusetts

Client:	Town of Douglas School Building Committee
Project Description:	New High School (Grades 9-12) for 700
Building Area:	124,000 sf
Site Area:	90 acres
Design Population:	\$20M
Construction Cost:	Completed 9/03
Project Status:	Completed 9/07

Client:	Town of Marblehead, MA
Project Description:	New High School (Grades 9-12)
Building Area:	900
Site Area:	215,000 sf
Design Population:	28 acres
Estimated Construction Cost:	\$35.3M
Project Status:	Completed 8/02

Client:	Dennis/Yarmouth School Committee
Project Description:	Renovations and Additions to the Dennis Yarmouth Regional High School
Building Area:	224,000 sf
Site Area:	105,000 sf
Estimated Construction Cost:	\$22.0 M
Project Status:	Completed 9/06



Bridgewater-Raynham Regional High School, Bridgewater, Massachusetts

HIGH SCHOOLS

“The commitment to connecting students to the world of work influenced how we organized our clusters. Students in grades 10 through 12 select one of four clusters and spend three years in that cluster through their course work, cluster activities, and school-to-career programs students relate what they are learning in school to world of work around them

Hudson High School was also designed as a community center. The results of early community engagement in the school’s design led to a facility that serves as a community center for concerts, a recreation center for children, a daycare-preschool program for young children, a conference center for education and community groups, and a center for community governance in addition to its role as a high school

The design was featured in the premier issue of Safe Learning in January 2001 as a model of a school that creates community as a way to maximize security. Hudson High School received the Richard W. Riley Award for Schools as Centers of Community from the KnowledgeWorks Foundation and the American Architectural Association in 2005.”

~ John Stapelfeld, Principal,
Hudson High School



Exterior Courtyard, Hudson High School,
Hudson, Massachusetts



Front Entrance, Marblehead High School,
Marblehead, Massachusetts

Client: Town of Hudson
Project Description: New Hudson Model High School

Building Area: 218,000 sf
Site Area: 23 acres
Construction Cost: \$34.6M
Project Status: Completed 9/03

Client: Town of Mashpee, MA
Project Description: New High School & Junior High School
Design Population: 190,000 sf
Building Area: 50 acres
Site Area: 1,100
Construction Cost: \$14.3M
Project Status: Completed 11/96

Client: Town of Sharon, MA
Project Description: Renovations and Additions to Sharon High School (Grades 9-12)
Design Population: 137,000 sf total (30,000 sf new construction)
Building Area: 12 acres
Site Area: 1,000
Construction Cost: \$10.4M
Project Status: Completed 9/99

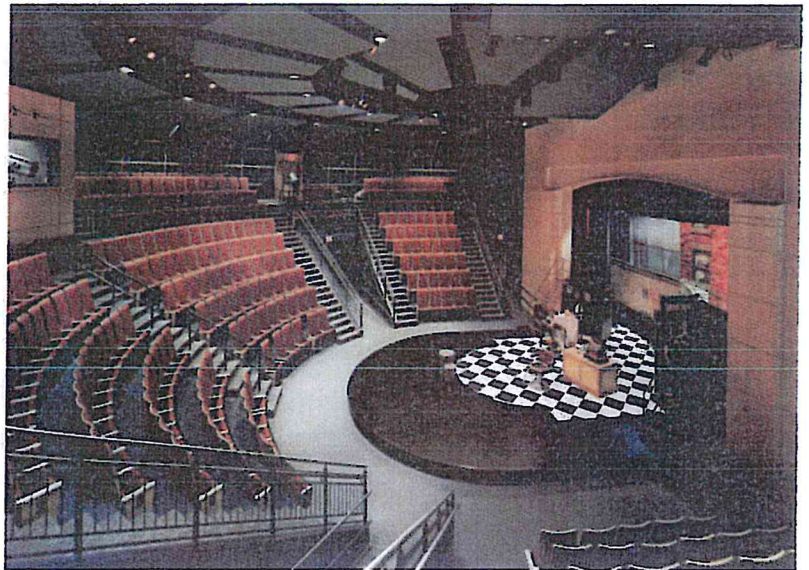
HIGH SCHOOLS

“The flexible classrooms and large group meeting areas have added to the “cross fertilization” of ideas and approaches among students and educators. Finally, once the students learn the building, they find it easy to navigate while taking advantage of its many attributes furthering their education.

As successful as the design was in meeting educators’ and students’ needs, it has been a huge success with the community. The design allows certain parts of the building to be used while other parts are closed. The auditorium with its “theater in the round” concept has not only added to the school system’s award-winning drama program but has also fit the need for many community groups including local theater groups and various community presentations.

This has been a rewarding project that has changed how Marblehead’s residents view their school system and it has also been instrumental in recruiting the best educators to our district.”

~ Rob Dana, Chairman,
Marblehead High School
Building Oversight Committee



Auditorium, Marblehead High School,
Marblehead, Massachusetts

Client: City of Chelsea, MA
Project Description: New High School (Gr. 9-12)
Building Area: 150,000 sf
Site Area: 12 acres
Design Population: 1,000
Construction Cost: \$18.7M
Project Status: Completed 9/96

Client: Town of Grafton
Project Description: New High School
Building Area: 186,350 sf
Site Area: 45 acres
Design Population: 900
Construction Cost: \$56.9M
Project Status: Completed 8/12

Client: Town of Tewksbury
Project Description: New High School (Gr. 9-12)
Building Area: 218,781 sf
Site Area: 56 acres
Design Population: 1,100
Construction Cost: \$50.8M
Project Status: Completed 8/12

HIGH SCHOOLS

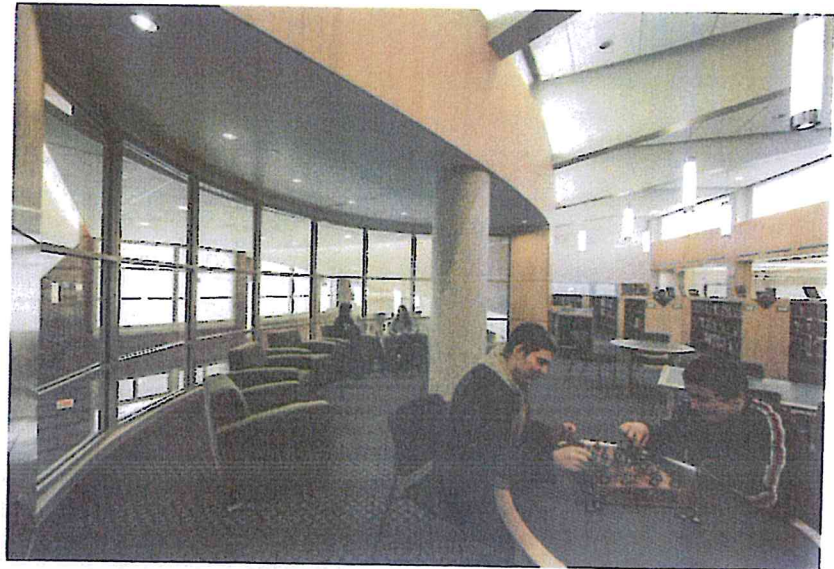
“The 9th Grade Academy Terrier House is a transitional supportive environment for Freshmen. The support around students, rather than students having to search for support. If we decide in the future that we don't want to have Terrier House, we can easily repurpose the space, we are not confined. The design allows us to use the space flexibly. It's a school with 4-sided and 5-sided spaces. The 5-sided spaces allow for more collaboration, our students have to learn how to work together, how to problem solve with one another, how to collaborate. The 5-sided spaces enable this better.”

We were excited to partner with a firm that is so forward-thinking. There are members of SMMA who we could ask to teach high school tomorrow and they will be able to do it...They are building schools, not building buildings.”

~ Dr. Russell Johnston,
Superintendent, West Springfield
Public Schools



West Springfield Model High School,
West Springfield, Massachusetts



Media Center, Tewksbury Memorial High School,
Tewksbury, Massachusetts

Client: Town of West Springfield
Project Description: New Model High School (Gr. 9-12)
Building Area: 257,525 sf (not including natatorium)
Site Area: 68 acres
Design Population: 1,340
Construction Cost: \$70.4M
Project Status: Construction Administration

Client: Town of Winchester
Project Description: Renovations and Additions to High School (Gr. 9-12)
Building Area: 278,925 sf
Site Area: 27 acres
Design Population: 1,370
Construction Cost: \$103M (est.)
Project Status: Schematic Design

Client: North Middlesex Regional School District
Project Description: New High School
Building Area: 195,000 sf
Site Area: 50 acres
Design Population: 870
Construction Cost: \$89M (est.)
Project Status: Schematic Design

HIGH SCHOOLS

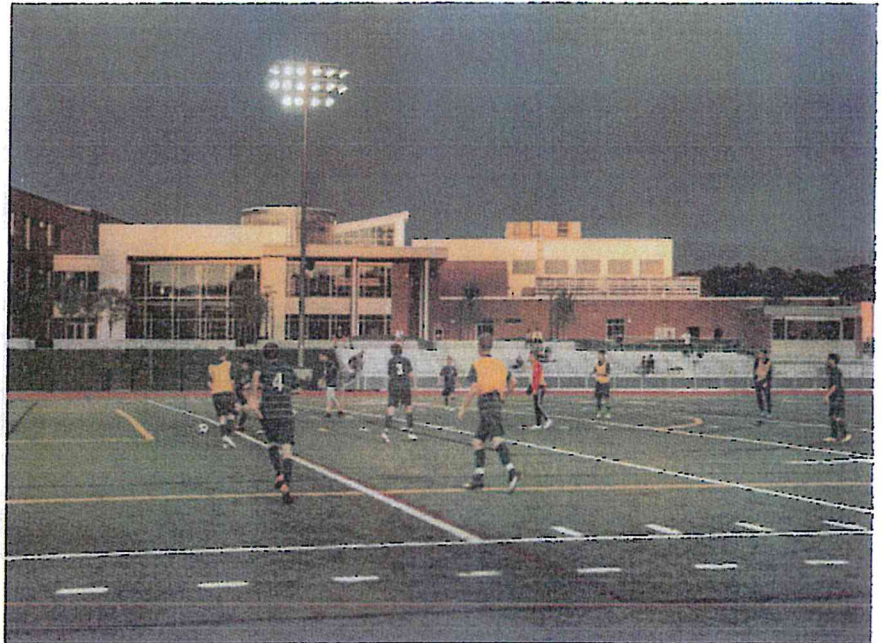
“ We were incredibly fortunate — lucky enough to work with people who listened to us and brought their expertise. The collaboration was extraordinary. I would do nothing different at all because of their leadership. SMMA is very well respected in the City. Things are connected. technical programs are connected with the traditional curriculum. Nursing was separate in the past and now it's next to science. The science fair had a huge number of entries this year. The solar panels, which were a tax credit, are a major teaching tool. The Greenhouse is powered by solar energy ”

~ Dr. Rick DeCristofaro,
Superintendent, Quincy Public
Schools

~ Frank Santoro, Principal,
Quincy High School



Quincy High School,
Quincy, Massachusetts



Grafton High School, Grafton, MA

Client: Ayer-Shirley Regional School District
Project Description: Renovations to High School (Grades 9-12)

Building Area: 144,000 sf
Site Area: 55 acres
Design Population: 495
Construction Cost: \$44.4M (est.)
Project Status: Construction Administration

Client: Monument Mountain Regional School
Project Description: Renovations to Regional High School (Gr. 9-12)

Building Area: 137,672 sf
Site Area: 86 acres
Design Population: 570
Construction Cost: \$43M (est.)
Project Status: Schematic Design



SMMA CLIENT
REFERENCES
CURRENT OR
RECENT PROJECTS

East Longmeadow District-Wide Master Plan

Mr. Gordon Smith

East Longmeadow Public Schools
180 Maple Street
East Longmeadow, Massachusetts 01028
gsmith@eastlongmeadowma.gov
(413) 525-5450

Hamilton-Wenham Regional School District Master Plan

Dr. Michael Harvey

Superintendent
Hamilton-Wenham Regional School District
5 School Street
Wenham, Massachusetts 01984
m.harvey@hwschools.net
(978) 468-5310

Sharon High School

Mr. Glenn Brand

Assistant Superintendent
Sharon Public Schools
75 Mountain Street
Sharon, Massachusetts 02067
brand@sharon.k12.ma.us
(781) 784-1570

Stow Public Schools Elementary / Middle School Master Plan

Ms. Ellen Sturgis

Executive Director, AIA Central Massachusetts
12 Canterbury Road
Stow, Massachusetts 01775
e.sturgis@gmail.com
(978) 460-0883

Comparative Evaluation Criteria

The SMMA team meets or exceeds all of the comparative evaluation criteria in the following ways:

✓ 1: Cost:

SMMA is accustomed to developing fee structures and business terms in a variety of ways that align best with our client's goals and project objectives. As such, we remain flexible in finalizing an approach, which meets both your technical needs and budgetary limitations for this project. At the appropriate time, we are happy to discuss the cost information (attached in a separate sealed envelope) and any questions you may have regarding the scale of services we are proposing for this project.

✓ 2: Qualifications of Key Personnel:

Design Project Management

As a creative enterprise, SMMA recognizes the importance of supporting the ability of designers to design. Our approach to managing the Waltham Building Evaluations School project draws significantly on our project management discipline. SMMA is one of the few design firms in New England to have developed a project management team with expertise at organizing and managing the myriad tasks within design projects. At SMMA, our architects and engineers focus on design, while a trained project manager uses SMMA tools and processes to ensure the design process proceeds efficiently and thoroughly.

SMMA's designated project manager for this project is Lorraine Finnegan, AIA, GRP, LEED AP, MCPPO, a seasoned design professional adept at working with towns, their constituents, and the MSBA to expedite projects from initiation through construction completion. Ms. Finnegan will serve as the point of contact for the Town, and will have primary responsibility for the project throughout its duration.

An Experienced Project Team

We cannot state strongly enough the importance of selecting the right team for the project — an experienced team with extensive history of working together on complex, successful K-12 projects. The clear reflection of our commitment to the Town of Waltham is the experience and dedication of the team we are proposing for your project.

SMMA has selected key personnel for this project that meet or exceed the requirements set forth in the RFQ.

- **Principal-in-Charge | Educational Programmer** - Philip J. Poinelli, FAIA, CEFP, LEED AP has over 40 years of experience successfully completing projects for K-12 schools.
- **Project Manager** - Lorraine B. Finnegan, AIA, LEED AP, MCPPO, has over 20 years of design and project management experience.
- **Educational Visioning** - Frank Locker, PH.D, Frank Locker Educational Planning, has over XX years of providing educational visioning for K-12 school projects.
- **Enrollment Consultant** - Tracy Healy, REFP, FutureThink, has over 18 years of experience as a K-12 enrollment specialist.



Parker Elementary School,
Billerica, MA



Thoreau Elementary School,
Concord, MA

Comparative Evaluation Criteria Continued:

- **Project Architect** - Alex C. Pitkin, AIA, NCARB, has 25 years of experience in the design of K-12 facilities at all grade levels.
- **Civil Engineer / Site Selection Specialist** - Erin Prestileo, PE, has over 5 years experience with design, site layout, grading, utility design, storm water management design, sanitary system design, and plan detailing.
- **Data / Communications / Security Specialist** - Patrick L. Wegint, RCDD, has over 25 years of experience in the design and use of communications and network technology systems.

For a complete description please see the resumes contained in Section 2 of this proposal.

Current Workload

SMMA's K12 Studio has ongoing projects in various phases of design or construction. SMMA has the capacity and ability to staff these projects to allow multiple teams to lead clients through the detailed steps of the Feasibility Study process with successful delivery of the PDP and PSR packages to the MSBA.

Project / Phase		Phil Pitkin, FWA CDDP LEED AP BD+C Project Director	Laura Fitzgibbon, AIA CDDP LEED AP BD+C Project Manager	Alex Pitkin, AIA Project Architect
In Study				
North Middlesex Regional H.S.	In Schematic Design	Programming Complete	Project Manager	Project Designer
Winchester H.S.	In Schematic Design	Programming Complete	Project Manager	Project Designer
Berkshire Hills Regional H.S.	Project on Hold	Programming Complete	Not on Project	Associated Architect with Margo Jones
In Construction				
Ayer-Shirley Regional H.S.	In Construction	Not on Project	Not on Project	Project Designer
West Springfield H.S.	In Construction Phase I: Complete 2/2014 Phase II: Complete 5/2015	Not on Project	Project Manager	Not on Project
Bancroft E.S.	In Construction Phase I: Completed 8/2012 Phase II: Complete 9/2014 Phase III: Complete 8/2015	Not on Project	Project Manager	Not on Project

✓ 3: Similar Experience / Past Performance on Similar Projects

SMMA has completed over 50 municipal projects for other towns in the Commonwealth of Massachusetts in the last 15 years.

Comparative Evaluation Criteria Continued:

✓ 4: Technical Approach, Capacity, Management Approach

In this proposal, SMMA has demonstrated how our multidisciplinary in-house staff will benefit the Town of Waltham through all phases of these school building evaluations. Refer to Section 3 for our detailed project understanding and technical approach.

Capacity

SMMA manages its staffing through weekly meetings of the Operations Group, which is comprised of the firm's senior architects and engineers. This committee coordinates overall manpower and ensures that each project is properly staffed to meet its schedule.

SMMA's performance history speaks to the capacity of the firm:

- 170 person firm including 33 Registered Architects and 21 Registered Professional Engineers
- September 2012, SMMA opened 5 schools all designed and constructed simultaneously consisting of:
 - 872,000 sf of space
 - 4,660 students served
 - \$235.1 million in construction
- 5 schools currently in various stages of design or construction consisting of:
 - 924,000 square feet of space
 - 4,700 students served
 - Two schools currently in construction, approximately \$105.5 million
 - Three schools currently in Programming and/or Feasibility Study
- Past 10 Years 47 schools designed and constructed – over \$1 billion of school construction; over 6.2 million square feet of new construction and renovation

Demonstrated Performance

Applicable Codes

The Massachusetts State Building Code is based upon the International Building Code (IBC). Our current design work in Massachusetts — performed to meet the requirements of the IBC in addition to local codes — fully complies with the building code of the Commonwealth of Massachusetts.

Cost and Schedule Control

The following table illustrates our success on recent K-12 projects with regard to controlling cost and schedule.

Recent / Relevant Projects	Estimated Construction Cost	Actual Award Cost	Estimated Completion Date	Actual Completion Date
Ayer-Shirley Regional High School	\$44,360,100	N/A	August 2015	N/A
Winchester High School	\$101,118,621	N/A	August 2018	N/A
Monument Mountain Regional High School	\$41,728,813	N/A	January 2018	N/A
North Middlesex High School	N/A	N/A	2017	N/A

New Construction Projects	Estimated Construction Cost	Actual Award Cost	Estimated Completion Date	Actual Completion Date
Argenziano Community School	\$27,500,000	\$27,700,000	August 2007	August 2007
Quincy Comprehensive High School	\$102,769,879	\$98,993,615	September 2010	July 2010
Cole Middle School	\$30,465,441	\$22,750,000	July 2011	August 2011
Wellesley High School	\$90,071,532	\$83,279,182	July 2012	February 2012
Tewksbury Memorial High School	\$65,946,782	\$50,800,000	August 2012	August 2012
Grafton High School	\$56,926,262	\$55,027,349	August 2012	July 2012
West Springfield High School	\$73,294,900	\$70,461,000	February 2014	Ongoing
Parker Elementary School	\$27,089,210	\$22,486,000	August 2012	August 2012

Additions / Renovation Projects	Estimated Construction Cost	Actual Award Cost	Estimated Completion Date	Actual Completion Date
Bedford High School	\$35,201,846	\$35,400,000	August 2008	July 2008
The Village School	\$16,258,479	\$11,016,493	August 2010	August 2010
East Greenwich High School	\$2,381,765	\$2,556,400	July 2010	July 2010
Center Elementary School	\$28,816,175	\$23,640,900	June 2012	August 2012

Construction Administration

In SMMA's approach to the Waltham School project, we feel the following processes and practices will contribute considerable value through rigorous cost and quality control.

By instituting a top-down quality mindset throughout the design and construction administration phases, we have helped our clients experience a tangible improvement in reducing the number and value of construction change orders.

Design Quality Control

Construction cost control begins at the start of the project with solid programming and design. SMMA is one of the few A/E design firms in the nation to comply with the rigorous requirements of the ISO 9001 International Quality Standards system used by major corporations worldwide. The ISO program requires a company-wide commitment to learn and adhere to its high quality standards. SMMA made that commitment in 1996 and continues to follow the program closely.

The ISO system provides a means for standardizing processes and evaluating project performance to ensure that the project meets client design and cost expectations. It is based on the philosophy that "attention to client needs is Job One." Our QC approach involves five main precepts:

- Development of a detailed Work Plan, wherein client expectations are aligned with project goals.
- Interim design checks at specific design phases to assure compliance with the program and cost
- Constant cost checking of the proposed plan with our historical project cost database
- Final design QC review to confirm program, scope, and cost compliance
- Follow through construction oversight during the construction phase

Our ISO 9001 system demonstrates our commitment to integrating quality management into all our project designs. These processes include best practices, benchmarking, and client service evaluations. SMMA also evaluates processes for tracking trends in areas such as errors and omissions, work plan effectiveness, reduction of rework, training, and change order management, and how these items affect SMMA and the clients we serve. The high level of quality service provided by our ISO 9001 system enables us to address specific project needs and to deliver products that respond to these needs.

The clear measure of our QC approach is seen in the initial construction cost of our projects and in the control of change orders during the construction phase. By instituting a top-down quality mindset throughout the design and contract administration phases, we have enabled our clients to experience a tangible improvement in reducing the number and value of construction change orders. The result for the Town of Waltham is realistic construction pricing at or near the original bid and minimal change orders during construction.

EXHIBIT

EXHIBIT A.

**SCHOOL COMMITTEE VOTES REGARDING CONSULTANT
AND CAPITAL IMPROVEMENT FUNDING VOTES**

CURRICULUM AND INSTRUCTION

Dr. Nicholson was pleased to announce that Waltham Public Schools has been named to the College Board's 2012 AP District Honor Roll for expanding access to Advanced Placement (AP) curriculum and maintaining or improving the percent of students scoring three or higher on the AP exams.

VOTED: On motion of Mayor McCarthy, seconded by Mr. Graceffa, that the AP District Honor Roll announcement be forwarded to all the real estate agents in Waltham.

UNFINISHED BUSINESS

Waltham High School Accreditation

Dr. Nicholson met with Purchasing Agent Joseph Pedulla, Mr. DeMeo and Mr. Frost to develop a draft RFP for the facilities condition report. Included in the RFP were items identified in the 2005 accreditation report.

Central Office Location

This item was not addressed by the School Committee.

Capital Improvement Projects

1. Culinary Arts
2. Cosmetology
3. Title IX Project
4. Kennedy Middle School Gym Lockers
5. WHS Air Conditioning

Mayor McCarthy met with Mr. Pedulla and Mr. Fournier on the Title IX project. Due to the cost of renovating the locker room it must have a separate contract. Dr. Nicholson reported that RDK Engineering has signed a contract and is waiting for the results of test cuts made in the air conditioning tubes to determine if acid leaked into the tubes when the unit failed.

There were no other updates at this time.

Compliance Update: Transfer of Parental Rights

VOTED: On motion of Ms. Burstein, seconded by Mr. Tarallo, to hear from an off-committee member.

Dr. Valerie Ardi-Flynn, Administrator of Pupil Personnel, reported that a random selection of student records revealed that nineteen out of twenty were in compliance. A brief discussion ensued.

Capital Improvement Plan 2013-2018

The Committee reviewed several Capital Improvement Plan documents. Mr. Cincotta inquired about the school construction accounts with long existing balances.

VOTED: On motion of Mr. Tarallo, seconded by Mr. Graceffa, that the Superintendent will provide a status of the accounts.

Ms. Donnelly stated the district is in great need of a plan for technology. Dr. Nicholson reviewed the FY18 items and requested they be moved forward. The Committee discussed repaving Jack's Way and the high school parking lot, as well as equipment requests from the music department.

Dr. Nicholson reviewed the supplemental requests for FY14. A brief discussion ensued regarding the use of existing accounts for the additional requests.

A motion was made by Ms. Burstein, seconded by Mrs. Limonciello, to approve the FY18 additions to the Capital Improvement Plan.

Mayor McCarthy reminded the Committee the five year plan must be submitted to the City Council by the end of December, but that amendments to the plan will be allowed.

A motion was made by Mr. Tarallo and seconded by Mr. Cincotta, to table the FY18 plan until additional information is received on the music department requests.

A motion was made by Ms. Burstein, seconded by Mr. Tarallo, to approve the amendments to the FY14 Capital Improvement Plan.

UNFINISHED BUSINESS
con't
Capital Improvement Plan
2013-2018

A motion was made by Mr. Cincotta, seconded by Mr. Graceffa, to amend the motion and decrease the \$350,000 request for items 1a, b & c to \$150,000. Roll call: Mr. Graceffa, yes; Mrs. Limonciello, no; Ms. Burstein, no; Mr. Cincotta, yes; Ms. Donnelly, yes; Mr. Tarallo, no. The motion failed to carry.

VOTED: On motion of Ms. Burstein, seconded by Mr. Tarallo, to approve the amendments to the FY14 Capital Improvement Plan.

NEW BUSINESS
Space Utilization Report

Dr. Nicholson informed the Committee there is a trend toward increased enrollments and a concern the district may be running out of classroom space. Dr. Nicholson pointed out that Waltham is unique in that it enjoys the luxury of teachers not sharing classrooms. The Superintendent suggested a sub-committee of the School Committee to review space utilization.

VOTED: On motion of Ms. Donnelly, seconded by Mr. Graceffa, to hear from an off-committee member.

Mr. George Frost, Human Resources Administrator presented several documents detailing historical and projected enrollments, current sections by grade level and school, and a chart depicting the number of additional sections that may be needed for FY14. Mr. Cincotta remarked that each elementary school was constructed to hold up to five hundred students with dedicated art and music rooms. Mr. Cincotta noted that Waltham enjoys very low class sizes that come with astronomical costs and stressed this should be given close attention at budget time. Ms. Donnelly agreed that some use of space in the schools is a luxury. Mr. Tarallo questioned the original planning of the buildings and if any classrooms designated for twenty-five students are being used for eight to ten students. Mr. Frost indicated each building was reviewed space by space and not by square footage. Ms. Burstein confirmed that redistricting for some schools will be necessary in the very near future. Mr. Frost suggested a three year outlook for grades K-5 noting that the more difficult fixes will be at Stanley and Whittemore Elementary Schools. Mr. Graceffa commented on the use of full size classrooms for small groups. Mayor McCarthy requested information on trends at all levels regarding when students enter and exit, at what grade level and time of year, independent of birth. The Mayor directed that the district must look at equity city-wide and decisions must be based on education not location. Mr. Tarallo suggested the monthly enrollment format should be reviewed. The space utilization sub-committee will sift through data, consider all available options and propose short term and long term solutions. Mr. Graceffa, Mrs. Limonciello, Mr. Tarallo and Mayor McCarthy offered to serve on the sub-committee.

FY14 Budget

Dr. Nicholson presented several documents detailing the assumptions, timeline, district goals and budget drivers for FY14. Mrs. Limonciello would like to see what is currently in place for additional support at the level three schools. Dr. Nicholson responded to questions regarding budget meetings with administrators and confirmed the same budget format will be used with details provided as needed. Dr. Nicholson assured the Committee she will be seeking ways to reduce the budget and provide services in a more cost effective manner. Ms. Burstein noted the purpose of the timeline is for the Committee to be more engaged in the process and there should be ample opportunity prior to April 24th to discuss the budget. Dr. Nicholson responded to Ms. Donnelly that the rough draft of the budget will be in the February 6, 2013 meeting packet. Members of the Committee responded to Mr. Tarallo regarding timelines, voting on line items and opportunity for budget discussions.

FISCAL MATTERS
Bills on Warrant

VOTED: On motion of Mrs. Limonciello, seconded by Mr. Graceffa, to approve the bills on warrant.

NEW BUSINESS

Proposed Changes to Concussion Policy

Director of Nurses Marie DeSisto presented proposed changes to the current concussion policy and responded to questions from the Committee.

VOTED: On motion of Mr. Tarallo, seconded by Mr. Graceffa, to approve the proposed changes to the concussion policy.

Education Consultant

Mayor McCarthy forwarded the draft scope of work for an RFP for an education consultant and architect to evaluate the six elementary schools in conjunction with the potential impact on the two middle schools and high school.

VOTED: On motion of Mr. Tarallo, seconded by Mr. Graceffa, to approve the scope of work and all necessary documents.

Draft 2014 School Committee Calendar

VOTED: On motion of Mrs. Limonciello, seconded by Mr. Graceffa, to approve the 2014 School Committee calendar as presented.

EDCO Collaborative Board Appointment

VOTED: On motion of Mrs. Limonciello, seconded by Mr. Graceffa, to nominate Ms. Margaret Donnelly as the EDCO Advisory Board Member.

Chinese Bridge Delegation

Dr. Nicholson informed the Committee she has been selected to join the 2013 Chinese Bridge Delegation. This is a one week educational program in November and is sponsored by the Confucius Institute Headquarters/Hanban.

Dr. Nicholson explained this will be an opportunity to visit provinces in China, share best practices and perhaps adopt a classroom or school. The visit also supports one of the overarching goals of global citizens and aligns with the MASS GS21 Committee, of which the Superintendent is a member.

Dr. Nicholson will pay the \$900 fee and the cost of transportation to and from JFK Airport in New York. The Institute will sponsor the remainder of the cost of the program. The Superintendent will provide a disclosure statement indicating the cost and value of the trip. The Superintendent responded to questions and comments from the Committee.

VOTED: On motion of Mrs. Limonciello, seconded by Mr. Graceffa, to allow Superintendent Nicholson six professional development days, November 6-14, 2013 to join the Chinese Bridge Delegation.

VOTED: On motion of Mr. Tarallo, seconded by Mr. Graceffa, to authorize Mayor McCarthy to sign the disclosure statement.

FISCAL MATTERS

Bills on Warrant

VOTED: On motion of Mr. Cincotta, seconded by Mr. Graceffa, to approve the bills on warrant.

FY14 Budget

VOTED: On motion of Mr. Tarallo, seconded by Mr. Graceffa, to table this item until the next meeting.

FUTURE ITEMS FOR DISCUSSION

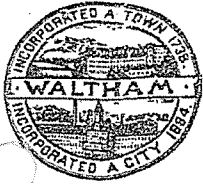
Mrs. Limonciello requested a consent agenda be added to the next meeting. Mr. Tarallo would like an electronic packets workshop and brief discussion on how best to use the iPad at a future meeting.

ADJOURNMENT

VOTED: On motion of Mrs. Limonciello, seconded by Mr. Graceffa, to adjourn at 8:55 p.m.

Susan M. Nicholson, Ed. D.
Clerk

EXHIBIT B.
WALTHAM HIGH SCHOOL SOI APPLICATION



Waltham Public Schools

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Susan M. Nicholson, Ed.D., Superintendent

SusanNicholson@k12.waltham.ma.us

April 1, 2013

Massachusetts School Building Authority
Mr. Brian McLaughlin, Capital Program Manager
40 Broad Street
Suite 500
Boston, MA 02109

Dear Mr. McLaughlin,

Waltham Public Schools and the City of Waltham respectfully submit the following documentation required by the MSBA for the SOI related to Waltham High School, located at 617 Lexington Street, Waltham, MA 02452.

- An original of the signed and certified Statement of Interest
- The certified vote of the City Council
- The full text of the vote of the Waltham School Committee with a copy of the minutes of the School Committee meeting at which the Committee voted to authorize the submission of the Statement of Interest, signed by the Chair of the School Committee
- Other information as indicated within the Statement of Interest system or at the direction of the MSBA

Thank you for your time and consideration over the past few weeks. Your knowledge and advice are much appreciated.

Sincerely,

Susan M. Nicholson

Susan M. Nicholson, Ed. D.
Superintendent

Massachusetts School Building Authority

Next Steps to Finalize Submission of your FY 2013 Statement of Interest

Thank you for submitting your FY 2013 Statement of Interest (SOI) to the MSBA electronically. **Please note, the District's submission is not yet complete.** The District is required to print and mail a hard copy of the SOI to the MSBA along with the required supporting documentation, which is described below.

Each SOI has two Certification pages that must be signed by the Superintendent, the School Committee Chair, and the Chief Executive Officer*. Please make sure that both certifications contained in the SOI have been signed and dated by each of the specified parties and that the hardcopy SOI is submitted to the MSBA with **original signatures**.

SIGNATURES: Each SOI has two (2) Certification pages that must be signed by the District.

In some Districts, two of the required signatures may be that of the same person. If this is the case, please have that person sign in both locations. Please do not leave any of the signature lines blank or submit photocopied signatures, as your SOI will be incomplete.

**Local chief executive officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated as the chief executive office under the provisions of a local charter.*

VOTES: Each SOI must be submitted with the proper vote documentation. This means that (1) the required governing bodies have voted to submit each SOI, (2) the specific vote language required by the MSBA has been used, and (3) the District has submitted a record of the vote in the format required by the MSBA.

- **School Committee Vote:** Submittal of all SOIs must be approved by a vote of the School Committee.
 - For documentation of the vote of the School Committee, Minutes of the School Committee meeting at which the vote was taken must be submitted with the original signature of the Committee Chairperson. The Minutes must contain the actual text of the vote taken which should be substantially the same as the MSBA's SOI vote language.
- **Municipal Body Vote:** SOIs that are submitted by cities and towns must be approved by a vote of the appropriate municipal body (e.g., City Council/ Aldermen/Board of Selectmen) in addition to a vote of the School Committee.
 - Regional School Districts do not need to submit a vote of the municipal body.
 - For the vote of the municipal governing body, a copy of the text of the vote, which shall be substantially the same as the MSBA's SOI vote language, must be submitted with a certification of the City/Town Clerk that the vote was taken and duly recorded, and the date of the vote must be provided.

CLOSED SCHOOLS: Districts that have reported closed school information must download the report from the "Closed School" tab, which can be found on the District Main page. Please print this report, which then must be signed by the Superintendent, the School Committee Chair, and the Chief Executive Officer. A signed report, with original signatures must be included with the District's hard copy SOI submittal. **If a District submits multiple SOIs, only one copy of the Closed School information is required.**

ADDITIONAL DOCUMENTATION FOR SOI PRIORITIES #1 AND #3: If a District selects Priority #1 and/or Priority #3, the District is required to submit additional documentation with its SOI.

- If a District selects Priority #1, Replacement or renovation of a building which is structurally unsound or otherwise in

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a condition seriously jeopardizing the health and safety of the school children, where no alternative exists, the MSBA requires a hard copy of the engineering or other report detailing the nature and severity of the problem and a written professional opinion of how imminent the system failure is likely to manifest itself. The District also must submit photographs of the problematic building area or system to the MSBA.

- If a District selects Priority #3, Prevention of a loss of accreditation, the MSBA requires the full accreditation report (s) and any supporting correspondence between the District and the accrediting entity.

ADDITIONAL INFORMATION: In addition to the information required with the SOI hard copy submittal, the District may also provide any reports, pictures, or other information they feel will give the MSBA a better understanding of the issues identified at a facility.

If you have any questions about the SOI process please contact Brian McLaughlin at 617-720-4466 or Brian.McLaughlin@massschoolbuildings.org.

Massachusetts School Building Authority

School District Waltham

District Contact Susan Nicholson TEL: (781) 314-5400

Name of School Waltham Sr High

Submission Date 4/1/2013

SOI CERTIFICATION

To be eligible to submit a Statement of Interest (SOI), a district must certify the following:

- The district hereby acknowledges and agrees that this SOI is NOT an application for funding and that submission of this SOI in no way commits the MSBA to accept an application, approve an application, provide a grant or any other type of funding, or places any other obligation on the MSBA.
- The district hereby acknowledges that no district shall have any entitlement to funds from the MSBA, pursuant to M.G.L. c. 70B or the provisions of 963 CMR 2.00.
- The district hereby acknowledges that the provisions of 963 CMR 2.00 shall apply to the district and all projects for which the district is seeking and/or receiving funds for any portion of a municipally-owned or regionally-owned school facility from the MSBA pursuant to M.G.L. c. 70B.
- The district hereby acknowledges that this SOI is for one existing municipally-owned or regionally-owned public school facility in the district that is currently used or will be used to educate public PreK-12 students and that the facility for which the SOI is being submitted does not serve a solely early childhood or Pre-K student population.
- After the district completes and submits this SOI electronically, the district must sign the required certifications and submit one signed original hard copy of the SOI to the MSBA, with all of the required documentation described under the "Vote" tab, on or before the deadline.
- The district will schedule and hold a meeting at which the School Committee will vote, using the specific language contained in the "Vote" tab, to authorize the submission of this SOI. This is required for cities, towns, and regional school districts.
- Prior to the submission of the hard copy of the SOI, the district will schedule and hold a meeting at which the City Council/Board of Aldermen or Board of Selectmen/equivalent governing body will vote, using the specific language contained in the "Vote" tab, to authorize the submission of this SOI. This is not required for regional school districts.
- On or before the SOI deadline, the district will submit the minutes of the meeting at which the School Committee votes to authorize the Superintendent to submit this SOI. The District will use the MSBA's vote template and the vote will specifically reference the school and the priorities for which the SOI is being submitted. The minutes will be signed by the School Committee Chair. This is required for cities, towns, and regional school districts.
- The district has arranged with the City/Town Clerk to certify the vote of the City Council/Board of Aldermen or Board of Selectmen/equivalent governing body to authorize the Superintendent to submit this SOI. The district will use the MSBA's vote template and submit the full text of this vote, which will specifically reference the school and the priorities for which the SOI is being submitted, to the MSBA on or before the SOI deadline. This is not required for regional school districts.
- The district hereby acknowledges that this SOI submission will not be complete until the MSBA has received all of the required vote documentation and certification signatures in a format acceptable to the MSBA.

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Chief Executive Officer *

School Committee Chair

Superintendent of Schools

Jeanette A. McCarthy
(print name)

Jeanette A. McCarthy
(print name)

Susan M. Nicholson
(print name)

Jeanette A. McCarthy
(signature)

Jeanette A. McCarthy
(signature)

Susan M. Nicholson
(signature)

Date 4/3/13

Date 4/3/13

Date 4/3/13

* Local chief executive officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated to the chief executive office under the provisions of a local charter.

Massachusetts School Building Authority

School District Waltham

District Contact Susan Nicholson TEL: (781) 314-5400

Name of School Waltham Sr High

Submission Date 4/1/2013

Note

The following Priorities have been included in the Statement of Interest:

1. Replacement or reovation of a building which is structurally unsound or otherwise in a condition seriously jeopardizing the health and safety of school children, where no alternative exists.
2. Elimination of existing severe overcrowding.
3. Prevention of the loss of accreditation.
4. Prevention of severe overcrowding expected to result from increased enrollments.
5. Replacement, renovation or modernization of school facility systems, such as roofs, windows, boilers, heating and ventilation systems, to increase energy conservation and decrease energy related costs in a school facility.
6. Short term enrollment growth.
7. Replacement of or addition to obsolete buildings in order to provide for a full range of programs consistent with state and approved local requirements.
8. Transition from court-ordered and approved racial balance school districts to walk-to, so-called, or other school districts.

SOI Vote Requirement

I acknowledge that I have reviewed the MSBA's vote requirements for submitting an SOI which are set forth in the Vote Tab of this SOI. I understand that the MSBA requires votes from specific parties/governing bodies, in a specific format using the language provided by the MSBA. Further, I understand that the MSBA requires certified and signed vote documentation to be submitted with the SOI. I acknowledge that my SOI will not be considered complete and, therefore, will not be reviewed by the MSBA unless the required accompanying vote documentation is submitted to the satisfaction of the MSBA.

Potential Project Scope: Renovation/ Addition

Is this SOI the District Priority SOI? YES

District Goal for School: Please explain the educational goals of any potential project at this school

The SOI for Waltham High School is based on concerns about the loss of accreditation, our vision for Ch. 74 certified programs within our CTE option, the need to provide a wireless environment, enhanced Special Education and Finish Strong programs to address drop out rates and to better meet student needs, concerns over recent enrollment projections and the aging infrastructure of the building. We also need to address ADA issues to provide students with disabilities with open access to all programs in all building areas. Adequate space must be provided in our health offices. In 2005 the New England Association of Schools and Colleges identified the following areas as inadequate and/or outdated: outdated and small science lab areas lacking modern accoutrements; insufficient space for the Carpentry program; better site for the Graphic

Communications program; need for indoor/outdoor space for the Child Care program; appropriate privacy in the Health office; ADA compliance issues; HVAC upgrades. We have made some improvements but most of the above require a more significant project. Waltham has always provided vocational programs for its students and has developed a vision to improve and increase our CTE program. Waltham is NOT a member of Minuteman Regional H.S. We currently offer nine Ch. 74 certified programs. We have a vision and commitment to offer new programs over the next few years in Culinary Arts, Cosmetology, Allied Health, Plumbing and Protective Services which aligns with recent student interest in these areas. This is coupled with solving other CTE program issues: curricular options in Carpentry are limited by space constraints; Child Care students must be out-placed because there is no in-house option. Additional space allows for enhanced programs which will help reduce drop out rates. Similar program improvements (for example, Alternative High School option) in Special Education and Finish Strong will lead to similar results but will need minimally retrofitted or new space. The district worked with NESDEC to update enrollment projections using 10/1/11 and 10/1/12 data. The analysis revealed that the district is in the midst of a significant growth cycle due to increased birth rates and increased Kindergarten Cohort Survival ratios. The current impact is at grades K-5 but will roll through all grade levels and will fully impact the high school in 2021 when a 35% (500 student) increase is projected. Enrollments and a commitment to growing CTE will exacerbate constrained space issues. Finally the existing high school was first occupied in 1969. This building has been well maintained and has undergone some important renovation projects. For example, the roof has been replaced and significant boiler work done. However, it is best described as a facility with "aging infrastructure" and these resultant issues: the window walls have only had emergency repairs and are single pane energy inefficient; ADA issues remain and need to be addressed; any technology enhancements are carried out via "raceway" options and the district is committed to a wireless environment to allow 21st century curriculum; asbestos removal above drop ceilings should be completed. The building in its current state is fast approaching the outer limits of use to provide an efficient and effective learning environment for our students.

District's Proposed Schedule: What is the District's proposed schedule to achieve the goal(s) stated above?

There has already been \$150,000 approved and allocated to begin the process of a feasibility study once the M.S.B.A. has approved this project. Once the scope of work and the cost of the project is established by the feasibility study and approved by M.S.B.A., the process for approvals from the School Committee and the City Council would begin and take 5-8 weeks to complete. The schedule to begin the building process would depend upon approval of this project by the M.S.B.A. as the city would be looking for financial support to move this project forward in these challenging economic times.

Is this part of a larger facilities plan? NO

If "YES", please provide the following:

Facilities Plan Date:

Planning Firm:

Please provide an overview of the plan including as much detail as necessary to describe the plan, its goals and how the school facility that is the subject of this SOI fits into that plan:

Please provide the current student to teacher ratios at the school facility that is the subject of this SOI: 20 students per teacher

Please provide the originally planned student to teacher ratios at the school facility that is the subject of this SOI: 30 students per teacher

Does the District have a Master Educational Plan that includes facility goals for this building and all school buildings in District? YES

If "YES", please provide the author and date of the District's Master Educational Plan.

Dr. Susan M. Nicholson, Superintendent, has provided a four year, 2012-2015, District Improvement Plan. The Superintendent has also created a five year Capital Improvement Plan, FY14-FY18 for all the facilities in the district.

Is there overcrowding at the school facility? NO

If "YES", please describe in detail, including specific examples of the overcrowding.

Has the district had any recent teacher layoffs or reductions? YES

If "YES", how many teaching positions were affected? 5

At which schools in the district? Waltham High School

Please describe the types of teacher positions that were eliminated (e.g., art, math, science, physical education, etc.).

1 Alternative teacher .6 Art teacher .4 CTE teacher .3 English teacher .6 Instructional Tech teacher .4 Phys. Ed teacher .4 Reading teacher 1 Science/Health teacher .8 World Language teacher

Has the district had any recent staff layoffs or reductions? NO

If "YES", how many staff positions were affected? 0

At which schools in the district?

Please describe the types of staff positions that were eliminated (e.g., guidance, administrative, maintenance, etc.).

Please provide a description of the program modifications as a consequence of these teacher and/or staff reductions, including the impact on district class sizes and curriculum.

N/A

Please provide a detailed description of your most recent budget approval process including a description of any budget reductions and the impact of those reductions on the district's school facilities, class sizes, and educational program.

The budget approval process includes a proposed request on February 6, 2013 of 20.25 additional positions. After further review, the budget approval process now includes a proposed request on February 27, 2013 of a net 11.7 additional positions. The budget approval process will continue through April 24, 2013 when the final vote is expected.

General Description

BRIEF BUILDING HISTORY: Please provide a detailed description of when the original building was built, and the date(s) and project scopes(s) of any additions and renovations (maximum of 5000 characters).

The High School was built in 1968 on 43.3 acres of property. In 1998 the auto tech shop was built directly behind the high school to meet educational needs. In 2002, a Fine Arts addition was constructed to meet educational needs. In 2004, two full fields of new style artificial turf were installed to meet educational needs. The high school roof was replaced in October-November 2011 during the construction of multiple solar panels on all school roofs as part of a city-wide "Green Project." The acreage available appears to give owners/designers multiple options to correct shortfalls of appropriate educational space.

TOTAL BUILDING SQUARE FOOTAGE: Please provide the original building square footage PLUS the square footage of any additions.

449700

SITE DESCRIPTION: Please provide a detailed description of the current site and any known existing conditions that would impact a potential project at the site. Please note whether there are any other buildings, public or private, that share this current site with the school facility. What is the use(s) of this building(s)? (maximum of 5000 characters).

There are no known existing conditions that would impact a potential project at this site.

ADDRESS OF FACILITY: Please type address, including number, street name and city/town, if available, or describe the location of the site. (Maximum of 300 characters)

617 Lexington Street, Waltham, MA 02452

BUILDING ENVELOPE: Please provide a detailed description of the building envelope, types of construction materials used, and any known problems or existing conditions (maximum of 5000 characters).

Constructed in 1968, Waltham High School is a three and four story steel frame structure with brick and C.M.U. non bearing interior walls. 95 % of the roofs were replaced during the period of Oct 2011 to Nov, 2011 including insulation with .72 mil PVC (Sarnifil) material. Roof drains have also been replaced during this time. Exterior walls are brick veneer and pre-cast concrete. Windows for the most part are aluminum framed, single pane glass; a majority of these units need to be replaced. The window walls cause major heat loss, replacement will create a "green envelope" for the facility. The building is not completely A.D.A. compliant and is in need of addressing this issue. A majority of the exterior doors are in need of replacement as well as a quantity of interior doors. The building was well constructed and well maintained, but as noted, infrastructure systems are dated and produce inefficiencies.

Has there been a Major Repair or Replacement of the EXTERIOR WALLS ? NO

Year of Last Major Repair or Replacement: 1968

Description of Last Major Repair or Replacement:

Has there been a Major Repair or Replacement of the ROOF? YES

Year of Last Major Repair or Replacement: 2011

Type Of ROOF: PVC .72 mil (Sarnifil)

Description of Last Major Repair or Replacement:

Replaced existing roof in Nov 2011 including replacing roof drains and new insulation.

Has there been a Major Repair or Replacement of the WINDOWS? NO

Year of Last Major Repair or Replacement: 2008

Type Of WINDOWS: Double Pane

Description of Last Major Repair or Replacement:

No major replacement, a few sections of single pane windows (4) were replaced with double pane insulated windows to resolve a heat issue at the back of the school.

MECHANICAL and ELECTRICAL SYSTEMS: Please provide a detailed description of the current mechanical and electrical systems and any known problems or existing conditions (maximum of 5000 characters).

The original mechanical and electrical systems are dated 1968.

Presently there are 5 Aerco condensing boilers (1999) which supply hot water to heat the hydroid heating system and the domestic hot water tank. The heating system consists of two (2) main circulators located in the boiler room and eight (8) secondary circulators throughout the building. The building is equipped with fourteen (14) air handling units which introduce outside air and which are critical to providing fresh air and appropriate climate within the facility. Each classroom is pneumatically controlled by a thermostat located in each space. Due to the age of the pneumatic system, moisture and leakage prohibits the efficiency of the heating system as well as inaccurate classroom temperatures. Ancillary equipment throughout is antiquated and in need of replacement. Unit ventilators should be changed to fan coil units with associated roof top units controlled by DDC. The pneumatic valves throughout are in need of replacement.

The center block air conditioning system consists of an air cooled chiller and two air handlers. Control issues with the center block air conditioning system have been a habitual issue and failed in the spring of 2012. The television studio needs to have suitable air conditioning installed to appropriately cool recently installed electronic equipment. The chimney lining is in need of repair. The electrical

service has three electrical services each sized at 2000 amperes, 208/120 volt 3 phase – 4 wire. The service entrance equipment is made up of three switchboard enclosures with a 2000 ampere main circuit breaker in each enclosure. All three switchboards have two distribution sections. There is no surge protection on the existing electric service. Electrical primary and secondary feeds as well as the switchboard and transformers shall be examined for general condition. There is a 150KW emergency generator located at the high school. The emergency transfer switches are in need of modernization due to ongoing maintenance concerns. Typical classrooms have two 120 volt duplex receptacles. This is inadequate for today's educational needs. In 2003 the fire alarm system was replaced in its entirety.

Has there been a Major Repair or Replacement of the BOILERS? YES

Year of Last Major Repair or Replacement: 1999

Description of Last Major Repair or Replacement:

Replaced original American Standard boilers with 5 Aerco Benchmark 2.0 high efficiency condensing boilers.

Has there been a Major Repair or Replacement of the HVAC SYSTEM ? NO

Year of Last Major Repair or Replacement: 1968

Description of Last Major Repair or Replacement:

Has there been a Major Repair or Replacement of the ELECTRICAL SERVICES AND DISTRIBUTION SYSTEM? NO

Year of Last Major Repair or Replacement: 1968

Description of Last Major Repair or Replacement:

BUILDING INTERIOR: Please provide a detailed description of the current building interior including a description of the flooring systems, finishes, ceilings, lighting, etc. (maximum of 5000 characters).

Interior walls in classrooms, offices, gym and cafeteria are C.M.U. Some offices are gypsum wall board. Restrooms are ceramic tile. The corridor and stairwell flooring consists of vinyl asbestos tile and vinyl composition tile. The classroom flooring consists of vinyl asbestos tile. Toilet rooms are seamless epoxy and some offices and the library consists of wall to wall carpeting. The ceilings throughout are 2' x 4' acoustical tile suspended grid type. Any renovation would need to include asbestos abatement in the ceilings. The gym ceiling is a painted exposed structure. The restrooms ceiling is gypsum board, painted.

PROGRAMS and OPERATIONS: Please provide a detailed description of the current programs offered and indicate whether there are program components that cannot be offered due to facility constraints, operational constraints, etc. (maximum of 5000 characters).

Waltham High School is a comprehensive high school with a wide range of educational programs (See attached Program of Studies). We are unable to offer several programs because of limitations of the building (Cosmetology, Culinary Arts, and Allied Health, Plumbing and Protective Services). Other programs are in spaces that are not considered adequate (Carpentry and Cabinetmaking, Electrical, Child Care, and Graphic Communications). Computer labs are not adequate. Locker room areas do not meet the demands of our current extracurricular programs.

CORE EDUCATIONAL SPACES: Please provide a detailed description of the Core Educational Spaces within the facility, a description of the number and sizes (in square feet) of classrooms, a description of science rooms/labs including ages and most recent updates, and a description of the media center/library (maximum of 5000 characters).

Waltham High School was built in 1968 and there have been few updates. There are 125 classrooms ranging from 730-990 square feet. Science labs are 990 square feet and include both student seating and lab areas and were identified as outdated in the 2005 NEASC accreditation report. They have not been updated in any way since the building was completed in 1968. The media center facility exists as it did in 1968, except for some technology upgrades, and were noted as inadequate in the most recent NEASC report.

CAPACITY and UTILIZATION: Please provide a detailed description of the current capacity and utilization of the school facility. If the school is overcrowded, please describe steps taken by the administration to address capacity issues. Please also describe in detail any spaces that have been converted from their intended use to be used as classroom space (maximum of 5000 characters).

Waltham High School's Commonwealth of Massachusetts certificate of inspection permit lower level capacity is 160, 1st floor is 830, 2nd floor is 830, 3rd floor is 880. The current student enrollment is approximately 1380. The need for office space has displaced a number of classrooms over the past several years. Three computer labs have taken over additional classroom space. An alternative program is utilizing five classrooms. Special Education programs require smaller class sizes.

MAINTENANCE and CAPITAL REPAIR: Please provide a detailed description of the district's current maintenance practices, its capital repair program, and the maintenance program in place at the facility that is the subject of this SOI. Please include specific examples of capital repair projects undertaken in the past, including any override or debt exclusion votes that were necessary (maximum of 5000 characters).

Maintenance:

The Waltham Public Schools Facilities Department has three divisions within the department, a custodial division, a maintenance division and the office of facilities management. The office of facilities management consists of a Director of Facilities and his secretary, a Preventive Maintenance Coordinator, a Life Safety, Compliance & Environmental Coordinator. The maintenance division provides maintenance for the school district and consists of the following positions; Two Working Maintenance Foremen, One foreman is a licensed H.V.A.C. Technician & a Licensed Master Electrician and supervises two Electricians, a H.V.A.C. Technician and a Plumber. The other Working Foreman (Locksmith/Carpenter) supervises two Carpenters and two Painters.

The Department is using SchoolDude.com as a web based computerized maintenance management system to oversee and record maintenance work orders and preventive maintenance.

We have presently 8 new schools on line with D.D.C. controls maintaining all of our heating, ventilation and air conditioning within these schools. Some buildings also maintain lighting systems.

Within the High School there are 15 custodians working two shifts to maintain the upkeep of the building. They are supervised by a senior custodian who is responsible for requesting maintenance issues through the internet maintenance management system. The senior custodian assigns requests to the custodial staff made by the preventive maintenance coordinator. Higher level preventive maintenance will be performed by the maintenance staff.

Attached for your review is our maintenance procedure.

Capital Repair Projects:

Within the last ten (10) years capital projects have been completed at Waltham High School.

In 1998, a newly constructed Automotive Shop for \$1,023,381 +/-

In 1999, we installed five gas fired Aerco Benchmark boilers (condensing heat exchangers) for the cost of \$286,000.

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Although the ancillary equipment (unit ventilators, Air handling units, Roof Top units, piping) remains original.

In 2001, built an addition for a Fine Arts Center \$1,677,821. In 2001, 2002 replaced student lockers throughout the building \$94,000 +

In 2002, replaced Fire Alarm system \$490,000 +/-

In 2010, 206 occupancy sensors were added to classrooms/offices and 24 lighting retrofits at a total project cost of \$68,532 an estimated utility incentive of \$25,374 for a total project cost to Waltham of \$43,158. It is estimated the Waltham School system will save \$15,225 whereby realizing a 2.8 year payback. 95% of the high school roof was replaced in the fall of 2011 when a major "green project" was initiated by the City and solar panels were added to most school buildings. We also have put two projects out to bid for replacement of the core air conditioning/cooling system and for mandated Title IX locker room upgrades.

Attached for your review is our 5 Year Capital Plan.

Priority 3

Question 1: Please provide a detailed description of the "facility-related" issues that are threatening accreditation. Please include in this description details related to the program or facility resources (i.e. Media Center/Library, Science Rooms/Labs, general classroom space, etc.) whose condition or state directly threatens the facility's accreditation status.

Background: Waltham High School is a comprehensive high school with both academic and Chapter 74 Career and Vocational Technical Programs. Waltham has provided its students with programs in Vocational training since 1892 and is committed to those programs. Until the late 1990s Waltham maintained two separate schools: One for the traditional academic programs and one for Vocational Technical programs. At that time it was determined that the needs of our students were no longer being met under this model, that all students needed to be exposed to the highest quality academics as well as opportunities in Career and Vocational Education programs. In response to the move, a new automotive facility was built adjacent to Waltham High School at a cost of approximately \$1,000,000. All other Vocational Technical programs are housed in spaces that have been retrofitted for use by the current programs. In all cases the space was either classroom space or space created for Industrial Arts programs. Those space needs have to be addressed as well as the need to increase Vocational Technical offerings. In the early 1990's a decision was made to move all Central Offices to the High School building, taking classroom, guidance office, hallway, and faculty space away. Consideration has been given, but no final decision has been made, on moving Central Office out of the high school. Waltham High School was built in 1968; it has been well-maintained and is on an excellent site. In order to meet current educational needs several issues must be addressed very soon. The high school needs to reclaim Central Office space as it plans for significantly increased enrollment and mandated program needs (for example, Alternative High School model).

Science labs are outdated, operating under 1960's technology, lab space is inadequate, and does not meet square footage requirements. Chemical storage areas are obsolete and dangerous. Ventilation systems are constantly breaking down and therefore need constant maintenance. NEASC requested and received an "update on our plans to address the shortcomings of the school Science labs." Lab space that needs addressing includes 19 Science lab/classrooms and two other lab areas (including a chemical storage room and lab preparation room.)

NEASC has informed us that the following areas need to be addressed in order to comply with the ADA and HP regulations for the state of Massachusetts: Television studio, Mini Gym, all 13 boys' lavatories and 13 girls' lavatories, six mens' lavatories, and six women's' lavatories, the Medical Suite for Health services, ten entrances/exits, and approximately 150 rooms and offices (door hardware and accessibility).

NEASC has informed us that several Vocational labs, including Child Care, Carpentry and Cabinetmaking, Graphic Communications, and Electrical are not adequate for those programs and required a plan to address those needs by 2010. These programs enroll over 200 current students. It is important to note that this number is likely to increase by expanded and enhanced offerings in concert with projections of significant increase in high school enrollment over the next five (5) to ten (10) years.

Priority 3

Question 2: Please describe the measures the district has taken to mitigate the problem(s) described above.

\$150,000 has been approved for a feasibility study. Capital Improvement funding (\$550,000) has been approved for the Culinary Arts and Cosmetology programs; however, initial bids came in well above the committed amount so the projects have been stalled and are now viewed as better suited for inclusion in the SOI. A few lavatories within the high school have been retrofitted to better accommodate student needs but the building does not fully comply with current ADA regulations. With support from the School Committee, the Superintendent created a Facilities Planning Committee to review current needs and devise a plan to meet the challenge of increasing enrollment and the high school project is critical to its success. The School Committee, Mayor and City Council are prepared to support corrections and improvements to the high school. With this committed support within the City, we only await MSBA's invitation to move forward with the process.

Priority 3

Question 3: Please provide a detailed explanation of the impact of the problem described in this priority on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem(s) identified.

Science classes are not afforded up-to-date lab areas for experiments. Science lab areas are overcrowded, and in some cases students need to triple and quadruple up in areas designed for two students. Handicapped students cannot access instructional areas including Television Production classes and Fitness classes. Handicapped students have inadequate access to the Health/ Medical area and lavatories throughout the building. Students in the Carpentry and Cabinetmaking program do not have adequate space to provide for the competencies that need to be covered (such as framing, roofing, and siding) Students in Graphic Communications are unable to easily utilize equipment used in the industry (computers, presses, plate making). Students in the Child Care program must be placed in internships off site in order to work with young children, as our facility does not allow for that exposure onsite. Demand for our Electrical program exceeds the physical space we have and students are unable to enroll into the program each year.

In addition to the limitations and problems noted above, we have determined that there is great need for program enhancements and improvements that focus on alternative programming for our neediest students in Special Education and to have positive impact on issues like drop out rates. We have clearly identified that current space limits and impedes high standard programs which allow us to better meet student needs.

Please also provide the following:

Name of accrediting entity (maximum of 100 characters)::

NEASC

Current Accreditation Status: Please provide appropriate number as 1=Passed, 2=Probation, 3=Warning, 4=Lost:

1

If "WARNING", indicate the date accreditation may be switched to Probation or lost::

If "PROBATION", indicate the date accreditation may be lost::

Please provide the date of the first accreditation visit that resulted in your current accreditation status.: 11/1/2005

Please provide the date of the follow-up accreditation visit.: 11/1/2015

Are facility-related issues related to Media Center/Library? If yes, please describe in detail in Question 1 below.:

NO

Are facility-related issues related to Science Rooms/Labs? If yes, please describe in detail in Question 1 below.:

YES

Are facility-related issues related to general classroom spaces? If yes, please describe in detail in Question 1 below.:

YES

Are facility-related issues related to SPED? If yes, please describe in detail in Question 1 below: NO

Are facility-related issues related to support spaces? If yes, please describe in detail in Question 1 below.: NO

Are facility-related issues related to "Other"? If yes, please identify the other area below and describe in detail in Question 1 below.: NO

Please describe (maximum of 100 characters).:

Priority 4

Question 1: Please describe the conditions within the community and School District that are expected to result in increased enrollment.

The district worked with NESDEC to update enrollment projections using 10/1/11 and 10/1/12 data. The analysis revealed that the district is in the midst of a significant growth cycle due to increased birth rates and increased kindergarten cohort survival ratios. The current impact is at the elementary level, but will roll through all grade levels and will fully impact the high school in 2021 when a 35% (500 student) increase is projected. Enrollment and a commitment to growing CTE programs will exacerbate constrained issues.

District enrollment is growing by 100+ students per year with the most significant impact currently at grades K-5. The growth has been consistent for several years and projects to continue.

Priority 4

Question 2: Please describe the measures the School District has taken or is planning to take in the immediate future to mitigate the problem(s) described above.

The district is planning to deal with impending enrollment increases projected by NESDEC in a thoughtful proactive manner that is cost efficient. With support from the School Committee, the Superintendent has created a Facilities Planning Committee to consider a multitude of ways to address the enrollment growth. The most immediate concern is to provide program space at the K-5 level. Under consideration are several options that include moving Special Education Programs and Preschool classes, some redistricting and/or identifying alternative space for some programs (for example move preschool to rented space). The Facilities Planning Committee is also considering restructured Grade configurations for Middle Schools (currently Grades 6-7-8 to a Grade 5-6 and 7-8 which moves Grade 5 out of the K-5 current structure). Additionally, there is some thought being given to having Middle Schools transition to Grades 5-6-7 with Grade 8 moving to the High School. Such a move solves current preK-8 issues but exacerbates the pressure on High School space and program.

Other consideration is being given to moving Central Office and other district programs (for example Parent Information Center, Attendance Officer and Food Service) out of the High School to create space for needed High school Programs. As an example, with some renovation, the central Office area could be well used by Alternative High School options and more specialized Special Educations options.

What is most compromised in the short term is the inadequacy of space for CTE / Ch. 74 programs. Unless expensive retrofits are undertaken, we will continue to lose students to regional tech schools in the areas of Culinary Arts, Cosmetology, Allied Health, Plumbing and Protective Services. The district feels strongly about keeping these students in district by meeting the growing interest in these types of programs. Similarly, more traditional options (carpentry needs more appropriate space, child care needs an in-house internship option and new programs (plumbing) need additional space. The resolution outside of a major building project will necessitate significantly higher costs to retrofit these projects.

Priority 4

Question 3: Please provide a detailed explanation of the impact of the problem described in this priority on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.

The district's goal of a 1:1 learning environment for all students will be impeded at the high school level because of the challenges directly related to installing a wireless infrastructure. It is not likely that there will be great impact on High School programs in the short term beyond what we are currently experiencing. For example, inadequate space in our science labs compromises and impacts curriculum delivery in a negative fashion. Constraints on the CTE/Ch. 74 programs have already been articulated. However, the enrollment growth is coming because of significant changes in birth rates and K survival ratios. The problems noted above will be exacerbated by substantial pressure placed on academic programs in all curricular areas. The High school is currently scheduled in the 70% range but with 500 additional students the schedule rate will increase rapidly beyond 85% once the roll through enrollment growth begins in five or so years.

In the short run, space allocated to Central Office could be better utilized for Special Education and an Alternative High School. The Parent Information Center could be retrofitted for a kitchen for a restaurant "lab" setting option.

The greatest immediate impact is felt on existing traditional vocational programs that struggle with inadequate space to deliver appropriate programming. These challenges are best addressed with a thoughtful feasibility study which results in redesigned space that meets the needs of our children and prepares them to be college and career-ready.

Please also provide the following:

Cafeteria Seating Capacity: 900

Number of lunch seatings per day: 3

Are modular units currently present on-site and being used for classroom space?: NO

If "YES", indicate the number of years that the modular units have been in use:

Number of Modular Units:

Classroom count in Modular Units:

Seating Capacity of Modular classrooms:

What was the original anticipated useful life in years of the modular units when they were installed?:

Have non-traditional classroom spaces been converted to be used for classroom space?: NO

If "YES", indicate the number of non-traditional classroom spaces in use:

Please provide a description of each non-traditional classroom space, its originally-intended use and how it is currently used (maximum of 1000 characters):

Please explain any recent changes to the district's educational program, school assignment polices, grade configurations, class size policy, school closures, changes in administrative space, or any other changes that impact the district's enrollment capacity (maximum of 5000 characters). :

The Facilities Planning Committee is currently researching several options to address the immediate enrollment concerns. These options will be presented to School Committee for their review.

What are the district's current class size policies (maximum of 500 characters)?:

Per the Waltham Educators Association Contract:

Kindergarten: 20

Grades 1-6: 25

Middle and Senior High School, exclusive of Ch. 74 programs and team teaching: Academic Subjects=30, Science

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Labs=20, Technical Education=15, Family/Consumer Science=20, Art=15, Music=30, Physical Education=25

Priority 5

Question 1: Please provide a detailed description of the issues surrounding the school facility systems (e.g., roof, windows, boilers, HVAC system, and/or electrical service and distribution system) that you are indicating require repair or replacement. Please describe all deficiencies to all systems in sufficient detail to explain the problem.

The window system is original from 1968 and consists of single pane windows. It is difficult to maintain constant temperatures within the educational building. These windows should be changed to double thermo pane windows.

In 1999 the boilers were replaced with five (5) AERCO condensing boilers. To date, we have had two of these boilers fail (heat exchangers).

The H.V.A.C. system is antiquated, there is no direct digital controls (presently pneumatic) all original ancillary pumps and controls need to be updated due to the age of the facility. Temperatures are difficult to maintain throughout the building. Motors should be converted to NEMA motors. These chillers failed in the spring of 2012 and we are in a bid process for repair. The system will need to be replaced in its entirety as part of this project. The chiller for the center block of the building should be changed to a DX split system, this unit and its controls are inefficient and can not maintain temperature appropriately. The unit ventiators should be replaced with fan coil units and R.T.U.'s w/ D.D.C. The air conditioning system at the 1100 + seat auditorium is in need of replacement. This is an ideal location for demand control ventilation. Temperatures within the auditorium are extremely difficult to maintain.

The electrical service is presently above ground on poles, the poles are 40 years old and are in need of replacing; a potential solution of direct burial cable is possible. The arc shoots within the manual break switch are in need of repair. If the electrical service is to be left above ground the use of spacer cable may be best rather than 3 phase over cross arm.

Regarding the electrical distribution system, three of the switchboards are 1200 amps and one is a 2000 amp; they are 120/208v 3 phase. Main breakers may need to be checked be checked and possible replaced. All the motor controller within the building need to be replaced due to the age.

Priority 5

Question 2: Please describe the measures the district has already taken to mitigate the problem/issues described in Question 1 above.

As repairs are needed the maintenance staff addresses and performs corrective maintenance. Regarding major renovations of building systems. The city has approved \$150,000 for a feasibility study to correct these concerns. Capital Improvement Plan funding has been approved for the Culinary Arts and Cosmetology programs (bids came in too high and have stalled). Similarly funding is available to complete a wireless project which will in and of itself allow for curriculum enhancements. The School Committee has also funded the NESDEC enrollment study which will provide better data for future decision making. A Facilities Planning Committee is considering current stresses on facilities created by enrollment growth. Several of these decisions could have an impact on the scope and needs of a high school project. The development of a five year vision for Ch. 74/CTE programming coupled with a vision for Special Education and other high school based issues (Alternative HS/drop out prevention, etc) has given focus and direction to what is really needed.

Priority 5

Question 3: Please provide a detailed explanation of the impact of the problem/issues described in Question 1 above on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.

Single-pane windows are inadequate to keep heat in the classrooms. Heating systems cannot keep classrooms warm in the cold winter months. Students in several classrooms on the north side of the building need to be regularly moved because of these uncomfortable conditions.

Hardware on doors does not meet ADA and HP state requirements. Handicapped students do not have proper access. Several corridor, fire, gymnasium, and office doors are beyond repair and obsolete.

Electrical systems are 1960's technology and have not been updated. Circuits are tripped regularly due to inadequate power supply. Computer labs, Vocational program equipment, and other IT equipment were not planned for when the building was designed and are an important part of our present educational program. Current electrical and IT systems are enhanced by the creation of a "raceway model" for improved wiring. As we look to move the high school into a wireless environment, substantial work is necessary in this area. Wireless availability will have huge impact on curricular options and hardware decisions all of which are critical to create and sustain 21st century learning opportunities for all students.

Lighting in classrooms was updated with a grant from Boston Edison approximately 20 years ago, although several office areas, Library/Media, and Gymnasiums were not updated at that time and lighting needs in those areas should be addressed.

Priority 5

Question 4: Please describe how addressing the school facility systems you identified in Question 1 above will extend the useful life of the facility that is the subject of this SOI and how it will improve your district's educational program.

The current building is structurally sound and the current layout of the building is conducive to providing an excellent educational environment because of the courtyard configuration. Correcting the identified issues will assist the educational process providing appropriate indoor climate and environmental control issues.

Please also provide the following:

Have the systems identified above been examined by an engineer or other trained building professional?: YES

If "YES", please provide the name of the individual and his/her professional affiliation (maximum of 250 characters)::

Keyes associates, LLP, THE CO/OP-ADA, Novare Engineers-Heating, Ventilation and Plumbing

The date of the inspection:: 3/10/1999

A summary of the findings (maximum of 5000 characters)::

Priority 7

Question 1: Please provide a detailed description of the programs not currently available due to facility constraints, the state or local requirement for such programs, and the facility limitations precluding the programs from being offered.

Computer lab space is not adequate; the number of computers per student does not meet state technology guidelines. The building was not designed for computer use. Current wiring must run through corridor raceways because of spray on asbestos on infrastructure above the drop ceilings. This impedes access and availability of technology. Mobile labs and individual student device usage are dependent on developing wireless capacity within the building.

We are unable to offer the following programs because of a lack of space: Culinary Arts, Cosmetology, Allied Health, Plumbing and Protective Services. We do not have adequate lab space for a Technology/Engineering program. We do not have appropriate space to include an in-house child care/preschool option for CTE (students have to be out placed as interns); this also limits our opportunity to house and in-house Integrated Preschool which would offer enhanced options for Special Education.

Child Care, Carpentry and Cabinetmaking, Graphic Communications, and Electrical programs are limited due to facility constraints. This building was not designed to house these programs: The space was retrofitted when the former Vocational School building was made surplus.

Special Education Pervasive Disability Disorder program space is not adequate. The Special Education program would benefit from additional smaller space options and there is great need for an in-house Alternative High School program. Minimally, Central Office should move and its core area retrofitted for Special Education programs.

Priority 7

Question 2: Please describe the measures the district has taken or is planning to take in the immediate future to mitigate the problem(s) described above.

In order to deliver an appropriate education for students, the district has retrofitted classrooms for computer use but have reached the end of the productive road for those options. 21st century curriculum and instruction needs wireless capability and the district is currently trying to pull together funding to make this a viable option in the short run, but the best solution is to do it as part of a larger high school project.

The district with School Committee, Mayor and City Council has been sensitive to and supportive of trying to resolve CTE/Ch.74 options in Culinary Arts and Cosmetology and have even appropriated Capital Funds to move in this direction; and yet, this remains a reactive approach. The development of a five year vision for CTE/Ch. 74 has now generated a defined focus to the development of a planned approach to meet student needs.

Priority 7

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Question 3: Please provide a detailed explanation of the impact of the problem described in this priority on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.

Because of space limitations we are unable to update and/or add several Vocational programs to meet the needs of our students and address competency requirements. Students are forced to choose alternate programs. Computer use is limited by infrastructure and space constraints. Students and teachers are not exposed to current technology. Teachers can not provide students with the tools needed in today's society and ensure that our students are college and career ready.

Stated most simply, space issues have become an impediment to student learning and progress.

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Vote

Vote of Municipal Governing Body YES: 13 NO: 0 Date: 3/25/2013

Vote of School Committee YES: 5 NO: 0 Date: 2/27/2013

Vote of Regional School Committee YES: NO: Date:

REQUIRED FORM OF VOTE TO SUBMIT AN SOI

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REQUIRED VOTES

If a City or Town, a vote in the following form is required from both the City Council/Board of Aldermen OR the Board of Selectmen/equivalent governing body AND the School Committee.

If a regional school district, a vote in the following form is required from the Regional School Committee only. FORM OF VOTE Please use the text below to prepare your City's, Town's or District's required vote(s).

FORM OF VOTE

Please use the text below to prepare your City's, Town's or District's required vote(s).

Resolved: Having convened in an open meeting on _____, the _____ [City Council/Board of Aldermen, Board of Selectmen/Equivalent Governing Body/School Committee] Of _____ [City/Town], in accordance with its charter, by-laws, and ordinances, has voted to authorize the Superintendent to submit to the Massachusetts School Building Authority the Statement of Interest dated _____ for the _____ [Name of School] located at _____ [Address] which describes and explains the following deficiencies and the priority category(s) for which an application may be submitted to the Massachusetts School Building Authority in the future

_____ ; [Insert a description of the priority(s) checked off on the Statement of Interest Form and a brief description of the deficiency described therein for each priority]; and hereby further specifically acknowledges that by submitting this Statement of Interest Form, the Massachusetts School Building Authority in no way guarantees the acceptance or the approval of an application, the awarding of a grant or any other funding commitment from the Massachusetts School Building Authority, or commits the City/Town/Regional School District to filing an application for funding with the Massachusetts School Building Authority.

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CERTIFICATIONS

The undersigned hereby certifies that, to the best of his/her knowledge, information and belief, the statements and information contained in this statement of interest and attached hereto are true and accurate and that this Statement of Interest has been prepared under the direction of the district school committee and the undersigned is duly authorized to submit this Statement of Interest to the Massachusetts School Building Authority. The undersigned also hereby acknowledges and agrees to provide the Massachusetts School Building Authority, upon request by the Authority, any additional information relating to this Statement of Interest that may be required by the Authority.

Chief Executive Officer *

School Committee Chair

Superintendent of Schools

Jeanette A. McCarthy

Jeanette A. McCarthy

Susan M. Nicholson

(print name)

(print name)

(print name)

Jeanette A. McCarthy

Jeanette A. McCarthy

Susan M. Nicholson

(signature)

(signature)

(signature)

Date *4/3/13*

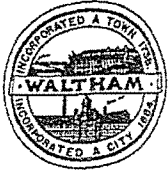
Date *4/3/13*

Date *4/3/13*

* Local chief executive officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated to the chief executive office under the provisions of a local charter.

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**CITY OF WALTHAM
IN THE CITY COUNCIL**

Order # 31885

Ordered:

Having convened in an open meeting on March 25, 2013, the City Council of Waltham, in accordance with its charter, by laws and ordinances, has voted to authorize the Superintendent to submit to the Massachusetts School Building Authority the Statement of Interest dated February 22, 2013 for the Waltham High School located at 617 Lexington Street which describes and explains the following deficiencies and the prior category(s) for which an application may be submitted to the Massachusetts School Building Authority in the future:

- Prevention of the loss of accreditation/outdated science laboratories
- Prevention of severe overcrowding expected to result from increased enrollments/high school programming will be adversely affected by the projected 35% enrollment growth over the next ten years.
- Replacement, renovation or modernization of school facility systems, such as roofs, windows, boilers, heating and ventilation systems, to increase energy conservation and decrease energy related costs in a school facility/ the high school is over forty years old and needs significant work on building systems.
- Replacement of or addition to obsolete buildings to provide for a full range of programs consistent with state and approved local requirements/significant enhancements to CTE/Chapter 74 programming.

And hereby further specifically acknowledges that by submitting this Statement of Interest Form, the Massachusetts School Building Authority in no way guarantees the acceptance or the approval of an application, the awarding of a grant or any other funding commitment from the Massachusetts School Building Authority, or commits Waltham School District to filing an application for funding with the Massachusetts School Building Authority.

Read & Adopted March 25, 2013

Approved March 26, 2013
 Jeannette A. McCarthy, Mayor

Attest Rosario C. Malone, CMC
 City Clerk

TRUE COPY ATTEST:

ROSARIO C. MALONE, CITY CLERK

"B"

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Order # 31885

Ordered: SADUMH

School

In the City Council

Read and Adopted 3-25-13

Robert Williams

City Council President

Approved: 3-26-13

Jamund C. Dy

Mayor

Received

MAR 26 2013

Mayor's Office

CC: _____



City of Waltham
In the City Council

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Date : March 25, 2013 State of Interest WHS

	Yea	Nay	Abstained
Paul J. Brasco	✓		
Thomas J. Curtin	✓		
George A. Darcy, III	✓		
Kenneth B. Doucette	✓		
Joseph M. Giordano, Jr.	ABSENT		
Diane P. LeBlanc	✓		
Robert G. Logan	✓		
Gary J. Marchese	✓		
Kathleen B. McMenemy	✓		
Daniel P. Romard	✓		
Stephen F. Rourke	✓		
Thomas M. Stanley	✓		
Edmund P. Tarallo	✓		
Joseph W. Vizard	✓		
Robert J. Waddick President	PRESIDING		

YEA 13
 NAY 0

TRUE COPY ATTEST:

 ROSARIO C. MALONE, CITY CLERK

Abstained _____ Ruling _____

REGULAR MEETING

The regular meeting of the Waltham School Committee convened at 6:02 p.m. Present were Mr. Cincotta, Ms. Donnelly, Mr. Graceffa and Mr. Tarallo. Mrs. Limonciello presided.

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VOTED: On motion of Mr. Graceffa, seconded by Ms. Donnelly, to adjourn to executive session for the purpose of strategies with respect to collective bargaining with the Waltham School Secretaries Association and Waltham Building Trades Association, to include Dr. Nicholson, Mrs. Chadbourne, and Atty. Sean Sweeney and return to public session at 7:30 p.m.

The regular meeting of the Waltham School Committee convened at 7:32 p.m. Present were Ms. Burstein, Mr. Cincotta, Ms. Donnelly, Mr. Graceffa, Mrs. Limonciello and Mr. Tarallo. Mayor McCarthy presided. Mr. Cincotta led the Committee in the Pledge of Allegiance.

A moment of silence was held in memory of Jean O'Neil and Sheila Davis, two former school employees who recently passed away.

VOTED: On motion of Ms. Donnelly, seconded by Ms. Burstein, to proceed out of order to agenda item 6a.

CURRICULUM AND
INSTRUCTIONFine and Performing Arts

Mr. Douglas Trudeau, Director of Fine and Performing Arts, introduced the fifth grade chorus from Northeast School. Under the direction of music teacher Melinda Verde, the students performed two songs for the enjoyment of the Committee and the community.

Mr. Trudeau introduced music teachers Ginger Connearney and Mary Coughlan. Mrs. Coughlan and Mrs. Connearney reported on the "I Have a Dream" contest. Senior Dalena Tran, whose drawing was selected to advance to the regionals along with the drawings of four runner-ups, read her essay and shared her drawing with the Committee. The drawings of the four semi-finalists (Daniel Gonzales, Herline Bastien, April Fitzgerald, and Asha Burrell) were also shared with the Committee.

Mr. Trudeau updated the Committee on the music, art and drama departments and reported many of the music students will be performing throughout Waltham, the state of Massachusetts and also the states of Florida and California before the end of June. Mr. Trudeau further reported that student art work is on display throughout the District, at Mt. Auburn Hospital, the transportation building in Boston and hopefully soon in Washington, D.C. Mr. Trudeau praised the dedication and hard work of the Fine and Performing Arts staff.

At this point, Mr. Trudeau shared his "dream" for our school district to develop a middle school of Fine and Performing Arts. Mr. Trudeau gave a brief overview of what he believes would be a very successful addition to the Waltham Public Schools. Mr. Trudeau informed Committee members of a workshop he attended run by the DESE on the availability of innovative school grants and that Waltham would be eligible for them and feels if planned correctly, this would have little impact on the school budget.

Mr. Trudeau invited everyone to attend the All City Concert on April 2, 2014 at 7:00 p.m. at the Kennedy Middle School.

Committee members thanked Mr. Trudeau and his staff for their dedication and excellence to Waltham Public Schools.

PUBLIC SESSION

Susan Sutherland, 71 Ellery Road, came forward to report on her recent attendance at the second annual "Digital Learning Day." This is a national campaign that empowers teachers and shines a spotlight on successful instructional practices and effective uses of technology in classrooms across the country. The program is sponsored by the Alliance for Excellent Education. Mrs. Sutherland invited all PTOs and parent groups in the district to participate next year.

Mrs. Sutherland presented the Committee with an informational packet along with a proclamation from Governor Deval Patrick declaring February Digital Learning Month. Mrs. Sutherland asked that this proclamation be displayed in the Parent Information Center or another suitable location.

Safety Officer Ann Frassica came forward to publicly commend the school custodians for their tremendous efforts and cooperation in helping with snow removal after the recent blizzard. Officer Frassica reported custodians were asked to help with the removal of snow from sidewalks beyond their school limits and did so willingly and without complaint.

STUDENT COUNCIL

The Student Advisory Council was not represented this evening.

MINUTES

Regular meeting held on
February 6, 2013

VOTED: On motion of Ms. Burstein, seconded by Mr. Graceffa, to approve the minutes of the regular meeting held on February 6, 2013. Ms. Donnelly abstained.

Executive Session Held on
February 6, 2013

VOTED: On motion of Mr. Tarallo, seconded by Mrs. Limonciello, to approve the minutes of the executive session held on February 6, 2013. Ms. Donnelly abstained.

**SUPERINTENDENT'S
REPORT**

Statement Regarding
Security Breach at
Waltham High School

At this time Mayor McCarthy read the following joint statement released today from the Superintendent and Mayor: "There is an ongoing investigation by the Waltham and Leominster police departments regarding a person arrested in Leominster early this morning. This person is employed by Command Security Corporation, a company that the district contracts with for security at Waltham High School. He was arraigned in court and is being held on a dangerousness hearing until Friday. There are allegations that this person was in possession of chemicals that were stolen from the chemistry storage room at Waltham High School. The investigation continues by Waltham and Leominster police as well as the School Department." Mayor McCarthy personally thanked the Superintendent and the Leominster and Waltham Police for their immediate action with regard to this situation.

Parental Leave

VOTED: On motion of Ms. Donnelly, seconded by Mr. Tarallo, to approve the parental leave request of Leah Travers, ESL teacher, Kennedy Middle School; effective May 13, 2013 to June 30, 2014.

The Committee was informed of the following miscellaneous personnel items:

New Hires

Ryan Cummins, 8 Grindstone Ct., Westborough, 01582; BA Saint Anselm College; long term substitute biology teacher, Waltham High School, replacing E. Oberlin (parental leave); salary \$42,252 (B/O) prorated; effective February 25, 2013 to June 30, 2013.

SUPERINTENDENT'S
REPORT, cont'd
New Hires

Daniel Pero, 82 Lexington Street, Burlington, 01803; BA Fitchburg State College; collision technology teacher, Waltham High School, replacing P. Ramsay (retirement); salary \$61,640 (B/8) prorated; effective February 26, 2013 to June 30, 2013.

"B"
"B"

Transfer

Diane Krueger, Title I tutor, Stanley Elementary, transfer to Interim Assistant Principal, Stanley Elementary School, replacing S. Kanode (medical leave); salary \$433.78 per day; effective February 6, 2013 to February 15, 2013.

Information

Forwarded for the committee's information were the January enrollments and a review of the FY13 mid-year budget.

School Calendar
Committee

Dr. Nicholson informed the Committee that the final meeting of the School Calendar Committee was held last night and the findings of the School Calendar Survey would be presented at the next School Committee meeting.

Kindergarten Registration

Dr. Nicholson reported that five out of the six elementary schools have held their kindergarten registration with 269 students registered and an additional 61 families who have started the process. Northeast Elementary will be holding their registration tomorrow night.

Facilities Planning
Committee Update

Dr. Nicholson updated the Committee on the Facilities Planning Committee and noted the challenges the district is facing, especially at the elementary level, which will impact the middle and high school levels in the coming years.

In the short term, for September 2013, the Facilities Planning Committee proposes to move three pre-school classrooms from Stanley to MacArthur. This in turn would free up three classrooms at Stanley and fill three classrooms at MacArthur. Additionally, the Facilities Planning Committee recommends moving grades 1, 2, 3 and 4 of the Language Based Resource Rooms at Whittemore to Fitzgerald. The proposal includes combining grades one and two (10 students projected) and combining grades three and four (12 students projected). This plan would free up four classrooms at Whittemore and occupy two classrooms at Fitzgerald. The proposed plan would keep grade five students at Whittemore for their final year at elementary and move grade five to Fitzgerald a year from now. Dr. Nicholson reported she believes we will have significant additional opportunities for inclusion programs at Fitzgerald than we would be able to manage at Whittemore. Additionally, a limited amount of redistricting is proposed for September and a more conclusive plan will be available soon.

Dr. Nicholson stated long term recommendations would include a more comprehensive redistricting for September 2014 and ongoing data collection would be available shortly regarding available sites for the addition of programs and/or district movement.

At this time Mr. Tarallo reported steady enrollment increases are projected over the next several years and mentioned the Facilities Planning Committee's long term goal would be to ask the City Council if we could take back the Fitch School building and perhaps use it to house the pre-school program and Central Administration.

Mr. Tarallo made a motion, seconded by Ms. Burstein, to ask the City Council to take back Fitch Elementary School.

On the motion, Ms. Donnelly commented we don't have the background information necessary to make an informed decision.

Facilities Planning
Committee Update, cont'd

Mr. Tarallo informed the Committee that the city is looking at options with regard to the Fitch building and feels we should act quickly. Ms. Donnelly commented she is not opposed to taking the building back but would like to see a plan in place first.

"B"
"B"

Mr. Cincotta addressed his concerns and feels this came up very quickly and there is no data to support this move. Mayor McCarthy reported the City Council has formed an Ad Hoc Committee to study the disposition of the Fitch building. Mr. Cincotta further commented it would be more prudent to express to City Council that we are interested in the building and perhaps they could take our future plans into account.

Ms. Burstein reiterated the need to have a plan; let City Council know we are serious and then work out the details including being prepared to answer questions from the Council and what our next steps are.

Mr. Graceffa commented it boils down to needing the classroom space and the need for a plan in order to move quickly.

Mr. Cincotta reiterated the need for a concrete plan.

VOTED: On motion of Mr. Cincotta, seconded by Mrs. Limonciello, to postpone a vote on this issue until we have a plan to present to the City Council along with this request.

Mr. Cincotta noted the plan must state kinds of issues we are trying to resolve and our needs. It doesn't need to specify it will definitely be used as a pre-school but needs to provide some backup as to why we need this building back. Mr. Cincotta does not think we should move forward until we have something to present to City Council.

Roll call: Mr. Graceffa, no; Ms. Burstein, no; Mrs. Limonciello, yes; Mr. Cincotta, yes; Ms. Donnelly, yes; and Mr. Tarallo, no. The Chair voted yes to postpone the vote on this issue.

At this point, Mayor McCarthy suggested any further discussion with regard to this topic be continued under Unfinished Business.

FY13 Mid-Year Budget
Review

Dr. Nicholson reported she has included the Mid-Year Budget Review for their perusal and Mrs. Wilcinski would be present next week to answer any questions.

COMMUNICATIONS
WEA

VOTED: On motion of Mr. Cincotta, seconded by Mrs. Limonciello, to open negotiations for a successor agreement with the Waltham Educators Association. Mr. Tarallo abstained.

Bunn Donation

VOTED: On motion of Ms. Burstein, seconded by Mr. Graceffa, to accept with gratitude and sincere appreciation a donation of various technology equipment from Mr. Shawn Bunn to the MacArthur Elementary School.

UNFINISHED BUSINESS
Waltham High School
Accreditation
Central Office Relocation

This item was not addressed by the Committee.

This item was not addressed by the Committee.

Capital Improvement
Projects

Dr. Nicholson reported the Culinary Arts and Cosmetology projects have been rolled into the Statement of Interest.

Girls' Varsity Locker Room

Dr. Nicholson informed the Committee the Designer Selection Board will meet on March 15, 2013 to select a firm to design the Girls' Varsity Locker Room.

UNFINISHED BUSINESS

cont'd

Kennedy Middle School
Gym Lockers

Dr. Nicholson stated a purchase order has been secured for the KMS gym lockers and that work had been scheduled for February vacation. Due to a delay with the lockers it was decided to put this project on hold and install the lockers over April vacation.

"B"
"B"

McDevitt Floor
Replacement

Dr. Nicholson informed the Committee the McDevitt floor replacement project was completed over February vacation.

Waltham High School Air
Conditioning

Dr. Nicholson reported the purchasing agent is in the process of awarding the low bidder, Lemar HVAC of Lynnfield, MA, the contract to install a new chiller and condenser at Waltham High School (subject to appropriation). The low bid was for \$239,000 but she would like to request a ten percent contingency for a total of \$262,900. Dr. Nicholson stressed there was a ten week lead time on ordering the equipment and it is important we secure a contract and start this project as soon as possible. A discussion ensued regarding clarification on the appropriation. Ms. Burstein noted that given concerns regarding funds for major maintenance and not being able to ascertain an amount this evening, she suggested we move ahead with the understanding we may need to go back for funds at a later date.

VOTED: On motion of Mr. Cincotta, seconded by Ms. Burstein, to amend the FY14 CIP to adjust the high school air conditioning unit from \$500,000 to \$300,000 and to request the Mayor to request City Council for an appropriation of \$262,900 to replace the High School air conditioner.

SOI

Dr. Nicholson presented the Committee with the SOI that she plans to submit to the Massachusetts School Building Authority. Included in the SOI are the plans for Culinary Arts and Cosmetology. For the committee's edification, Dr. Nicholson called attention to back up documents she included in their packets regarding our vision for an Alternative High School along with a Preschool proposal. Dr. Nicholson reported a specific vote of the committee is needed.

VOTED: On motion of Mr. Cincotta, seconded by Ms. Burstein, to authorize the following:

Resolved: Having convened in an open meeting on February 27, 2013, the School Committee of Waltham, in accordance with its charter, by-laws, and ordinances, has voted to authorize the Superintendent to submit to the Massachusetts School Building Authority the Statement of Interest dated February 22, 2013 for the Waltham High School located at 617 Lexington Street which describes and explains the following deficiencies and the priority category(s) for which an application may be submitted to the Massachusetts School Building Authority in the future:

- prevention of the loss of accreditation/outdated science laboratories
- prevention of severe overcrowding expected to result from increased enrollments/high school programming will be adversely affected by the projected 35% enrollment growth over the next ten years
- replacement, renovation or modernization of school facility systems, such as roofs, windows, boilers, heating and ventilation systems, to increase energy conservation and decrease energy related costs in a school facility/the high school is over forty years old and needs significant work on building systems

SOI cont'd

- replacement of or addition to obsolete buildings in order to provide for a full range of programs consistent with state and approved local requirements/significant enhancements to CTE/Chapter 74 programming;

and hereby further specifically acknowledges that by submitting this Statement of Interest Form, the Massachusetts School Building Authority in no way guarantees the acceptance or the approval of an application, the awarding of a grant or any other funding commitment from the Massachusetts School Building Authority, or commits Waltham School District to filing an application for funding with the Massachusetts School Building Authority.

Roll call: Mr. Graceffa, yes; Mrs. Burstein, yes; Mrs. Limonciello, yes; Mr. Cincotta, yes; Ms. Donnelly, yes; and Mr. Tarallo, yes.

Compliance Update:
Monitoring Out-of-District
Students

Dr. Valerie Ardi-Flynn presented the Committee with a Corrective Action Plan Review for SE 37. Dr. Ardi-Flynn reported on the progress in meeting the compliance requirements for SE 37 along with procedures for approved and unapproved out-of-district placements. Dr. Ardi-Flynn further reported a recent audit of files for students in out-of-district placements indicated 100% compliance on randomly selected files for review.

Preliminary FY14 Budget
Information

Dr. Nicholson presented an overview of the preliminary budget for FY14. Dr. Nicholson reported on reductions that will be taken, special education changes that will include reallocating some staff, increasing legal expenses, and increasing the allocation for diagnostic supplies. Dr. Nicholson reported on reductions through attrition that will include two district positions, two paraprofessional positions, funding a part-time human resource administrator, a part-time grants management position, and reducing classroom supplies. The budget impact for Special Education is estimated to be \$787,067 which includes tuition increases of \$151,188, unanticipated placements carried over into FY14 of \$642,781, increase in residential placements totaling \$284,907, fiscal responsibility of \$121,000, pending placements of \$296,549, a savings of \$877,358 for graduating/aging-out/moving students and a \$168,000 circuit breaker adjustment. Also included are the addition of five ESL teachers and one ESL instructional coach for a budget impact of \$300,000. Professional development is expected to increase by \$50,000 due to mandated SEI Endorsement Courses and NEASC preparation costs. Dr. Nicholson informed Committee members the proposed budget does include \$900,000 for steps/longevity increases, \$13,000 for increases due to degree changes, \$75,000 for the Waltham Family School, \$75,000 for transportation, \$100,000 for an Administrator of Technology, and \$12,000 for twelve month principals at our level 3 schools. Dr. Nicholson further reported the proposed budget does not include settlement of negotiated contracts, cost of proposed short-term solutions due to space issues, cost of addressing security issues/concerns, cost of agreement to be reached on optimum class size, and possible funding cuts due to the Federal Sequestration. Dr. Nicholson noted a 3.68% increase in the budget.

Dr. Nicholson plans on presenting a refined FY14 budget at the next meeting. The budget book will be presented at the March 20th meeting. A public hearing will be held on April 3rd and a final vote of the budget is expected to take place at the April 24th School Committee meeting.

Preliminary FY14 Budget Information, cont'd

At this time, Dr. Nicholson answered questions from the Committee. Ms. Burstein questioned class size and Dr. Nicholson noted she has discussed class size at length with administrators and that we try to keep kindergarten and grade one to approximately 18 students; grades 2-5 at 18-20 students; middle school at 18 students; and high school, depending on level and subject, at 15-25 students.

"B"
"B"

Mr. Cincotta addressed his concerns and stated he feels the Committee needs to have a discussion and make a statement on optimal class size. Discussion ensued. It was agreed that additional data on class size projections from each of the schools is needed.

Ms. Donnelly asked, if at all possible, that budget books be sent to Committee members as soon as possible for their perusal.

UNFINISHED BUSINESS, cont'd
Plan for Fitch

VOTED: On motion of Mr. Tarallo, seconded by Ms. Burstein, to add the Plan for Fitch to the agenda.

Discussion continued regarding the possible plan to take back Fitch School.

Mr. Tarallo stated that over the next 10 years we're going to have an increase of 24 percent of our student body and over the next five years it will be 13 percent. Since 2004, our cohort survival rate has exceeded 60 percent and it is projected that it will continue to do that.

Dr. Nicholson stated there is a need for additional data. Dr. Nicholson noted we currently have two years of data but a third year of data would be better. Dr. Nicholson reported the Facilities Planning Committee discussed the possibility of taking Fitch back and the possibility of renting space in outside buildings. The Facilities Committee will continue to work on a long term plan.

Mr. Cincotta commented we are looking for more information/data than what has been presented and he would like to see something to back up the request. Mr. Cincotta reiterated the Committee has voted to postpone the request until they see more documentation. Mr. Cincotta stated he feels the fact we are having this discussion shows the School Committee doesn't feel comfortable with what is being proposed.

Mayor McCarthy left the meeting at 10:35 pm.

NEW BUSINESS

There were no New Business agenda items this evening.

FISCAL MATTERS
Bills on Warrant

VOTED: On motion of Ms. Donnelly, seconded by Mr. Graceffa, to approve the bills on warrant.


FUTURE ITEMS FOR DISCUSSION

Ms. Donnelly requested a brief update be provided at the next meeting regarding the status of open positions.

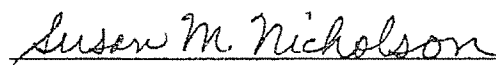
Mr. Tarallo would like communications to the School Committee and ConnectEd calls (reverse 911) be discussed at a future meeting.

ADJOURNMENT

VOTED: On motion of Ms. Burstein, seconded by Mr. Graceffa, to adjourn the meeting at 10:45 p.m.



Honorable Jeannette A. McCarthy
Chairperson



Susan M. Nicholson, Ed.D.
Superintendent

Massachusetts School Building Authority

School District Waltham

District Contact Susan Nicholson

TEL (781) 314-5400

Submission Date 4/1/2013

Closed Schools Information

Closed Schools

Question 1: Has the district sold, closed, or otherwise removed from service a school in the last 10 years?

Yes

School Name: Johnathan Bright Elementary School

260 Grove Street
Waltham, MA 02453

Which of the following apply to the school?

Determined surplus by the School Committee and turned back over to the City of Waltham

Please provide the year the school was sold, closed, or otherwise removed from service.

2008

Please provide the year the school was originally opened.

1887

Please provide the age of the school when it was sold, closed, or otherwise removed from service.

121

Please provide a history of the use of the school, including grades served, any educational programs at the school, and any major renovation, addition, and/or repair projects at the school.

The school was a kindergarten through grade five school for its existence. One major addition was the gym/cafeteria in 1976.

Please provide the reason for selling, closing or otherwise removing the school from service. Please be as specific as possible and provide as much detail as you are able as to the reason(s) for the district's decision.

The school had reached the end of its useful life and would have required significant renovations to stay open.

Please provide a detailed description about the placement of students, programs, teachers, and administrative staff that were served by the school which was sold, closed, or otherwise removed from service. For example, were the students moved to another school(s), were the programs moved to another school(s) or were they eliminated, were the teachers moved to other school(s) or were the teaching positions eliminated?

All students and staff were incorporated into the new Fitzgerald Elementary School when it opened after its rebuilding.

Please provide the district's understanding of any school building grant money that the district received from the state for the school that was sold, closed, or otherwise removed from service. Please provide as much detail as possible.

Not applicable.

School Name: South Middle School

"B"

"B"

510 Moody Street
Waltham, MA 02453

Which of the following apply to the school?

Determined surplus by the School Committee and turned back over to the City of Waltham

Please provide the year the school was sold, closed, or otherwise removed from service.

2008

Please provide the year the school was originally opened.

1923

Please provide the age of the school when it was sold, closed, or otherwise removed from service.

85

Please provide a history of the use of the school, including grades served, any educational programs at the school, and any major renovation, addition, and/or repair projects at the school.

The school serviced grades 7, 8 and 9 until the 1980's and then grades 6, 7 and 8 when grade 9 was moved to the high school. In 1975 renovations were made to the cafeteria and gym. In 1977 three classrooms were added.

Please provide the reason for selling, closing or otherwise removing the school from service. Please be as specific as possible and provide as much detail as you are able as to the reason(s) for the district's decision.

The school had reached the end of its useful life and would have required extensive renovations in order to continue using it as a school.

Please provide a detailed description about the placement of students, programs, teachers, and administrative staff that were served by the school which was sold, closed, or otherwise removed from service. For example, were the students moved to another school(s), were the programs moved to another school(s) or were they eliminated, were the teachers moved to other school(s) or were the teaching positions eliminated?

Students and staff from South were relocated to the new McDevitt Middle School when it opened. Students from the Whittemore Elementary School were temporarily placed at South during the rebuilding of the Whittemore.

Please provide the district's understanding of any school building grant money that the district received from the state for the school that was sold, closed, or otherwise removed from service. Please provide as much detail as possible.

Not applicable.

School Name: Ezra Fitch Elementary School

10 Ash Street
Waltham, MA 02453

Which of the following apply to the school?

"B" "B"

Determined surplus by the School Committee and turned back over to the City of Waltham

Please provide the year the school was sold, closed, or otherwise removed from service.

2011

Please provide the year the school was originally opened.

1931

Please provide the age of the school when it was sold, closed, or otherwise removed from service.

80

Please provide a history of the use of the school, including grades served, any educational programs at the school, and any major renovation, addition, and/or repair projects at the school.

The Fitch was a Kindergarten through grade six elementary school. Its students and staff were merged with the Banks Elementary School into the new Stanley Elementary School. The Fitch was then used as a temporary location for students and staff from Fitzgerald while waiting for their new school to be built.

Please provide the reason for selling, closing or otherwise removing the school from service. Please be as specific as possible and provide as much detail as you are able as to the reason(s) for the district's decision.

The building had reached the end of its useful life and would have required extensive renovations to continue its use as a school building.

Please provide a detailed description about the placement of students, programs, teachers, and administrative staff that were served by the school which was sold, closed, or otherwise removed from service. For example, were the students moved to another school(s), were the programs moved to another school(s) or were they eliminated, were the teachers moved to other school(s) or were the teaching positions eliminated?

Students and staff were merged with the Banks Elementary School into the new William F. Stanley Elementary School.

Please provide the district's understanding of any school building grant money that the district received from the state for the school that was sold, closed, or otherwise removed from service. Please provide as much detail as possible.

Not applicable.

Question 2: Does the district have any plans to sell, close, or otherwise remove from service a school in the next 10 years?

No

"B"

"B"

CERTIFICATIONS

The undersigned hereby certifies that, to the best of his/her knowledge, information and belief, the statements and information contained in this Closed Schools Information are true and accurate and that this Closed Schools Information has been prepared under the direction of the district school committee and the undersigned is duly authorized to submit this Closed Schools Information to the Massachusetts School Building Authority. The undersigned also hereby acknowledges and agrees to provide the Massachusetts School Building Authority, upon request by the Authority, any additional information relating to this Closed Schools Information that may be required by the Authority.

Chief Executive Officer *

School Committee Chair

Superintendent of Schools

Jeannette A. McCarthy
(print name)

Jeannette A. McCarthy
(print name)

Susana M. Nicholson
(print name)

Jeannette A. McCarthy
(signature)

Jeannette A. McCarthy
(signature)

Susana M. Nicholson
(signature)

Date 4/3/13

Date 4/3/13

Date 4/3/13

* Local chief executive officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated to the chief executive office under the provisions of a local charter.

EXHIBIT C. CURRENT SPACE ALLOCATION
EXHIBIT D. CURRENT PROGRAM ALLOCATION
EXHIBIT F. CURRENT PROGRAM DATA

Space Utilization
K-5

October 2013

"C", "D" & "F"

C, D, F

GRADE	FITZGERALD	MACARTHUR	NORTHEAST	PLYMPTON	STANLEY	WHITTEMORE
K	5	4	4	5	5	5
1	4	3	4	4	5	5
2	4	3	4	4	4	4
3	4	3	3	3	3	4
4	4	3	3	3	3	3
5	4	2	3	3	3	3
ART	1	1	1	1	1	1
MUSIC	1	1	1	1	1	1
DRAMA	0	1	1	0	0	0
SCIENCE	0	1	1	0	0	0
COMPUTER LAB	1	1	1	1	1	1
RESOURCE RM.	2-LBRR	5	4	6	7 PDD	1-LBRR
OTHER SPED.			7 PK	0	2 PK	
OTHER		Math Lab	Math/Rdg Coaches	1-Multi-use space	1-Multi-use space	Large Fac. Rm.
OTHER				ELL/Title I		
Total Classrooms Spaces	33	32	35	31	37	28
LEARNING CTR.	1	1	1	1	1	1
READING	1	2	1 w/Challenge	1	1	1
OT	1	1	1	1	1	1
PT	0	0	1	1	0	0
SPEECH/LANG.	2	1	2	1	2 rooms	1
ELL	3	1	1	0	2 rooms multi-use	2
TITLE I	0	0	0	0	1	1
GYM	1	1	1	1	1	1
CAFETERIA	1	1	1	1	1	1
OPEN	0	1	0	0	0	0
						196
						6
						7
						6
						2
						9
						9
						2
						6
						6

"C", "D" & "F"

C, D, F

SPACE UTILIZATION
MIDDLE SCHOOLS
OCTOBER 2012
KENNEDY

GRADE	MCDEVITT
CLASSROOMS	29
SCIENCE LABS	6
ART	1
MUSIC	1
BAND	1
CHORUS	0
DRAMA	1
TECH ED.	2
HEALTH	1
RESOURCE RM.	7
SPEC. ED OTHER	7
GYM	1
CAFETERIA	1

51
6
1
1
1
0
1
2
1
6
3
1
1

SPACE UTILIZATION
WALTHAM HIGH
OCTOBER 2012

"C", "D" & "F"

C, D, F

CLASS	# OF ROOMS	COMMENTS			
ENGLISH	17				
MATH	17				
HISTORY/SOC. SCIENCE	14				
WORLD LANGUAGES	11	1 used for language lab			
BUSINESS	3				
FINE ARTS	8	1 used for lab			
ELL	6				
HEALTH	2				
SCIENCE LABS	16	1 ELL			
COMPUTER LABS	2				
SPED	12	includes PDD			
CREDIT RECOVERY	1				
READING	1				
CENTRAL OFFICE	14,838 sq. ft.				
AUDITORIUM	1				
GYM	1				
CAFETERIA	1				
MAIN OFFICE AREA	1				
HEALTH OFFICE	1				
HOUSE OFFICES	4	Plus 4 activity rooms			
VOCATIONAL	10 shops	& several related academic classrooms			
Parent Information Ctr.	1	1200 sq. feet			

EXHIBIT E. CURRENT ENROLLMENT DATA

EXHIBIT J. CURRENT PRE-K DATA

NESDEC Enrollment Projection Service Form EP1.1

Name of Public School District: WALTHAM PUBLIC SCHOOLS
 Person Completing Form: Marian K. Parrella Email: marianparrella@k12.waltham.ma.us Tel. No. 781-314-5401
 Superintendent of Schools: Dr. Susan M. Nicholson
 Address: 617 Lexington Street, Waltham, MA 02452

Grade combinations in reports are K-4, K-5, K-6, 5-8, 6-8, 7-8, 7-12, 9-12 unless requested otherwise. Other combinations needed?: _____

2012-13 PUBLIC SCHOOL ENROLLMENTS: Please report data in a manner consistent with previous years. Data often will match October 1 enrollments reported to state.

Enrollments as of 10/1/12	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	Ungraded*	Total
	150	492	478	383	386	353	384	358	357	372	349	335	361	347		5105

*Ungraded includes only students who are not counted in the individual grade totals.

NON-PUBLIC SCHOOL ENROLLMENTS (Regular Education): Residents in private or parochial schools (please use most recent year available; indicate year used)

Enrollments as of 10/1/12	K	1	2	3	4	5	6	7	8	9	10	11	12	K-12 TOTAL

ADDITIONAL ENROLLMENTS

K-12 Homeschooled Students	2012	26
K-12 "Choiiced-Out" or in Charter or Magnet Schools	2012	0
K-12 SpEd Out-Placed Students	2012	94
K-12 "Choiiced-in," Non-Resident Students (tuition, etc.)	2012	0

OUT-OF-DISTRICT REGIONAL VOCATIONAL/TECHNICAL/AGRICULTURAL SCHOOL ENROLLMENTS

Enrollments as of 10/1/12	9	10	11	12	TOTAL
2012	10	18	10	7	45

Please indicate any changes in your community/district that may affect enrollment. Examples: addition of full-day Kindergarten, recent uptick in the number of rented/leased homes, a new or renovated school, opening/closing of a Charter or Magnet school/private school; change in high school accreditation status, etc.

NESDEC Enrollment Projection Service Form EP1.1

Name of Public School District: Waltham Public Schools Tel. No. (781-314-5401

Person Completing Form: Marian K. Parrella Email: marianparrella@k12.waltham.ma.us

Superintendent of Schools: Susan M. Nicholson, Ed. D.

Address: 617 Lexington Street, Waltham, MA 02452

Grade combinations in reports are K-4, K-5, K-6, 5-8, 7-8, 7-12, 9-12 unless requested otherwise. Other combinations needed?: _____

2013-14 PUBLIC SCHOOL ENROLLMENTS: Please report data in a manner consistent with previous years. Data often will match October 1 enrollments reported to state.

Enrollments as of 10/1/13	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	Ungraded*	Total
156	503	461	441	389	381	366	373	356	348	372	342	329	346	5007		

*Ungraded includes only students who are not counted in the individual grade totals.

NON-PUBLIC SCHOOL ENROLLMENTS (General Education): Residents in private or parochial schools (please use most recent year available; indicate year used)

Enrollments as of 10/1/13	K	1	2	3	4	5	6	7	8	9	10	11	12	K-12 TOTAL

ADDITIONAL ENROLLMENTS

K-12 Homeschooled Students	2013	24
K-12 "Choiced-Out" or in Charter or Magnet Schools	2013	N/A
K-12 "Choiced-In," Non-Resident Students (tuition, etc.)	2013	N/A
K-12 Special Education Out-Placed Students	2013	65

OUT-OF-DISTRICT REGIONAL VOCATIONAL/TECHNICAL/AGRICULTURAL SCHOOL ENROLLMENTS

Enrollments as of 10/1/13	9	10	11	12	TOTAL
2013	14	8	20	7	49

Please indicate any changes in your community/district that may affect enrollment. Examples: recent uptick in the number of rented/leased homes, addition of full-day Kindergarten, soon will open a new or renovated school, opening/closing of a Charter or Magnet school/private school; change in high school accreditation status, etc.

"F" & "J"

Massachusetts School and District Profiles
Waltham

"E" & "J"

E, J

Enrollment Data

Race	% of District	% of State
African American	9.3	8.6
Asian	6.2	5.9
Hispanic	32.5	16.4
Native American	0.1	0.2
White	49.3	66.0
Native Hawaiian, Pacific Islander	0.2	0.1
Multi-Race, Non-Hispanic	2.4	2.7

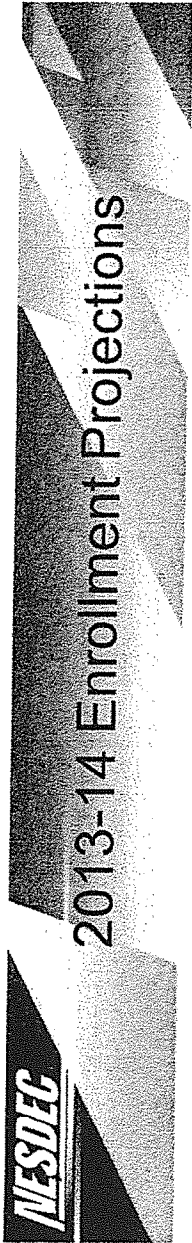
	District	State
Male	2,620	489,289
Female	2,478	465,484
Total	5,098	954,773

	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	SP	CT	Total
Douglas MacArthur Elementary School	0	65	63	54	67	47	52	0	0	0	0	0	0	0	0	-	349
Henry Whittemore Elementary School	0	87	87	87	75	62	53	0	0	0	0	0	0	0	0	-	431
James Fitzgerald Elementary School	0	86	87	81	73	72	74	0	0	0	0	0	0	0	0	-	473
John F. Kennedy Middle School	0	0	0	0	0	0	0	186	190	174	0	0	0	0	0	-	550
John W. McDavitt Middle School	0	0	0	0	0	0	0	171	165	198	0	0	0	0	0	-	534
Northeast Elementary School	76	71	70	61	49	68	62	0	0	0	0	0	0	0	0	-	457
Thomas R. Plympton Elementary School	0	73	80	60	62	72	65	0	0	0	0	0	0	0	0	-	412
Waltham Sr High	0	0	0	0	0	0	0	0	0	0	346	337	359	342	5	-	1,389
William F. Stanley Elementary School	75	104	86	61	60	56	61	0	0	0	0	0	0	0	0	-	503
District	151	487	473	384	386	377	367	357	355	372	346	337	350	342	5	-	5,098

EXHIBIT G. PROJECTED ENROLLMENT DATA

EXHIBIT K. PROJECTED PRE-K DATA

G, K



TO: Dr. Susan M. Nicholson, Superintendent of Schools, Waltham, MA
 FROM: Donald G. Kennedy, Ed.D., Demographic Specialist
 DATE: October 9, 2013
 RE: Enrollment Projections

We are pleased to send you the enclosed documents displaying the past, present, and projected enrollments for the Waltham School District. We have used the figures given to us by the district and we assume that the method of collecting the enrollment data has been consistent from year to year.

NESDEC's enrollment projection totals from fall of 2012 data fell within 101 students of the actual Grade K-12 enrollment total for fall, 2013 (5,108 projected v. 5,007 actual). In Grades K-5, 2,571 pupils were projected v. 2,541 enrolled. In Grades 6-8, 1,115 students were forecast v. 1,077 enrolled. And in Grades 9-12, 1,422 pupils were forecast v. 1,389 enrolled. The largest variance came in Grade 1, where NESDEC had projected 494 children v. 461 who enrolled this fall.

The two factors now at work which will have the greatest effect upon future enrollments are: a significant increase in the number of births to Waltham residents and, to a greater degree, b. the resumption of in-migration (which had slowed, due to the real estate slowdown). In the decade from 1998-2007, Waltham averaged 712 births per year; more recently (and expected over the next 6-7 years) are about 794-837 births annually - averaging about 95 more per year than previously. Incidentally, hard-hit Connecticut experienced an 8.6% decline in births from 2007 to 2009 (in large part caused by the economic Recession), the largest decline among the six New England states -- followed by an 8.1% decline in Rhode Island births, the two states with the highest rates of unemployment in the New England region. Economists are forecasting a slow-yet-steady recovery from the

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current rates of unemployment (RI 9.1%; CT 8.1%; US average non-farm unemployment 7.3%; MA 7.2%; ME 7.0%; NH 5.0%; and VT 4.6%) which, in turn, may lead to additional in-migration and births.

The ever-changing relationship between Waltham births and Kindergarten enrollments is displayed on the B-K graph. Waltham, over the past seven years, has registered about 58 Kindergarteners for every 100 births (five years previous), a relationship which has been quite stable...however this fall there were a 60 Kindergarten children for every 100 births five-years-previous, the fourth highest ratio in ten years -- and the cause of NESDEC's slight under-projection in Kindergarten (499 children projected v. 503 actual). Note on the graph, however, that in 2008 there were only 53 Kindergarteners for every 100 births. Grade 1 is expected to be about 1% smaller than the previous year's Kindergarten class.

Like many nearby communities Waltham continues to experience enrollment fluctuations of in/out-migration in Grades 1-8 (Grades 9-12 are excluded from this calculation, as there often is a 2% increase in Grade 9 for reasons that have little to do with new families moving into Waltham). Over the past ten years in Grades 1-8, there have been four years of 1-2% out-migration (including -2% in 2012 and -1% in 2013; three flat years; and three years of 1-2% in-migration (including +1% in 2011). The rising K-12 enrollment is due, primarily, to a larger entering group of Kindergarteners who are replacing a smaller group of HS seniors who graduated in June.

Over the next three years, K-5 enrollments are forecast to increase by a total of 235 students (due primarily to additional incoming Kindergarteners); Grades 6-8 to increase by 84 pupils; and the high school level to increase by about 70 pupils...all within the next three years. After that point these projections show fairly flat enrollment in Grades K-5, and further large increases in Grades 6-12. That said, it is possible that real estate turnover will have increased, bringing in additional new families - see the "Projections" page.

Will these patterns of declining enrollments really last for as long as ten years? Probably not. All projections are more reliable in Years #1-5; and less reliable in Years #6-10. As soon as the economy and real estate situation improve in the region, additional in-migration likely will return to Waltham. Many communities in the region sold during 2008-2012 only about 60-80% as many homes as in 2003-2007. Building permits had slowed a bit as well, as in nearby communities; see the "Additional Data" table below. See the description on Page 4 below regarding "reliability of projections".

The birth numbers used in the projections, through 2010, are from the MA Department of Public Health. The "estimated" years, beginning with 2011 are a rolling five-year average, which NESDEC has found to be the most accurate method of estimation. Local City Clerks have birth information for 2011, 2012 and 2013, however do not

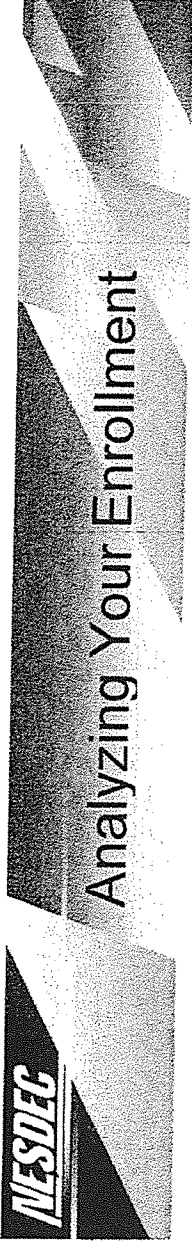
have access to the numbers of Waltham residents born out-of-state (information which will eventually become known to the MA DPH). **Undoubtedly NESDEC will be doing follow-up projections during this school year, in which we will incorporate additional birth information.**

The two most difficult grades to forecast in all districts are Kindergarten and Grade 9. The latter is difficult to anticipate, as there are so many options for Grade 9 (in vocational or agricultural schools, private or parochial non-public schools, etc.). Kindergarten can be difficult to project based upon births alone, as many districts have large numbers of "net move-ins/move-outs" who are ages 1-4. Some districts take the extra steps to track 3 and 4-year olds with a local census, or report to NESDEC the known number of 4-year olds in local preschools/nursery schools which typically enroll Kindergarteners in the district. Knowing this information helps NESDEC to project Kindergarteners more reliably...as does data from the Kindergarten Screening in districts which also track 3 and 4-year old siblings (or neighbors) at that time. The more data, in addition to births, which is sent to NESDEC, the greater is the chance that "enrollment surprises" will be minimized.

A word about PK projections: the trend in virtually every district is to serve additional 3 and 4-year olds each year, even if the number of Kindergarteners is in decline. Hence, the rising numbers in PK projections. The reasons why additional 3 and 4-years olds are being served are multiple: more children in need of Special Education services are being identified at early ages, including larger number of students on the autism spectrum. Further, many districts are moving to expand their services to "typically developing" 3 and 4-year olds in order to improve/enhance the educational quality of their existing programs. Longitudinal research continues to indicate both the educational and fiscal benefits of early intervention programs of schooling.

Recent New England trends in the 275+ district for which NESDEC furnishes projections are primarily on the side of declining enrollments, due to fewer births combined with fewer new families moving into the districts...the latter factor, however, may be changing. **Large cities and their nearby communities have displayed flat or rising numbers of births, and enough new reuters to keep the school population flat or rising.** If your district has need for further assistance in the area of long range facilities planning, we urge you to call so that we might discuss our planning services which include our Demographic and Long-Range Enrollment Projection Studies. We have enclosed suggestions for interpreting the printout and a brief description of the modified cohort survival methodology used in preparing the projections. As always, we would be delighted to hear from you regarding ways in which we might make the enrollment forecasts more useful to you. Please don't hesitate to call or email us at ep@nesdec.org. Best wishes for the school year.

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Historical Public Enrollments

1. After the "YEAR" column can be found the "BIRTHS" column. The number of births to residents for each of eleven years is displayed. Note any trends, e.g., have births been decreasing? increasing? leveling off? Kindergarten and Grade 1 enrollments are normally quite responsive to these fluctuations.
2. Look down the K and 1 columns and note the direction of the trend. This affords a comparison of these classes over a ten-year period. Add the K and Grade 1 enrollments of the first school year recorded, and compare them with the sum of the current K and Grade 1 enrollments.
3. Take the first K class and follow it diagonally to trace its movement to Grade 1, 2, etc. up to its current 10th grade status. This comparison (which can be accomplished for other classes also) gives some measure of the effects of migration in your school district. If a sixth grade class today is larger than it was as a K class six years ago, then in-migration has probably occurred; if it is smaller, then out-migration has probably occurred.
4. Compare each K class with the previous year's graduating class. Note which is larger and by what amount one surpasses the other. Larger graduating classes generally reflect declining enrollments; larger K classes generally indicate increasing enrollments.
5. In the "Grade Combinations" section, note the trends of elementary, middle school/junior high, and high school enrollments. A significant and consistent trend in these summaries usually results in the corresponding trend for projected enrollments. If enrollments are leveling off in the elementary grades after a period of decline, then the secondary enrollments might be expected to continue to decline for several years until the leveling off experience has had time to take hold at the secondary grades.

Enrollment Projections

1. Note the trends exhibited in the total K-12 (or 1-12) projection for the next five years as well as the

"G" & "K"

projections for various grade combinations. The trends on this page should generally exhibit a continuation of the trends mentioned above for historical enrollments, although the rate of change may be quite different.

2. Look at the births in the most recent years and note whether the trend is up, down, or level.
3. Make similar comparisons as appropriate on this page as were suggested for the "Historical Public Enrollments" page.

PROJECTION METHODOLOGY

The cohort survival technique is the most frequently used method of preparing enrollment forecasts. NESDEC uses that technique, but modifies it in order to move away from forecasts which are wholly computer or formula driven. Such modification permits the incorporation of important, current town-specific information into the generation of the enrollment forecasts. Basically, percentages are calculated from the historical enrollment data to determine a reliable percentage of increase or decrease in enrollment between any two grades. For example, if 100 students enrolled in Grade 1 in 2010-11, increased to 104 students in Grade 2 in 2011-12, the percentage of survival would have been 104% or a ratio of 1.04. Such ratios are calculated between each pair of grades or years in school over several recent years.

After study and analysis of the historical ratios and based upon a reasonable set of assumptions regarding births, migration rates, retention rates, etc., ratios most indicative of future growth patterns are determined for each pair of grades. The ratios thus selected are applied to the present enrollment statistics for a pre-determined number of years. The ratios used are the key factors in the reliability of the projections, given the validity of the data at the starting point. The strength of the ratios lies in the fact that each ratio encompasses collectively the variables that account for increases or decreases in the size of a grade enrollment as it moves on to the next grade. Each ratio represents the cumulative effect of the following factors:

1. Real estate turnover and new residential construction;
2. Migration, in or out, of the schools;
3. Drop-outs, transfers, etc.;
4. Births to residents;
5. Retention in the same grade.

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RELIABILITY OF ENROLLMENT PROJECTIONS

Projections can serve as useful guides to school administrators for educational planning. In this regard, the projections are generally most reliable when they are closest in time to the current year. Projections six to ten years out may serve as a guide to future enrollments, and are useful for facility planning purposes. However, they should be viewed as subject to change given the possibility for change in the underlying assumptions/trends.

Projections based upon **the children already in the district** (the current K-12 population only) will be the most reliable; the second level of reliability will be for those children already **born into the community but not yet old enough to be in school**. The least reliable category is the group for which an estimate must be made to **predict the number of births**, thereby adding an additional variable. See these three multi-colored groupings on the "Projected Enrollment" slide/page.

How often do the actual enrollments closely match the NESDEC projections? The research literature reports the closest that enrollment forecasters are likely to come to actual enrollments is about 1% variance per year-from-the-known-data. That is, a 1% variance from projection-to-actual "one-year-out" into the future (2% variance "two-years-out" ... 10% variance "ten-years-out"). NESDEC reaches this "highest possible" standard in about 90% of cases. When our NESDEC variance is greater, the reasons often are one of the following: a. imbedded/intervening "hidden" variables (examples: a parochial school closed or other students returned from non-public schools, a charter school opened, the Kindergarten program changed entrance age or to extended/full-day, the high school toughened its course credit/graduation requirements, the District set new attendance boundaries for elementary schools, or the District had well-publicized budget/referendum difficulties); b. the District size was below 500 students, thus subject to fluctuations; or c. the District has not done enrollment projections on an annual basis.

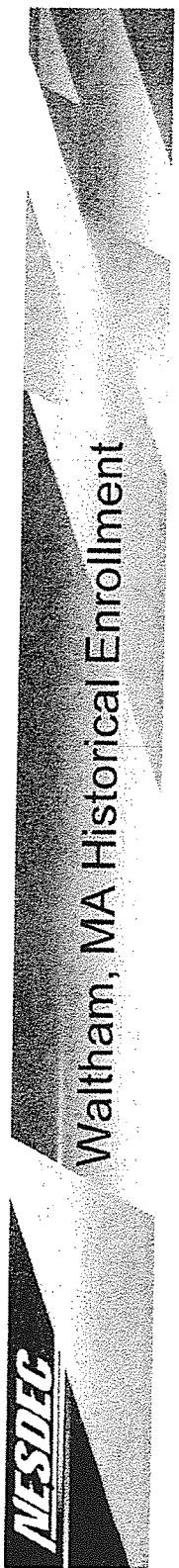
Annual updates allow for early identification of recent changes in historical trends. When the actual enrollment in a grade is significantly different (high or low) from the projected number, it is important (yet difficult) to determine whether this is a one-year aberration or whether a new trend may be starting. **In light of this, NESDEC urges all school districts to have updated enrollment forecasts developed by NESDEC each October.** This service is available at no cost to affiliated school districts.

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School District: Waltham, MA 10/9/2013

Historical Enrollment By Grade

Birth Year	Births	School Year	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	UNGR	K-12	PK-12
1998	706	2003-04	52	393	328	333	323	329	350	354	365	354	369	374	379	364	0	4615	4667
1999	681	2004-05	83	398	364	324	340	322	321	355	364	351	370	382	332	360	0	4583	4666
2000	684	2005-06	107	364	375	352	325	325	326	342	369	380	367	395	383	321	0	4624	4731
2001	686	2006-07	106	383	343	364	350	337	336	367	396	379	393	371	389	382	0	4730	4836
2002	672	2007-08	121	347	357	332	346	338	319	344	363	343	360	371	382	394	0	4604	4725
2003	736	2008-09	125	392	401	352	325	347	336	332	362	355	341	362	372	349	0	4626	4751
2004	676	2009-10	131	419	385	371	350	329	357	331	332	344	354	337	359	364	0	4632	4763
2005	733	2010-11	138	404	410	380	357	351	342	377	332	330	337	331	324	353	0	4658	4796
2006	764	2011-12	165	466	408	384	375	345	353	385	335	335	339	345	361	355	0	4829	4994
2007	783	2012-13	150	492	478	383	386	353	384	358	357	372	349	335	361	347	0	4955	5105
2008	837	2013-14	156	503	461	441	381	389	366	373	356	348	372	342	329	346	0	5007	5163

Historical Percentage Changes

Year	K-12	Diff.	%
2003-04	4615	0	0.0%
2004-05	4583	-32	-0.7%
2005-06	4624	41	0.9%
2006-07	4730	106	2.3%
2007-08	4604	-126	-2.7%
2008-09	4626	22	0.5%
2009-10	4632	6	0.1%
2010-11	4658	26	0.6%
2011-12	4829	171	3.7%
2012-13	4955	126	2.6%
2013-14	5007	52	1.0%
Change		392	8.5%

Historical Enrollment in Grade Combinations

Year	K-4	K-5	K-6	K-8	5-8	6-8	7-8	7-12	9-12
2003-04	1706	2056	2410	3129	1423	1073	719	2205	1485
2004-05	1748	2056	2424	3139	1391	1070	715	2159	1444
2005-06	1741	2067	2409	3158	1417	1091	749	2215	1466
2006-07	1777	2113	2480	3195	1418	1082	715	2250	1535
2007-08	1722	2041	2365	3091	1369	1050	706	2219	1513
2008-09	1817	2153	2485	3202	1385	1049	717	2141	1424
2009-10	1854	2211	2542	3218	1364	1007	676	2090	1414
2010-11	1902	2244	2621	3283	1381	1039	662	2037	1375
2011-12	2041	2386	2739	3459	1416	1073	720	2090	1370
2012-13	2092	2476	2834	3563	1471	1087	729	2121	1392
2013-14	2175	2541	2914	3618	1443	1077	704	2093	1389

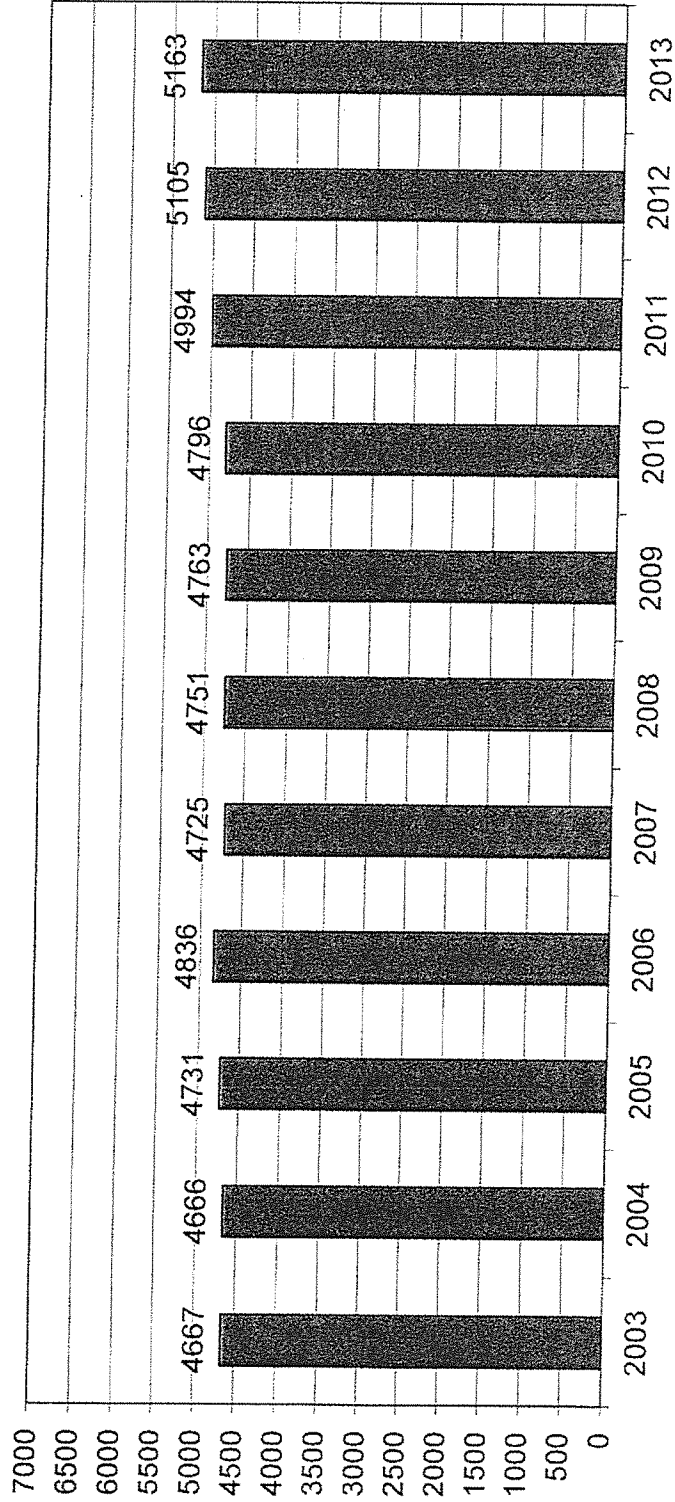
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NESDEC
Waltham, MA Historical Enrollment

PK-12, 2003-2013



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Waltham, MA Projected Enrollment

School District: Waltham, MA

10/9/2013

Enrollment Projections By Grade*

Birth Year	Births	School Year	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	UNGR	K-12	PK-12
2008	837	2013-14	156	503	461	441	381	389	366	373	356	348	372	342	329	346	0	5007	5163
2009	815	2014-15	158	500	498	439	434	378	395	371	376	350	366	371	345	321	0	6134	5292
2010	794	2015-16	160	487	485	474	432	431	384	400	374	370	368	355	336	0	5271	5431	
2011	799	2016-17	162	490	483	471	466	429	437	389	404	368	379	357	358	0	5396	5588	
2012	806	2017-18	164	494	486	460	463	429	435	443	392	397	376	378	360	0	5495	5659	
2013	810	2018-19	166	497	489	463	453	460	469	441	447	385	406	375	382	0	5618	5784	
2014	805	2019-20	168	493	492	466	455	450	467	476	445	440	394	406	379	0	5733	5901	
2015	803	2020-21	170	492	489	466	458	452	457	473	479	438	450	393	409	0	5827	5997	
2016	804	2021-22	172	493	488	466	460	455	459	463	477	471	448	449	397	0	5924	6096	
2017	805	2022-23	174	494	489	465	458	457	462	465	467	469	469	447	453	0	5995	6169	
2018	805	2023-24	176	494	489	466	457	455	464	468	469	459	480	481	451	0	6074	6250	

*Projections should be updated on an annual basis.

Based on an estimate of births

Based on children already born

Based on students already enrolled

Projected Enrollment in Grade Combinations*

Year	K-4	K-5	K-6	K-8	5-8	6-8	7-8	7-12	9-12
2013-14	2175	2541	2914	3618	1443	1077	704	2083	1389
2014-15	2249	2644	3015	3741	1492	1097	726	2119	1393
2015-16	2319	2703	3103	3847	1528	1144	744	2168	1424
2016-17	2339	2776	3165	3937	1598	1161	772	2231	1459
2017-18	2365	2800	3243	4032	1667	1232	789	2252	1463
2018-19	2362	2831	3272	4104	1742	1273	832	2346	1514
2019-20	2356	2823	3298	4183	1827	1300	885	2435	1550
2020-21	2359	2816	3289	4206	1847	1390	917	2538	1621
2021-22	2362	2821	3284	4232	1870	1411	948	2640	1692
2022-23	2363	2825	3290	4226	1863	1401	936	2708	1769
2023-24	2361	2825	3293	4221	1860	1396	928	2781	1853

See "Reliability of Enrollment Projections" section of accompanying letter.

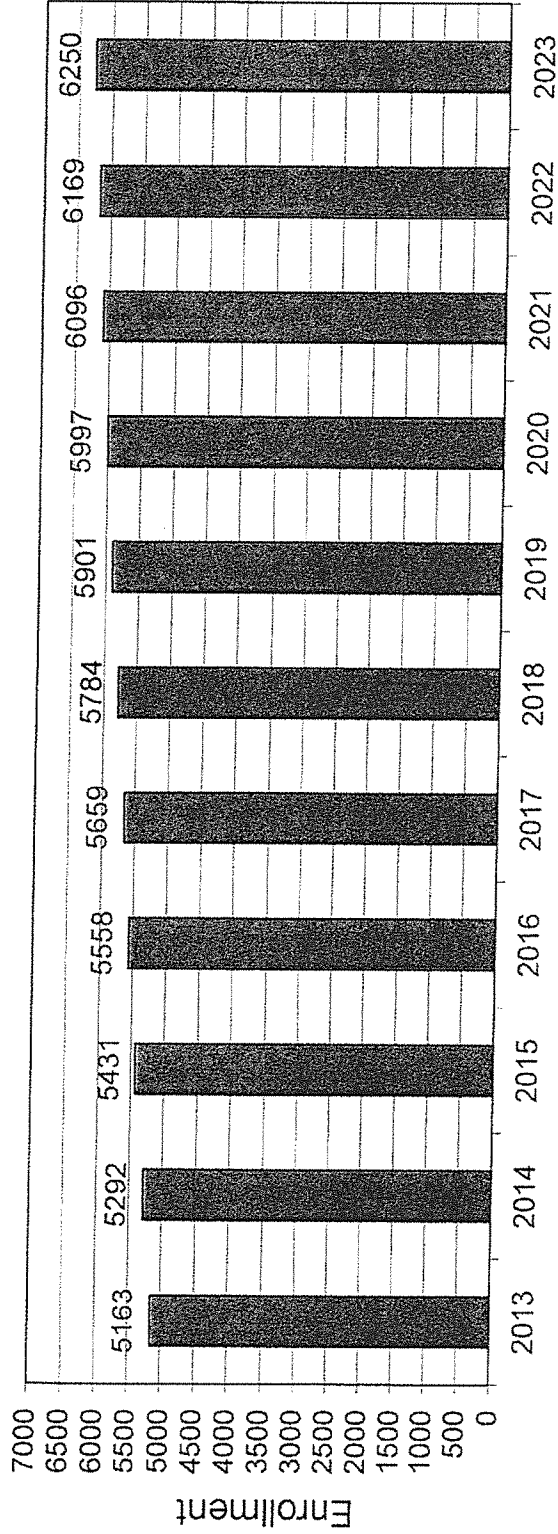
Projections are more reliable for Years #1-5 in the future than for Years #6 and beyond.

Projected Percentage Changes		
Years	K-12	%
2013-14	5007	0.0%
2014-15	5134	2.5%
2015-16	5271	2.7%
2016-17	5396	2.4%
2017-18	5495	1.8%
2018-19	5618	2.2%
2019-20	5733	2.0%
2020-21	5827	1.6%
2021-22	5924	1.7%
2022-23	5995	1.2%
2023-24	6074	1.3%
Change	1067	21.3%



Waltham, MA Projected Enrollment

PK-12 TO 2023 Based On Data Through School Year 2013-14



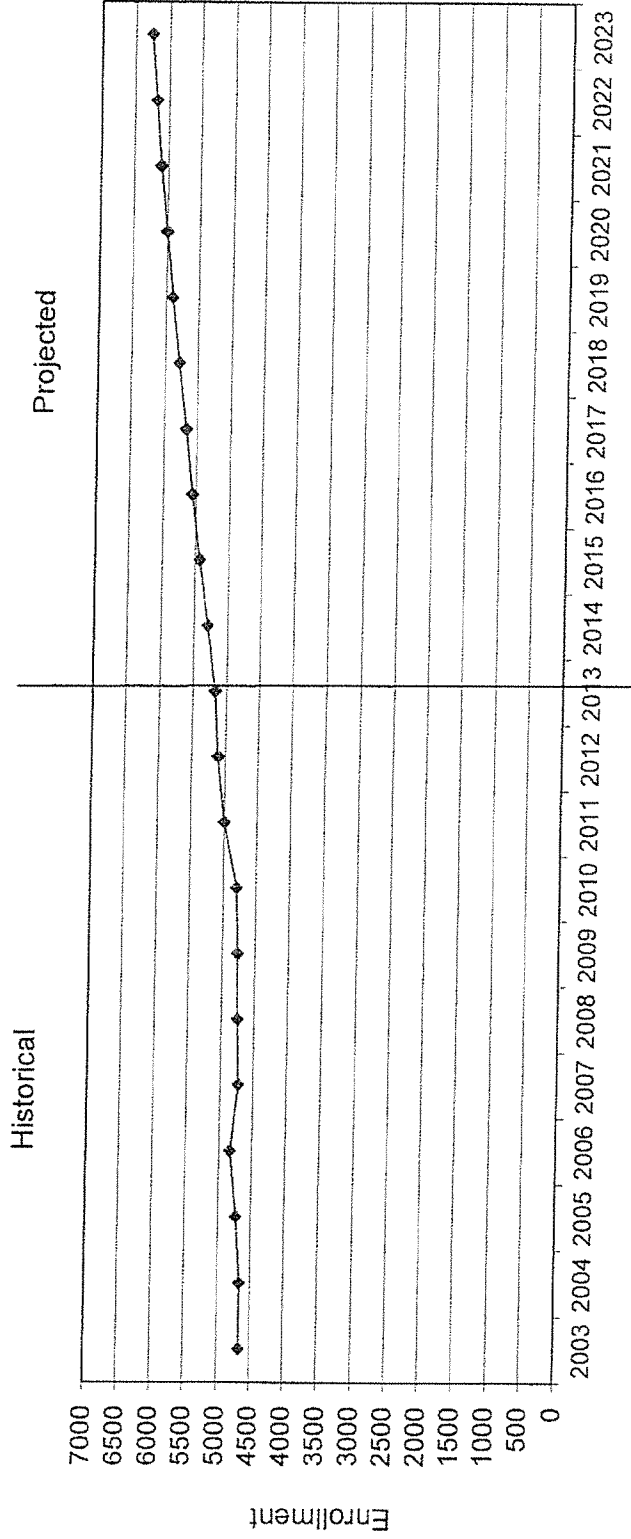
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Waltham, MA Historical & Projected Enrollment

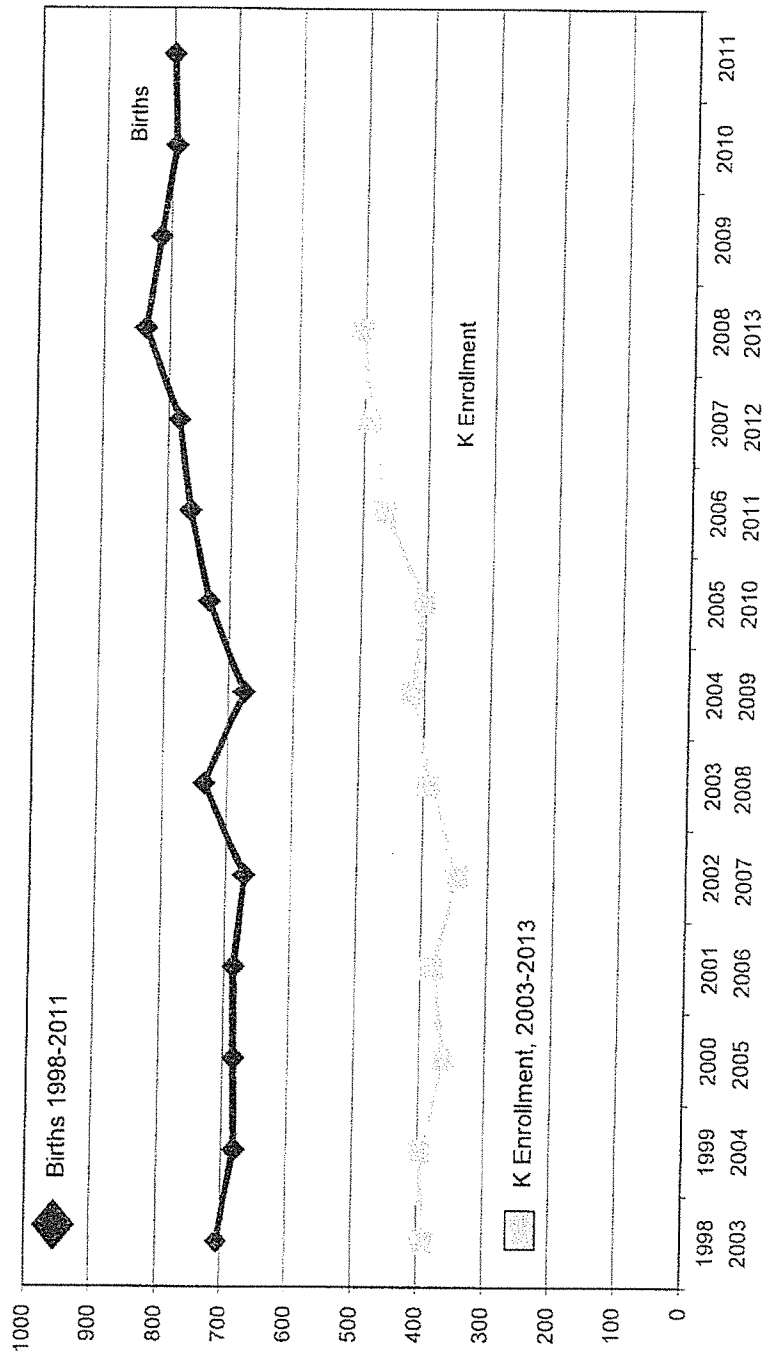
PK-12, 2003-2023



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NESDEC
Waltham, MA Birth-to-Kindergarten Relationship



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Waltham, MA Additional Data

Building Permits Issued		
Year	Single-Family	Multi-Units
2005	19	12
2009	19	12
2010	20	44
2011	41	8
2012	17	14
2013	24 to Aug 31	200 to Aug 31

Source: HUD and Building Department

Year	Enrollment History	
	Voc-Tech 9-12 Total	Non-Public K-12 Total
2005-06	n/a	n/a
2009-10	n/a	n/a
2010-11	n/a	n/a
2011-12	n/a	n/a
2012-13	45	n/a
2013-14	49	n/a

Residents in Non-Public Independent and Parochial Schools (Regular Education)														
Enrollments as of Oct 1	K	1	2	3	4	5	6	7	8	9	10	11	12	K-12 TOTAL
0	0	0	0	0	0	0	0	0	0	0	0	0	0	n/a

K-12 Home-Schooled Students	24
2013	n/a

K-12 Residents "Choiced-out" or in Charter or Magnet Schools	n/a
2013	65

K-12 SpEd Outplaced Students	65
2013	n/a

K-12 Choiced-In, Tuitioned-In, & Other Non-Residents	n/a
2013	n/a

The above data were used to assist in the preparation of the enrollment projections. If additional demographic work is needed, please contact our office.

EXHIBIT H.
PROJECTED PROGRAM DATA

"H"

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PROJECTED PROGRAMS

Alternative High School

Expanded Career & Technical Education Programs

◦ Culinary Arts

◦ Cosmetology

Special Education Inclusion

"H"
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Projected Special Education Enrollments 2013-14		
<u>Fitzgerald</u>	<u>Plympton</u>	<u>Northeast</u>
Grade K Inclusion (3)	Grade K Inclusion (6)	Grade K Inclusion (4)
Grade 1 LBRR (5)	Grade K Successful Start (0)	Grade 1 Inclusion (2)
Grade 2 LBRR (7)	Grade 1 Successful Start (2)	Grade 2 Inclusion (3)
Grade 3 LBRR (9)	Grade 2 Successful Start (4)	Grade 3 Inclusion (5)
Grade 4 LBRR (6)	Grade 3 Successful Start (3)	Grade K Intensive (4)
Learning Center (16)	Grade 4 Successful Start (4)	Grade 1 Intensive (3)
	Grade 5 Successful Start (2)	Grade 2 Intensive (3)
	Grade 2 RR (2)	Grade 3 Intensive (2)
	Grade 3 RR (4)	Grade 4 Intensive (4)
	Grade 4 RR (6)	Grade 5 Intensive (7)
	Grade 5 RR (7)	Learning Center (10)
	Learning Center (15)	
<u>MacArthur</u>	<u>Stanley</u>	<u>Whittemore</u>
Grade K Inclusion (3)	Grade K Inclusion (10)	Grade K Inclusion (7)
Grade 1 RR (5)	Grade K PDD (8)	Grade 5 LBRR (10)
Grade 2 RR (6)	Grade 1 PDD (11)	Learning Center (20)
Grade 3 RR (7)	Grade 2 PDD (5)	
Grade 4 RR (9)	Grade 3 PDD (8)	
Grade 5 RR (11)	Grade 4 PDD (10)	
Learning Center (11)	Grade 5 PDD (8)	
	Learning Center (25)	

"H"

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Possible Projections for English Language Learner Enrollment for 2014 to 2015 School Year

Prepared by Ann Feldman / English Language Learner Director / Waltham Public Schools

Enrollment of Identified English Learners 2011 to 2014

Year	Number of Identified Limited English Proficient Students K - 12	Approximate Number of Identified Limited English Proficient Kindergartners
2011 to 2012	603	110
2012 to 2013	620	123
2013 to 2014	740	170

Facts:

- It is important to note that in 2012 to 2013, 37.5% of our students in Waltham Public Schools spoke a language other than English at home (compared with an average of 17.3% in the state). At Whittemore Elementary School, 60.3% of the students spoke a language other than English at home during the 2012 to 2013 school year. These percentages have most certainly gone up given the increase in ELL population in the district during the 2013 to 2014 school year.
- **Approximately 35% of new enrollments in the district for the 2013 to 2014 school year have been identified as English learners (for Kindergarten as well as for grades 1 - 12) This means that approximately 1 out of 3 students enrolling as new students in Waltham Public Schools are English learners.**
- For **Kindergarten**, there was an increase in ELLs of approximately 10% from 2011- 12 to 2012 -13 and an increase of approximately 40% from 2012-13 to 2013-14.
- There was an increase in our **overall district ELL population** of 3% from 2011 - 12 to 2012-13 and an increase of 20% from 2012-13 to 2013-14.

Prediction:

- If the ELL population increased by 20% over the course of one year, it is possible that, if the trend continues, we might have approximately 890 ELLs next year and 1,065 the following year. Since the **general education population is decreasing**, this would impact the percentage of ELLs compared with the total school population.

EXHIBIT I. SEE EXHIBITS C THROUGH H

EXHIBIT L.

**CURRENT AND PROPOSED HOMELESS POPULATION DATA
INCLUDING ANTICIPATED JUNE 2014 ADJUSTMENT**

"L"

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CURRENT MCKINNEY VENTO STUDENTS 2013-14

Grades K-12 104

Transporting to Other Districts 27

The MA Department of Education does not yet have information regarding the June 2014 adjustment.

EXHIBIT M.
CURRENT BUS ROUTES AND SCHOOL MAPS

2013-14 Waltham Schools Bus Routes

WALTHAM HIGH SCHOOL

Route 101 – Upper Main

START: 7 a.m.
Milton St @ Stow St
Tavern Rd @ Stow St
Main St @ Stow St (front of the bank)
Main St @ Sheridan St
Main St @ Nathan Rd
Prospect Hill Rd @ Elson Rd

Route 102 – Cedarwood

START: 7 a.m.
Fairmont Ave @ Weston St
Summit Ave @ Rockridge Rd
Cedarwood Ave @ Villa St

Route 103 – Columbus

START: 7 a.m.
Wellington St @ Columbus Ave
Columbus Ave @ Hammond St
School St @ Francis St*
School St @ Bacon St*
*(These stops take 104 in PM)

Route 104 – School St

START: 7 a.m.
School St @ Exchange St
Gregory St @ Smart St*
*(This stop takes 103 in PM)

Route 105 – Prospect Hill/Jennings Rd

START: 7 a.m.
Jennings Rd @ James St
Prospect Hill Rd @ Dermody Rd
(105 takes 103 in PM)

Route 106 – South St

START: 7 a.m.
South St @ Wheelock Rd
Morton St @ Sunnyside St
Charlesbank Way @ Sagamore Rd
South St @ Bedford St

Route 107 – Felton St

START: 7 a.m.
Felton St @ Mechanic St
Felton St @ Fountain St
Felton St @ Harvard St
Harvard St @ Russell St

Route 108 – Prospect St

START: 7 a.m.
Prospect St @ Felton St*
South St @ Vernon St**
Prospect St @ Russell St**
*(This stop takes 107 in PM)
**(These stops take 106 in PM)

Route 109 – Woerd/Adams

START: 7 a.m.
Woerd Ave @ Rumford Ave
Crescent St @ Adams St
Adams St @ Robbins St
Adams St @ Maple St

Route 110 – Moody St

START: 7 a.m.
Moody St @ Derby St
Moody St @ Brown St
Moody St @ Myrtle St
Moody St @ Chestnut St
Moody St @ Taylor St

Route 112 – Lowell & Derby

START: 7 a.m.
Lowell St @ Taylor St
Lowell St @ Chestnut St
Lowell St @ Alder St

Route 114 – Derby/Newton

START: 7 a.m.
Fuller St @ Lowell St
Newton St @ Brown St
Newton St @ Myrtle St



Route 115 – Newton/Calvary

START: 7 a.m.

Calvary St @ Newton St*

Cedar St @ Calvary St**

Cedar St @ Cutter St*

*(These stops takes 114 in PM)

** (This stop takes 117 in PM)

Route 116 – Newton/Central

START: 7 a.m.

Bright St @ Grove St

Newton St @ Barton St

Route 117 – River St

START: 7 a.m.

Willow St @ School Ave

River St @ Bright St

River St @ Clark St

Route 118 – Lowell Field

START: 7 a.m.

Colonial Ave @ Ranglely Rd

Colonial Ave @ Grove St

Grove St @ Willow St

Main St @ Willow St

Route 119 – Warren St

START: 7 a.m.

Beaver St @ Linden St

Beal Rd @ Barbara Rd

Beal Rd @ Candace Rd

Warren St @ Tennyson Rd

Warren St @ Wayne St

Circuit Lane @ Warren St

Beaver St @ Hollace St

Route 120 – Warrendale

START: 7 a.m.

Chaffee Ave @ Brightwood Rd

Chaffee Ave @ Bowker Rd

Chaffee Ave @ Bruce Rd

Route 121 – Marlborough/Glen East

START: 7 a.m.

Shirley Rd @ Upton Rd

69 Trapelo Rd

Trapelo Rd @ Briarwood Rd

Marlborough Rd @ Newburgh St

Trapelo Rd @ Marlborough Rd

Trapelo Rd @ Chase Rd

Trapelo Rd @ Emmeline Ave

Trapelo Rd @ Sherwood Ln

Route 123 – Brewster/Glen West

START: 7 a.m.

Trapelo Rd @ Clocktower Dr

Trapelo Rd @ Kingston Rd # 2

Trapelo Rd @ Miriam Rd

Trapelo Rd @ Sheffield Rd

Trapelo Rd @ Banbury Ave

1355 Trapelo Rd

Brewster Rd @ Banbury Ave

Hardy Pond Rd @ Seminole Ave

Pheasant Rd @ Trapelo Rd

1300 Trapelo Rd

1284 Trapelo Rd

Trapelo Rd @ Grove Rd

1080 Trapelo Rd

1066 Trapelo Rd

Route 124 – Totten Pond & Fourth Ave

455 Totten Pond

32/52 Fourth Ave

Route 125 – Lincoln Line

START: 6:50 a.m.

221 Smith St

Trapelo Rd @ Brennen Ave

Trapelo Rd @ Candlewood Dr

Trapelo Rd @ Sherbourne Pl

Trapelo Rd @ Cusano Cir

43 Lincoln Woods Rd

Trapelo Rd @ Woodchester Rd

Trapelo Rd @ Hobbs Brook Rd

1714 Trapelo Rd

1700 Trapelo Rd

Smith St @ Snow Circle

LATE BUSES – WHS, Kennedy & McDevitt - Approx 3:30-3:45 P.M.

Route 105 – WHS & Kennedy

Totten Pond, 4th Ave, Lincoln Woods, Trapelo Rd Via Waverly Oaks Rd

Route 108 – WHS & Kennedy

Prospect Hill, Cedarwood Ave and South St

Route 115 – WHS & McDevitt

Moody St, Newton St, Warrendale, River St

KENNEDY MIDDLE SCHOOL Late Buses are available. Please see WHS Routes

Route 201 – Prospect Hill

START: 7:25 a.m.

Jennings Rd @ James St

Prospect Hill Rd @ Dermody Rd

Prospect Hill Rd @ Hansen Rd

Prospect Hill Ave @ Columbus Ave

Columbus Ave @ Rich St

Route 202 – West Trapelo

START: 7:20 a.m.

Trapelo Rd @ Brennan Ave

Trapelo Rd @ Sherbourne Pl

Trapelo Rd @ Cusano Circle

Trapelo Rd @ Woodchester Rd

1690 Trapelo Rd

80 Smith St

Lincoln St @ Hibiscus Ave

Milner St @ Pine Hill Cir

Malvern St @ Walton St

Route 203 – Southside

START: 7:20 a.m.

Charles St @ Harvard St

Moody St @ Chester Ave

Lowell St @ Ash St

Alder St @ Lowell St

Newton St @ Calvary St

River St @ Bright St

Willow St @ Grove St

Grove St @ Newton St

Lyman St @ Summer St

Route 204 – Totten Pond & Dale

START: 7:25 a.m.

115 Totten Pond Rd

203 Totten Pond Rd

455 Totten Pond Rd

52 4th Ave

Totten Pond Rd @ Craig Ln

Bacon St @ Greenwood Ln

Tomlin St @ Dale St

Tomlin St @ Summit St

Plympton St @ Prentice St

Route 205 – Glen Meadow East

START: 7:25 a.m.

Trapelo Rd @ Emmeline Ave

Abbott Rd @ Temple Rd

Temple Rd @ Doty St

Harrington Rd @ Hillcroft Rd

Harrington Rd @ Forest Park Dr

Harrington Rd @ Cliff Rd

Beaver St @ Robert Treat Paine Dr

705 Beaver St

Route 206 – Marlborough

START: 7:25 a.m.

Trapelo Rd @ Shade St

Shirley Rd @ Upton Rd

Waverley Oaks Rd @ Wilson Rd

Mallard Way @ Briarwood Rd

Marlborough Rd @ Newburgh St

Trapelo Rd @ Chase Rd

Forest St @ Doty St

Route 223 – South & School

START: 7:25 a.m.

Russell St @ South St

Main St @ Edgehill Rd

Stow St @ Dorchester St

Ravenswood Rd @ Sheridan Rd

Everett St @ Main St

School St @ Hammond St

School St @ Common St

Route 224 – Glen Meadow West

START: 7:20 a.m.

Trapelo Rd @ Clocktower Dr

Trapelo Rd @ Nancy Ln

Trapelo Rd @ Kingston Rd #2

Trapelo Rd @ Miriam Rd

1307 Trapelo Rd

1363 Trapelo Rd

1385 Trapelo Rd

Brewster Rd @ Banbury Ave

Hardy Pond Rd @ Seminole Ave

Silver Hill Ln @ Graymore Rd

645 Lincoln St

Smith St @ Wingate Rd

1344 Trapelo Rd

1312 Trapelo Rd

KENNEDY - Route 230 – Bacon & Exchange

START: 7:20 a.m.
135 Lura Lane
Worcester Ln @ Sanders Ln
Bacon St @ Dale St
School St @ Bacon St
School St @ Exchange St

KENNEDY Route 224 – Glen Meadow West – Cont.

1300 Trapelo Rd
Trapelo Rd @ Grove Rd
1134 Trapelo Rd

MCDEVITT MIDDLE SCHOOL Late Buses are available. Please see WHS routes.

Route 208 – West End

START: 7:25 a.m.
Prospect Hill Rd @ Hansen Rd
Stow St @ Milton St
Cedarwood Av @ Villa St
Rockridge Rd @ Summit Ave
Winthrop St @ Cabot St
Everett St @ Main St

Route 209 – Belmont Line

START: 7:20
Beal Rd @ Madison Rd
Beal Rd @ Barbara Rd
Beal Rd @ Candace Ave
Warren St @ Tennyson Rd
Thayer St @ Bames St
Warren St @ Wilmont Rd
Beaver St @ Hollace St
Beaver St @ Linden St
Linden St @ Marianne Rd

Route 210 – Crescent/Lowell

START: 7:25 a.m.
Adams St @ Brown St
Woerd Ave @ Riverview Ave
Crescent St @ Norumbega Ter
Moody St @ Dexter St
Alder St @ Lowell St

Route 212

START: 7:25 a.m.
Derby St @ Lowell St
Lowell St @ Brown St
Brown St @ Newton St
Berkshire Rd @ Parmenter Rd
Cedar St @ Cutter St
Moore St @ Calvary St
Farwell St @ Calvary St
Newton St @ River St

Route 225 – South St

START: 7:25 a.m.
South St @ Russell St
South St @ Vernon St
South St @ Bedford St
South St @ Wheelock Rd
Morton St @ Sunnyside St
677 South St
74 Charles River Rd
Angelside Rd @ Sagamore Way
South St @ Highland St
Charles St @ Prospect St

Route 299 – Bleachery

START: 7:30 a.m.
Chaffee Ave @ Canterbury Rd
Richgrain Ave @ Aberdeen Ave
Willow St @ Grove St

FITZGERALD ELEMENTARY

Route 305 – Warren @ Chaffee

START: 8:10 a.m.

Whitman Rd @ Fairfax Rd
 Whitman Rd @ Tennyson Rd
 Warren St @ Marlton Rd
 Warren St @ Wayne Ave
 Thayer St @ Barnes St
 Warren St @ Circuit Ln
 Waverley St @ Wilton St
 Wilbur St @ Hollace St

Route 306 – Gardencrest

START: 8:10 a.m.

Ellison Park
 Summer St @ Garden Cir # 1
 Summer St @ Garden Cir # 2
 99 Linden St
 Linden St @ Marianne Rd
 Linden St @ Beaver St

Route 323 – East Bleachery

START: 8:10 a.m.

River St @ Bright (Across)
 Willow St @ Grove St
 Aberdeen Ave @ Douglas Rd
 Gore St @ Lawndale Ave
 Colonial Ave @ Allen Rd
 Main St @ Ranglely Rd

Route 324 – Waverly Oaks/Candace Rd

START: 8:10 a.m.

Willow St @ Main St
 Willow St @ School Ave
 River St @ Bright St
 River St @ Clark St
 Newton St @ Grove St
 Bright St @ Grove St
 Bright St @ Bennett St
 Potter Rd @ Gilbert St

Route 325 – School St/Charles St

START: 8:00 AM

Linden St @ Middlesex Rd
 Main St @ Harris St
 Lyman St @ School St
 School St @ Liberty St
 Elm St @ River St
 Amory Rd @ Rezem St
 Central St @ Cross St

Route 331 – Summer St

START: 8:10 a.m.

Lyman St @ Garden Ln
 Summer St @ Church St
 Lexington St @ School St
 Lexington St @ Summer St
 Summer St @ Harris St

MACARTHUR ELEMENTARY

Route 307 – Lexington & Amherst

START: 8:00 AM

43 Lincoln Woods Rd
 1000 Lexington St
 Lexington St @ Ridge Ln
 Lake St @ Indian Rd
 Amherst Av @ Wamsutta Ave

Route 308 – College Farm

START: 8:00 AM

Lake St @ Nutting Rd
 730 Lexington St
 17 College Farm Rd
 College Farm Rd @ Montview Ave
 College Farm Rd @ Mt Walley Rd
 College Farm Rd @ Indian Rd
 Opposite #22 Piedmot Ave
 Trimount Ave @ Marivista Ave
 Trimount Ave @ Montclair Ave

Route 310 – Goldencrest

START: 8:00 AM

Smith St @ Hersum Way
 221 Smith St
 Smith St @ Wingate Rd
 Brennan Ave @ Goldencrest Ave
 Crestview Rd @ Midland Dr
 150 Candlewood Dr
 Sherbourne Pl @ Vesper St
 Trapelo Rd @ Hobbs Brook Rd
 110 Smith St
 80 Smith St
 Lincoln St @ Wyman St

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College Farm Rd @ Princeton Ave
 START: 8:00 AM
 Charles St @ Fountain St
 Felton St @ Mechanic St
 South St @ Bedford St
 Prospect Hill Rd @ Eison Rd
 Prospect Hill Rd @ Hansen Rd
 16 Winter St
 Winter St @ Malvern St
 Smart St @ Walton St

Route 329 – Lincoln Woods
 START: 8:00 AM
 455 Totten Pond Rd
 52 Fourth Ave
 Lincoln St @ Smith St
 Hillcrest Rd @ Outlook Rd
 Hardy Pond Rd @ Seminole Av
 Silver Hill Ln @ Graymore Rd

NORTHEAST ELEMENTARY

Route 314 – Chesterbrook
 START: 8:10 AM
 455 Totten Pond Rd
 Lexington St @ Bishops Forest Dr
 Brookway Ct Stop # 1
 Brookway Ct Stop # 2
 Brookway Ct Stop # 3
 Lexington St. @ Colonial Manor Apts
 Jacqueline Rd @ Lionel Ave

Route 315 – Forest St
 START: 8 a.m.
 Forest St @ Leblanc Cir
 Forest St @ Rosewood Dr
 Woodcliff Dr @ Azalea Rd
 76 Forest St
 Forest St @ Rogers Way
 Harrington Rd Chatham Ln
 Pigeon Ln @ Juniper Hill Rd
 Harrington Rd @ Roseanna Park Dr
 Roseanna Park Dr @ Raffaele Dr
 Harrington Rd @ Hillcroft Rd
 Shade St @ Kenwood Ln
 Emmeline Ave @ Helen St

Route 318 – Stearns Hill
 START: 8:10 AM
 1000 Lexington St
 Lexington St @ Stearns Hill Rd

Route 316 – Glemneadow West
 START: 8 a.m.
 Trapelo Rd @ Kingston Rd # 2
 Miriam Rd @ Leitha Dr
 Berkley St @ Brewster Rd
 Berkley St @ Banbury Ave
 Brewster Rd @ Whittier Ave
 Grove Rd @ Plant Rd

Route 317 – Marlborough
 116 Trapelo Rd
 Upton Rd @ Shirley Rd
 Upton Rd @ Parkview Rd
 Waverley Oaks Rd @ Wilson Rd
 109 Trapelo Rd
 Mallard Way @ Briarwood Rd
 Albemarle Rd @ Marlborough Rd
 Arcadia Ave @ Sparkill St
 Albemarle Rd @ Ivaloo St
 Trapelo Rd @ Chase Rd

NORTHEAST Route 330 – Trapelo Rd West
 Trapelo Rd @ Clocktower Dr
 Trapelo Rd @ Nancy Ln
 1105 Lexington St
 1219 Trapelo Rd
 1273 Trapelo Rd
 1385 Trapelo Rd
 1160 Trapelo Rd
 Trapelo Rd @ Old Lexington St

PLYMPTON ELEMENTARY

Route 319 – Prospect Hill

START: 8:15 AM
Prospect Hill Rd @ Dermody Rd
Prospect Hill Rd @ Hansen Rd
Prospect Hill Rd @ Elson Rd

Route 320 – Lexington/Bacon

START: 8 a.m.
360 Lexington St
Valley View Rd @ Lyman St
Beaver St @ Robert T. Paine
Lexington St @ Summer St
785 Beaver St
459 Lexington St
Lexington St @ Stanley Rd
Curve St @ Lexington St
Curve St @ Lincoln St
Pond End Rd @ Bigelow Rd
Clark Ln @ Buxton Ln
Greenwood Ln @ Woodlawn Ave
24 Greenwood Ln

Route 321 – West End

START: 8 a.m.
17 Weston St
Eddy St @ Weston St
195 Weston St
Stow St @ Keach St
Stow St @ Colburn St
Stow St @ Milton St
Ravenswood Rd @ Sheridan Rd
Malone St @ Overland Rd
Main St @ Nathan Rd
Plympton St @ Hawthorne Rd
62 Woodland Rd
James St @ Jennings Rd

Route 326 – Totten Pond

START: 8:05 a.m.
81 Totten Pond Rd
455 Totten Pond Rd
52 4th Ave
Craig Ln @ Totten Pd Rd
Worcester Ln @ Sanders Ln
Worcester Ln @ Lura Ln

STANLEY ELEMENTARY

Route 301 – Cedarwood

START: 8:05 a.m.
Weston St @ Stow St
Fairmont Ave @ Elmwood Ave
Villa St @ Summit Ave
Villa St @ Rockridge Rd
Villa St @ Cedarwood Ave
Cedarwood Ave @ Florence Rd
Florence Rd @ Harland Rd
Cedarwood Ave @ Wetherbee Rd
Cedarwood Ave @ Thomson Rd
Cedarwood Ave @ Virginia Rd

Route 303 – Main/Weston/South

START: 8:10 a.m.
Hartwell St @ Morton St
Morton St @ Sunnyside St
South St @ Banford Way
677 South St (Opposite Charles Bank Way)
South St @ Charles River Rd
Charlesbank Way @ Sagamore Way
Sagamore Way @ Angleside Rd

Route 302 – Charles/Adams

START: 8:05 a.m.
Main St @ Stratton Terr
Felton St @ Mechanic St
Charles St @ Harvard St
Charles St @ Williams St
Charles St @ Grant St
Charles St @ Fountain St
Charles St @ Mechanic St
Adams St @ Spruce St
Adams St @ Walnut St
Adams St @ Chestnut St

Route 304 – Woerd/Adams

START: 8:05 a.m.
Martyn St @ Park St (Playground)
Crescent St @ Adams St (Across from Adams)
Adams St @ Chester Ave
Adams St @ Brown St
Adams St @ Maple St

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WHITTEMORE ELEMENTARY

Route 322 -- Calvary St

START: 8 a.m.

Main St @ Hastings Ave

River St @ Jackson St

Central St @ Cross St

Adams St @ Chestnut St

Adams St @ Ash St

Adams St @ Chester Ave

Crescent St @ Woerd Ave

Martyn St @ Park St

Crescent St @ Norumbega Terr

241 Calvary St

Calvary St @ Farwell St

MINUTEMAN HIGH SCHOOL

Minuteman students may take our

Waltham High School buses in the morning.

The Minuteman bus will leave from the

WHS main entrance at approximately 7:30 A.M.

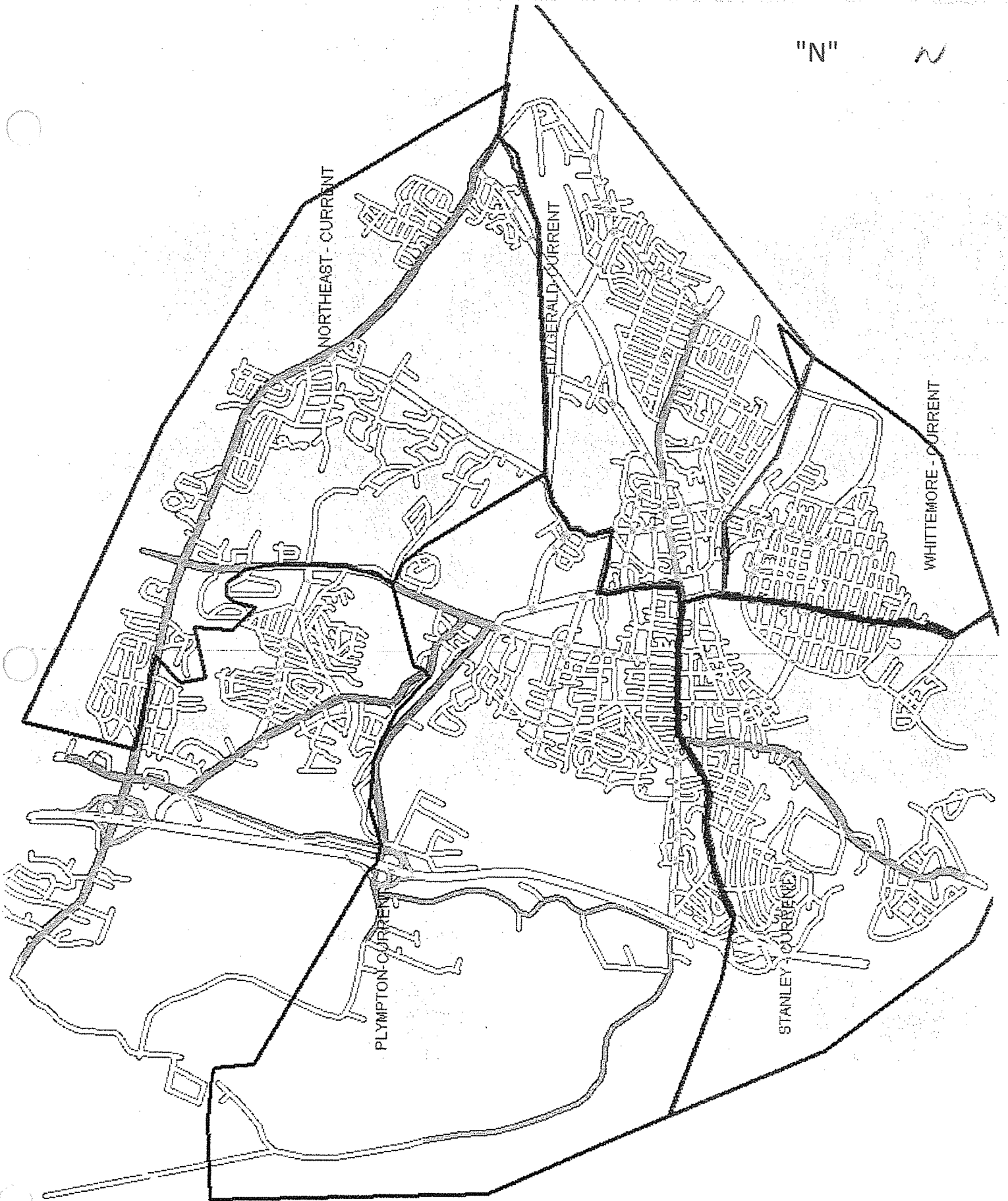
Late buses available from WHS at approximately 3:45 P.M.

On days that Waltham is not in session the Minuteman students are responsible for transportation to and from WHS.

EXHIBIT N.
CURRENT DISTRICTS (HOME BASE AND PROGRAM)

"N"

N



Waltham Public Schools
District Map

"N"

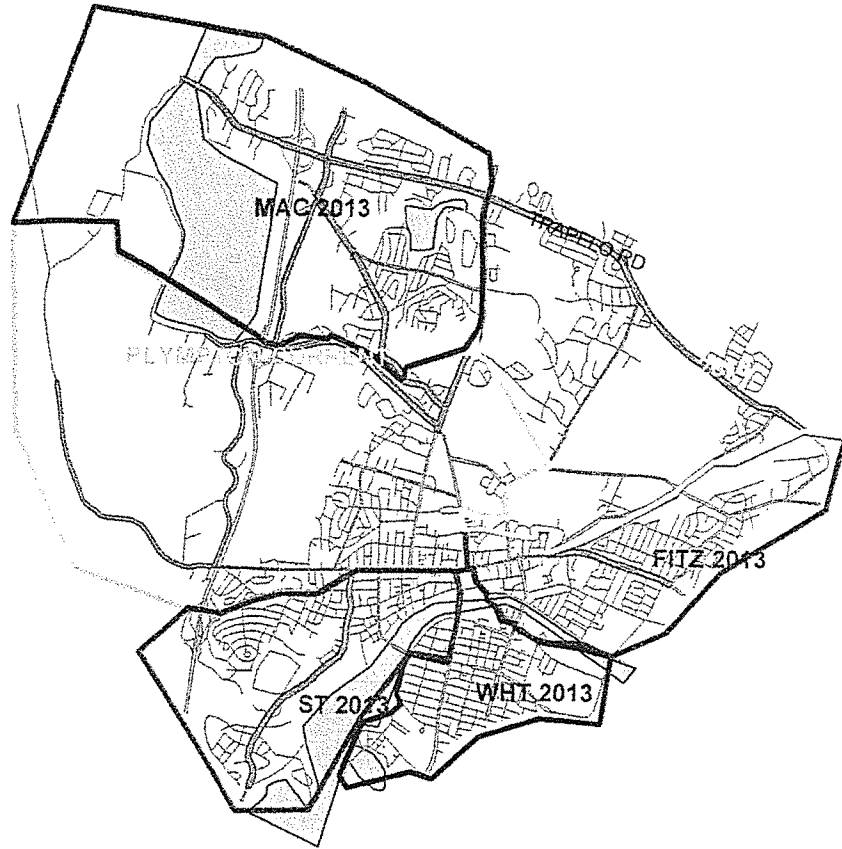


EXHIBIT O.
DISTRICT PROFILE

Massachusetts School and District Profiles

Waltham

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Contact Information

Susan M Nicholson, Superintendent

Mailing Address: 617 Lexington Street
Waltham, MA, 02452 3099

Phone: 781-314-5400

Fax: 781-314-5411

Email: susannicholson@k12.waltham.ma.us

NCES ID: 2512000

Chapter 74 Approved Programs:

Automotive Collision Repair & Refinishing (470603)
Automotive Technology (470604)
Carpentry (460201)
Early Education and Care (131210)
Electricity (460302)
Electronics (150303)
Exploratory (990100)
Graphic Communications (100301)
Metal Fabrication & Joining Technologies (480599)
Radio & Television Broadcasting (090701)

District Operating Status: Operating

District Title I Status: Title I District

Educator Preparation Program Provider (EPPP): \$ Not Defined

Inter-District School Choice: Does Not Offer Choice

METCO Program: Does Not Accept METCO Students

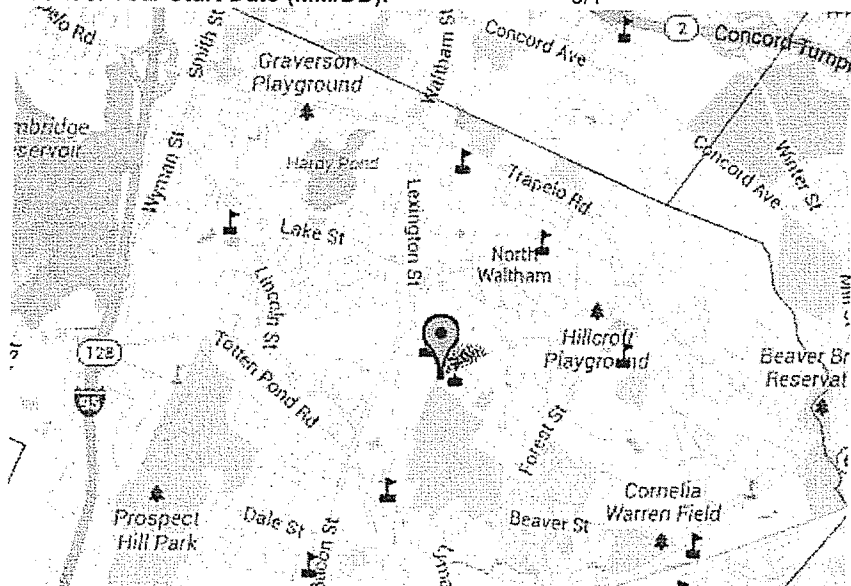
Mass District Type: Local School


RTTT Grant Program: Yes

SES Provider: \$ Not Defined

School Year End Date (MM/DD): 06/24

School Year Start Date (MM/DD): 9/1



**Massachusetts School and District Profiles
Waltham**"0" **Teacher Data (2012-13)**

	District	State
Total # of Teachers	454.9	70,635.8
% of Teachers Licensed in Teaching Assignment	100.0	97.5
Total # of Classes in Core Academic Areas	-	-
% of Core Academic Classes Taught by Teachers Who are Highly Qualified	-	-
Student/Teacher Ratio	11.2 to 1	13.5 to 1

EXHIBIT P. NOVEMBER 2013 DATA
EXHIBIT Q. DESE OCTOBER 1 DATA

Massachusetts School and District Profiles
Waltham

P, Q

Enrollment Data

"P" & "Q"

Race	% of District	% of State
African American	10.0	6.2
Asian	6.2	5.5
Hispanic	29.2	15.4
Native American	0.2	0.2
White	52.0	68.0
Native Hawaiian, Pacific Islander	0.3	0.1
Multi-Race, Non-Hispanic	2.3	2.4

	District	State
Male	2,466	499,353
Female	2,300	465,200
Total	4,766	965,553

	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	SP	CT	Total
<u>Downs MacArthur Elementary School</u>	0	55	64	53	50	59	55	0	0	0	0	0	0	0	0	-	336
<u>Henry Whittemore Elementary School</u>	0	64	70	56	48	48	35	0	0	0	0	0	0	0	0	-	321
<u>James Fitzgerald Elementary School</u>	0	90	83	74	65	64	54	0	0	0	0	0	0	0	0	-	430
<u>John F. Kennedy Middle</u>	0	0	0	0	0	0	0	183	157	173	0	0	0	0	0	-	523
<u>John W. McDevitt Middle School</u>	0	0	0	0	0	0	0	194	165	157	0	0	0	0	0	-	516
<u>Northeast Elementary School</u>	66	65	56	68	77	61	79	0	0	0	0	0	0	0	0	-	472
<u>Thomas R. Plympton Elementary School</u>	0	61	62	66	66	64	55	0	0	0	0	0	0	0	0	-	384
<u>Waltham Sr. High</u>	0	0	0	0	0	0	0	0	0	0	337	351	324	353	0	-	1,375
<u>William F. Stanley Elementary School</u>	72	69	75	63	51	55	54	0	0	0	0	0	0	0	0	-	439
District	139	404	410	380	357	351	342	377	332	330	337	351	324	353	0	-	4,766

Massachusetts School and District Profiles
Waltham

Enrollment Data

P Q
"P" & "Q"

Race	% of District	% of State
African American	9.6	8.3
Asian	6.3	5.7
Hispanic	31.4	16.1
Native American	0.2	0.2
White	50.2	67.0
Native Hawaiian, Pacific Islander	0.2	0.1
Multi-Race, Non-Hispanic	2.3	2.5

	District	State
Male	2,576	469,736
Female	2,418	464,633
Total	4,994	934,369

	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	SP	CT	Total
Douglas MacArthur Elementary School	0	56	53	64	50	52	55	0	0	0	0	0	0	0	0	-	330
Henry Whittemore Elementary School	0	79	63	67	59	55	48	0	0	0	0	0	0	0	0	-	371
James Fitzgerald Elementary School	0	89	86	84	72	75	63	0	0	0	0	0	0	0	0	-	469
John F. Kennedy Middle	0	0	0	0	0	0	0	196	190	168	0	0	0	0	0	-	554
John W. McDevitt Middle School	0	0	0	0	0	0	0	157	195	167	0	0	0	0	0	-	519
Northeast Elementary School	76	75	63	55	73	65	57	0	0	0	0	0	0	0	0	-	474
Thomas R. Plympton Elementary School	0	82	64	69	69	71	61	0	0	0	0	0	0	0	0	-	416
Waltham Sr High	0	0	0	0	0	0	0	0	0	0	339	345	361	325	0	-	1,370
William F. Stanley Elementary School	89	85	79	69	61	57	51	0	0	0	0	0	0	0	0	-	491
District	165	466	408	408	384	375	345	353	395	335	339	345	361	325	0	-	4,994

Massachusetts School and District Profiles
Waltham

P Q

Enrollment Data

"P" & "Q"

Race	% of District	% of State
African American	9.3	8.6
Asian	6.2	5.9
Hispanic	32.5	16.4
Native American	0.1	0.2
White	49.3	66.0
Native Hawaiian, Pacific Islander	0.2	0.1
Multi-Race, Non-Hispanic	2.4	2.7

	District	State
Male	2,620	469,289
Female	2,478	465,484
Total	5,098	954,773

	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	SP	CT	Total
Douglas MacArthur Elementary School	0	66	63	54	67	47	52	0	0	0	0	0	0	0	0	-	349
Henry Whittemore Elementary School	0	87	87	67	75	62	53	0	0	0	0	0	0	0	0	-	431
James Fitzgerald Elementary School	0	86	87	81	73	72	74	0	0	0	0	0	0	0	0	-	473
John F. Kennedy Middle School	0	0	0	0	0	0	0	186	190	174	0	0	0	0	0	-	550
John W. McDevitt Middle School	0	0	0	0	0	0	0	171	165	198	0	0	0	0	0	-	534
Northeast Elementary School	76	71	70	61	49	68	62	0	0	0	0	0	0	0	0	-	457
Thomas R. Plympton Elementary School	0	73	60	60	62	72	65	0	0	0	0	0	0	0	0	-	412
Waltham Sr High	0	0	0	0	0	0	0	0	0	0	346	337	359	342	5	-	1,389
William F. Stanley Elementary School	75	104	86	61	60	56	61	0	0	0	0	0	0	0	0	-	503
District	151	487	473	384	386	377	367	357	355	372	348	337	359	342	5	-	5,098

ATTACHMENT D
FACILITIES INVENTORY
 Office of Educational Quality and Accountability

PURPOSE: To help determine (1) the adequacy of facilities and of operational management and (2) the efficiency of organizational management and resource utilization.

EQA USE: Examiners will review this document for its applicability to the Business and Finance standard. The results of that review may be cited as evidence in the EQA report to the Educational Management Audit Council (EMAC).

DIRECTIONS: Please complete the inventory for all facilities either owned or leased by the district. If the information is not applicable (N), is unattainable (U), or is irretrievable (R), please indicate that in the appropriate cell below.

Name of Facility	DOE School Code	Grade Levels Instructed In Facility	Date Of Construction	Date Of Most Recent Renovation For Its Current Use	Enrollment	General Condition	Size of Facility (Square Feet)
Waltham High School		9-12	1970 Vo Tech 1998	2001, Fine Arts Ctr. only	1507	Good	440,000
Kennedy Middle School		6-8	September, 2005	September, 2005	537	Excellent	165,000
McDevitt Middle School		6-8	September, 2003	September, 2003	563	Above Avg.	121,000
Plympton Elementary		k-5	March, 2004	March, 2004	315	Excellent	75,000
Whittemore Elementary		k-5	1926 addition 1977	Under Construction	252		57,916 to 75,000
MacArthur Elementary		k-5	January, 2006	January, 2006	361	Above Avg.	75,000
Stanley Elementary		k-5, preschool	January, 2003	January, 2003	391	Excellent	93,000
Northeast Elementary		k-5, preschool	January, 2004	January, 2004	391	Above Avg.	93,000
Fitzgerald Elementary		k-5	1945 addition 1947	Under Construction	285		28,730 to 75,000
Bright Elementary		k-5	1887	1976	124	Life Cycle Over	29,574
Fitch Elementary <i>6/15/11</i>		k-5	1931	1977	285	Life Cycle Over	40,488
South Middle School <i>2008</i>		6-8	1923	1977	252	Life Cycle Over	87,100

Prepared by: Skip Bandimi, C.P.E., Director of Facilities

Signature _____ Date _____

Thank you for taking the time to complete the inventory. EQA is available to address any questions or concerns regarding this form at (617)-727-2398.

Floor Plans, All Schools

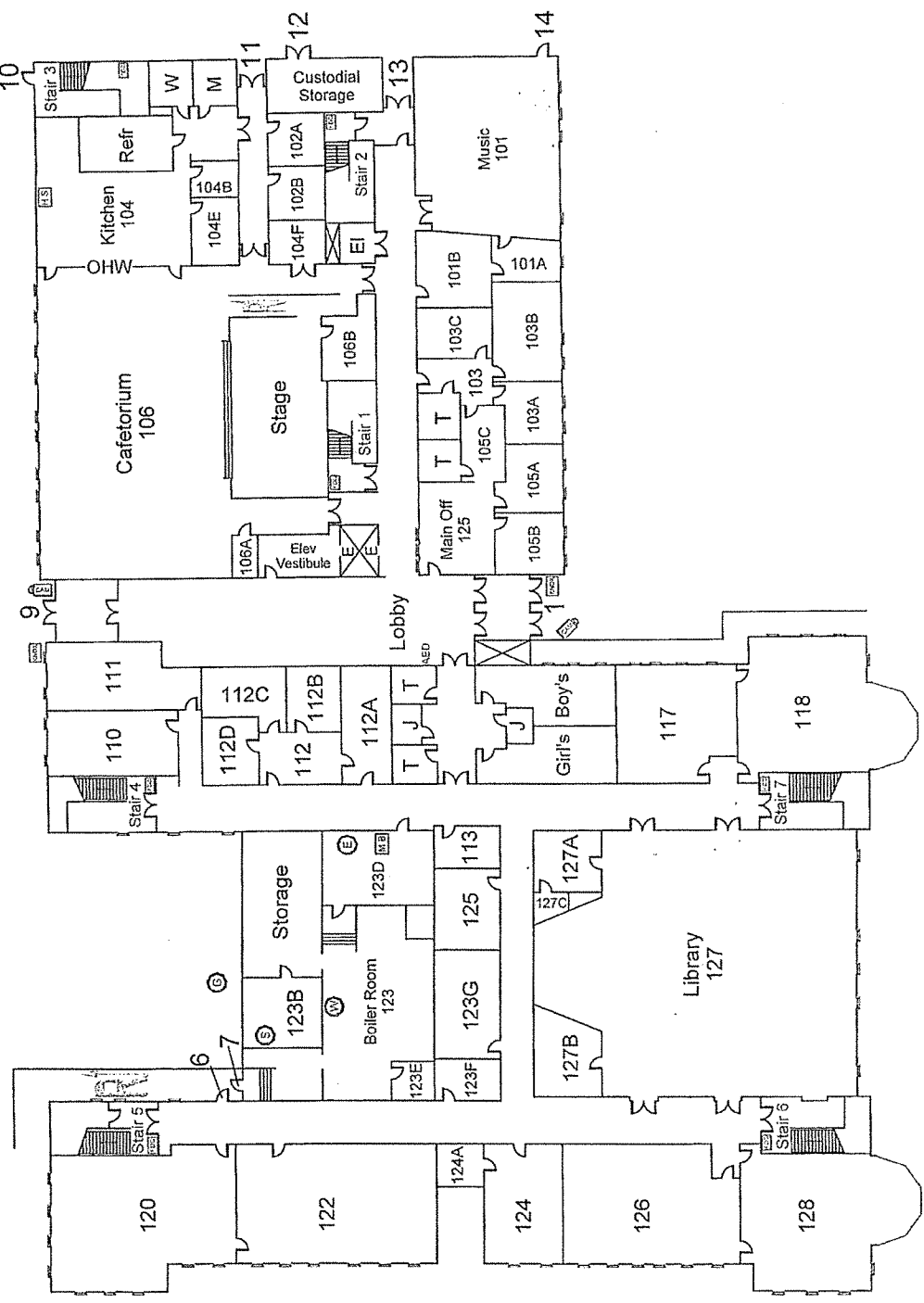
"S"

30 Parmenter Road Waltham, MA 02543

Side C

Side D

1st Floor Plan 4



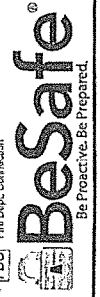
District:	Waltham Public Schools
School Name:	Whittemore Elementary School
Address:	30 Parmenter Road Waltham, MA 02543

Floor 1

Side B

Side A

- Legend**
- Camera
 - Chair-Lift
 - Elevator
 - Water Shutoff
 - Sprinkler Shutoff
 - Electrical Shutoff
 - Gas Shutoff
 - Ramp
 - Emergency Generator
 - Fire Alarm Master Box
 - Halon System
 - Fire Dept. Connection



For Official Use Only

Side C

Side D

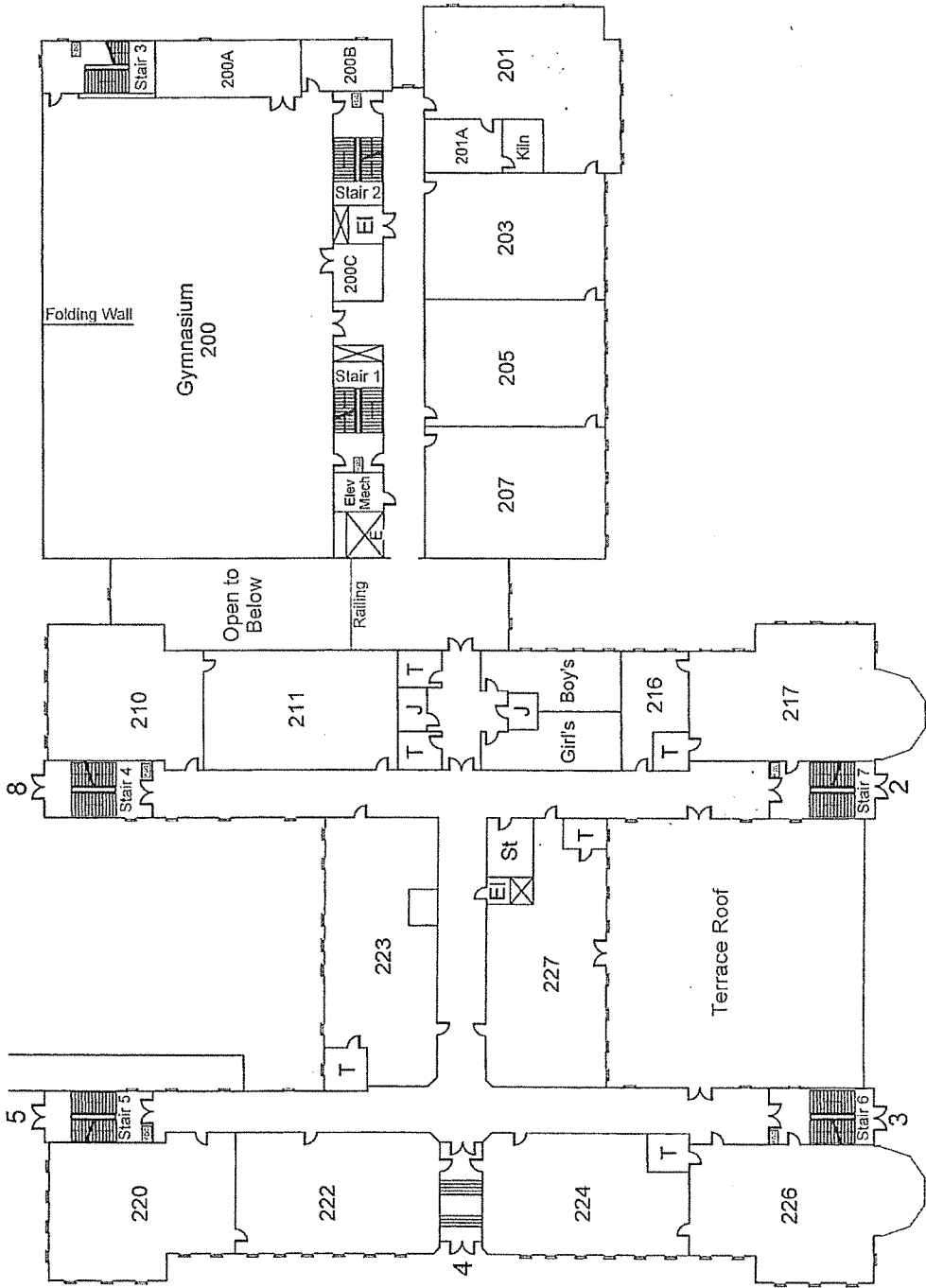
2nd Floor Plan

Side A

Floor 2

Side B

District:	Waltham Public Schools
School Name:	Whittemore Elementary School
Address:	30 Parmenter Road Waltham, MA 02543



- Legend**
- Camera
 - Ched. LH
 - Elevator
 - Water Shutoff
 - Sprinkler Shutoff
 - Electrical Shutoff
 - Gas Shutoff
 - Ramp
 - Emergency Generator
 - Fire Alarm Master Box
 - Halon System
 - Fire Dept. Connection



For Official Use Only

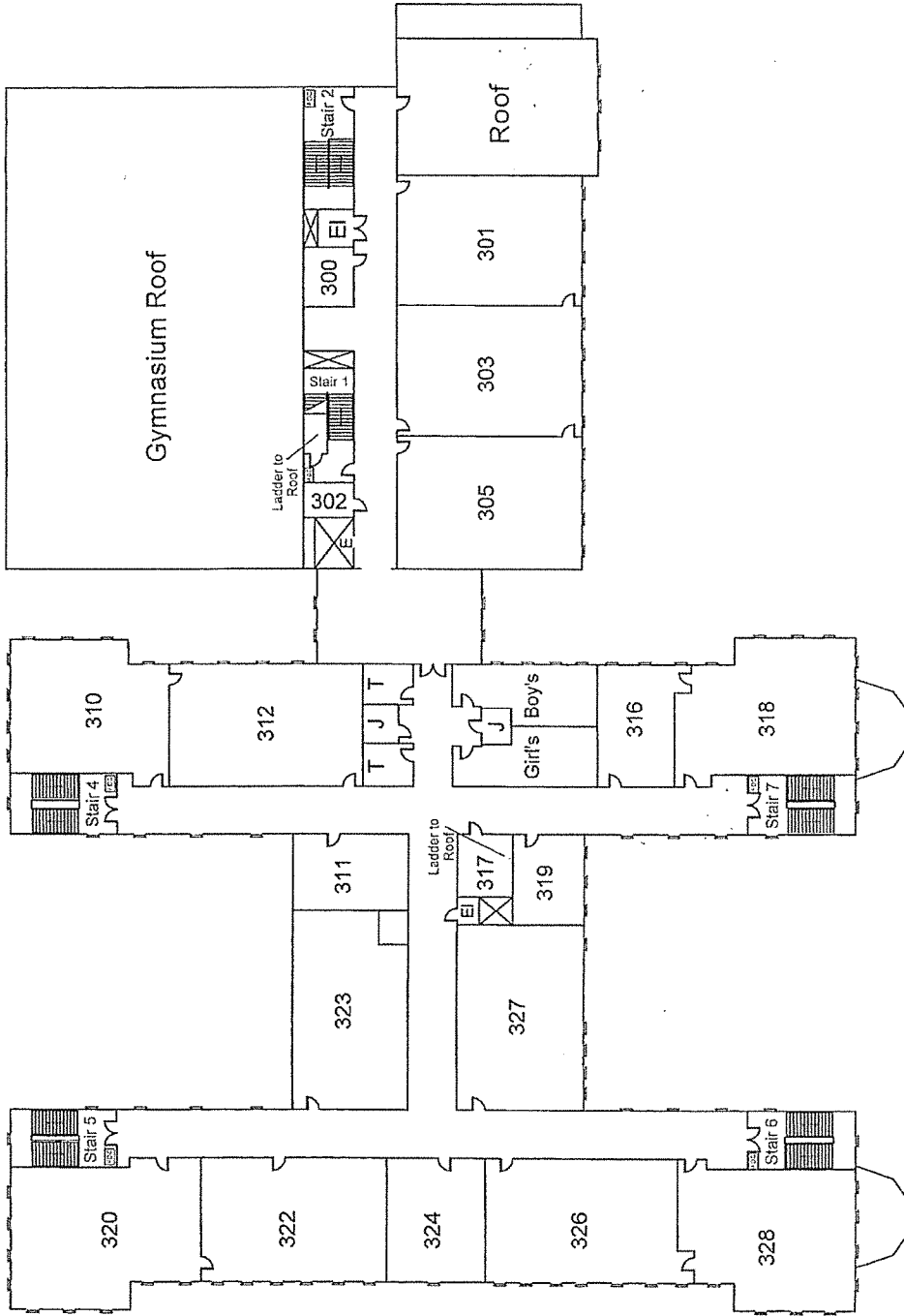
Side C

Side D

Side A

Floor 3

District:	Waltham Public Schools
School Name:	Whittemore Elementary School
Address:	30 Parmenter Road Waltham, MA 02453



Side B

Legend

- Camera
- Chair LIT
- Elevator
- Water Shutoff
- Sprinkler Shutoff
- Electrical Shutoff
- Gas Shutoff
- Ramp
- Emergency Generator
- Fire Alarm Master Box
- Horn System
- Fire Dept. Connection



District:	Waltham
School Name:	Stanley Elementary School
Address:	250 South Street Waltham, MA 02453
School Hours:	8:45 am - 3:00 pm
In-session Contact:	Marcia Pertuz (781) 314-5620
Off-Hours Contact:	
Approach Hazards:	None; Sloping Hill Side C
Notes:	

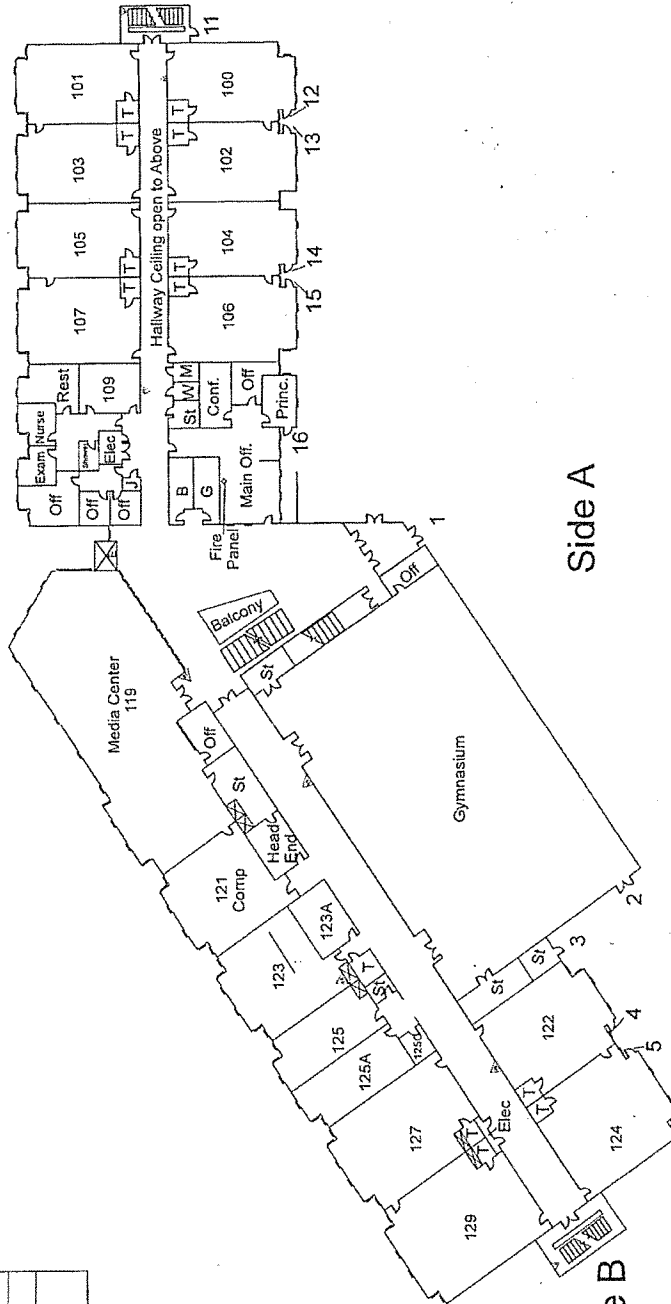
1st Floor

Side C

Side D

Side A

Side B



Legend

- Single Door
- Double Door
- Window
- Stairs
- Ramp
- Elevator
- Fire Extinguisher
- Gas Shut-Off
- Electrical Shut-Off
- Water Shut-Off
- Chair Lift
- Sprinkler Shutoff
- Generator
- Camera
- Fire Standpipe

District:	Waltham
School Name:	Stanley Elementary School
Address:	250 South Street Waltham, MA 02453
School Hours:	8:45 am - 3:00 pm
In-session Contact:	Marcia Perfuz (781) 314-5620
Off-Hours Contact:	
Approach Hazards:	None; Sloping Hill Side C
Notes:	

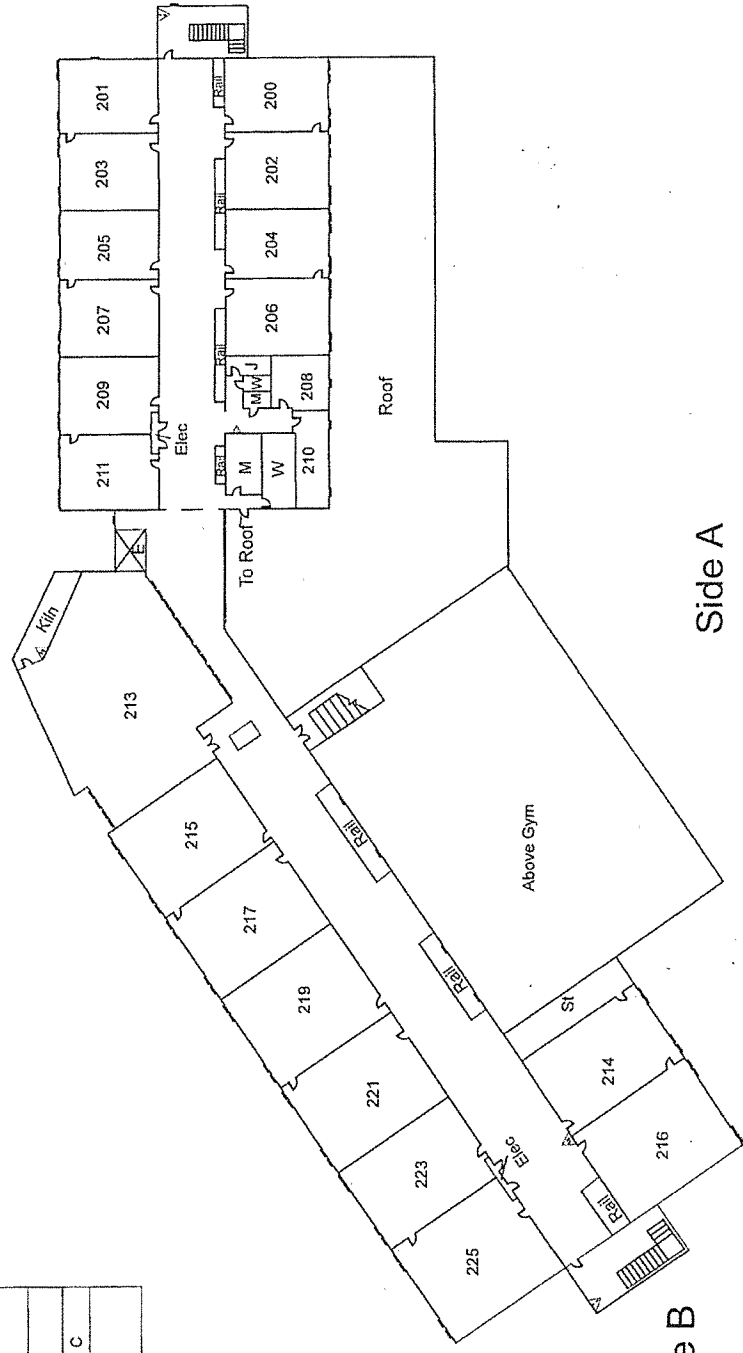
2nd Floor

Side C

Side D

Side A

Side B



Legend

- Single Door
- Double Door
- Window
- Stairs
- Ramp
- Elevator
- Fire Extinguisher
- Gas Shut-Off
- Electrical Shut-Off
- Water Shut-Off
- Chair Lift
- Sprinkler Shutoff
- Generator
- Camera
- Fire Standpipe

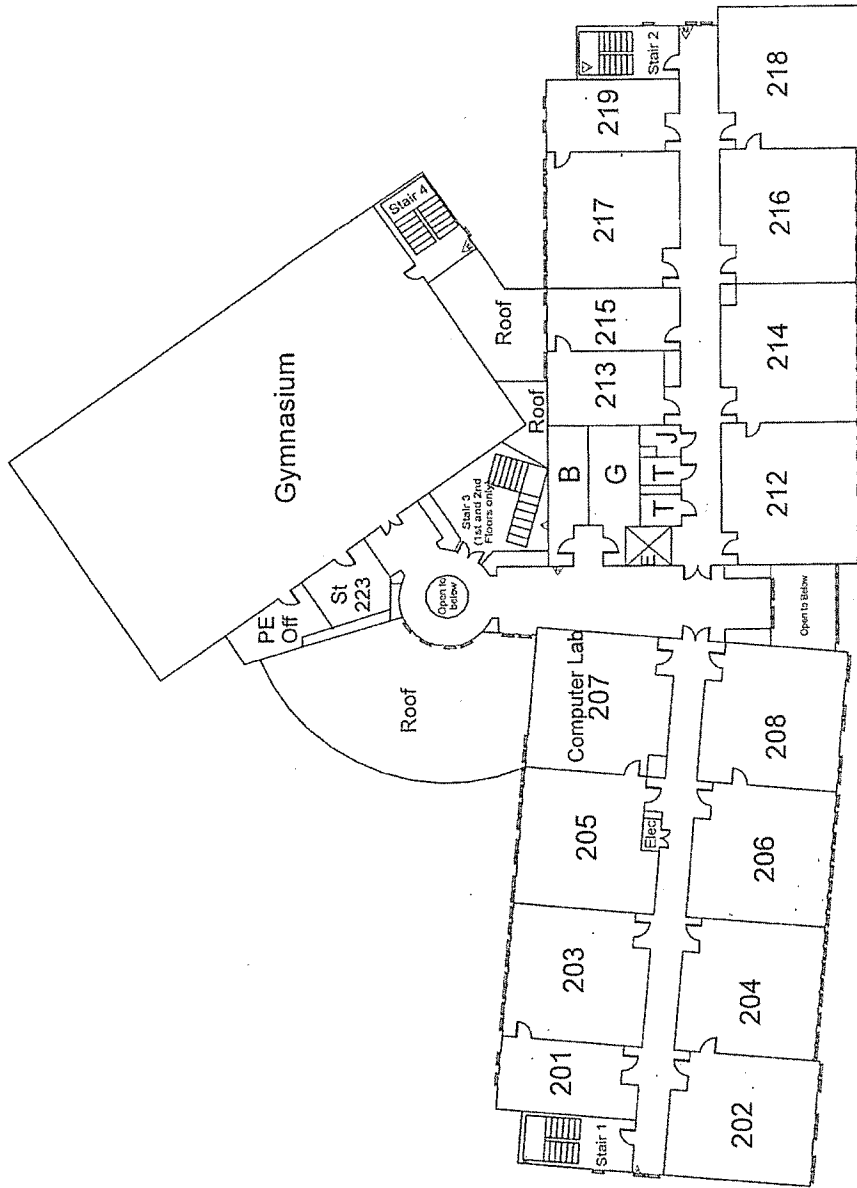
District:	Waltham
School Name:	Plympton Elementary School
Address:	20 Farnsworth Street Waltham, MA 02451
School Hours:	8:45 am - 3:00 pm
In-session Contact:	John Barry (781) 314-5760
Off-Hours Contact:	
Approach Hazards:	None; Residential Neighborhood; Ball Field Side A; Can drive around school
Notes:	

2nd Floor

Side B

Side C

Side D



Side A

Legend

- Single Door
- Double Door
- Window
- Stairs
- Ramp
- Elevator
- Fire Extinguisher
- Gas Shut-Off
- Electrical Shut-Off
- Water Shut-Off
- Chair Lift
- Sprinkler Shutoff
- Generator
- Camera
- Fire Standpipe

Waltham Public Schools

 201 Farnsworth Street

 Waltham, MA 02451

 (781) 314-5760


 www.waltham.k12.ma.us


District:	Waltham
School Name:	Plympton Elementary School
Address:	20 Farnsworth Street Waltham, MA 02451
School Hours:	8:45 am - 3:00 pm
In-session Contact:	John Barry (781) 314-5760
Off-Hours Contact:	
Approach Hazards:	None: Residential Neighborhood: Ball Field Side A: Can drive around school
Notes:	


3rd Floor

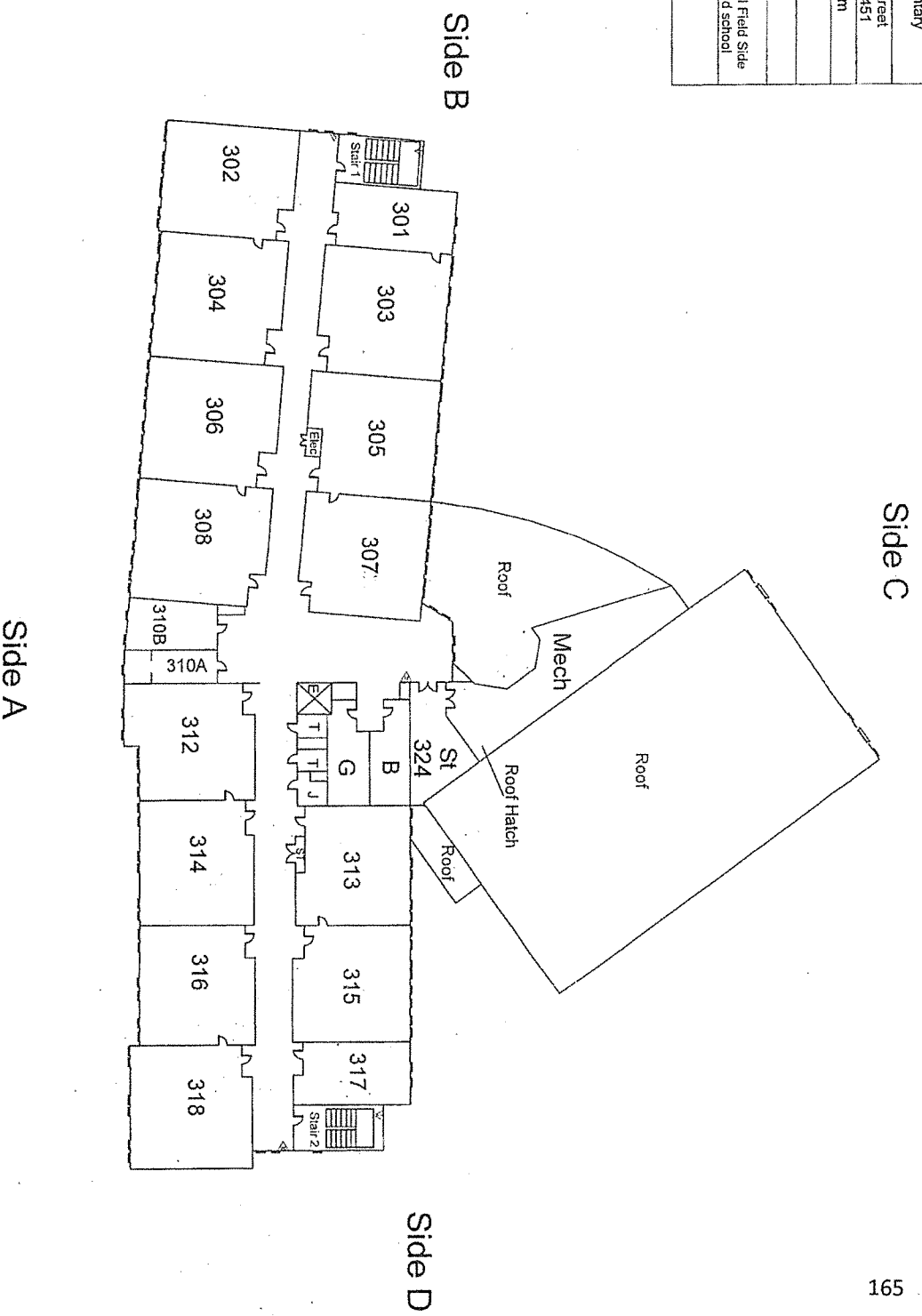
- Legend**
- M Single Door
 - M Double Door
 - Window
 - Stairs
 - R Ramp
 - E Elevator
 - A Fire Extinguisher
 - G Gas Shut-Off
 - E Electrical Shut-Off
 - W Water Shut-Off
 - L Chair Lift
 - S Sprinkler Shutoff
 - Generator
 - Camera
 - Fire Standpipe

STAIRS

Approved by:  Massachusetts State Board of Fire Safety

Approved by:  Massachusetts State Board of Fire Safety

Approved by:  Massachusetts State Board of Fire Safety

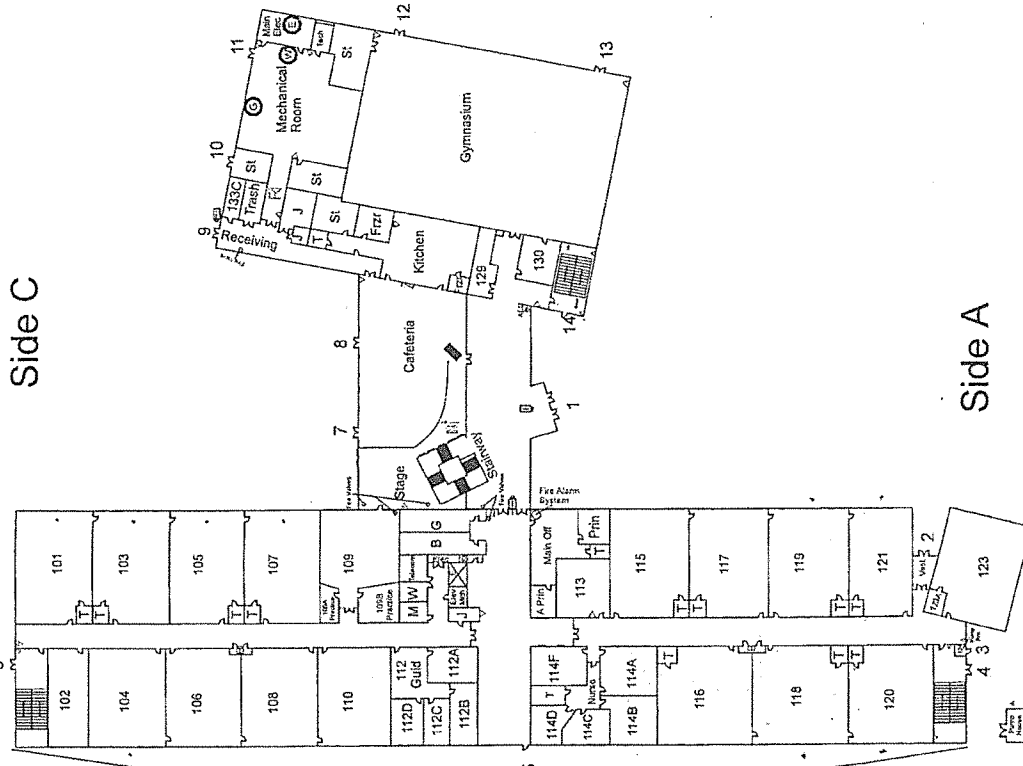


District:	Waltham
School Name:	Northeast Elementary
Address:	70 Putney Lane Waltham, MA 02452
School Hours:	8:45 am - 3:00 pm
In-session Contact:	Nadene Stein (781) 314-5745
Off-Hours Contact:	
Approach Hazards:	
Notes:	

1st Floor

Side B

Fence



Side C

Side D

Side A

Legend

- Single Door
- Double Door
- Window
- Stairs
- Ramp
- Elevator
- Fire Extinguisher
- Gas Shut-Off
- Electrical Shut-Off
- Water Shut-Off
- Chair Lift
- Sprinkler Shutoff
- Generator
- Camera
- Fire Standpipe

STARS
Produced by:
Metropolitan Area
Planning Council
Metropolitan Area
Planning Council
Metropolitan Area
Planning Council

District:	Waltham
School Name:	Northeast Elementary
Address:	70 Putney Lane Waltham, MA 02452
School Hours:	8:45 am - 3:00 pm
In-session Contact:	Nadene Stein
Off-Hours Contact:	(781) 314-5745
Approach Hazards:	
Notes:	

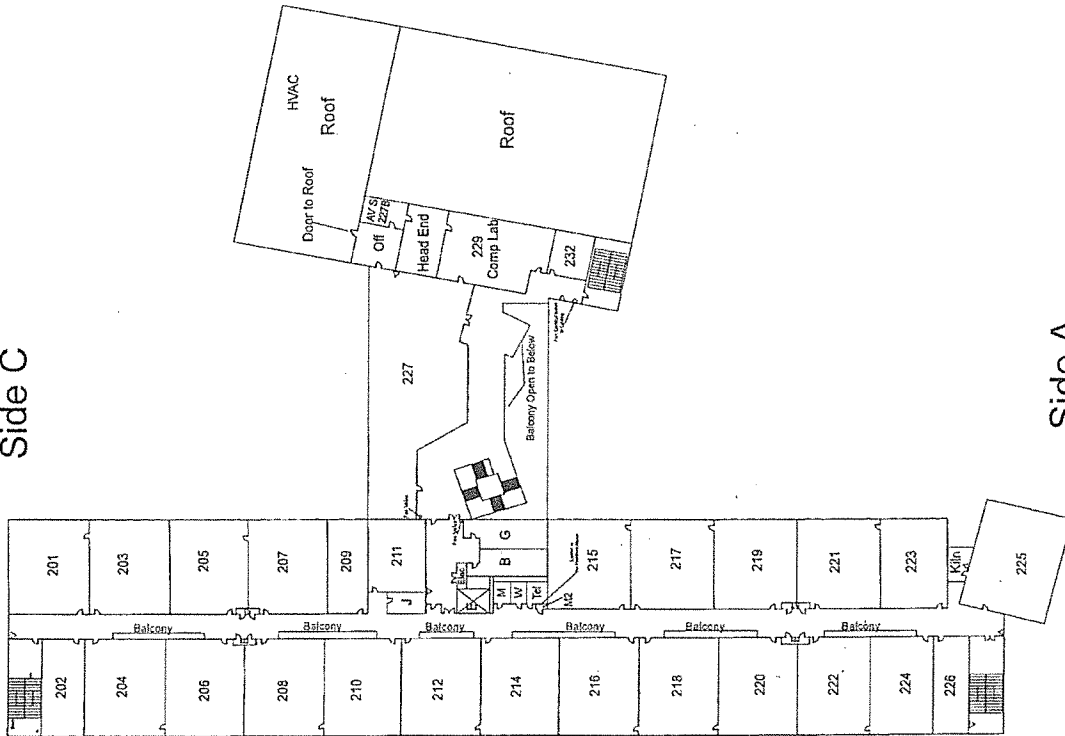
2nd Floor

Side B

Side C

Side D

Side A



Legend

- Single Door
- Double Door
- Window
- Stairs
- Ramp
- Elevator
- Fire Extinguisher
- Gas Shut-Off
- Electrical Shut-Off
- Water Shut-Off
- Chair Lift
- Sprinkler Shut-off
- Generator
- Camera
- Fire Standpipe

Produced by:

 SIARDS

 ASSISTANT REGIONAL SAFETY

 REGIONAL LABORATORY GROUP

 Produced by:

 SIARDS

 ASSISTANT REGIONAL SAFETY

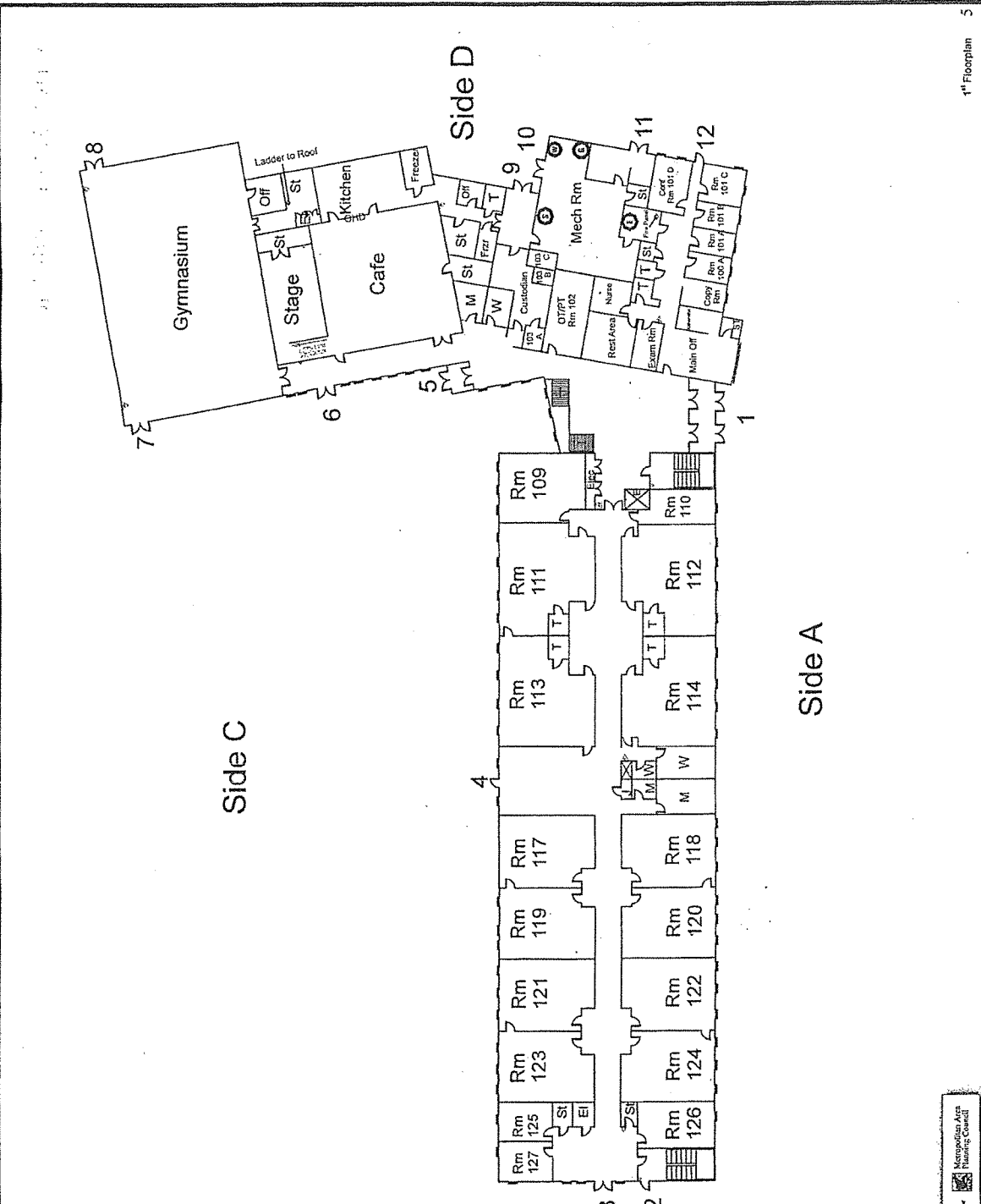
 REGIONAL LABORATORY GROUP

District:	Waltham
School Name:	MacArthur Elementary School
Address:	494 Lincoln Street Waltham, MA 02452
School Hours:	8:45 am - 3:00 pm
In-session Contact:	Deborah Ireland (781) 314-5720
Off-Hours Contact:	
Approach Hazards:	
Notes:	

1st Floor

Legend

- Single Door
- Double Door
- Window
- Stairs
- Ramp
- Elevator
- Fire Extinguisher
- Gas Shut-Off
- Electrical Shut-Off
- Water Shut-Off
- Chair Lift
- Sprinkler Shutoff
- Generator
- Camera
- Fire Standpipe



District:	Waltham
School Name:	MacArthur Elementary School
Address:	494 Lincoln Street Waltham, MA 02452
School Hours:	8:45 am - 3:00 pm
In-session Contact:	Deborah Ireland (781) 314-5720
Off-Hours Contact:	
Approach Hazards:	
Notes:	

2nd Floor

Legend

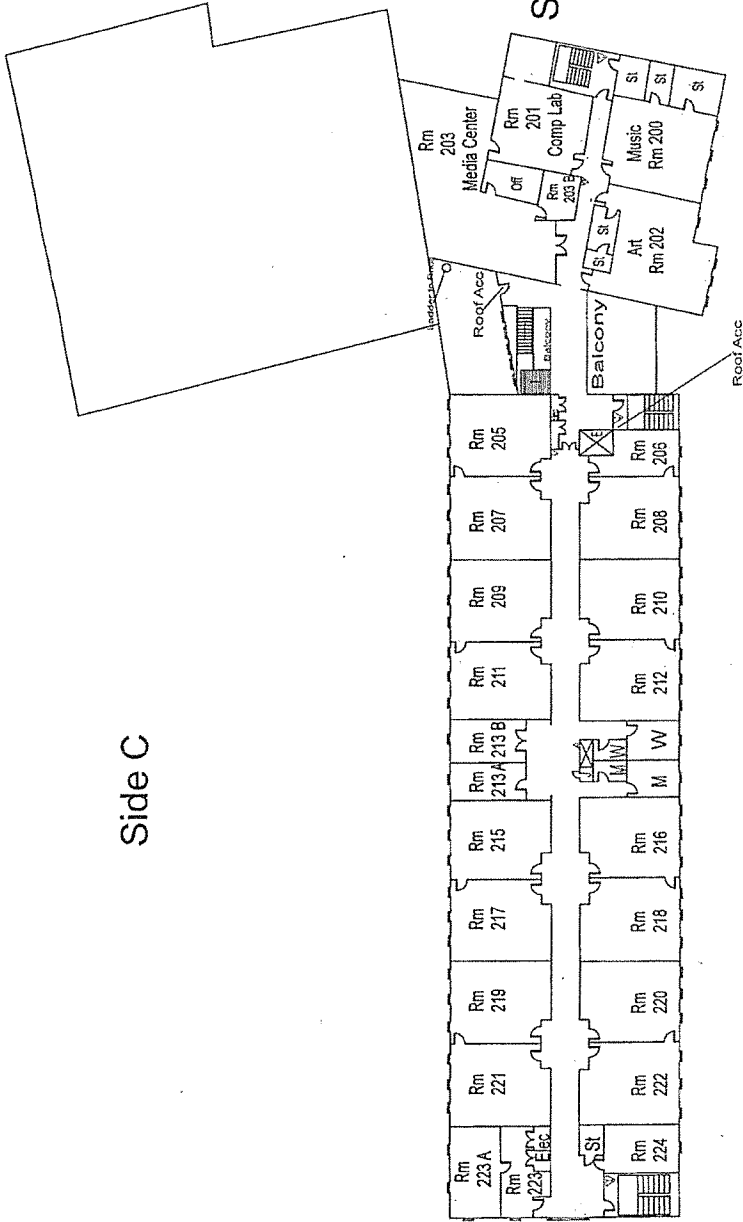
- Single Door
- Double Door
- Window
- Stairs
- Ramp
- Elevator
- Fire Extinguisher
- Gas Shut-Off
- Electrical Shut-Off
- Water Shut-Off
- Chair Lift
- Sprinkler Shutoff
- Generator
- Camera
- Fire Standpipe

Side B

Side D

Side C

Side A



Produced by
 STARS
 Massachusetts Fire & Life Safety Council
 1000 State Street
 Boston, MA 02118
 617-552-3300
 www.massstars.org

District:	Waltham Public Schools
School Name:	Fitzgerald Elementary School
Address:	140 Beal Road Waltham, MA 02543

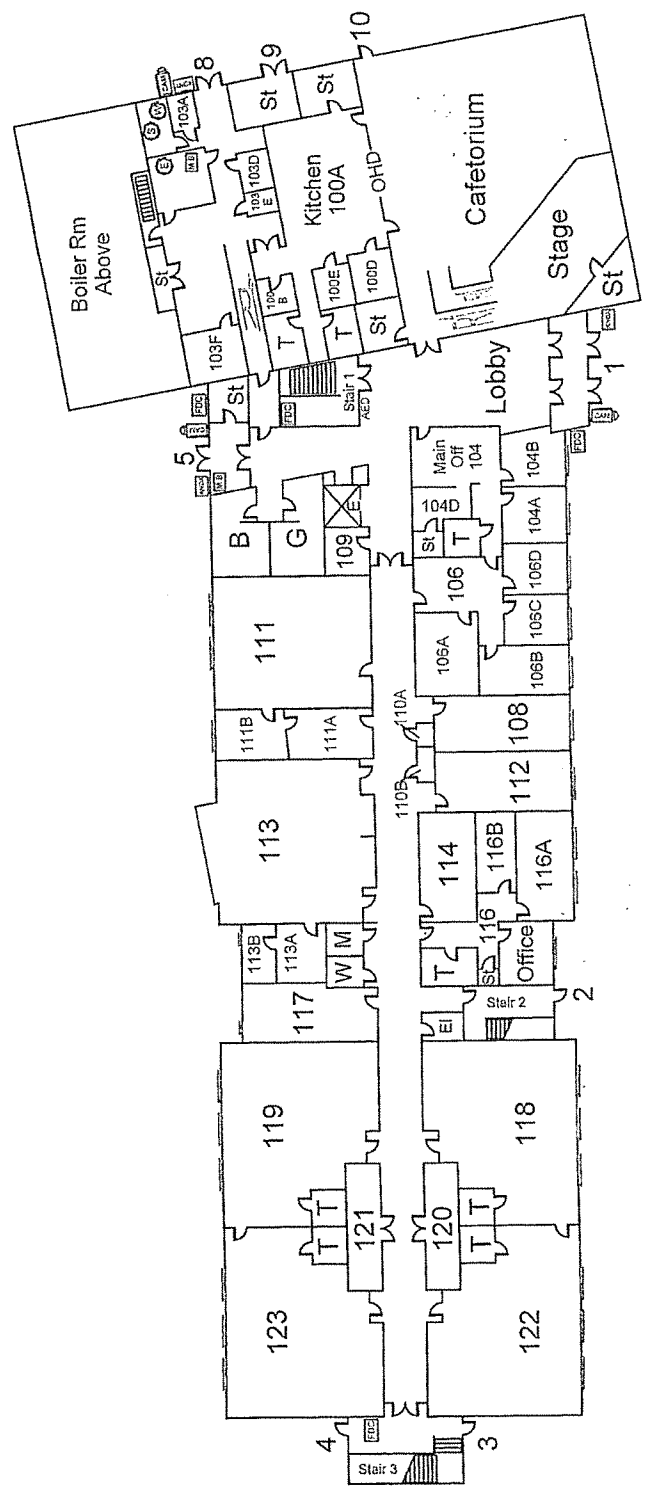
Floor 1

Side C

Side B

Side A

Side D



- Legend**
- Camera
 - Chair Lift
 - Elevator
 - Water ShutOff
 - Sprinkler ShutOff
 - Electrical ShutOff
 - Gas ShutOff
 - Ramp
 - Emergency Generator
 - Fire Alarm Master Box
 - Hibern System
 - Fire Dept. Connection



District:	Waltham Public Schools
School Name:	Fitzgerald Elementary School
Address:	140 Beal Road Waltham, MA 02543

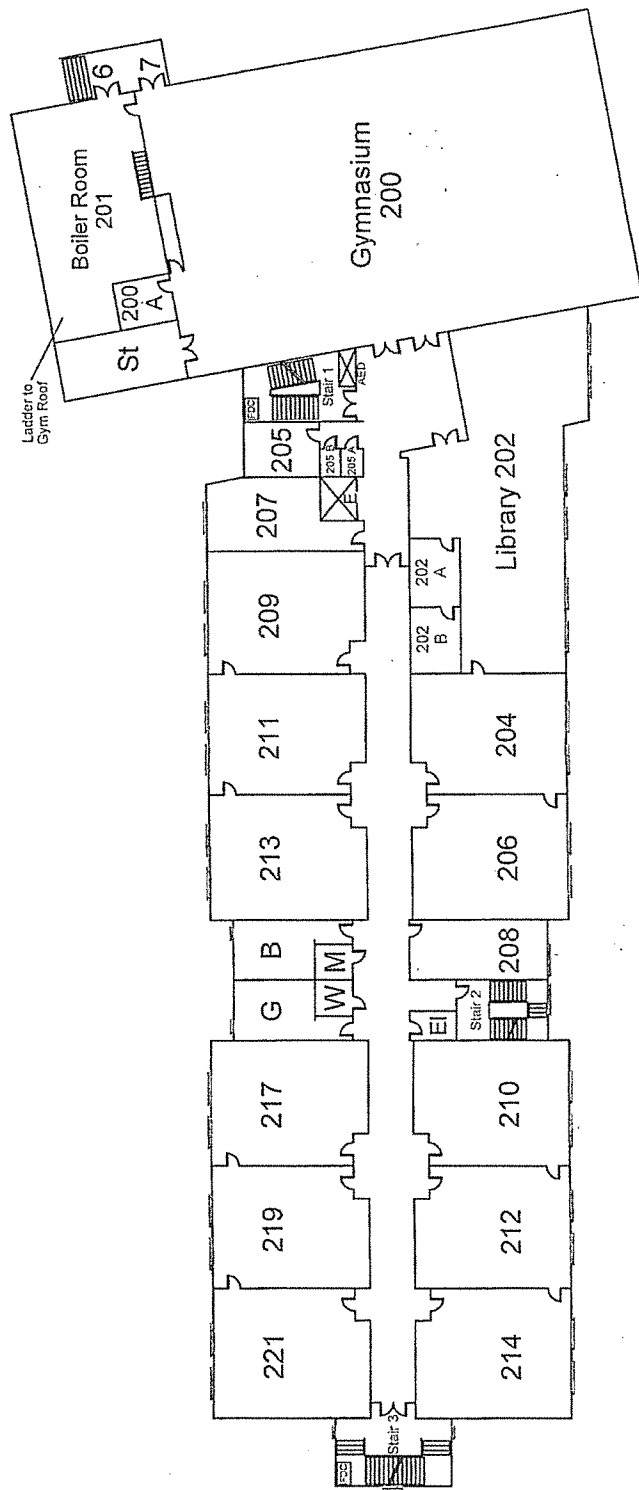
Floor 2

Side C

Side D

Side B

Side A



- Legend**
- Camera
 - Chair Lift
 - Elevator
 - Water Shutoff
 - Sprinkler Shutoff
 - Electrical Shutoff
 - Gas Shutoff
 - Ramp
 - Emergency Generator
 - Fire Alarm Master Box
 - Halon System
 - Fire Dept. Connection

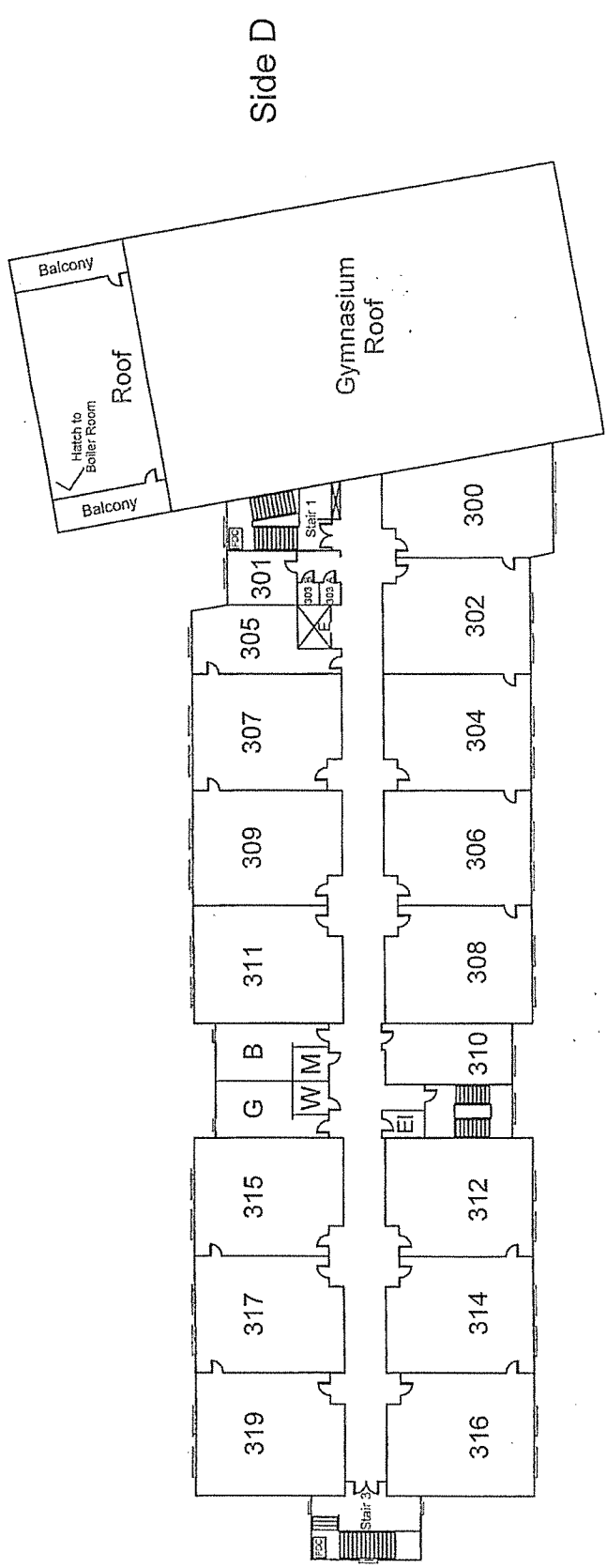


WALTHAM PUBLIC SCHOOLS

Side C

District:	Waltham Public Schools
School Name:	Fitzgerald Elementary School
Address:	140 Beal Road Waltham, MA 02543

Floor 3



Side B

Side A

Side D

Legend

- Camera
- Chk LK
- Elevator
- Water Shutoff
- Sprinkler Shutoff
- Electrical Shutoff
- Gas Shutoff
- Ramp
- Emergency Generator
- Fire Alarm Master Box
- Alarm System
- Fire Dept. Connection



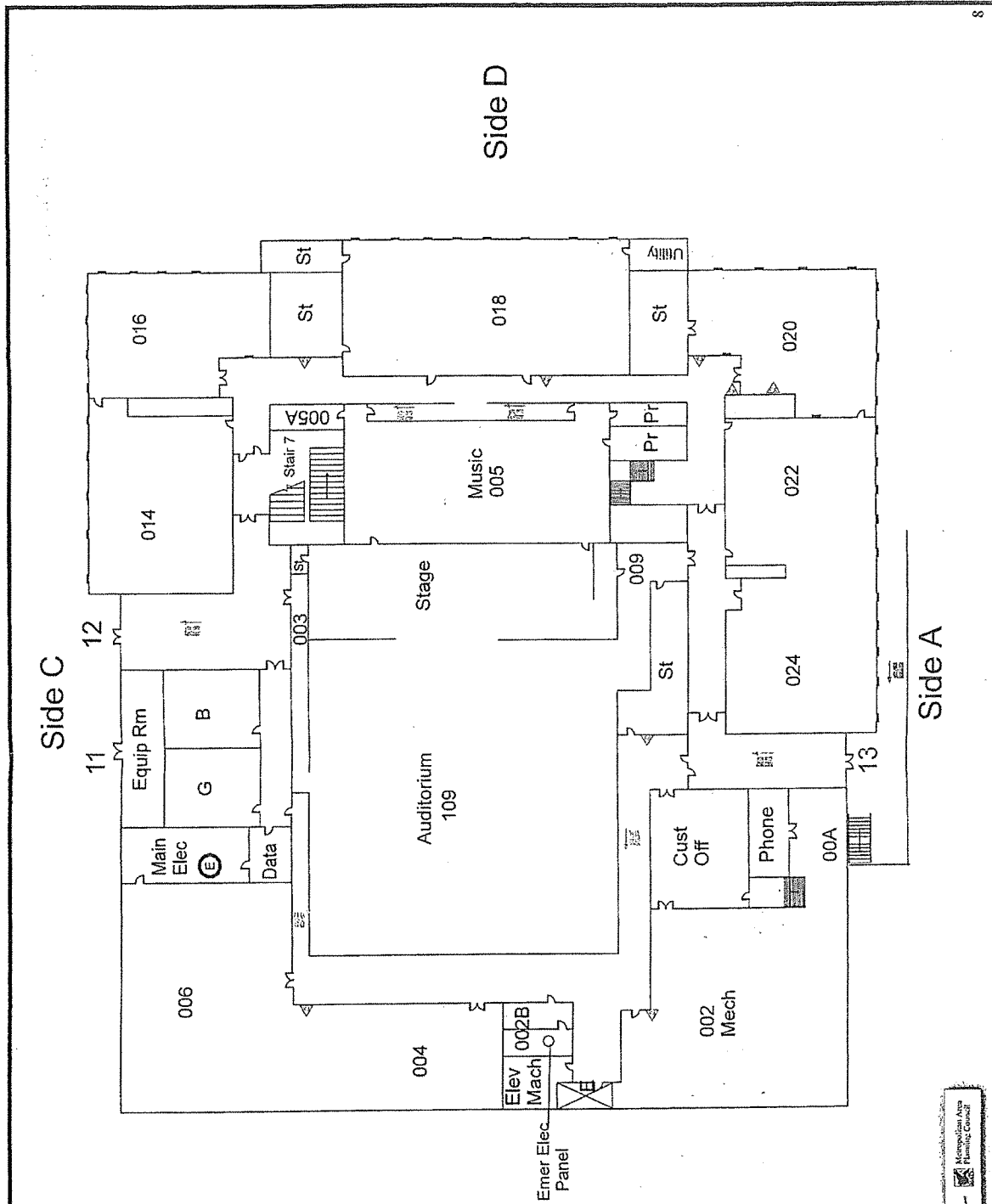
District:	Waltham
School Name:	McDevitt Middle
Address:	75 Church Street Waltham, MA 02453
School Hours:	8:00 am - 2:30 pm
In-session Contact:	Brad Morgan (781) 314-5595
Off-Hours Contact:	
Approach Hazards:	None; Residential Area; Can drive around school
Notes:	

Basement Floor

Side B

Legend

- Single Door
- Double Door
- Window
- Stairs
- Ramp
- Elevator
- Fire Extinguisher
- Gas Shut-Off
- Electrical Shut-Off
- Water Shut-Off
- Chair Lift
- Sprinkler Shutoff
- Generator
- Camera
- Fire Standpipe

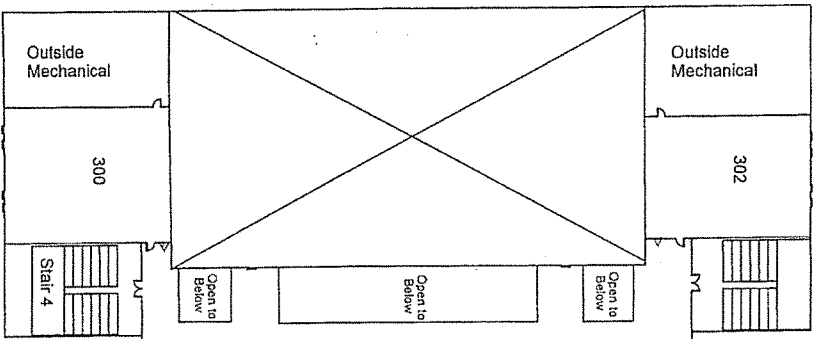


District:	Waltham
School Name:	McDevitt Middle
Address:	75 Church Street Waltham, MA 02453
School Hours:	8:00 am - 2:30 pm
In-session Contact:	Brad Morgan (781) 314-5595
Off-Hours Contact:	
Approach Hazards:	None; Residential Area; Can drive around school
Notes:	

3rd Floor

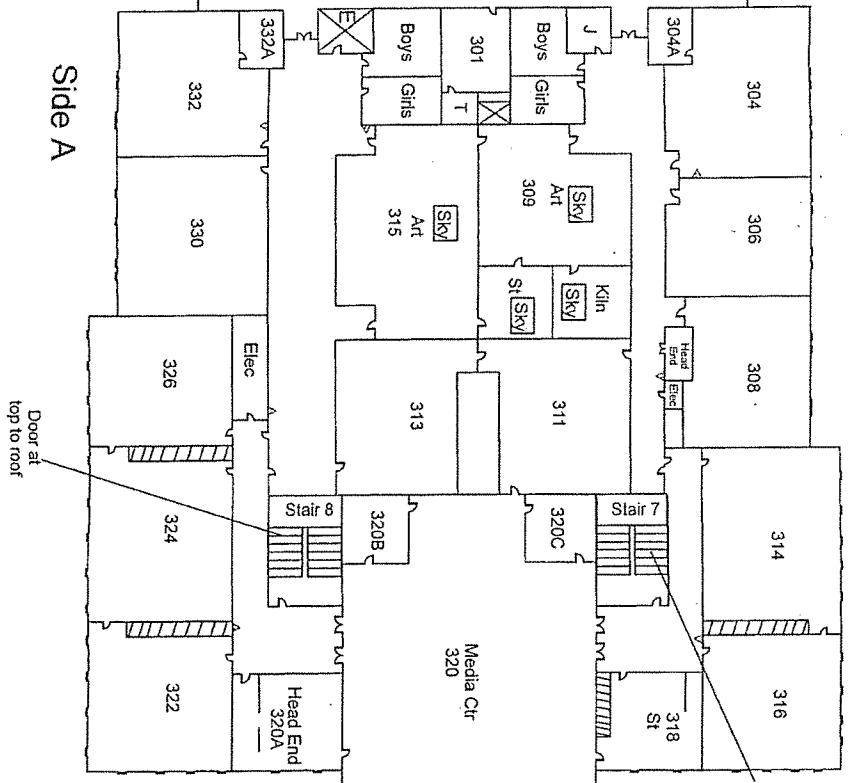
Side B

- Legend**
- Single Door
 - Double Door
 - Window
 - Stairs
 - Ramp
 - Elevator
 - Fire Extinguisher
 - Gas Shut-Off
 - Water Shut-Off
 - Chair Lift
 - Sprinkler Shut-off
 - Generator
 - Camera
 - Fire Standpipe



Side C

Side A



Side D

STANIS
 Professional
 Waltham Regional Middle School
 Waltham, MA 02453
 Telephone: (781) 314-5595
 Fax: (781) 314-5595
 Email: stanis@stanis.com
 Website: www.stanis.com

District:	Waltham
School Name:	Waltham High School
Address:	617 Lexington Street Waltham, MA 02452
School Hours:	8:30 am - 2:00 pm
In-session Contact:	John Gracetta (781) 314-5440
Off-Hours Contact:	
Approach Hazards:	None; Can drive around school; Middle school at bottom of street, side C & D
Notes:	

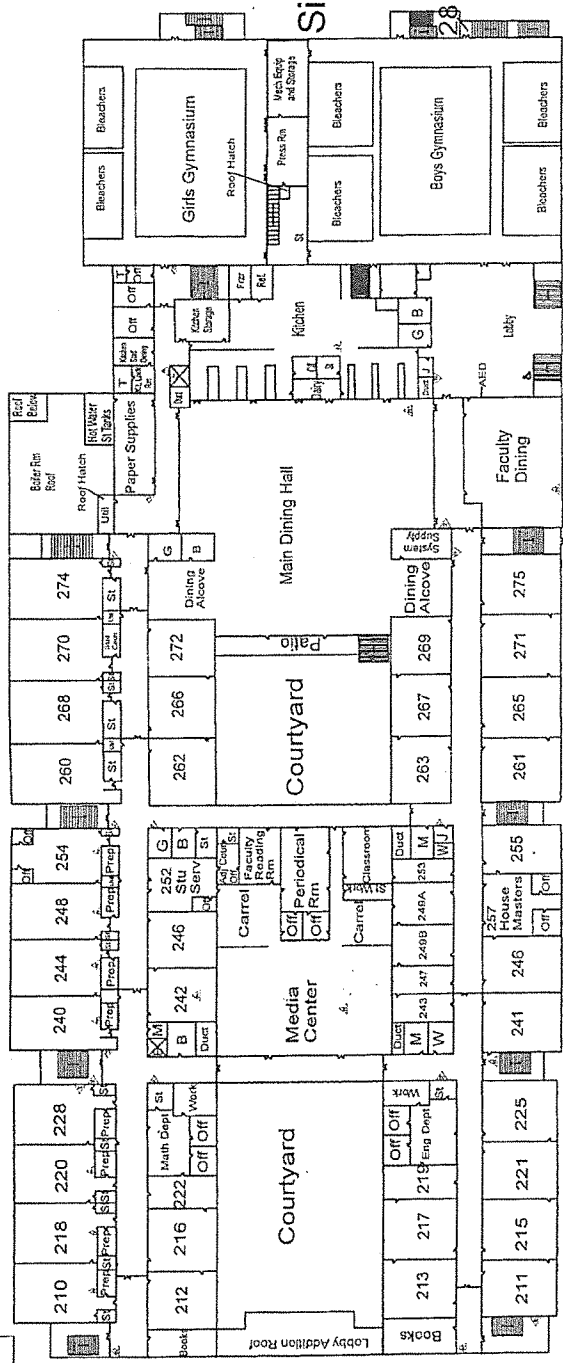
2nd Floor

Side C

Side B

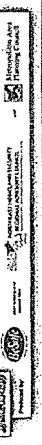
Side D

Side A

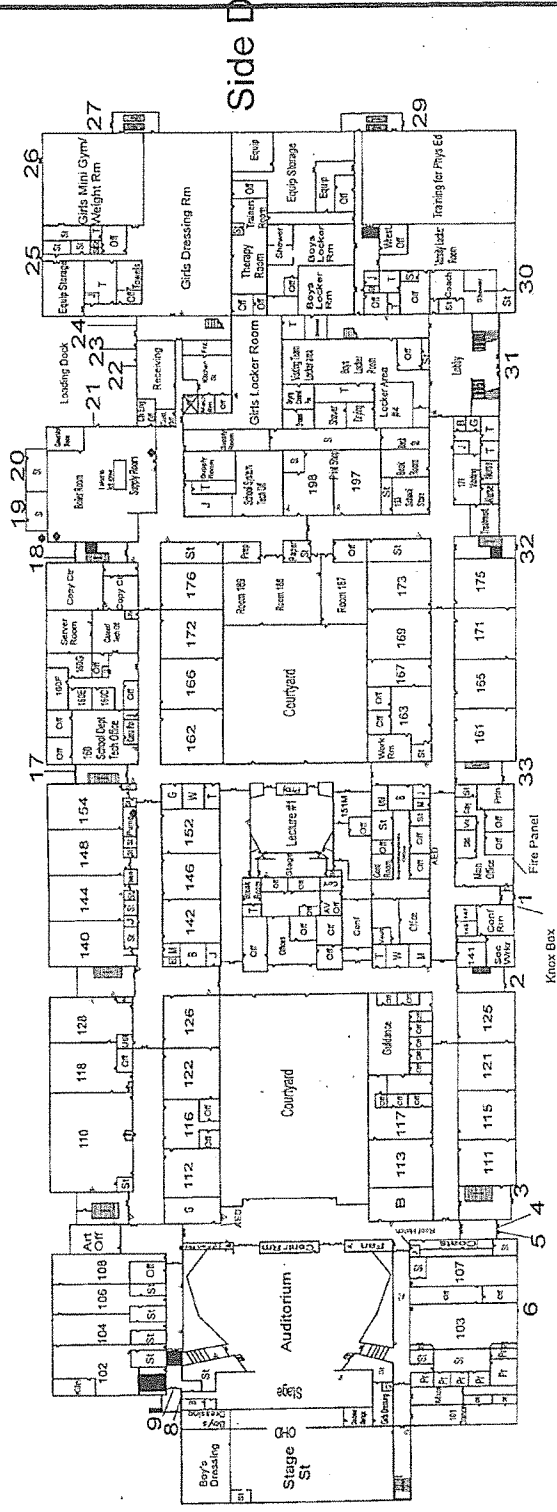


Legend

- Single Door
- Double Door
- Window
- Stairs
- Ramp
- Elevator
- Fire Extinguisher
- Gas Shut-Off
- Electrical Shut-Off
- Water Shut-Off
- Chair Lift
- Sprinkler Shutoff
- Generator
- Camera
- Fire Standpipe



District:	Waltham
School Name:	Waltham High School
Address:	617 Lexington Street Waltham, MA 02452
School Hours:	8:30 am - 2:00 pm
In-session Contact:	John Gracetta (781) 314-5440
Off-Hours Contact:	
Approach Hazards:	None: Can drive around school; Middle school at bottom of street, side C & D
Notes:	



Side C

Side B

Side A

1st Floor

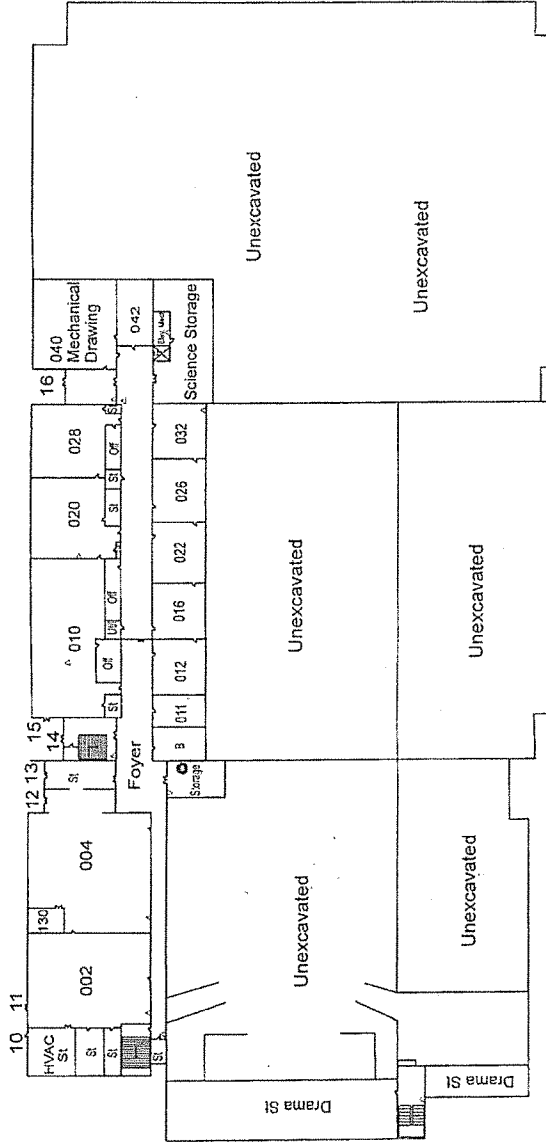
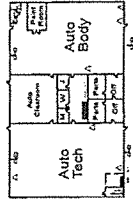
Legend

- Single Door
- Double Door
- Window
- Stairs
- Ramp
- Elevator
- Fire Extinguisher
- Gas Shut-Off
- Electrical Shut-Off
- Water Shut-Off
- Chair Lift
- Sprinkler Shutoff
- Generator
- Camera
- Fire Standpipe

179

District:	Waltham
School Name:	Waltham High School
Address:	617 Lexington Street Waltham, MA 02452
School Hours:	8:30 am - 2:00 pm
In-session Contact:	John Graceffa (781) 314-5440
Off-Hours Contact:	
Approach Hazards:	None; Can drive around school; Middle school at bottom of street, side C & D
Notes:	

Side C



Ground Floor

Side B

Side D

Side A

Legend

- Single Door
- Double Door
- Window
- Stairs
- Ramp
- Elevator
- Fire Extinguisher
- Gas Shut-Off
- Electrical Shut-Off
- Water Shut-Off
- Chair Lift
- Sprinkler Shutoff
- Generator
- Camera
- Fire Standpipe

18

District:	Waltham
School Name:	JFK Middle School
Address:	260 Grove Street Waltham, MA 02453
School Hours:	8:00 am - 2:30 pm
In-session Contact:	John Cawley (781) 314-5565
Off-Hours Contact:	
Approach Hazards:	None; Can Drive Around School; Woods on Side B; High School Side C
Notes:	

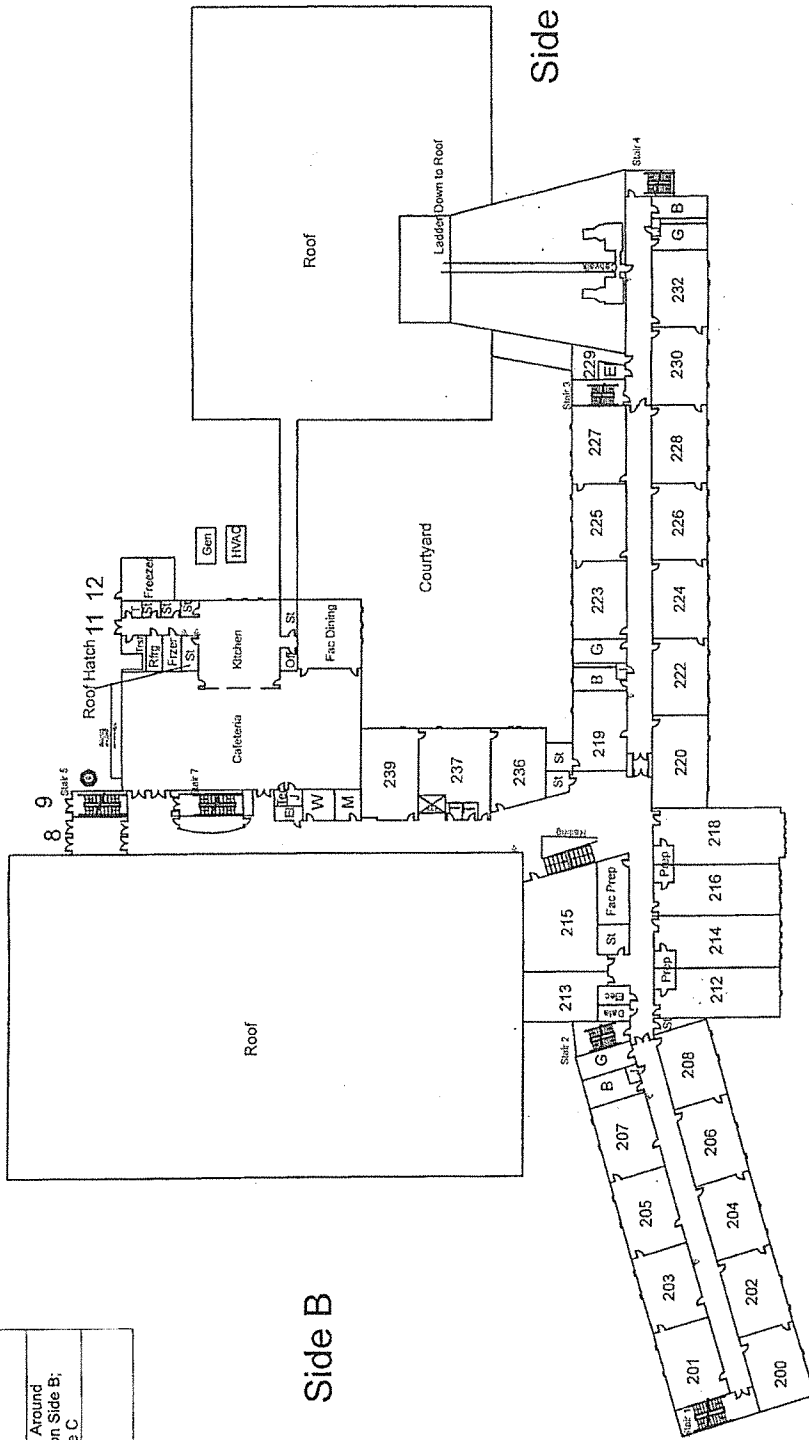
2nd Floor

Side B

Side C

Side D

Side A



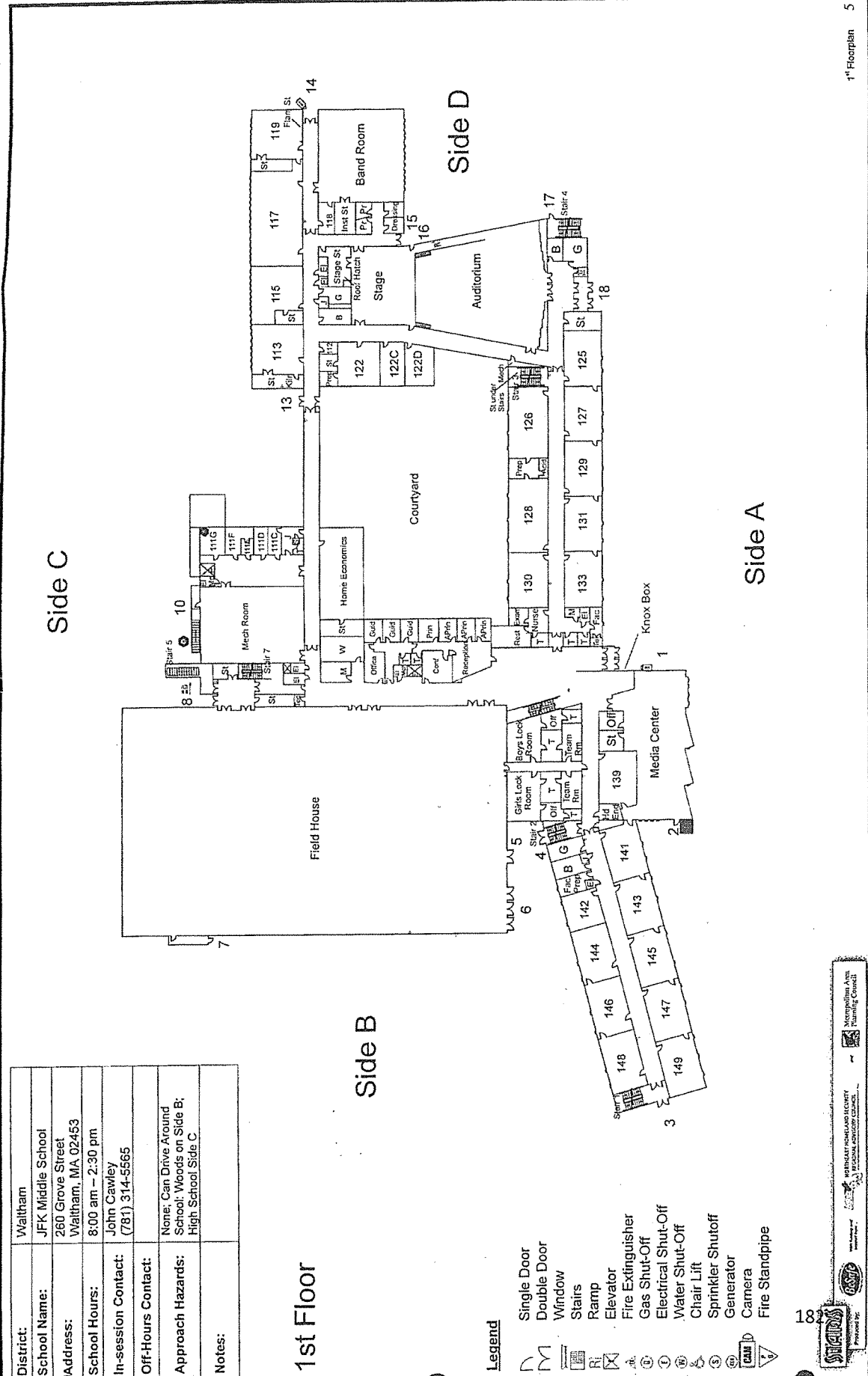
Legend

- Single Door
- Double Door
- Window
- Stairs
- Ramp
- Elevator
- Fire Extinguisher
- Gas Shut-Off
- Electrical Shut-Off
- Water Shut-Off
- Chair Lift
- Sprinkler Shutoff
- Generator
- Camera
- Fire Standpipe

Massachusetts Ave Planning Council

District:	Waltham
School Name:	JFK Middle School
Address:	260 Grove Street Waltham, MA 02453
School Hours:	8:00 am - 2:30 pm
In-session Contact:	John Cawley (781) 314-5565
Off-Hours Contact:	
Approach Hazards:	None: Can Drive Around School; Woods on Side B; High School Side C.
Notes:	

1st Floor



Legend

- Single Door
- Double Door
- Window
- Stairs
- Ramp
- Elevator
- Fire Extinguisher
- Gas Shut-Off
- Electrical Shut-Off
- Water Shut-Off
- Chair Lift
- Sprinkler Shutoff
- Generator
- Camera
- Fire Standpipe

WALTHAM FIRE DEPARTMENT
 WALTHAM POLICE DEPARTMENT
 WALTHAM MIDDLE SCHOOL

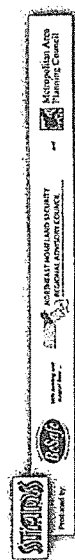
District:	Waltham
School Name:	Whitmore at South Elementary School
Address:	510 Moody Street Waltham, MA 02452
School Hours:	8:45 am - 3:00 pm
In-session Contact:	Patricia Vasquez (781) 314-5785
Off-Hours Contact:	
Approach Hazards:	None
Notes:	

2nd Floor

Side B

Legend

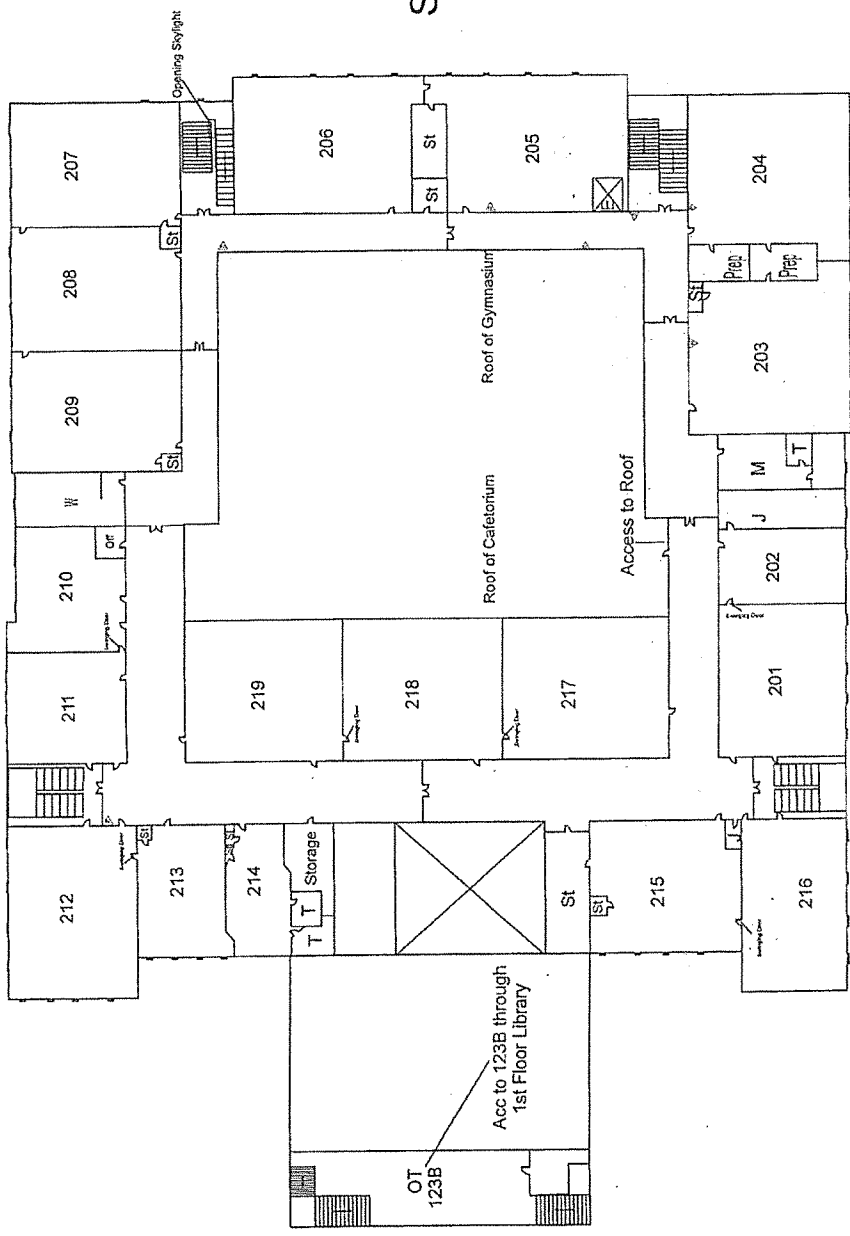
- Single Door
- Double Door
- Window
- Stairs
- Ramp
- Elevator
- Fire Extinguisher
- Gas Shut-Off
- Electrical Shut-Off
- Water Shut-Off
- Chair Lift
- Sprinkler Shutoff
- Generator
- Camera
- Fire Standpipe



Side C

Side D

Side A



District:	Waltham
School Name:	Whitmore at South Elementary School
Address:	510 Moody Street Waltham, MA 02452
School Hours:	8:45 am - 3:00 pm
In-session Contact:	Patricia Vasquez (781) 314-5765
Off-Hours Contact:	
Approach Hazards:	None
Notes:	

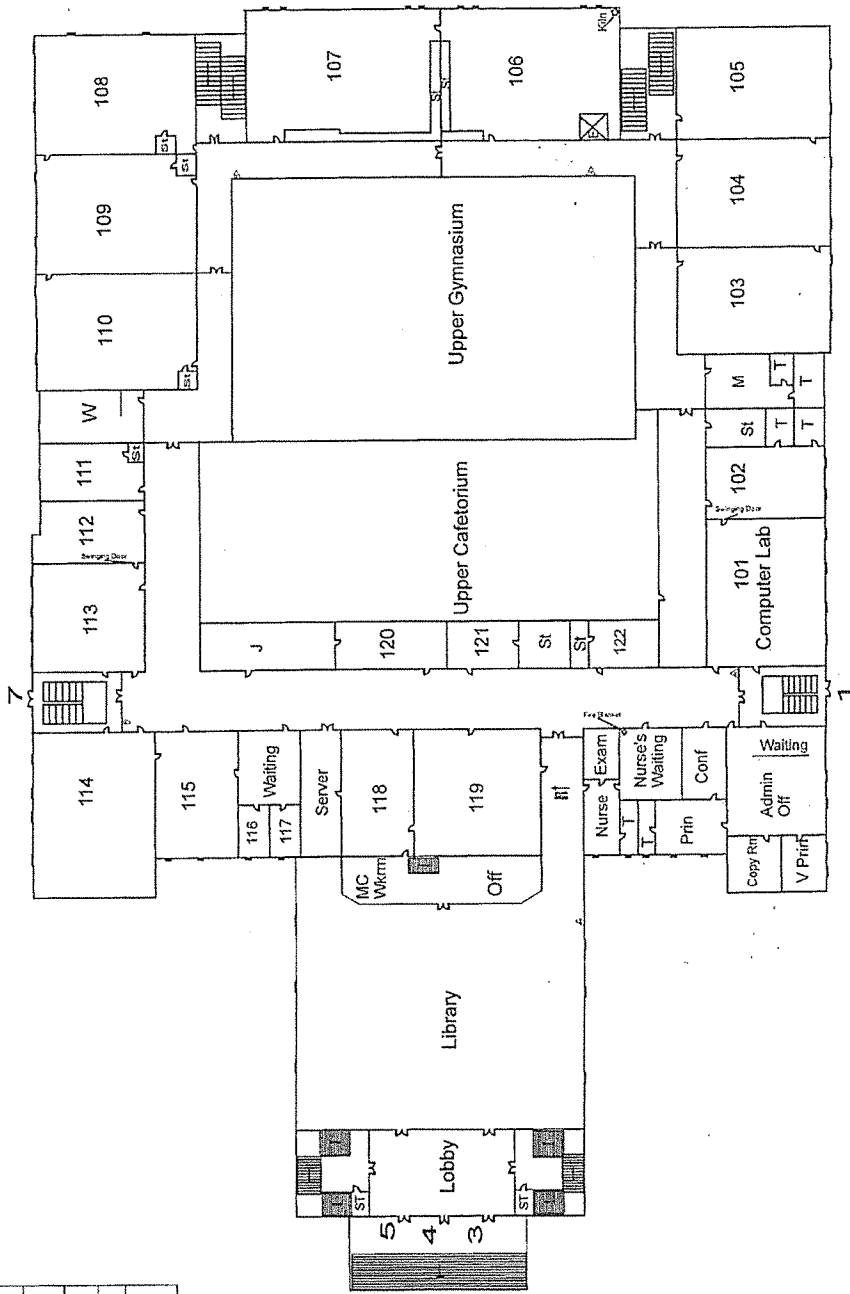
1st Floor

Side B

Legend

- Single Door
- Double Door
- Window
- Stairs
- Ramp
- Elevator
- Fire Extinguisher
- Gas Shut-Off
- Electrical Shut-Off
- Water Shut-Off
- Chair Lift
- Sprinkler Shutoff
- Generator
- Camera
- Fire Standpipe

Side C



Side A

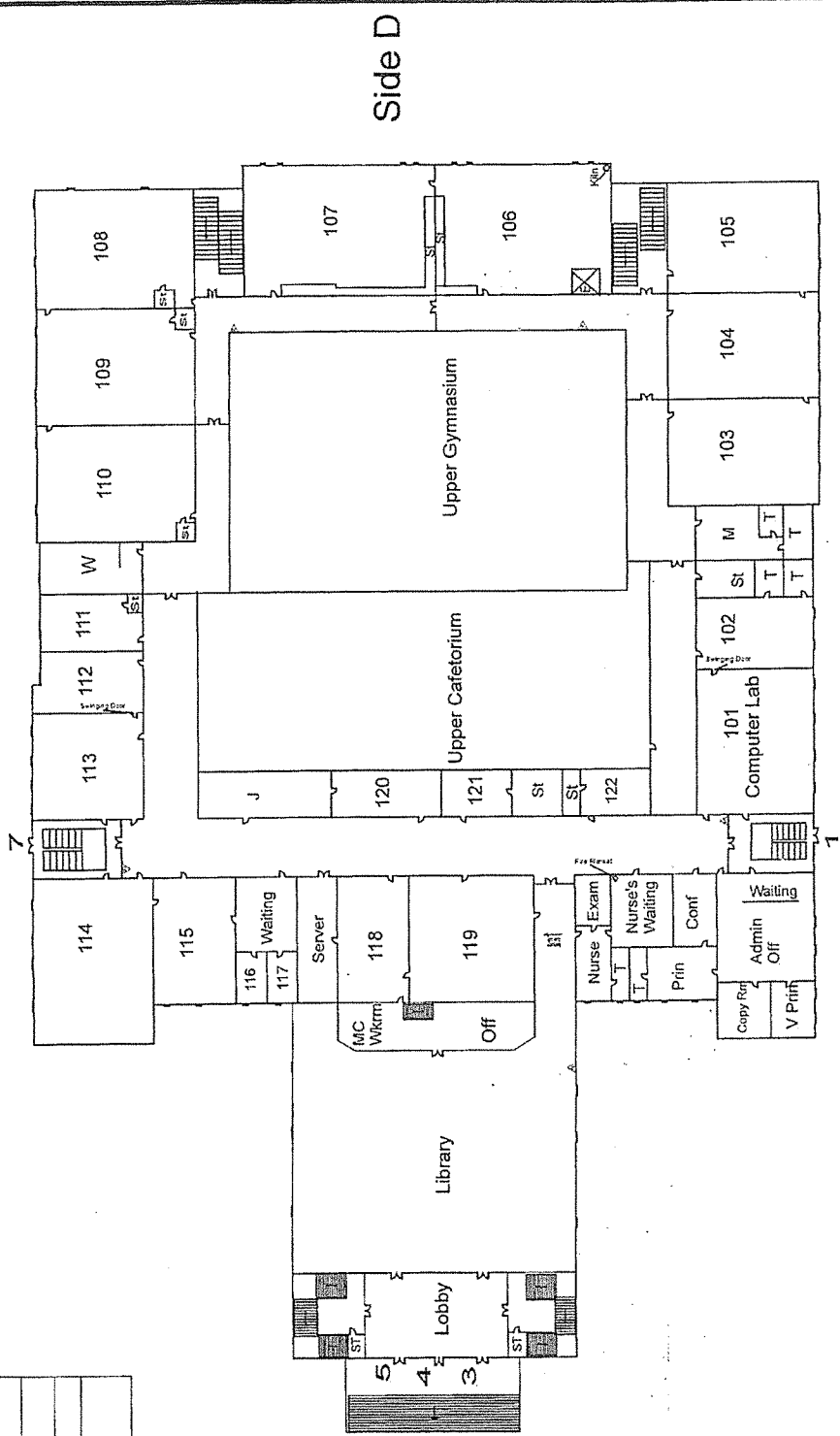
District:	Waltham
School Name:	Waltham South Elementary School
Address:	510 Moody Street Waltham, MA 02452
School Hours:	8:45 am - 3:00 pm
In-session Contact:	Patricia Vasquez (781) 314-5765
Off-Hours Contact:	
Approach Hazards:	None
Notes:	

Ground Floor

Side B

Legend

- Single Door
- Double Door
- Window
- Stairs
- Ramp
- Elevator
- Fire Extinguisher
- Gas Shut-Off
- Electrical Shut-Off
- Water Shut-Off
- Chair Lift
- Sprinkler Shutoff
- Generator
- Camera
- Fire Standpipe



Side A

Waltham Planning Council

 Massachusetts State Planning Council

ADDENDUM 1

THE CITY OF WALTHAM
MASSACHUSETTS

PURCHASING DEPARTMENT

ADULT EDUCATION PROVIDER

ADDENDUM NO. 1

August 1, 2013

CHANGES, CORRECTIONS AND CLARIFICATIONS

The attention of bidders submitting proposals for the above subject project is called to the following addendum to the specifications. The items set forth herein, whether of omission, addition, substitution or clarification are all to be included in and form a part of the proposal submitted.

THE NUMBER OF THIS ADDENDUM (NO. 1) MUST BE ENTERED IN ANY BLANK SPACE ON PAGE ONE (1) OF THE BID SOLICITATION

ITEM NO.: 1 **ANSWERS TO POSED QUESTIONS**

Q1. Please clarify how the term multi-sector is used in the section headed Services Required number 4 which talks about "coordinate multi-sector adult education planning, generating programs and initiatives as appropriate." Define multi-sector and give examples.

A1. In the past, various adult education programs were provided. For example, they had GED, ESL 1, ESL 2 etc. That is what is meant by No. 4.

End of Addendum 1

FORM W-9

Request for Taxpayer Identification Number and Certification

Give Form to the
 requester. Do not
 send to the IRS.

Print or type
 See Specific Instructions on page 2.

Name (as shown on your income tax return) Symmes Maini & McKee Associates, Inc.	
Business name/disregarded entity name, if different from above	
Check appropriate box for federal tax classification: <input type="checkbox"/> Individual/sole proprietor <input checked="" type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ <input type="checkbox"/> Other (see instructions) ▶ _____	Exemptions (see instructions): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____
Address (number, street, and apt. or suite no.) 1000 Massachusetts Avenue	Requester's name and address (optional) Chief Procurement Officer Purchasing Department, City of Waltham 610 Main Street Waltham, MA 02452
City, state, and ZIP code Cambridge, MA 02138	
List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number	
[] [] [] - [] [] - [] [] [] []	
Employer identification number	
0 4 - 2 7 4 5 1 7 9	

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
- I am a U.S. citizen or other U.S. person (defined below), and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign Here	Signature of U.S. person ▶ <i>H. Jeffrey Neale</i>	Date ▶ <i>12/20/2013</i>
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. The IRS has created a page on IRS.gov for information about Form W-9, at www.irs.gov/w9. Information about any future developments affecting Form W-9 (such as legislation enacted after we release it) will be posted on that page.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, payments made to you in settlement of payment card and third party network transactions, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and

4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct.

Note. If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

